



CUPE ONTARIO

POLICY MANUAL

Updated March 2023

CUPE ONTARIO POLICY MANUAL

This Policy Manual will be distributed at each CUPE Ontario Convention and will be sent to all affiliated locals not in attendance at the CUPE Ontario Convention.

All changes to the Policy Manual will be approved by the Executive Board upon recommendation of the Policy Committee. These policies will be reviewed on a regular basis by the Policy & AROAP Committees in consultation with the Racial Justice Committee to ensure equity components are up to date.

Anti-racism and anti-oppression guiding principles

CUPE Ontario recognizes that barriers exist for members of diverse and equity-seeking groups within CUPE Ontario and the broader labour movement. The union acknowledges that inequitable practices create systemic barriers for different equity-seeking committees and groups affecting access to opportunities to education, health care, jobs, housing, social services, justice, and limits participation in decision-making bodies. Further, the union acknowledges that oppression is embedded in the dominant culture and institutions in a way that is pervasive and often invisible, therefore requiring ongoing training and interventions.

We understand racism as a system of control that determines access to justice, opportunities, and resources. We understand anti-oppression as an interdisciplinary approach primarily rooted in social justice work that focuses on ending socioeconomic oppression. The following guiding principles are rooted in anti-racism and anti-oppression values strategies and are meant to inform the entire Policy Manual.

Given the union's commitment to identifying and dismantling systemic and individual barriers to participation, leadership, and engagement, CUPE Ontario will:

- Ensure that CUPE Ontario's policies and practices continue to reflect our commitment to equity and anti-racism while maintaining a brave environment that facilitates open and respectful participation and dialogue for all equity deserving committees and groups.
- Ensure that all Equality Committees have equitable access to union resources and decision-making processes.
- Act in non-discriminatory ways and promote the goals of anti-racism, access and equity by actively challenging racism, settler-colonialism, patriarchy, homophobia, transphobia, ableism, ageism, and oppression in all its forms.
- Ensure that there is equitable representation in decision-making about policies, procedures, and the work of the union.
- Work towards the elimination of all forms of oppression in the development and implementation of campaigns, employment equity, and member services to create and maintain a safe environment that facilitates open and respectful participation and dialogue of staff, members, allies, community, and Board Members.
- Apply an equity lens to all policies and practices. An equity and inclusion lens is like a pair of glasses. It helps you see things from a new perspective which is informed by the worldview and viewpoint of equity deserving people's lived experiences and daily realities. Applying an equity lens allows you to make better decisions while learning and/or applying knowledge of history,

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including the history of racism and the impacts of white supremacy including different terms from what we use in CUPE and other forms of oppression.

- Understanding how and why exclusion happens, resulting in actionable steps to take.
- Reflecting upon the needs of people with a range of experiences
- Finding a diversity of ways for people to participate as opposed to a “one size fits all” approach which may further entrench inequities.

FINANCE POLICIES

1 Member Events (Conferences / Committees / Convention)

1.1 PER DIEM

1. CUPE Ontario will pay members the following per diem rates for CUPE Ontario pre-approved attendance for meetings on the following basis:

Daily Rate – CUPE Ontario will provide a per diem of \$80.00 per day for meetings, including travel time, greater than three hours in one day.

½ Daily rate – CUPE Ontario will provide a per diem of \$40.00 per day for meetings equal to or less than three hours in one day.

The rates above will be reduced as follows when meals are provided at a meeting. When all three meals are provided there will be no per diem paid.

- Breakfast provided – deduct \$17.00
- Lunch provided – deduct \$23.00
- Dinner provided – deduct \$40.00

2. Members on National Campaign Book-off: For those days a member is on a CUPE Ontario pre-approved National Campaign Book-off:
 - a. The above per diem rates are not applicable.
 - b. For out-of-town Book-off days, CUPE Ontario will provide a per diem of \$80.00 per day, if the member stays in Toronto.
3. Members may request a per diem advance by sending an expense claim with a request to the Treasurer 2 weeks in advance of the meeting date. If the request is made with less than 2 weeks notice, the Treasurer will endeavor to accommodate the request.
4. If a member’s local per diem exceeds the rates listed above, CUPE Ontario will not be responsible for any top ups.

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5. It is the member's responsibility to obtain and retain pre-approved authorization from CUPE Ontario to be provided a per diem reimbursement. Being a current member of a committee is classified as a pre-approval authorization for a committee meeting.

1.2 TRAVEL POLICY

1. 57¢ per km or Economy Class airfare, plus ground travel, whichever is less.
2. Airfare, train, taxi, bus fare, hotel, parking, etc. must be supported by original receipts. (Air and train transportation are normally booked through W.E. Travel).
3. Where more economical, members should use public transportation.
4. When travelling into the City of Toronto for meetings from the airport, members should use the airport bus to a downtown hotel, where possible, and then taxi to their final destination.
5. If the member's local mileage rate is higher, CUPE Ontario will not pay the difference.
6. Members may request a travel advance by sending an expense claim with a request to the Treasurer 2 weeks in advance of the meeting date. If the request is made with less than 2 weeks' notice, the Treasurer will endeavor to accommodate the request.
7. Members may request from CUPE Ontario the use of a Taxi Chit to have taxi expenses billed directly to a CUPE Ontario taxi account.

1.3 FAMILY OR DEPENDENT CARE SUBSIDY

1. CUPE Ontario will reimburse for family care (elder or childcare) expenses up to a maximum of \$100.00 per day per family, above and beyond normal family care costs. For example, if your regular fees are \$60.00 per day CUPE Ontario will reimburse the difference of \$40.00 per day. If the regular fee is \$125.00 per day, CUPE Ontario will reimburse up to \$100.00 only. Family care subsidy forms are available at CUPE Ontario.

1.4 NO FREE ALCOHOL PROVIDED AT EVENTS

1. CUPE Ontario will not pay for any alcoholic beverages for any CUPE Ontario events and dinners.
2. There will be no reimbursement for the purchasing of alcohol to members, Officers or staff.
3. The Executive Board may approve the purchasing of alcohol for special events. Such approval shall be provided in advance of the expense.

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1.5 EXPENSE REIMBURSEMENTS TO MEMBERS

1. Expense reports must be submitted within the 45-day timeframe as stated on the back of the CUPE Ontario Expense Form to be reimbursed as follows:
 - a. CUPE Ontario will reimburse all member expense claims properly authorized and submitted within three weeks of the date the claim is received by the Ontario Division Office.
2. Expense reports submitted after the 45-day timeframe as stated on the back of the Ontario Division expense form and within the current fiscal year end will be reimbursed as follows:
 - a. Ontario Division will reimburse all member expense claims properly authorized and submitted within four weeks of the date the claim is received by the Ontario Division Office.
3. Expense reports submitted after the 45-day timeframe as stated on the back of the Ontario Division expense form but not within the current fiscal year end (eg. for expenses from the prior fiscal year) will not be reimbursed. (An 8-week grace period will be allocated once the fiscal year ends).
4. CUPE Ontario cannot control the timeframe for members' expenses being reimbursed by CUPE National but at the request of a member, Ontario Division Office will have immediate discussions with CUPE National about a repayment timeframe.
5. All CUPE Ontario expense claims will contain all the relevant information pertaining to the expenses including date, location, reason for expense and signature.
6. All expenses claims will be submitted using two CUPE Ontario vouchers. One voucher is for lost time and the other voucher will be for all other expenses. Lost time claims must be submitted on a separate and distinct voucher.
7. It is understood that for all payments of late lost time & expense claims, the Secretary-Treasurer will exercise discretion when authorizing payments.

1.6 PETTY CASH

1. There will be no petty cash on hand at the Ontario Division Office.
2. Petty cash of up to \$1,000 will be used at conferences and events if there is a need. Such decision shall be approved by the Secretary-Treasurer.

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1.7 WORK PLANS AND BUDGETS

1. Work plans with attached budgets will be developed in conjunction with appropriate elected members and staff. Committees' plans, and campaigns must be submitted prior to any related activities or expenditures to the Secretary-Treasurer for approval (based on the approved overall budget).
2. Expenditures for each committee or campaign must work within the original work plan / budget or require approval by the Secretary-Treasurer in advance if the expenditures are planned to exceed the original budget.
3. The Secretary-Treasurer will report the expenditures for each committee or campaign compared to the original work plan / budget or approved revised budget.
4. The Secretary-Treasurer will work with the bookkeeper, Chairs, and staff liaisons to monitor and stay within budget lines.

1.8 COMPLIMENTARY HOTEL ROOMS

1. CUPE Ontario will negotiate, through our agent, the highest number of complimentary hotel nights we can achieve in every contract and use them to offset CUPE Ontario's costs associated with that event.
2. CUPE Ontario will assign complimentary hotel rooms to members or staff who are required to attend the event at the expense of CUPE Ontario. Comp rooms will be made available to the Ombudsperson for use at events.
3. CUPE Ontario will negotiate to maximize the concessions achieved with each hotel contract and will prioritize direct member services over individual upgraded hotel suites.

1.9 ACCOMMODATION COSTS

1. CUPE Ontario will only pay for standard rate hotel room. CUPE Ontario will not pay for upgrade hotel rooms.
2. CUPE Ontario will only pay for hotel accommodations for members attending a pre-approved meeting and who live more than 100km from the meeting location.
 - a. The 100km rule will be reduced to 50km during the Orientation session of the joint Equality Committee meetings which takes place once every two years.
3. The Secretary-Treasurer will consider additional accommodation nights to avoid members traveling in inclement weather.

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4. If an officer of CUPE Ontario chooses not to move his/her principal residence, which is more than 100km away, to the Toronto area, CUPE Ontario will pay for an apartment/hotel for up to six months, following which CUPE Ontario will cover the reasonable and customary costs of a rental property, including parking, for the term of office. CUPE Ontario will also cover any moving costs associated with the relocation to the Toronto area.

If an officer of CUPE Ontario chooses to move his/her principal residence to the Toronto area, CUPE Ontario will pay for an apartment/hotel for up to six months. CUPE Ontario will cover all moving costs related to the relocation to the Toronto area. The Moving Policy provisions will apply to family members of the CUPE Ontario officer with whom they currently reside.

For the period until the move has taken place not to exceed the first six weeks after arrival in Toronto, CUPE Ontario will reimburse the newly elected officer at the out-of-town per diem rate as set by the Executive Board for expenses, in addition to the per day allowance set for miscellaneous expenses. (*Adopted by the Executive Board December 2011*).

1.10 PARTICIPATION AT SECTOR CONFERENCES & OTHER EVENTS

1. Registration at conferences and committees will be provided by committee members. Ontario Division will provide support through training and direction to those committee members via email and conference calls where possible.
2. Political staff participation at events shall be determined by the officers in consultation with the committee holding the event.
3. When organizing CUPE Ontario events, an AROAP lens must be considered when inviting speakers, panelists, facilitators, and guests.

1.11 DONATIONS

1. **Matching Donations:** All requests for matching donations off the floor of the convention, conference or school must be reviewed and approved by the Policy Committee who will determine, based on the current situation, the level of donations available (taking into consideration CUPE Ontario's Constitution and budget) for that particular issue.
2. **Striking & locked out local donations to CUPE Locals:** Each local on strike in Ontario will receive a flat rate donation of \$5,000.
 - a. Locals with more than 250 members and less than 500 members will receive an additional \$5.00 per member.
 - b. Locals with less than 250 members will receive an additional \$10.00 per member.
 - c. All locals will receive CUPE Ontario solidarity support as needed and determined by the local and strike support committee.
 - d. Should strikes last longer than 60 calendar days, the Executive Board will determine the additional donation amount.

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3. **Non- Campaign Related Donation Principles:** CUPE Ontario guidelines and principle for donations:
- a. CUPE Ontario will act as a partner, not a funder. Donations will be considered to outside allies, projects and organizations who share CUPE Ontario values, principles and who are carrying out work consistent with the CUPE Ontario action plan and strategic priorities.
 - b. CUPE Ontario will endeavour to play a meaningful role in projects that we donate to through our sectors and committee work (i.e., If we are funding a rally, we will not just provide money but do our part to get people out to the rally, promote on social media, provide volunteers, speakers, buses, etc.).
 - c. CUPE Ontario will limit financial contributions to any one organization to two per year unless authorized by the executive board. This does not include an annual donation that is broken up into 4 contributions throughout the year, (i.e.: the Ontario Health Coalition).

1.12 **CONVENTION**

1. The following represents policies for the annual Convention Committees:
 - a. The Resolutions Committee will have a maximum of seven members.
 - b. The Constitutions Committee will have a maximum of five members.
 - c. The Ways & Means Committee will have a maximum of three members in addition to three members of the Executive Board Finance Committee.
 - d. The Credentials Committee will have a maximum of 15 members.
 - e. CUPE Ontario will only pay Committee members for the period of time prior to Convention that Committee members are required to be in attendance. Once convention begins, Locals pay their costs.
 - f. Committee members are responsible for their travel costs.
 - i. If there is an additional cost for a convention committee member to travel to the convention early to participate in the committee duties, CUPE Ontario will reimburse the difference.
 - g. CUPE Ontario will endeavor to hire local entertainers in the geographic region where the convention is being held. With the approval of the Executive Board, additional members can be added to convention committees based on need and to ensure equity and geographical representation.

1.13 **CONFERENCES**

1. CUPE Ontario will endeavour to coordinate / bundle conferences and other events into one venue to reduce venue costs.

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2. Conferences venues and associated costs must be approved by the Secretary-Treasurer.
3. CUPE Ontario policy is that all conferences, at a minimum, must break even. CUPE Ontario events coordinator will work with the committee chairs and coordinators to ensure conference planning achieves a break-even status.
4. CUPE Ontario staff participation at conferences will be based on need and approved by the Officers in advance.
5. CUPE Ontario will charge non-affiliates a higher rate for attendance at CUPE Ontario events. Such rate to be determined by the Ways & Means Committee or the Secretary-Treasurer, based on a break-even principle for the event.
6. CUPE Ontario will collect membership survey data at each CUPE Ontario event to gain information about which members are attending events. A summary of this data per event will be housed on the CUPE Ontario Website.

2 Member Book-Off

2.1 BOOK-OFF POLICY

1. Only affiliated members will be invited to do member book-off for CUPE Ontario campaigns and activities.
2. CUPE members will be selected based on the following:
 - a. Level of knowledge and/or expertise in a specific area.
 - b. Member skill sets.
 - c. Geographical area or sector relevant to a campaign.
 - d. Availability.
 - e. CUPE Ontario will rotate through member book-offs and apply and report on an equality screen.
3. All members on book off to work on CUPE Ontario projects or campaigns will report to CUPE Ontario campaigns staff on a day-to-day basis. Campaigns staff will be responsible for providing the day-to-day communications and support as per the normal functions of the role. As an additional layer of accountability, CUPE Ontario Executive Board Members will be responsible for reporting directly to the CUPE Ontario Officers on their overall work plan and the progress of their work. Each CUPE Ontario Board Member will be required to submit a weekly report in writing to the CUPE Ontario Campaigns Coordinator assigned to the project.
4. Book-off will be provided for travel days where there is no meeting being held on the following basis:

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- a. No book-off will be provided for travel days if you live within 250km of the meeting location.
 - b. If you live within the 250km range and work 12-hour shifts, CUPE Ontario will provide book-off for the last 4 hours of the shift only. If a member works afternoon shifts, book offs will be provided for all time after 7:00p.m.
5. CUPE Ontario will provide reimbursement for lost time on the principle of “no loss”. It is understood that the principle of “no loss” includes reimbursement for lost benefits. Any claim for reimbursement of lost time must be accompanied by proof of the loss. This could include an invoice from the employer or local union or a letter from a local union officer/ workplace manager verifying the loss. A regular schedule on file indicating the days and hours of an individual’s work will be considered enough proof. Such letter must be submitted annually to CUPE Ontario or at the time of a change in schedule, classification or pay rate. Special circumstances may be considered on an individual basis by the Secretary-Treasurer.
6. Executive Board members on book off to work on CUPE Ontario projects or campaigns will report to CUPE Ontario campaigns staff on a day-to-day basis. Campaign staff will be responsible for providing the day-to-day communications and support as per the normal functions of the role. As an additional layer of accountability, CUPE Ontario Executive Board members will be responsible for reporting directly to the CUPE Ontario Officers on their overall work plan and the progress of their work. Each CUPE Ontario Board member will be required to submit a weekly report in writing to the CUPE Ontario Campaigns Coordinator assigned to the project.
7. Lost time will be reimbursed in one of the following ways:
- a. The employer pays the member and CUPE Ontario reimburses the employer.
 - b. The Local covers the cost and CUPE Ontario reimburses the Local.
 - c. If a and b are not possible, then CUPE Ontario will reimburse the member directly at their regular rate of pay.
 - d. A fee for service arrangement is established based on the member’s collective agreement provisions or a CUPE Ontario approved rate (for example, in the university sector during the summer months / during non-teaching month). The fee for service payment will be limited to 8 hours per day and 40 hours per week. It is understood and accepted that “proof of loss” will not be provided under this circumstance.
 - e. A Part-Time member doing full time book off work for CUPE Ontario will be compensated on a contract basis above and beyond the regular scheduled shifts up to full time hours. It is understood that this does not apply for regular Committee or Executive Board functions.
 - f. If a, b, c, or d is not an option for reimbursement, the member must contact the Secretary-Treasurer in advance to seek approval for alternate arrangement.
 - g. CUPE Ontario will reimburse daily lost time based on a regular workday.
 - h. Special circumstances will be reviewed on an individual basis by the Secretary-Treasurer.

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All book-offs will be approved by CUPE Ontario officers in advance and the book-off local will be notified by CUPE Ontario.

3 Financial Controls

3.1 THREE QUOTE POLICY

1. CUPE Ontario requires three quotes to be obtained for all expenses / contracts more than **\$10,000**.
2. CUPE Ontario will strive to obtain competitive quotes from organizations that are unionized and with Canadian-made products and services. CUPE Ontario will ensure inclusion of organizations aligned with trade unionist principles and owned and/or run by equity deserving people.
3. Ongoing professional services such as legal, audit and consulting are exempt from this policy. These services may be tendered and/or authorized by the officers based on each situational requirement.

3.2 PURCHASE ORDER AND PURCHASING AUTHORITY

1. CUPE Ontario purchases can only be made by an authorized staff member or officer.
2. A Purchase Order must be prepared and approved by the authorized staff member or officer for any purchase more than \$1,000.
3. The Purchase Order must be attached and agreed to the approved supplier invoice prior to the payment made to the supplier for that invoice. For purchases under \$1,000, the supplier invoice must be approved by the authorized staff member.
4. The authorized staff member or Officer must ensure the purchase is within their authorized budget, otherwise Secretary-Treasurer approval is required on the Purchase Order or supplier invoice.
5. The following outlines the authorization limits for Purchase Order approval:
 - a. Authorized staff can purchase up to \$3,000 no more than 5 times per year.
 - b. The Secretary-Treasurer and President may authorize purchases up to \$20,000.
 - c. The Finance Committee must authorize purchases of more than \$20,000.

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3.3 CHEQUE SIGNING AND LIMITS

1. The CUPE Ontario President's stamp may be used in conjunction with the Secretary-Treasurer's signature for cheques less than \$10,000 which are supported by documented approval of the purchase(s).
2. Both Officers are required to sign cheques for amounts equal to and more than \$10,000 which are supported by documented approval of the purchase(s). The President's stamp may be used for Receiver General and other government remittance payments as well as payments to CUPE National for Rent, Benefits and Pension payments.
3. The Board shall designate a third signing officer.

3.4 TIPPING

1. Reimbursement for tipping will be capped at 25%. It is understood that the normal an acceptable standard rate for tipping is 20%. Any tipping over 25% will not be reimbursed unless authorized by the Executive Board for exceptional circumstances.

3.5 CREDIT CARDS

1. CUPE Ontario officers and designated staff will be provided CUPE Ontario Credit Cards for events, travel, and accommodation related expenses for which the individual is authorized. Coordinator of Operations' Credit Card will be authorized for office purchases.
2. Credit cards are for CUPE Ontario business use only.
3. All expenses charged to the card must be properly supported by itemized receipts.
4. All receipts are to be provided to the administrative support responsible for the reconciliation by the 10th of each month. For example, January receipts are to be submitted no later than February 10th.
5. If a credit card holder is unable to provide supporting itemized receipt(s), the Secretary-Treasurer is required to approve the expense. If the Secretary-Treasurer does not approve the expense, then the credit card holder is personally responsible for the reimbursement to CUPE Ontario. If the Secretary-Treasurer is unable to provide an itemized receipt, then the President must approve the expense.

3.6 REWARD POINTS COLLECTED ON CUPE PURCHASES

1. CUPE Ontario owns all reward points generated from purchases using all our credit cards, hotel stays and any other activity that earns reward points while on CUPE Ontario business (except individual personal Air Canada Aeroplan points).

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2. All reward points collected will be used for the work of the CUPE Ontario membership.

3.7 LONG TERM CONTRACTS

1. Any supplier contracts which have a term greater than one year and are more than \$20,000 per year require the review and approval of the Policy Committee prior to the officers' signing. An equity lens will be applied to supplier contracts.
2. Any long-term contract requirements may be reviewed with CUPE National to determine cost saving/sharing opportunities and an equity lens will be applied.

3.8 LEGAL COSTS

1. If CUPE Ontario agrees to pay legal fees for any individual relating to non-CUPE Ontario business, the following terms apply:
 - a. A maximum amount of legal fees to be paid by CUPE Ontario will be agreed to by the Ontario Division Board in advance, with any legal fees more than the agreed amount being the responsibility of the individual.
 - b. Any settlement awarded to the individual will be first used to pay back all legal fees paid by CUPE Ontario. The remaining balance of the settlement will be retained by the individual.
 - c. Any settlement judged against the individual will be the responsibility of the individual. In this situation, all legal fees paid by CUPE Ontario will not be required to be reimbursed by the individual.
 - d. Each situation will be reviewed annually.

3.9 CANADIAN MADE / UNION MADE PRODUCTS

1. At the 2006 CUPE Ontario Convention, delegates passed a resolution calling on CUPE Ontario to use only Canadian Made / Union Made products. This policy is designed to detail the will of the membership in passing this resolution:

CUPE Ontario will:

- a. Only hold events at unionized venues, which include community venues where our members work.
- b. Only book travel with unionized transportation companies.
- c. Ensure all products available for purchase at events, or utilized as promotional items for our union, are Canadian Made/Union Made products.

For clarification this means:

- a. The first choice is for the product to be made by unionized workers in Canada.
- b. Next that the product be made by unionized workers elsewhere in the world.

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- c. Finally, that the product has been partially assembled, screened with decals, etc. in Canada by unionized workers.

Options b. and c. are ONLY to be employed if a product is NOT available as a Canadian Made/Union Made product.

4 Human Resources Policies

4.1 HIRING

1. CUPE Ontario is committed to employment equity principles and will work with its staff union to ensure the workforce at CUPE Ontario is representative of the full diversity of CUPE Ontario members.
2. CUPE Ontario will post all permanent external job opportunities to the members of CUPE Ontario through e-blast(s) to CUPE locals, through committee lists, on our social media accounts and post on the website. Interview preference will be given to CUPE members for external postings, as per the requirement in point 3.
3. CUPE Ontario will review all applications and will interview a select number of qualifying individuals. CUPE Ontario will ensure that at least 50% of all interview candidates are from self-identified equity deserving groups.
4. CUPE Ontario will not hire immediate family members of Officers or current employees to any position within the organization.
5. CUPE Ontario will comply with the provisions as set out in the collective agreement with COPE 343 on hiring as an equal opportunity employer and strive to ensure that all new CUPE Ontario hires reflect the diversity of our members.
6. CUPE Ontario will ensure that at least 1 racialized or Indigenous member from the Executive Board will serve on the Hiring Committee.

4.2 STAFF ON A LEAVE OF ABSENCE

1. Staff off, on sick leave, or an approved leave of absence for more than 30 days will be required to return all equipment belonging to the employer. This will include, but not limited to, Blackberrys/cell phones, credit cards, office keys, laptops as well as relevant documents and/or files related to their employment.
2. Staff will be notified by the Coordinator of Operations after the 30-day period to coordinate the return of the equipment within one week.

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3. If upon request from CUPE Ontario to return the equipment and the staff member does not do so, CUPE Ontario Officers may request payment from the staff member for the value of the equipment.
4. If an employee uses equipment that results in a monetary charge (cell phone/credit card) to CUPE Ontario that is not for CUPE Ontario business, CUPE Ontario will recoup the costs from the individual.

4.3 CUPE FLEET POLICY AND ALLOWANCE

1. CUPE Ontario will provide to designated staff and officers up to \$805 per month vehicle payment (for vehicle cost and insurance) based on one of the following two options:
 - a. **Vehicle Allowance:** The vehicle allowance will be paid to the individual on the first pay of each month.
 - b. **Direct Payment to Fleet Leasing Company:** CUPE Ontario will pay directly to the leasing company for the vehicle cost and insurance each month.

Anything greater than \$805 per month will be the responsibility of the staff member or officer.

2. In either a. or b. above it is understood that CUPE Ontario does not reimburse staff or officers for travel to and from the office.
3. Individuals are responsible for regular maintenance costs on the vehicle.
 - a. Staff or Officers on the fleet will have insurance covered under the CUPE National Insurance program.
4. Any exception to this policy relating to the monthly amount must be approved by the Finance Committee.
5. Any fleet renewals or new fleets will be discussed with the Finance Committee in advance.

4.4 FORMER EMPLOYEES

1. All former employees will be required to return all equipment to the employer upon leaving the organization. This will include, but not limited to, Blackberrys/cell phones, credit cards, office keys, laptops as well as relevant documents and/or files related to their employment.
2. Upon approval by an officer, a four-week grace period may be provided to allow the former employee to make alternate arrangements. The employee will be responsible for the costs during the four-week grace period.

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3. Upon approval by the Secretary-Treasurer with the former employee for any arrangement to keep equipment, all costs associated with the equipment will become the responsibility of the former employee.

4.5 CELL PHONE POLICY

1. The following positions will be provided paid cell phone for CUPE Ontario business:
 - a. President
 - b. Secretary-Treasurer
 - c. Coordinator of Operations
 - d. Executive Assistant to the President
 - e. Executive Administrative Assistant to the President
 - f. Campaign Coordinators
 - g. Communications Support
 - h. Technology Specialist
2. Officers and staff will be informed of the usage plan and its terms and conditions for usage.
3. CUPE Ontario may reimburse a portion of an employee's cell phone costs based on the requirements of the organization and where such costs are approved in advance.

5 Green Policies

5.1 PRINTING AND COPYING

1. All printing at the CUPE Ontario Office will be double sided.
2. Single sided printing requires approval by an officer or the coordinator of operations.
3. Coloured printing will only be used when necessary and will be approved in advance by the Coordinator of Operations or an Officer.

6 Risk Management Training

6.1 RISK MANAGEMENT TRAINING

1. Risk Management and Internal Audit Training will be provided to the CUPE Ontario Executive Board and Trustees once every two years after the election of a new Executive Board.

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2. CUPE Ontario will use events to reach out to CUPE Local Financial Officers annually and to continue this practice on-going. Example: change in Legislation, both provincially and federally, that could affect the finances of Local unions and CUPE as a whole.

GOVERNANCE POLICIES

7 CUPE Ontario Terms of Reference

7.1 EXECUTIVE BOARD

1. The Executive Board mandate and membership is described in our Constitution.
2. The Executive Board and officers are responsible to ensure CUPE Ontario is strategically working within its financial means and the approved budget.
3. The Executive Board will work with the officers to ensure that the CUPE Ontario approved Action Plan and campaigns are being implemented.
4. The Executive Board approves any proposed collective agreements brought forward by the Labour Relations Committee and officers.
5. Each Executive Board Member shall report to each CUPE Ontario Executive Board meeting and will be strongly encouraged to provide a written report.

7.1.1 BOARD MATERIALS IN ADVANCE

1. CUPE Ontario will provide Board Members material to be discussed at the meeting in advance of the Board meeting by uploading the material to a shared drive.

7.1.2 CUPE ONTARIO EXECUTIVE BOARD MEETINGS

1. CUPE Ontario will hold their regular Executive Board meetings at the CUPE Ontario Regional Office.
 - a. If the CUPE Ontario Regional office is not available, the Executive Board will meet in another free venue that is accessible and suitable if available.
2. CUPE Ontario will hold an annual strategic planning session to determine organizational priorities.
3. Only Executive Board Members and staff as required will attend the annual strategic planning session.

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4. Where possible, the Executive Board will plan for their meetings to have start times in a manner to avoid the need for traveling members to stay in a hotel the night before the meeting. For example, start a meeting at 1pm.
5. In election years, there will be an orientation session for members that are newly elected to the Board. It will also serve as the Anti-Racism/Anti-Oppression training for the entire Board. The Board will ensure that the staff of CUPE Ontario undergo similar anti-racism/anti-oppression training once every two years. The Anti-Racism Organizational Plan (AROAP) is a living document that evolves as human rights gains are made and our understanding of human rights in respect to equity deserving groups changes and grows, therefore the anti-racism/anti-oppression training will be reviewed annually to determine whether changes, additions and/or deletions are necessary to be current and aligned with AROAP.

7.2 POLICY COMMITTEE

1. The Policy Committee membership is to include five Executive Board Members, the Secretary-Treasurer, and the President. The Policy Committee will meet twice a year (pre-convention/post-convention).
2. The Secretary-Treasurer shall Chair the Policy Committee.
3. Policy Committee members will be provided Financial Reporting Training as required in order to acquire necessary skill sets.
4. The Secretary-Treasurer's signed-off quarterly Financial Reports are reviewed by the Policy Committee within 2 weeks of completion.
5. The Policy Committee establishes expenditure approval responsibility for any expenditure over a set amount and/or multi-year contracts. The limit is set at \$20,000.
6. Three members of the Policy Committee will participate in the Ways & Means Committee.
7. The Policy Committee will have at least one Equality Representative assigned.
8. The Policy Committee will have a bi-annual review (Refer to AROAP principles)

7.3 WAYS & MEANS COMMITTEE

1. Ways & Means Committee mandate and membership is described in the CUPE Ontario Constitution.

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2. The first Ways & Means Committee meeting should occur during the Spring to develop the upcoming fiscal year's preliminary budget. Officers must work within the preliminary budget from the start of the fiscal year to approved budget.
3. A second Ways & Means Committee meeting should occur prior to the annual Convention to review the year-to-date results of CUPE Ontario compared to the initial draft budget to determine if any revisions should occur to finalize the budget that will be debated and approved at the Convention.
4. Three (3) members of the Policy Committee will be appointed to the Ways & Means Committee. One of the three will be the Equality Representative assigned to the Policy Committee.

7.4 LABOUR RELATIONS COMMITTEE

1. A committee consisting of at least four members from the Executive Board and the two officers will serve as the CUPE Ontario Labour Relations Committee.
2. The Labour Relations Committee will assist with bargaining, grievances, employment equity plans, hiring and labour management.
3. The Labour Relations Committee is not created to be part of the day-to-day labour relation functions, but rather to serve as an accountability structure for the broader issues.
4. The Bargaining Committee will consist of the members on the Labour Relations Committee and will get its mandate from the Executive Board and will include at least one racialized or indigenous member.
5. The Collective Agreement negotiated by the Bargaining Committee with the staff employed by CUPE Ontario shall be subject to ratification by the CUPE Ontario Executive Board.

7.5 PRESIDENT

1. The President's role, responsibility and mandate are described in the CUPE Ontario Constitution. Compensation terms are tied to the Ontario Regional Director.

7.6 SECRETARY-TREASURER

1. The Secretary-Treasurer's role, responsibility and mandate is described in the CUPE Ontario Constitution. Compensation terms tied to the Ontario Assistant Regional Director.

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7.7 STAFF POSITIONS

1. Every staff member will have a job description which will tie into the positions outlined in the staff union's Collective Agreement.

7.8 TRUSTEE AND AUDIT REPORTING

1. Trustees will report to the CUPE Ontario Executive Board in person two times per fiscal year. In addition to this reporting, they will also be given time to report to the annual CUPE Ontario Division Convention.
2. Annually, CUPE Ontario's auditor reports in person directly to the Executive Board on the year end audited financial results and the Auditor's Management Letter.
3. CUPE Ontario Trustees will meet with the auditors during the auditing sessions.
4. CUPE Ontario Trustees will receive a copy of all Executive Board minutes within 2 weeks of the minutes being approved by the Executive Board.

8 Elections

8.1 ELECTIONS

1. As outlined in the Constitution, members running for election at a CUPE Ontario Division Convention may submit a one-page, black-and-white election letter, or flyer to CUPE Ontario by a date specified/announced on the 2nd convention call. A black-and-white copy of the material will be sent to all locals in advance of the convention. Members are responsible for their own translation costs.
2. The statement will also be posted on the CUPE Ontario website and election material for all candidates will be limited to that designated section.
3. Staff of CUPE Ontario will not be permitted to involve themselves in any way in any election of any member running for any office/committee within CUPE Ontario.
4. No CUPE Ontario resources (for example copiers, fax machines, computers, etc.) will be used in any way in any election of any member running for any office within CUPE Ontario (aside from point number 1 listed above).
5. No member will have access to membership lists for purposes of election campaigns.

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9 Campaigns

9.1 NATIONAL BUDGET PLANNING

1. CUPE Ontario will work to meet the National Union budget submission timelines in order to secure CUPE Ontario campaign funding.
2. CUPE Ontario's Campaign submissions will contain a contingency amount for any unexpected campaign activities during the upcoming year.
3. CUPE Ontario will work within the agreed written Terms of Reference for qualifying campaign expenses established jointly with CUPE National which clearly outlines what are reimbursable campaign expenses and the backup documentation required to reduce administrative time for both organizations and improve the timeliness for vendor payments.

9.2 EVALUATING AND REPORTING ON CUPE ONTARIO CAMPAIGNS

1. CUPE Ontario campaigns will be developed in consultation with the Campaign Coordinator relevant committee and assigned staff members.
2. CUPE Ontario Campaign Coordinator, in consultation with the staff and members directly involved in the campaign, will evaluate each campaign at its close.
3. The evaluation of individual campaigns will include the planning, execution and effectiveness. A cost analysis for each campaign will also be conducted to ensure the most effective use of Campaign funds, including the comparison of individual costs for a Campaign budget to actual.
4. The Secretary-Treasurer will prepare a Campaign Financial Report on the campaign expenditures compared to the approved original/revised budget. Regular reporting on campaigns will be presented to the Executive Board and members.

10 CUPE Members Appointed to Boards

10.1 CUPE MEMBERS APPOINTED TO BOARDS

Any member or staff person appointed to a board on behalf of CUPE Ontario will be required, as a condition of serving on the board, to redirect all financial compensation received to CUPE Ontario who uses all financial compensation for membership training and education.

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CUPE Ontario will reimburse members for lost time, per diem, travel and accommodations while performing regular board duties.

11 Social Media

11.1 SOCIAL MEDIA

This policy provides guidance for the use of social media on behalf of CUPE Ontario and its various committees and sector groups. This policy is aimed at minimizing risk to CUPE Ontario, our members and our staff, and should be seen as a reference guide to responsible participation on social media platforms.

1. Users need to know and adhere to the CUPE Ontario Equality Statement when using social media on behalf of CUPE Ontario and its various committees and sectoral groups.
2. Users are encouraged to use social media to promote the flow of useful information that supports CUPE Ontario operations and values.
3. Social media posts must not violate CUPE Ontario's values, CUPE Ontario Equality statement or the law.
4. The officers of CUPE Ontario retain the right to remove posting privileges if users do not adhere to these policies.

12 Guidelines For Local Assistance To Sector Conferences

12.1 CRITERIA

1. In order to be considered for local assistance the local must fall into one of the 4 categories:
 - a. Small local from the sector of less than 100 members.
 - b. A Northern local located north of the French River, or more than 500 kms from the location of the event.
 - c. A newly organized local union currently negotiating their first collective agreement.
 - d. A local which has been on strike or locked out within the previous year leading up to the conference.
 - e. CUPE Ontario will provide special consideration for a local seeking support to send one racialized or indigenous member.
2. In order for a local to be considered for local assistance, the following must apply:
 - a. With the exception of locals negotiating a first collective agreement, the local must be up to date with its CUPE Ontario per capita payments.

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- b. For purposes of this requirement - up to date shall be not more than 3 months in arrears at the time of the conference subsidy being awarded.
- c. The local must demonstrate an inability to pay.

12.2 DEMONSTRATING INABILITY TO PAY

1. A local's inability to pay will be determined based on cash assets in excess of 10x the amount to send one delegate to the conference in question. For example, if it is determined that the cost to send one delegate is \$1,000.00 the local must have less than \$10,000 available to them in cash. The following process will be applied:

- a. Once an application form is received, the Secretary-Treasurer will determine the cost of the local's participation based on their delegates' current day reality (location, wages, accommodation, registration fees).
- b. The local will be required to demonstrate an inability to pay by submitting to the Secretary-Treasurer a recent and approved local trustees report. The local will also be required to send a copy of their bank statement which will identify cash assets.
- c. Office furniture and equipment as well as property will not be considered for purposes of determining assets.
- d. Special circumstances, like a pending arbitration or strike averting campaign will be considered when determining the local's inability to pay.

12.3 APPLICATION

1. In order to be considered for assistance to attend an event, an application must be filled out and sent back to the Secretary-Treasurer by the deadline specified on the assistance form. Such form and guidelines shall be mailed with the conference call notice.

12.4 FINANCIAL ASSISTANCE

1. Local assistance shall be built into the conference budget using conference revenue.

Assistance shall be limited to the following:

- a. Assistance will normally be limited to one member per local. Assistance will not be available if the local is otherwise sending a delegate.
- b. The registration fee to attend the event shall be waived and such delegate will be entitled to all rights and privileges in accordance with the sector by-laws.
- c. Return travel shall be provided in the case of air or train travel and reimbursement of mileage in the case of automobile travel. The decision should be based on the most economical and reasonable method of travel.
- d. Where possible and where a conference has any unused complimentary rooms, accommodation may be provided as well.

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12.5 NEWLY ORGANIZED LOCALS

1. Some additional support may be provided in recognition of newly organized locals who have no collective agreement and no union dues being collected. Such support is to be considered at the time of conference budget planning.

13 Committee Member Expenses at Conferences

13.1 COMMITTEE MEETING IN ADVANCE OF CONFERENCE

1. Where a committee decides to have a face-to-face meeting attached to their conference, reimbursement for expenses should be as follows:
 - a. Reimbursement for committee expenses attached to the conference will not exceed one day, except for travel purposes.
 - b. CUPE Ontario will cover the cost of lost time, per diem and accommodation for the pre-conference meeting only.
 - c. CUPE Ontario will cover the cost of travel one way.
 - d. Costs related to pre-conference meetings shall be billed to the conference budget.

13.2 COMMITTEE MEMBERS NOT SELECTED AS DELEGATES

1. Members are expected to get support from their local to attend conferences. If a member of the committee is not selected to attend the conference as a delegate from their local, the committee may decide to financially support the committee member to attend with voice, but no vote.
 - a. Expenses shall be considered when developing the conference budget.
 - b. Such expenses shall be billed to the sector conference budget.
 - c. It is understood that you must be a delegate from your local to offer for a position on the committee.

13.3 COMMITTEE EXPENSES SIGN-OFF POLICY

1. Where possible, all committee expenses will be signed off by the chairperson or her designate prior to them being sent to the Secretary-Treasurer for approval.

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14 Educational Scholarship Policy & CUPE Ontario Schools

14.1 SCHOLARSHIP GUIDELINES

1. CUPE Ontario offers educational scholarships to members who are from locals affiliated to the CUPE Ontario Division and are in good standing as members. The purpose of scholarships is to support members pursuing and furthering their education and training from the Union to strengthen their local and the Union overall. Primarily, scholarships will be awarded to members from locals who do not have the financial resources to send members to educational opportunities.
2. Members of Education Committee will strive to ensure that scholarships are awarded fairly and equitably, and decisions will be made in accordance with the following criteria. Racialized and indigenous members will be especially encouraged to apply.
3. CUPE Ontario will ensure that an Anti-Racism/Anti-Oppression workshop will be offered at each CUPE Ontario Spring & Fall School, and such workshop will proceed with a minimum of 5 participants.
4. Scholarships will primarily be awarded for CUPE Ontario Schools, CUPE Council workshops and the Dave Saunders Week-long School.
5. To receive a scholarship, members must be from an affiliated local of the CUPE Ontario Division, or a new local to CUPE in the province of Ontario that is in the process of affiliating and negotiating a first collective agreement.
6. Members from locals with five hundred (500) members or less will be deemed a priority applicant in the pool but those from locals with less than two hundred and fifty will be ranked higher.
7. Scholarships will not be awarded to members from a local with a thousand (1,000) or more members.
8. Applications from members residing in Northern Ontario will also be deemed a priority for selection.
9. All applications will be awarded using an equality lens that seeks to first award scholarships to those members from a local with less than five hundred members who is from any of the six equality groups that include, in no order: women, racialized, First Nations and Aboriginal, young workers, workers with a disability, and queer and transgender members.
10. No member will receive more than one scholarship in the same calendar year.

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11. Applications received from members that have never received a scholarship will be prioritized.

12. All applications received by CUPE Ontario will be kept on file and reviewed for consideration by the Education Committee for one full calendar year. The Education Committee of CUPE Ontario bears no responsibility to ensure that applicants have completed their application fully with all accurate information.

13. Scholarships will be awarded to cover: the cost of registration, travel at the rate set by CUPE Ontario, accommodation in a unionized hotel, per diem based on CUPE Ontario policy, child/dependent care based on CUPE Ontario policy. All efforts will be made to cover or subsidize lost wages should the member not have access to union leave, lieu time or vacation.

14. Decisions to select scholarship winners will be made by the members appointed to the Education Committee. Staff from either CUPE Ontario or Union Development will have full voice but no vote in the final decision of the scholarship allocations.

15. The Lois Hill scholarship is reviewed and awarded by the Aboriginal Council and all applicants will be referred to the Aboriginal Council for information.

15 Accessible Member Service Policy

15.1 PURPOSE

The *Accessibility for Ontarians with Disabilities Act, 2005* (“AODA”) aims to create a more accessible Ontario. Its goal is to identify, prevent and eliminate barriers experienced by persons with disabilities.

This Policy is adopted pursuant to the *Accessibility Standards for Customer Service*, enacted by Regulation under the AODA, but it reflects CUPE Ontario’s longstanding commitment to accommodate the needs of persons with disabilities and to treat all people with equal dignity and respect, without discrimination based on disability or other personal characteristics.

CUPE Ontario strives to make its services fully accessible. We are committed to ensuring that persons with disabilities have equal access to our services and receive the same quality of services, in a manner that fully respects their dignity and independence. Wherever possible, our services are provided to persons with disabilities and others in an integrated fashion – unless an

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alternate measure is necessary in order to enable a person with a disability to obtain, use or benefit from our services.

15.2 APPLICATION

1. This Policy applies to all persons who, on behalf of CUPE Ontario, deal with members of CUPE Ontario or members of the public.

15.3 DEFINITIONS

1. Assistive device – any device used by a person with a disability to assist them in performing a particular task or tasks or to aid them in activities of daily living (eg. communications, mobility, etc.).
2. Disability – has the same meaning as defined in the Human Rights Code.
3. Service animal – an animal is a service animal if it is readily apparent that the animal is used by a person with a disability for reasons relating to his or her disability, or if the person provides a letter from a physician or nurse confirming that the person requires the animal for reasons relating to his or her disability.
4. Support person – a person who accompanies a person with a disability in order to help with communication, mobility, personal care, medical needs, or access to goods and services.

15.4 COMMUNICATIONS

1. CUPE Ontario is committed to communicating with its members and with members of the public in a manner that is accessible and that takes into account the disabilities of any persons with a disability.

15.5 ASSISTIVE DEVICES

1. While CUPE Ontario does not provide assistive devices onsite at our office in Markham, we invite any person with a disability to use their own assistive device while on our premises for the purpose of obtaining, using and benefiting from our services.

15.6 SERVICE ANIMALS

1. Persons with a disability may enter CUPE Ontario's premises and events accompanied by a service animal. The animal's working role will be respected at all times.

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15.7 SUPPORT PERSONS

1. Members and others who have disabilities are welcome to be accompanied by their own support person while visiting CUPE Ontario's premises. At no time will a person with a disability be prevented from having access to his or her support person while on our premises.

15.8 NOTICE OF TEMPORARY DISRUPTIONS

1. If there is a temporary disruption of CUPE Ontario facilities used by persons with disabilities, we will provide notice of the disruption to the public, through our website and e-blast capacity, including the reasons for the disruption and its anticipated duration. We will also provide notice of any available alternative facilities.

15.9 TRAINING

1. CUPE Ontario has provided training and will provide ongoing training, as required under the *Accessibility Standards for Customer Service*, to all persons to whom this Policy applies.

15.10 CUPE ONTARIO EVENTS

1. CUPE Ontario will include with all registrations forms a request for accommodations to support members with disabilities. If the form cannot be filled out the request may be placed with our office by calling or emailing or visiting the CUPE Ontario website. This will include, but will not be limited to:

- Wheelchair accessible locations including meeting rooms, stages and floor microphones
- Hotel accommodations (special placement in the hotel as well as accessible rooms – both meeting rooms and guest rooms)
- Special registration table
- Quiet room for large events (more than 500 members)
- Sign language
- Scooter
- Large font documents
- Electronic documents
- Access to special seating such as comfortable chairs as well as seating location

15.11 FEEDBACK

1. Our goal is to ensure unimpeded access to our services for all persons with disabilities, in a manner that respects their dignity and independence and is consistent with the principles of integration and equal opportunity. We welcome and appreciate feedback on whether our services are being provided in a manner that achieves this goal.

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Feedback can be provided to us by phone or in writing by email, fax, regular mail or personal delivery. If you prefer to provide feedback in person, an appointment will be arranged.

Please address your feedback or appointment request to the following individual:

Meaghan Dixon
Coordinator of Operations
CUPE Ontario
905-739-9739
mdixon@cupe.on.ca
80 Commerce Valley Drive E., Suite #1
Markham, ON L3T 0B2

The privacy and confidentiality of individuals who contact us will be respected. We also welcome anonymous feedback.

All feedback will be reviewed for possible action that can be taken to improve our service delivery.

Where feedback consists of a complaint about accessibility, we will endeavour to acknowledge the complaint (if it is not anonymous) within two business days. We will respond to all complaints in a manner that takes into account the complainant's disability (if any).

Where possible, complaints will be addressed immediately. However, some complaints may require more effort to address, which may take time. Complainants will be notified of the anticipated time required to address their concerns and of the actions that are ultimately taken by CUPE Ontario.

15.12 DOCUMENTATION

1. A copy of this Policy will be provided to any CUPE Ontario member upon request. It shall be provided in a format that considers a person's disability (if any). This Policy will also form part of the CUPE Ontario Policy Manual and be reviewed by the Policy Committee from time to time to ensure its content is relevant and up to date.

16 Elected Members on Sick Leave

16.1 OBJECTIVE

1. This policy is intended to help protect members who are off on sick leave, LTD or away due to workplace injury with their employer while serving in an elected role with CUPE Ontario.

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2. If you are on a sick leave or away from work due to a workplace injury and absent from the workplace, the Alternate elected shall be appointed until such time when the regular member can fulfill his/her duties on behalf of the committee.

16.2 WSIB

1. Members who are performing modified duties shall be considered to be in the workplace and actively at work. It shall be the responsibility of the committee member to identify scenarios which may hinder their ability to properly represent the members.

16.3 RE-ASSIGNMENT/REINSTATEMENT

1. The CUPE Ontario President will write to the member advising of the replacement by the Alternate until such time that they can fulfill their obligations.

2. The CUPE Ontario President will write to both parties immediately upon learning that the regular elected member is now in the position to fulfill the role and reinstatement shall be immediate.

16.4 REIMBURSEMENT

1. Members attending committee meetings who are on sick leave, LTD or away due to workplace injury will not have lost time or insurance payments paid for any reason.

17 Events Protocol

17.1 PROTOCOL

1. CUPE Ontario engages in events to support and further our mandate, to act in solidarity with our coalition partners, and to advance the interests of the labour movement and our communities more broadly.

2. Formal participation in events often includes mobilizing CUPE members to attend, along with CUPE Ontario officers, Executive Board members and staff. Participation is often documented through pictures posted on social media and used in other communications.

3. Safety:

- a. CUPE Ontario may choose not to participate in events if members' and staff safety is at risk. Risks may include inclement weather and threats of violence.

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4. Events during a strike/lockout:

- a. CUPE Ontario will not participate in actions or provide financial, human, or in-kind resources, that would result in members crossing picket lines. CUPE Ontario will also not participate in actions if those actions would result in the use of scab labour.
- b. As per the COPE 343 collective agreement, CUPE Ontario staff will not be required to participate in any event that would require them to cross a picket line.
- c. If CUPE Ontario participation in, or organization of, an event, has been scheduled prior to a strike or lockout beginning, CUPE Ontario will communicate with all members and staff who planned to participate the reasons for not crossing the picket line as early as possible. CUPE Ontario will also include with this information, ways to support the picket line and apply pressure to support the union in the dispute.
- d. CUPE Ontario will overtly remind members and local leadership of our Union's Policy in.

18 Committee Meetings

1. Where meetings are not connected to a conference or event and where possible, committee meetings will plan for their meetings to have start times in a manner to avoid the need for traveling members to stay in a hotel the night before the meeting. For example, start a meeting at 1pm.

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