



# FINAL CALL NOTICE!

## Secretary-Treasurers Conference 2024

Registration starts at 3 pm on February 6<sup>th</sup>, 2024.

Conference ends at noon on February 9<sup>th</sup>, 2024.

## SHERATON PARKWAY NORTH HOTEL

600 Highway 7 East, Richmond Hill, ON

### Hotel Guest Room Fee: \$189.00

Hotel room rate is subject to tax and fee per room.

Guest room reservations are to be made through W.E Union Travel by January 15, 2024.

Phone: 1(888) 676-7747

[Mention **Secretary-Treasurers Conference** when booking your room(s)]

Guestroom booking link: [www.weuniontravel.ca](http://www.weuniontravel.ca)

### Registration Fee:

\*On-line registration will be closed 5 business days prior to the Conference

Affiliates:	\$350.00
Non-Affiliates:	\$450.00

If you require French translation, ASL interpretation, childcare services, or any other accessibility accommodations, please submit your request by filing out the access request form by January 15, 2024. (The link to the access request form can be found in your confirmation email.)

[Click HERE to Register](#)

**\*No refunds or cancellations will be available after January 29, 2024  
All local leaders are encouraged to join the Conference!**

# WORKSHOPS

## **IMPORTANT NOTICE:**

Workshops are scheduled for Wednesday afternoon and the full day on Thursday. You will choose your workshop selections during online registration. Please note that if you are selecting Financial Essentials & Financial Officer for Trustees or Treasurers in Group A, you **CANNOT** choose any workshops in Group B.

## **GROUP A – PLEASE CHOOSE 1 WORKSHOP**

- 1. Financial Essentials & Financial Officer for Trustees      45 Spots**
- 2. Financial Essentials & Financial Officer for Treasurers      45 Spots**

**Time: Wednesday 1:30pm – 4:30pm & Thursday 9:00am – 4:30pm**

### **Financial Essentials**

This workshop is for all members in an elected position within the local union. Whether you are a trustee or a member of the executive, learning about the basics of the local union's finances is a priority. In this workshop, you will learn about your duties regarding the finances of the union, budgeting and how to be transparent and accountable to members.

### **Financial Officer**

Following the completion of LET - Financial Essentials, this 6-hour workshop allows Secretary-Treasurers and Trustees to delve deeper into local finances.

The Secretary-Treasurers will learn how to use the CUPE electronic ledger, manage the local union's funds and accounts, and prepare reports to the membership and the trustees.

The Trustees will learn how to properly perform an audit of the local union's books, accounts, properties, and assets. At the end of this workshop, Trustees will be able to make recommendations to the local union to improve the local union's financial health.

**NOTE: Please bring a laptop, if possible.**

# GROUP B – PLEASE CHOOSE 3 WORKSHOPS

**\*If you already choose workshop from Group A,  
you cannot pick any workshop from Group B**

**One workshop per session:**

**Session 1: Wednesday 1:30pm – 4:30pm**

**Session 2: Thursday 9:00am – 12:00pm**

**Session 3: Thursday 1:30pm – 4:30pm**

## **1. Building a Local Budget**

**35 spots per session**

Empower your local union with the important skills to create a strong budget that supports your goals and make timely strategic decisions throughout the year including where to focus / refocus resources based on your monthly financial results compared to your budget.

In this workshop you will learn: Budget Basics, Setting Priorities, Financial Planning, Transparency and Accountability, Effective Reporting and Communication

Join us to improve your local union's financial future!

## **2. CUPE National PCT & Electronic Ledger**

**35 Spots per session**

Understand the payment structures to CUPE National and the processes behind remittances of local union dues. Gain an understanding of how to use the online CUPE Electronic Ledger.

Note: Must bring or request laptop with Excel program or request one in advance from CUPE Ontario.

## **3. How to Apply for National Cost Share**

**35 Spots per session**

In this workshop, you will learn about preparation and submission of cost-share campaign plans to access the funds necessary (50-50 between CUPE National and the local) to support your campaigns around bargaining, contracting-out, anti-privatization and other initiatives. The workshop will explain how different resources can be accessed at appropriate points in a campaign arc, the elements of a successful campaign plan and how they fit into successful campaign proposals, timelines and deadlines, and relevant regulations around the National Defence Fund and the cost-sharing campaigns approval process.

## **4. By-Law Essentials – 30 Spots per session**

**35 Spots per session**

Good by-laws are an essential component of a well-functioning local. In this workshop, you will learn the principles of good by-laws and how to make sure they are in compliance with CUPE's National Constitution. We'll also look at how clear language by-laws help our members get involved in the work of the union.

NOTE: Please bring your local by-laws to the workshop.

## **5. Excel Course: From Intro to Advanced**

**35 Spots per session**

Unlock the full potential of Microsoft Excel in just 3 hours! Our comprehensive workshop takes you on a journey from Excel basics to some advanced techniques that will assist you for your local's needs, empowering union members with invaluable spreadsheet skills.

Key Learning Points:

- Get started with Excel's interface, navigation, and basic functions
- Learn time-saving data entry methods and formatting tips
- Learn essential formulas and functions for calculations and data analysis
- Learn how to generate reports
- Organize and filter data effortlessly

By the end of this workshop, you'll be equipped with Excel skills to boost productivity, simplify data analysis, and enhance your union-related tasks.

Note: Must bring or request laptop with excel program or request one in advance from CUPE Ontario.

## **6. Introduction to Organizing for Power**

**40 Spots per session**

**Note: This workshop is only available for Session 1 and 2**

This is an introductory workshop about what it means to organize worker power. Participants are introduced to the core concepts behind structure-based organizing, which can be used to build high participation bargaining campaigns at local unions. Interested participants will also be provided with information on how to access training on the various organizing methods named in this introductory workshop such as organic leader identification, structured organizing conversations, and charting.

# Agenda



## Tuesday, February 6, 2024

3:00-6:00 pm	Registration – Please have your QR Code ready!
6:00-9:00 pm	Welcome remarks Indigenous Land Acknowledgement Equality Statement Declaration of People of African Descent Announcements Fred Hahn – CUPE Ontario President Meet and Greet Reception

## Wednesday, February 7, 2024

8:00-9:00 am	Registration – Please have your QR Code ready! Cadance Rennick – CUPE National Secretary Treasurers
9:00-10:30 am	Yolanda McClean – CUPE Ontario Secretary Treasurers Affiliation Drive
10:30-10:45 am	Break
10:45am-12:00 pm	Panel Discussion – Building Workers Power Fraud Prevention – Mike Stevens
12:00-1:30 pm	Lunch
1:30-2:45 pm	Education Workshop – Group A & Group B Session 1
2:45-3:00 pm	Break
3:00-4:30 pm	Education Workshop – Group A & Group B Session 1

## Thursday, February 8, 2024

9:00-10:15 am	Education Workshop – Group A & Group B Session 2
10:15-10:30 am	Break
10:30-12:00 pm	Education Workshop – Group A & Group B Session 2
12:00-1:30 pm	Lunch
1:30-2:45 pm	Education Workshop – Group A & Group B Session 3
2:45pm-3:00 pm	Break
3:00-4:30 pm	Education Workshop – Group A & Group B Session 3
7:00-8:00 pm	Mix and Mingle

## Friday February 9, 2024

9:00-10:15 am	Retiree Network – Stephen Seaborn AROP WSIB Insurance Obligations for Locals
10:15-10:30 am	Break
10:30am-12:00 pm	We Travel – Ian Sinclair Panel Discussion – Ontario Finance Closing Remarks