



## FINAL CALL NOTICE!

### Secretary-Treasurers Conference 2026

Registration starts at 3 pm on February 10, 2026.  
Conference ends at noon on February 13, 2026.

### SHERATON PARKWAY NORTH HOTEL

600 Highway 7 East, Richmond Hill, ON

Hotel Guest Room Fee: \$195.00

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 7, 2026.

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 by January 10, 2026, after cut-off date is \$400
Non-Affiliates:	\$450.00 by January 10, 2026, after cut-off date is \$500

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 10, 2026.  
(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 30, 2026**  
**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: The Basic

**35 Spots per session**

Unlock the full potential of Microsoft Excel in just 3 hours! This introductory workshop takes you through the fundamentals of Excel and builds a strong foundation for everyday tasks that support your local's work. Perfect for beginners or anyone looking to refresh their skills.

### Key Learning Points:

- Get comfortable with Excel's interface, navigation, and basic functions
- Learn time-saving data entry methods and formatting techniques
- Understand essential formulas and functions for simple calculations
- Discover how to organize, sort, and filter data
- Learn how to generate basic reports

By the end of this workshop, you'll be equipped with practical Excel skills to boost productivity, simplify daily tasks, and support your union work more efficiently.

*Note: Participants must bring a laptop with Excel installed or request one in advance from CUPE Ontario.*

## 6. Excel for Union Officers: Beyond the Basics

**35 Spots per session**

Take your Excel abilities to the next level! This Intermediate workshop is designed for participants who already understand Excel fundamentals and want to deepen their analytical and reporting skills to better support local decision-making and data management.

### Key Learning Points:

- Explore reference types, formulas, and functions (e.g. Worksheet References, Structured References, CONCAT, TEXTSPLIT, VLOOKUP).
- Learn data validation, drop-down lists, and error-proofing tools.
- Learn quick data visualization tools to create dynamic charts and dashboards for impactful reporting.
- Learn the essentials of using PivotTables and Pivot Charts to summarize and analyze large datasets.
- Work with multiple worksheets, linking data and managing large files.
- Learn to work more efficiently with keyboard shortcuts and ALT Ribbon commands

By the end of this session, you'll be able to create sophisticated spreadsheets, analyze complex data, and produce professional-quality reports tailored to your local's needs.

*Note: Participants must bring a laptop with Excel installed or request one in advance from CUPE Ontario.*



# Agenda

## Tuesday, February 10, 2026

03:00pm - 06:00pm	Registration – Please have your QR Code ready!
06:00pm - 08:00pm	Welcome remarks Indigenous Land Acknowledgement Declaration of People of African Descent Equality Statement Equity Greeting Fred Hahn – CUPE Ontario President Meet and Greet Reception

## Wednesday, February 11, 2026

8:00am - 09:00am	Registration – Please have your QR Code ready!
9:00am - 10:00am	Candace Rennick – CUPE National Secretary Treasurers Yolanda McClean – CUPE Ontario Secretary Treasurers Overview and Update of Affiliation Drive
10:00am - 10:30am	AROAP – Ashleigh Watson
10:30am - 10:45am	Break
10:45am - 11:30am	Panel Discussion
11:30am - 12:00pm	Fraud Prevention – Mike Stevens
12:00pm - 01:30pm	Lunch
01:30pm - 02:45pm	Education Workshop – Group A & Group B Session 1
02:45pm - 03:00pm	Break
03:00pm - 04:30pm	Education Workshop – Group A & Group B Session 1

## Thursday, February 12, 2026

08:30am - 09:00am	Smudge
09:00am - 10:15am	Education Workshop – Group A & Group B Session 2
10:15am - 10:30am	Break
10:30am - 12:00pm	Education Workshop – Group A & Group B Session 2
12:00pm - 01:30pm	Lunch
01:30pm - 02:45pm	Education Workshop – Group A & Group B Session 3
02:45pm - 03:00pm	Break
03:00pm - 04:30pm	Education Workshop – Group A & Group B Session 3

## Friday February 13, 2026

08:30am - 09:00am	Smudge
9:00-10:15 am	Retirees Network Climate Justice AI Presentation WSIB Insurance Obligations for Locals
10:15-10:30 am	Break
10:30am-12:00pm	W.E. Union Travel – Ian Sinclair Keynote - Housing Crisis in Ontario – Tanya Talaga Closing Remarks

