

Policy and Procedure Manual

CUPE Local 523



Mission Statement

*To unite and encourage all members through Union Solidarity,
giving us the power and strength to secure and defend our rights as workers.*

Revised Date: 09/30/21

POLICY AND PROCEDURE MANUAL:

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SECTION 1. POLICIES

CUPE Local 523

ADMINISTRATION OF THE HARDSHIP ASSISTANCE FUND

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: To aid CUPE Local 523 members who are suffering from clear hardship circumstances and will generally be limited to hardship associated to medical factors.

Section 36 HARDSHIP ASSISTANCE FUND


This policy must be flexible and shall be applied only under clear hardship circumstances, and will generally be limited to hardship associated to medical factors. Payment under these guidelines does not imply any future or further responsibility or liability for funds.

- a) The maximum amount of assistance from CUPE Local 523 in any given instance shall be five hundred dollars (\$500). Revised: April 2019 Page 16, Local 523 Bylaws
- b) Payments shall only be made to a member in good standing. No payments shall be paid to anyone's estate.
- c) Requests to be sent in writing from Unit Chairs to the Executive Board. All such decisions shall be determined by a majority vote of the Executive Board.
- d) All members' circumstances shall be kept confidential within the Executive Board.
- e) The intent of this assistance is that it shall be applied on a "one time only" basis to individual members for any given issue.

The Local 523 Bylaws incorporates flexibility in the administration of this fund. The Executive of the Local will determine when payments are made by a 2/3 majority vote as provided for herein.

The following guidelines will be considered when deliberating a request for hardship fund assistance:

- The hardship fund should not be viewed as a "go to" fund when a member is short of cash. It is more accurately a "last ditch effort" in times of significant economic hardship.
- It is understood there is no obligation on the Local to pay any such funds for any reason and that each and every payment is solely discretionary and will be based on a case by case review.

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- All requests for hardship fund assistance will be decided by the Executive Board by way of a 2/3 majority vote.
 - It is understood that the amount of \$500 is a maximum per incident. The Executive may elect to provide any amount up to \$500.
 - Any payments from the hardship fund will be made to, or on behalf of a member in good standing as decided appropriate by the Executive.
 - Any member requests for assistance should come to the Executive Board through the applicable Unit Chair; however members may apply directly to the Executive through any Executive member, Good and Welfare rep, JEIS committee member by written request. Further information may be requested by the Executive prior to determining whether a payment will be made from the fund.
 - While all members' circumstances shall be kept confidential within the Executive, all payments from the fund shall be reported to the membership in a way so as to avoid identifying the members receiving the benefit.
 - While the benefit is payable on a "one time only" basis, members may be able to access the fund on more than occasion for significant and separate circumstances.
 - The hardship fund is not intended to provide funding in situations including but not limited to: a short term reduction in income or the "top up" of any other benefit.

The following guidelines will also be reviewed and considered when reviewing a member request for funds:

1. The member's family has experienced a serious unanticipated personal crisis or tragedy (this might include illness, injury, fire, trauma, etc.)
2. The member has lost employment income that will not be compensated for by any social security program or employment benefit. The employment loss would generally not be due to quitting or dismissal unless there are clearly extenuating circumstances.
3. The members' family is subject to a significant risk of further loss or hardship if one-time financial aid is not available. It is understood that simply missing a pay cheque does not meet the test of serious hardship. We all have to go without sometimes. For example: one can usually arrange to skip a mortgage payment.
4. The member is unable to arrange for emergency funds through family or a financial institution.

SECTION 1. POLICIES

CUPE Local 523

PRIVACY POLICY

Revised Date: 09/30/2111/1/22

Executive Approval Date: 09/30/21

Purpose: CUPE Local 523 is committed to being accountable for how we treat personal information and to the principles outlined in this policy. This policy is developed in compliance with British Columbia's British Columbia's Personal Information Privacy Act ("PIPA"). PIPA sets out rules for how organizations such as ours can collect, use and disclose your personal information. This policy is also designed to help individuals understand how their personal information is managed at CUPE Local 523.

Generally, Local 523 collects personal information for the following purposes:

- To represent our members in accordance with our Labour Relations Code obligations.
- To bargain collectively on behalf of all members.
- To manage and develop Local 523 operations and bylaws.
- To meet any legal and regulatory requirements.
- To inform members about CUPE services that may be of interest to them.
- To develop, enhance or improve the services provided by CUPE.

CUPE Local 523 collects and stores information in hard copy as well as electronically which is securely stored in Office 365. This information may be used for the purposes identified in this policy.

Scope

Those individuals protected by this Privacy Policy include Local 523 members and members of the public including students, parents and teachers. This Privacy Policy applies only to personal information as defined in the PIPA. "Personal information" means information about an identifiable individual, but does not include contact information or work product information.

Exceptions

If the policies and procedures outlined in this document do not address a specific situation, individuals are expected to contact the Local 523 Privacy Officer for guidance or clarification.



The Principles

Our Privacy Policy is designed to comply with applicable privacy legislation in British Columbia.

If we change our Privacy Policy in the future, those changes will be included in updates to our official Privacy Policy, wherever it is made available. When personal information that has been collected is to be used for a purpose not previously identified, the new purpose will be identified prior to use.

Accountability

CUPE Local 523 is responsible for maintaining and protecting the personal information under its control. Accountability for this function within our organization is held by:

Privacy Officer
c/o
CUPE Local 523

Penticton, BC

Email: 2vp@cupe523.com

Consent

An individual's knowledge and consent are required before CUPE Local 523 is allowed to collect, use or disclose his or her personal information, except where not required in accordance with PIPA. Where possible, Local 523 will obtain consent directly from the individual concerned at the time of collection. After having provided consent, an individual has the right to withdraw consent at any time by providing reasonable notice to the Local 523 Privacy Officer.

Members are considered to have given implied consent for the purpose for collecting, using or disclosing personal information would be considered obvious and the individual voluntarily provides personal information for that obvious purpose.

By registering for education, conferences or conventions, using other Local 523 services, or otherwise indicating approval, individuals consent to the collection and use of their personal information for the purposes identified in this Privacy Policy.

CUPE Local 523 will not require you to consent to the collection, use or disclosure of personal information beyond that required to provide CUPE services to you.

If you wish to withdraw your consent you may do so by contacting our Privacy Officer. Doing so does not negate the CUPE Local 523 requirement to represent



you in accordance with applicable legislation however your request may limit our ability to do so most effectively.

In limited circumstances, CUPE Local 523 may use or disclose personal information without the knowledge or consent of the individual, for example, for purposes of court order or subpoena, breaches of agreements, as required by governmental bodies acting with authority, or as authorized or required by applicable legislation.

Limiting Collection

CUPE Local 523 collects only the information that is necessary for the purposes outlined in this Privacy Policy.

Limiting Use, Disclosure and Retention

CUPE Local 523 will only collect, use or disclose personal information in accordance with PIPA.

CUPE Local 523 does not use personal information for purposes other than those for which it was collected, except with an individual's consent or as required by law. Once personal information is no longer required to fulfill the identified purposes or other legal requirements, it will be destroyed, deleted or made anonymous.

Local 523 will keep personal information used to make a decision that directly affects individuals for at least one year after we make that decision.


CUPE Local 523 may use the services of third parties to assist us in representing our members in accordance with our obligations. These third parties are made aware of our privacy policy and are obligated to keep personal information that we disclose to them confidential, to use the information only for the purpose requested and to destroy the information when it is no longer required. Member information is shared with external service providers only to the extent required for the provision of such services.

CUPE Local 523 does not sell personal information to any third-party organizations. In certain circumstances, we share basic contact information with groups we are affiliated to. Examples: CUPE BC and BC Federation of Labour to facilitate communication on important campaigns or issues.

Personal information is retained only as long as necessary for the fulfillment of the purposes stated in this policy.

Accuracy of Personal Information

Personal information is kept as accurate, complete and up to date as necessary for the purposes for which it is to be used. Individuals are encouraged to provide



updates to their personal information as changes occur, to enable us to continue to provide services to them.

The personal information of members can be reviewed and modified by contacting our Privacy Officer.

Individuals who wish to correct inaccuracies in their personal information can contact our Privacy Officer. If we are satisfied that corrections to the personal information in our control are warranted, we will undertake to correct such inaccuracies.

Safeguarding Personal Information

Personal information, whatever its form, will be protected by security safeguards appropriate to the sensitivity of the information. The safeguards will protect personal information against loss or theft, as well as unauthorized access, disclosure, copying, use or modification. The measures of protection include:

- physical measures, for example, locking filing cabinets and restricted access to offices;
- organizational measures, for example, limiting access to the personal information on a “need-to-know” basis;
- technological measures, for example, the use of passwords and encryption; and
- procedural measures, for example, the shredding of sensitive personal information when its retention is no longer required.


Openness

Local 523 is committed to being open about its policies and practices with respect to the handling of personal information. Our Privacy Policy is available publicly through our web site. If a hard copy or additional information is required, requests for such information may be made to the Privacy Officer.

Access to Personal Information

Members have the right to access their personal information under Local 523 custody or control. They also have the right to be informed of how their personal information has been used by Local 523, and which individuals have had access to their personal information.

Individuals may request a copy of their personal information held by CUPE Local 523 by submitting a written request to the Privacy Officer at the address above. Acceptable proof of identification is required before such information is given out.



Local 523 may charge a “minimal” fee for providing an individual with access to his or her personal information. If a fee is required, you will be provided a written fee estimate in advance.

If you feel the information we have about you is inaccurate, you may request that it be reviewed and, if inaccurate, changed, by contacting the Privacy Officer.

You will receive a response to all written requests from Local 523 within thirty (30) days.

If Local 523 refuses an access request, the individual will be advised of the refusal in writing, including the reasons for refusal and outlining further steps that are available to the member (including the right to ask the Office of the Information and Privacy Commissioner for British Columbia to review the decision).

Challenging Compliance

An individual can challenge compliance with the above policy by providing written details of the challenge to the Privacy Officer who shall provide a response within thirty (30) days.

If a member is not satisfied with our response, they can complain to the Office of the Information and Privacy Commissioner for British Columbia.

SECTION 1. POLICIES

CUPE Local 523

ONLINE MOTIONS AND VOTING

Revised Date: 09/30/21

Executive Approval Date: pending


Purpose: Actions or decisions that can't wait until the next Executive meeting for a decision can be brought forward for a vote using an online method.

Motion's Outside of an Executive Meeting

A member of CUPE Local 523 Executive Board wanting to make a motion outside of an Executive meeting must submit the motion to the President in writing. The President will determine whether the motion will be processed on-line by e-mail, by telephone conference, Teams, or held until the next executive meeting. Online motions are only suitable for straightforward motions. Online voting limits the opportunity for discussion or amendment to the motion that you would have in a face-to-face meeting.

Policy: Online Motion Procedure

- If the President of CUPE Local 523 deems that an email motion is necessary, they will send the motion to All Executive Board members.
- The subject line should include the word "Motion."
- Identification of the member making the motion and asking for a "second" for the motion.
- Once seconded, the President will set a reasonable timeline for discussion and give a specified date and timeline to vote.
- The mover of the motion may provide an explanation for the motion.
- The member who proposed the motion may withdraw it at any time prior to the vote.
- Votes will be cast through 'Reply All'.
- In the event that a vote is cast early, and the voter changes their mind because of the discussion, the member may vote again. Only the member's most recent vote will be counted.
- Online motions can only be voted up or down, it can't be amended.

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- If an amendment is needed, then the motion will be defeated and moved again with the proposed amendment.
 - When voting, include the words "I vote No" or "I vote Yes" in your response.
 - All Executive Board members, including the President are allowed to vote.
 - Online voting will not be permitted for votes that would normally be conducted by a Secret Ballot.
 - The President will tally the verified votes and share the result with the Executive.
 - The Recording Secretary must add the date, time, Motion and its outcome into the Motion Book.
 - The action or decision can be reviewed as a motion for the record at the next meeting of the Board and shall be included in the minutes of the meeting.

SECTION 1. POLICIES

CUPE Local 523

GRIEVANCE MAINTENANCE POLICY

Revised Date: 09/30/21

Executive Approval Date: 09/30/21


Purpose: It is important that grievance files are managed carefully in order that appropriate resolutions can be determined, and files are complete if/when they are handed over to the National Rep. for arbitration or mediation.

The following steps must be followed for the processing of any/all grievances. Should files not be completed as prescribed they will be referred back to the appropriate Steward and/or Unit Chair for completion prior to taking next steps.

In accordance with the Local Bylaws, the 1st Vice President has certain obligations for grievance processing. It is the responsibility of the Steward and Unit Chair involved ensuring that the 1st Vice President is kept apprised of grievance matters so that they can perform their duties. Those duties are found in section 11, which reads in part:

The 1st Vice President shall:

- a) Chair the Shop Stewards Committee and the Grievance Committee;
 - b) Direct the gathering of all pertinent information relative to grievances and process the grievances through the initial stages of the procedure contained in the appropriate Collective Agreement;
 - c) Work in liaison with the President regarding all Steward and grievance matters.
 - d) Perform such duties and carry out such functions as the Executive Board may direct.
 - e) Attend grievance meetings as required.
 - f) Attend Units shop steward meetings as required.
- All grievances shall be given a number for filing purposes. The format shall be the date (yyy/mm/dd) followed by the Unit designation (53, 67, 83, TPCS, NOYFSS). Should any unit file two grievances on the same date they shall add an "a, b, c" following the date. Grievances should also have a short title (ie: name of member, two word description of issue). The grievance number should be included on all documents sent to the National Rep or for filing.
 - The following procedures will apply to grievances:
 - Step 1 – send fact sheet to 1st Vice President and Recording Secretary whether resolved or not.
 - Step 2 – send updated fact sheet and grievance form to 1st Vice President and Recording Secretary whether resolved or not.

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- A copy of all grievance files shall be provided to National Rep and 1st Vice President after receiving a response to Step two. The steward involved will remain involved beyond step two. The 1st Vice President will ensure the National Rep is updated if necessary.
 - Unit Chairs should be kept informed by the shop steward at all steps of the grievance procedure.
 - All stewards in all units are advised that they have the ability to contact the National Rep at any time as a resource for grievance processing.
 - Fact sheets are required in each grievance file. Please provided as much detail as possible with the fact sheets. Add additional pages if necessary.

SECTION 1. POLICIES

CUPE Local 523

SPENDING EI FUNDS

Revised Date: 09/30/21

Executive Approval Date:

Purpose: This policy is for those Units that are covered under the EI Rebate (NOYFSS, Unit 67, and Unit 53)

The process for requesting and dispensing of these funds:

1. Units must have motions approved by their members at a Unit Meeting.
2. Those motions must be forwarded to the Secretary-Treasurer of the Local, indicating the date of the meeting, the motion voted on and the results.
3. When the planning is starting for an event that your Unit has agreed to use EI funds for, you will need to make a written request to the Secretary-Treasurer.
4. At the conclusion of the event, all receipts must be submitted to balance the cheque that was issued. Monies not supported by receipts must be returned to the Local.
5. If your Unit has voted to top up or match various benefits (i.e.; Retirement or Bursary donations) those motions must also be relayed to the Secretary-Treasurer.
6. All motions for EI spending are only good for 1 year, meaning each year they must be renewed or new ones in place.

SECTION 1. POLICIES

CUPE Local 523

UNION BOOK OFF/SCHEDULED MEETINGS

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: This is an Executive policy for Union Book Off's and Scheduled Meetings.

The Local 523 By-laws provide for the calling of meetings by Unit Chairs on an as-needed basis and by Committee Chairs for the purpose of conducting committee business.

When planning Unit meetings the Unit Chair shall advise executive members, in advance, of the purpose/agenda for the meeting, the time, date and location of the meeting, and any additional member book-off requirements for that meeting.

All Local and Unit Steward meetings and Local or Unit, Grievance Committee meetings shall be organized through and approved by the 1st Vice President who is authorized to approve member book-off as required. The 1st VP will advise the executive of the details of upcoming committee meetings. This does not apply to the individual grievance process meetings within the units; these are reported within the 1st VP report to the executive.

2nd and 3rd Vice President committee meetings shall be organized through the VP who is authorized to approve union book-off as required for such meetings. The executive will be advised of the planning of these meetings.


Extraordinary, Special or Appointed Committee meetings must have, in advance, plans and related expenses approved by the Local Executive.

Extraordinary member book-off requirements must be approved by the Table Officers (President, 1st Vice President, Secretary-Treasurer and Secretary).

It is the responsibility of the organizer of union meetings to ensure that Minutes are submitted to the Local Secretary in a timely manner.

It is the responsibility of the organizer of union meetings to ensure that expense claims are submitted to the Secretary-Treasurer, by means determined by the ST, as soon as is reasonably possible.

Executive member concerns about the nature, frequency, or cost of union meetings shall be addressed at a Local executive meeting.



Additional union meeting plans and cost related details must be approved, in advance.
Union book offs not consistent with the Bylaws must be approved by the table officers

NOTE

When scheduling meetings please be sure you have provided a purpose/agenda for the executive for information only.

According to our Bylaws the following positions should be included when scheduling meetings.

Unit Meetings: President and National Rep.

Shop Steward Meetings: 1st Vice President and National Rep.

SECTION 1. POLICIES

CUPE Local 523

TRUSTEES AND AUDITS

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: The CUPE Local 523 Executive in consultation with the CUPE Local 523 Trustees developed this policy in 2013 as an effort to provide clarity on the audit process and to ensure the Trustees remain an integral part of the CUPE Local 523 Executive structure.

Nothing in this policy is intended to limit the duties and rights of either the Trustees or Executive under the Local 523 Bylaws or the CUPE National Constitution.

The CUPE Local 523 Bylaws require an audit at least annually. This audit is to be reported at the next Local 523 General Meeting.

A Trustees report shall be scheduled on the Executive meeting agenda immediately following the conclusion of their audit and not less than one month prior to the General Meeting. Should the Trustees wish to decline such invitation because they have no, or only minor recommendations they may do so, however should they have any recommendations or concerns they shall report to the Executive meeting.

In addition to the above, the Executive shall schedule the Trustees to the next Executive meeting should the Trustees request such at any time.

The Executive and Trustees also agree to proper audit process shall be to ask the Secretary-Treasurer for any clarification they require. If the Trustees are not satisfied, they shall next speak to the Executive Board, and failing resolution they may request the assistance of the CUPE National Rep.

The Executive and Trustees agree further that the Recording Secretary and the Secretary-Treasurer shall maintain the "Motion Book" to confirm motions were properly made. Should the Trustees require access to actual minutes after review the "Motion Book" they may request such minutes. It is intended that Executive Board minutes be reviewed only when required to confirm motions. All Motions (a.k.a the "Motion Book") which used to be filed, hard copy, in a binder but are now recorded, filed, and stored in Office 365.

SECTION 1. POLICIES

CUPE Local 523

EXECUTIVE RECOGNITION OF SERVICE

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: The CUPE Local 523 Executive developed this policy in an effort to provide clarity on the process of recognizing the Service provided to the Local by Elected Officers. Elected Officers as defined in our Bylaws state:

Section 8 OFFICERS

The officers of the Local shall consist of a President, 1st, 2nd, 3rd Vice Presidents, Recording Secretary, Secretary Treasurer, Unit Chairs (NOYFSS, TPCS, School Districts 53, 67 & 83), and three (3) Trustees.

The minimum number of years required to earn recognition shall be 3 years.

The gift shall be presented at the time the member leaves the position. If he member at a later date returns they then qualify for a second benefit.

The yearly amount shall be one hundred dollars (\$100.00) yearly, to a maximum of \$1,000 per life time.

SECTION 1. POLICIES

CUPE Local 523

TO ATTEND ONLINE WORKSHOPS

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: When CUPE 523 and other locals offer online workshops, all registrations must be done through the CUPE Local 523 Education Committee. Registration costs will only be covered by the Local when the registration is approved by the Local's Education Committee. If a member chooses to register themselves without the approval of the Local, the member will be responsible for all costs associated with the workshop. Registration can be done by following these steps:

1. When a course is listed on the CUPE BC website, a member may attend by contacting the Unit Chair or Education Committee Representative by email or phone (contact information is available on the CUPE 523 website) and informing them of the name, date and host local for the workshop.
2. Complete the online education application located on our website at <https://523.cupe.ca/files/2018/01/Education-Application-Form-2018.pdf> and email it to the Education Committee Representative.
3. The Education Committee will make a decision on your application and will contact you by email or phone if approved. If the member is not successful in this application, they may receive pre approval from the committee to register in the course when it is offered again. In this case the committee should be notified at the time of registration.
4. When approved by the Education Committee you will be given instructions on how to proceed with registration.
5. If a member is interested in attending a course that is currently not offered on the CUPE BC website, they may fill out an education application and submit it to the education committee. A list will be kept by the Education Committee Chair and the education committee will endeavor to provide an opportunity for either providing this course or collaborating with another local who is planning to provide the course. The member may be notified when the course becomes available. Alternatively, the member may receive pre approval to attend a course when it is made available and the member may register immediately and notify the education committee that they have done so.

SECTION 1. POLICIES

CUPE Local 523

CHILDCARE FOR MEMBERS

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: If a member requires childcare to attend a unit meeting, general meeting, or special meeting.

1. If a member requires childcare to attend a meeting, they must notify the Union at least 4 days prior a meeting.
2. The hosting Unit Chair must be notified immediately to make arrangements.
3. The Local will higher childminder(s) who has taken the babysitting course or the responsible adult course, and some level of first aid training.
4. They will be paid a minimum of 3 hours at the rate of \$15.00 per hour.
5. The Secretary-Treasurer will be notified of any childcare services and will send the childminder(s) a cheque in the mail.
6. The ratio of caregiver to child(s) will be 1:4 unless otherwise specified.
7. All Unit Chairs will compile a list of available childcare providers who meet the qualifications and keep their references, certificates as well as their contact information on file.
8. Any childcare forms collected will not be shared and be kept in the Union office.



**SECTION 2.
PROCEDURES**

SECTION 2. PROCEDURES

CUPE Local 523

UNION EDUCATION

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: If you see, hear or read about a course that is being offered by CUPE and wish to attend, please follow the steps:

1. When a course is listed on the CUPE BC website, a member may attend by contacting the Unit Chair or Education Committee Representative by email or phone (contact information is available on the CUPE 523 website) and informing them of the name, date and host local for the workshop.
2. Complete the online education application located on our website at <https://523.cupe.ca/files/2018/01/Education-Application-Form-2018.pdf> and email it to the Education Committee Representative.
3. The Education Committee will make a decision on your application and will contact you by email or phone if approved. If the member is not successful in this application, they may receive pre approval from the committee to register in the course when it is offered again. In this case the committee should be notified at the time of registration.
4. When approved by the Education Committee you will be given instructions on how to proceed with registration.

Weeklong Training

The Education Committee makes the decision on the following for weeklong training:

- The member must be active in the union, whether this is on Executive, shop steward, a committee, trustee, event planner, and attends meetings regularly.
- You must Fill out Education Application form found on Local 523 website <https://523.cupe.ca>
- Member Must have completed 2-day Steward Training before any week longs.
- The Committee also considers if the members position warrants more training for the benefit of the membership.
- The member has not attended a weeklong in the past year.
- The Committee will accept all applications and will contact the member by email or phone if your request has been approved.



Some facts to know:

- Wages are covered by the union.
- Complete the necessary leave form for your employer indicating “Union Business” under details and “billable union leave” under type of leave.
- The union will book and cover hotel charges if required.
- Mileage is paid at \$.059 per kilometer.
- The union will cover the cost of meals for the member only (please be sure that you put any alcohol on a separate receipt). All receipts submitted must be itemized (**debit and credit card receipts are not acceptable**)

Note:

Any member wishing to attend education courses must follow this process in order for expenses to be covered by Local 523.

SECTION 2. PROCEDURES

CUPE Local 523

UNIT AND COMMITTEE REPORTS AT GENERAL MEETINGS

Revised Date: 09/30/2111/1/22

Executive Approval Date: 09/30/21

Purpose: To help the General Meetings flow in a timely manner.

A Committee Report given at a General Meeting should highlight important events or discussions taking place within the Local. It should be kept brief and to the point.

A Unit Report given at a General Meeting should highlight important events or discussions taking place within the Unit. It should inform members, but it should be kept brief and to the point. It is not a time to discuss grievances.

The report should start with a brief introduction.

For example, the name of the Unit, whether it is a K-12 or a social services Unit, and the list of communities it serves.

The report should highlight no more than three topics. Up to two of the topics can be about concerns within the Unit. At least one of the topics should be something positive or something to celebrate.

It is understood that when the report is given from the area in which the meeting is taking place that the report may be longer, due to topics of interest within that unit, members' questions, etc. within a reasonable time, if topics are too long or requires more attention, the Unit Chair should call a Unit meeting to further discuss.

SECTION 2. PROCEDURES

CUPE Local 523

RETIREMENT PLANNING SEMINAR

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose:

1. Go to our website: www.523cupe.ca
2. Click on tab "Forms"
3. Complete "Retirement Planning Seminar form"
4. Print the form and send it to: sec_treasurer@cupe523.com
5. Your name will be added on the wait list and you will receive a call from someone on the Education Committee when a space becomes available at one of the 3 day seminars.

Some facts to know:

- This seminar is open to the member and their spouse or significant other.
- Wages are covered by both the union and employer (each pays one day)
- Complete necessary leave form for your employer indicating "Retirement Seminar" under details.
- If hotel accommodations are required this is booked and covered by the union.
- Mileage is paid at \$0.59 per kilometer
- The cost of meals is covered by the union for the member only (please be sure that you put alcohol on a separate receipt). All receipts submitted must be itemized (**debit and credit cards receipts are not acceptable**)

Note:

Any member wishing to attend the 3 day seminar must follow this process in order for expenses to be covered by the union/employer.

SECTION 2. PROCEDURES

CUPE Local 523

CODE OF CONDUCT

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: CUPE Local 523 is committed to ensuring that all its meetings and activities are safe environments where members are encouraged to speak. Existing members are encouraged to welcome, mentor and support new members and equity-seeking members.

Local 523 strives to promote core values which include the principles of solidarity, equality, democracy, integrity, and respect. We are committed to mobilizing our energy and skills to work together to promote these values and to attain these goals in our Union, our communities, and globally.

Local 523 is committed to creating a council which is inclusive, welcoming, and free from harassment, discrimination and all types of bullying and intimidation. Local 523 will ensure that it provides a safe environment for members, staff, and elected officers to carry out our work. Local 523 expects that mutual respect, understanding and co-operation will be the basis of all our interaction.

This Code of Conduct for the LOCAL 523 sets out standards of behaviour for members at meetings, and all other events organized by the Local 523. It is consistent with the expectations outlined in the Equality Statement, CUPE National Constitution and these Bylaws. It does not apply to complaints arising in the workplace(s), as those are dealt with through the grievance procedure and/or the applicable workplace(s) harassment policy.

As members of CUPE LOCAL 523 we commit to one another and to the Union to be governed by the principles of the Code of Conduct and agree to:

- Abide by the provisions of the Equality Statement.
- Respect the views of others, even when we disagree.
- Recognize and value individual differences.
- Communicate openly.
- Support and encourage each other.
- Make sure that we do not harass or discriminate against each other.
- Commit to not engaging in offensive comment or conduct.
- Make sure that we do not act in ways that are aggressive, bullying, or intimidating.

- Take responsibility for not engaging in inappropriate behaviour due to abuse of alcohol or other drugs while participating in union activities, including social events.

Harassment is objectionable behaviour which may include actions, language, gestures, and/or written material, and which the harasser knows or ought reasonably to know is abusive and unwelcome. Bullying is a form of harassment which is serious ongoing behaviour which targets an individual or group and which threatens that person or persons' mental and/or physical wellbeing.

A complaint regarding this Code of Conduct will be handled as follows:

1. If possible, a member may attempt to deal directly with the person alleged to have engaged in behaviour contrary to the Code, by asking the person to stop such Revised: April 2017 Page 30 523 Bylaws behaviour. If that is not possible, or if it does not resolve the problem, a member may bring forward a complaint.
2. Once a complaint is received, a designated Officer of the Council will work to seek a resolution.
3. If this fails to resolve the matter, the designated Officer of the Local Union shall report the matter to the person in charge, who shall determine whether there is need to remove the member. The person in charge has the authority to expel members from the event for serious or persistent offenses.

This Code of Conduct is designed to create a safe, respectful and supportive environment within CUPE. It is meant to enhance the rights and obligations outlined in the Bylaws of LOCAL 523, CUPE National Constitution, the Equality Statement, and applicable human rights legislation, not replace them.

This Code of Conduct does not replace a member's right to access the trial provisions of the CUPE National Constitution.

SECTION 2. PROCEDURES

CUPE Local 523

EMPLOYMENT INSURANCE REBATE

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Union contracts can offer employees many work benefits over and above the standard offered by the Labour Standards legislation. One of these is the inclusion of short term disability insurance.

The BC Labour code allows for employees to take time off in case of illness or injury however it does not require the employer to pay employees during this time. Employment insurance is available for Canadians who partake of this option and will cover a portion of wages for a maximum of 15 weeks.

Because of successful bargaining in the past, the collective agreements of CUPE 523 and many other union locals provide short term disability. This insurance will pay out when an employee is unable to work due to illness or injury. This insurance also covers a portion (70%) of wages and is in effect for

Because of this short-term disability provision, employees under this collective agreement would not use the Employment Insurance Sick Leave Benefit. The portion of Employment Insurance contributions that is attributed to this benefit is paid back to employees on a semi-annual basis.

A number of years ago four of CUPE 523's five units voted to pool their EI rebate rather than receive it on their paycheques. This money is paid out to the union office in June and December each year and is set aside for each unit to spend as they see fit. Each unit must decide how to spend this money at a unit meeting. Turning Points Collaborative Society and SD83 also voted Not to pool their EI rebate funds.

There are a number of different ways that the EI money has been spent in the past. Family events for CUPE members and free events for the public are two popular items. Some units choose to support local food banks and women's shelters. Uniforms for local sports teams and money for local initiatives are other ways it can be spent. Some units use the money for entertainment and some top up the retirement and scholarships paid by the local. The possibilities are endless, requiring only a majority vote at a unit meeting. The amounts each unit has on hand can be found in the monthly financial reports provided by the Secretary-Treasurer at our General Meetings.

SECTION 2. PROCEDURES

CUPE Local 523

RESPONDING TO CORRESPONDENCE FROM MEMBERS ADDRESS TO THE WHOLE EXECUTIVE

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: On occasion, the whole Executive will receive a letter or email of concern from a member at large. The executive needs to take care when responding to such letters, to promote and exemplify unity and solidarity amongst the executive.

When such a letter is received the following should take place:

The President alone will respond directly to the member. The President will simply thank the member for their letter and let the member know that will be discussed at the following executive meeting.

At the following meeting, the executive will discuss the letter/email and form a response which is acceptable to all executive members.

The response will be sent to the member by the President, and the executive shall be cc'd.

Should the member answer and require another response, the same process shall be followed.

SECTION 2. PROCEDURES

CUPE Local 523

LOCAL EXECUTIVE AND UNIT INTERACTIONS

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: This guideline is intended to assist the Executive in their day to day dealings within the various units represented by CUPE Local 523. Nothing in these guidelines amends, limits, or reduces the provisions of the Local 523 Bylaws and must be read in conjunction with those bylaws.

It is important to know that every elected representative of Local 523 is bound by the same legal requirements of the Provincial Labour Relations Code. The same applies for the President of the Local to any Shop Steward within any Unit of the Local.

Having said that, all elected representatives have been elected to perform certain duties and tasks and all elected representatives deserve to have their role respected and supported by all other elected representatives.


It is important that the respective Unit Chair be informed as soon as possible when an elected member of the Executive is approached by a member within that unit. Unit members should be advised they should be taking their concerns to their unit stewards and/or unit chair before approaching an Executive member.

There are times however when the Executive member needs to hear out the member. That conversation should then be reported to the applicable unit chair for follow up as appropriate (direct contact, assign a steward etc). Members should be advised of this process at the time.

An Executive representative should not take action within a unit without informing and involving the applicable Unit Chair or designate.

An Executive member should become involved directly within a units day to day operations only in urgent circumstances, or when invited by the Unit Chair.

Should an Executive member have concerns with how issues are being processed within a unit, they need to bring those concerns to the attention of the Unit Chair prior to acting on them. The National Rep. can assist in resolving any such concerns as required.



These guidelines also apply generally to any Unit Steward or General meetings.

In conjunction with these guidelines the following communication protocols have been agreed:

- Unit Chairs will provide monthly reports of issues within their units to the Executive board at Executive meetings.
- Unit Chairs will provide a brief monthly report of issues within their Units to the General membership at a General meeting.
- Grievances and issues that are raised and/or resolved will be reported to the 1st Vice President and the National Rep. The reason for this is to ensure that the Collective Agreement language is being applied appropriately and consistently for all affected members.
- The National Rep. has a standing invitation to all Local and Unit Special, General and Steward Meetings.

SECTION 2. PROCEDURES

CUPE Local 523

MEMBERS REQUIRING CHILDCARE

Revised Date: 09/30/21

Executive Approval Date: 09/30/21

Purpose: If a member requires childcare to attend a unit meeting, general meeting, or special meeting.

- If a member requires childcare to attend a meeting, they must notify the Union at least 4 days prior a meeting.
- The members name, contact information, as well as how many children and their ages will be recorded. They will also be asked to print and fill out a childcare form, which can be found under forms on the Local523 website.
- The hosting Unit Chair must be notified immediately.
- The hosting Unit Chair must find a sitter who has taken the babysitting course or the responsible adult course, and some level of first aid training.
- The hosting Unit Chair will make sure that the meeting location has a separate space for childminding. If not, the Table Officer's must be contacted immediately.
- The childcare form will be dropped off with their child at the meeting.
- The childminder will have the parents sign their child in/out at the bottom of the form.
- Snacks will not be provided by the local. Parents can provide allergy aware snacks (i.e. nuts or other frequent allergies)
- The parent(s) are not allowed to leave the premises.
- Childcare forms will be filled in the Union office.

SECTION 2. PROCEDURES

CUPE Local 523

ATTENDING A UNION MEETING VIA MICROSOFT TEAMS

Revised Date: 02/05/2021

Executive Approval Date: 02/05/2021

Purpose: To assist with the conducting of Virtual meetings via Microsoft Teams.

Executive Roles

The Chair: Runs the meeting, same as an in-person meeting.

- Will go over the process to be followed during the Teams meeting (including who will speak when), the decision-making process, the possible outcomes and when and how these outcomes will be communicated.
- Reinforce that the meeting is confidential and that only those who have been invited should be present and all recording devices must be turned off.
- Is in charge if any voting is required, same as an in-person meeting. Voting will be presented to the membership via FORMS in the Teams chat bar.

Chat Moderator: For the purpose of online meetings, an Executive member will be assigned the role of Moderator.

- They will help bring forward any chat questions to the Chair, will monitor and guide the meeting `chat` and can provide meeting guidelines and reminders.
- They will inform the Chair if an issue requires immediate attention, such as a point of order.

General Meeting Guidelines and Etiquette

Be Respectful, even though virtual meetings don't seem as professional, the truth is that they are. As such, they deserve the same respect and etiquette. That means that everyone should turn off any smartphone or computer notifications, mute their mic when not speaking, and always looking into the camera.

Other important tips for a successful online meeting:

- Please be in a private, quiet space where you will not be disturbed. Only CUPE 523 members are permitted to attend, just as an in-person meeting.
- If multiple members are in one location, you must indicate this when you log in via the chat window.
- Bourinot's Rules of order still apply to on-line meetings.
- The chat window is not to be used for conversations or discussion! The only exception to this rule would be if a member does not have a mic. They may type their question, comment, motion, etc., in the chat window when called upon by the Chair.
- You may join the meeting with or without your camera on.
- When you are not speaking please mute your audio.
- Remember to unmute your microphone when invited to speak by the Chair.
- Speak clearly and please state your name and unit.
- Avoid talking over others. Unlike an in-person meeting, its sometimes difficult to distinguish between multiple conversations leading to confusion.
- If you would like to speak, move a motion, or give a notice of motion, or ask a question, please use the chat feature only. Just type in "speak please" and this will put you on a list of speakers and you will then be called upon by the Chair when it is your turn.
- An Executive member will be appointed as a Chat Moderator for on-line meetings. The Chat Moderator will help bring forward any chat questions and can provide meeting guidelines and reminders.
- Do not share or make the meeting link public.
- Recording of a meeting in whole or in part is not permitted.

SECTION 3.

CUPE BC EXPENSE POLICY

Revised Date: 10/01/2021

1. PREAMBLE

The purpose of this expense policy is to reimburse members for expenses incurred on behalf of CUPE BC. This policy shall be reviewed annually by the Trustees. Expense claim forms must be submitted within 6 months of when the expense(s) were incurred. The Secretary-Treasurer is authorized to approve expense claims past the 6 months for extraordinary circumstances.

2. WAGES

Lost wages for regularly scheduled hours of work shall be repaid at cost directly to the Local Union only. Wage loss will not be paid directly to individuals.

3. ACCOMMODATION

If accommodations are required, they must be booked through the CUPE BC office. Members are entitled to a single room, however if members choose to share a room, this should be clarified with the CUPE BC office when booking the room. Where possible all room, taxes and parking will be billed directly to CUPE BC.

4. DEPENDANT CARE

If required, dependant care will be paid outside of regular working hours at the rate of up to \$20.00/hour to a maximum of \$300.00/day (which includes travel time) upon completion of the CUPE BC Dependant Care Expense Claim form.

5. TRANSPORTATION

To be the most convenient and economical means with the maximum kilometres not to exceed airfare. Airfare where required (economy class) must be booked through WE Travel.

- a. Automobile allowance 59¢ km.
- b. Parking cost when on CUPE BC business (receipt must be provided).
- c. Taxi or airport shuttle from airport to hotel to meeting place upon submission of receipts. Taxis to be shared when possible.
- d. Where ferry travel is required, only land kilometres will be reimbursed (as well as ferry fares with submitted receipts). (Note: some distance calculators include the kilometres the ferry travels over the water, those kilometres should be deducted from claim.)

e. If you are not claiming for parking (excluding hotel parking where you are staying), taxi or mileage the day of your meeting you can claim a one day transit honorarium equivalent to the cost of an All Day Transit pass if you are using the public transit system to attend the meeting.

6. PER DIEM

- a. **\$43.00** per half day meeting (when no meals provided).
- b. **\$86.00** per day for an all-day meeting (when no meals provided).
- c. **\$43.00** for half-day of incoming travel to next day meeting or return travel day, next day after meeting.
- d. **\$86.00** for full day travel to and from meetings.
- e. **\$43.00** for evening meetings requiring meals (unless already receiving \$86.00 full day per diem).
- f. Where members are booked off for special projects (e.g. Zone coordinators, Campaign Workers, etc.), the full-time officers per diem policy will apply.

7. INCIDENTALS

- a. **\$17.00** for in person meetings where all expenses (meals) are included.
- b. **\$17.00** for video conferencing meetings scheduled for four (4) hours or more.

9. FULL-TIME OFFICERS

The CUPE BC Expense Policy will apply for full-time officers as follows: when conducting the duties of their office for meetings of the Admin Committee, Executive Board, BC Fed., etc. and committee meetings on behalf of CUPE BC away from the office.


When daily per diem is not in effect regular in town per diem will apply as per the Constitution. (\$17.00 per day.)

10. DAYS IN LIEU

In cases where CUPE BC business causes Executive Board members and/or Trustees to lose both of their consecutive regularly scheduled days off, they will be allowed to book off days in lieu at CUPE BC's expense. Prior authorization of the Secretary -Treasurer is required for book off of days in lieu.

11. CONVENTION COMMITTEES

Convention committee members will have wages and rooms paid for those days the committee is required to meet prior to Convention convening. Per diem for days committee meets when Convention is not in session will be - **\$86.00**.



The following per diems will apply to the Credentials, Resolutions and Sergeant-at-Arms Committees when Convention is in session:

- a. Chairperson - \$35.00 per day.
- b. Committee Members - \$30.00 per day.
- c. Hotel room at prevailing rates and loss of wages as required.

Convention Committee members who wish to forfeit per diem may have this amount donated to the Colleen Jordan Humanity Fund.

Resolutions Committee – When required to meet prior to the start of convention, lunch will be provided. When required to meet prior to daily convening of convention and through the lunch break food will be provided.

12. **RECEIPTED EXPENSES**

Where receipted expenses are being submitted, a credit card/debit slip will not be accepted on its own. An itemized receipt from the agency must also be included (e.g. hotels, BC Ferries, etc.) If no receipt is available due to special circumstances a declaration providing an explanation may be accepted, signed by the member and authorized by the Secretary-Treasurer. These declarations may be reviewed by the Trustees.