



TEACHER BARGAINING UNIT

ONTARIO SECONDARY SCHOOL TEACHERS' FEDERATION

DISTRICT 20 HALTON

PROCEDURES HANDBOOK

REVISED September 2022

Procedures Handbook

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PROCEDURES

PROC – 1 COUNCIL - OPERATIONS

- 1.1 Rules of order will follow Rules of Order as outlined in the OSSTF Handbook.
- 1.2 Regular T.B.U. Council meetings will be held on the third Tuesday of each month and as per Article 5, 5.2.3, of the T.B.U. Constitution.
- 1.3 T.B.U. Council meetings will begin at 4:30 p.m. and end no later than 8:00 p.m., barring motions to extend the time in half hour increments.
- 1.4 Items for T.B.U. Council agenda will be submitted to T.B.U. President or Chair one week in advance of the Council meeting.
- 1.5 Branch Concerns should be submitted, where possible, to the T.B.U. President or Speaker in writing 24 hrs. prior to Council.
- 1.6 The agenda will be published on the Wednesday preceding the meeting.
- 1.7 A copy of minutes for councillors and staff will be sent out by the Friday following the meeting.

PROC – 2 BRANCH PRESIDENTS

2.1 Duties

- 2.1.1 Receive, maintain, and interpret Minutes of all T.B.U. Council & T.B.U. Executive meetings in and to the Branch.
- 2.1.2 Call meetings of the Branch for the discussion of O.S.S.T.F. matters, to provide information to staff, to promote staff awareness, or to seek staff input.
- 2.1.3 Attend all T.B.U. Council functions or provide an Alternate for:
 - 2.1.3.1 T.B.U. Council Meetings
 - 2.1.3.2 T.B.U. Workshops
 - 2.1.3.3 District or T.B.U. General Meetings
 - 2.1.3.4 Others as called by the Chair of Council or the T.B.U. President or District President.

- 2.1.4 Report to T.B.U. members all pertinent business of meetings, preferably in writing.
- 2.1.5 Keep staff informed of local and provincial business both current and projected.
- 2.1.6 Report staff concerns to T.B.U. Council in writing, if possible, noting both the Branch concerns and the number of staff who have expressed this concern.
- 2.1.7 Become familiar with the policies and programs of District and Provincial Federation. Pay particular attention to the current local Collective Agreement.
- 2.1.8 Direct members to the appropriate resources. Advise members of their rights and responsibilities. Act as an objective resource person in any dispute between members. Refer to District Office as necessary.
- 2.1.9 Solicit school representatives for T.B.U. and District Committees, both Standing and Ad-hoc. Keep in touch with committee members from the school.
- 2.1.10 Appoint a T.B.U. Representative or accept personal responsibility for the dissemination to staff of material provided by local and provincial O.S.S.T.F.
- 2.1.11 Supervise the appointment or election of Branch Officers as needed (such as Alternate Branch President, Benefits Officer, and Grievance Officer). Supervise the election of the Branch President in May of the year that his/her term is completed.
- 2.1.12 Report to District Office all information requested. Cooperate in the administration of O.S.S.T.F. surveys and questionnaires.
- 2.1.13 Check with the District Office about the distribution of unofficial promotional materials.
- 2.1.14 Monitor the application of the Collective Agreement in the school.

The line of communication when members have a professional concern is as follows:

- Member
- Branch President
- District Office (905-332-1228)
- Provincial Field Officer (1-800-267-7867)

Members should be made aware that they can communicate directly with any of the above.

- 2.1.15 Forward O.S.S.T.F. Student Award winner's name to the District Office.

2.2 Term

The School Branch President is elected for a two-year term.

2.3 Election

2.3.1 Elections for Branch President will be held in May.

2.3.1.1 Each branch appoints a Branch Elections committee of two, in April, to seek C candidates for the position of O.S.S.T.F. Branch President.

2.3.1.2 This committee can include any members of the branch who will not be candidate for the position.

2.3.1.3 The names of these candidates will be provided to staff at least 1 week prior to election (nominations from the floor will be accepted).

2.3.1.4 Balloting will then take place as per the Annual T.B.U. Assembly model (i.e., person with fewest votes is dropped from the next ballot).

2.3.1.5 Ballots will be prepared and counted. The results will be announced by the Branch Elections committee.

2.3.1.6 Results will be forwarded to the District 20 Office prior to the June Council meeting.

2.3.2 Elections will be held in even numbered years in the following schools: Burlington Central, Craig Kielburger, Dr. Frank Hayden, Garth Webb, Milton, Nelson, Oakville Trafalgar, Iroquois Ridge, Syl Apps.

2.3.3 Elections will be held in odd numbered years in the following schools: Acton, Aldershot, Georgetown, M. M. Robinson, Elsie MacGill, T.A. Blakelock, Abbey Park, White Oaks, J.W. Singleton Centre, Gary Allan High School, eLearning (VSS If it is included as one branch).

2.3.4 If a vacancy is created, the alternate will assume the Branch President's role until the next scheduled election.

PROC – 3 STAFF OFFICERS

- 3.1 The role of the Staff Officers is to implement OSSTF District 20 TBU programs and carry out duties as stated in the By-Laws, and duties as approved by the TBU Executive, and duties as assigned by the President.
- 3.2 On a day-to-day basis, Staff Officers will work closely with the President and are required to carry out the policies and decisions of the District 20 TBU.
- 3.3 The Staff Officers shall be responsible through the President to the TBU Executive.
- 3.4 Terms and Conditions of Employment for the Staff Officer - Member Protection and Staff Officer - Equity & Wellness:
 - 3.4.1 The length of the term of appointment will be decided by the T.B.U. Council with recommendations from the T.B.U. Executive. The term will begin July 1 and end June 30th. Holidays will be the normal school holidays. Exceptions to the previous statement must be negotiated in advance with the T.B.U. President.
 - 3.4.2 The salary for the positions of T.B.U. Member Protection and T.B.U. Equity & Wellness Officer will be in accordance with PROC 11. The insured employee benefits available will be those available to other Members of the Branch Affiliate under the current T.B.U. Collective Agreement. Salary and benefits are to be paid as per the T.B.U. Collective Agreement.
 - 3.4.3 The T.B.U. Member Protection and T.B.U. Equity & Wellness Officers will have available a sum of money for activities related to their respective duties. This will be a line item for each of them in the T.B.U. budget.
 - 3.4.4 All other expenses incurred by the T.B.U. Member Protection and T.B.U. Equity & Wellness Officers in carrying out their responsibilities will be reimbursed by the Bargaining Unit or the District, subject to the authorization of the T.B.U. President or the District President.
 - 3.4.5 The alteration of, and/or addition to, the duties and responsibilities of the T.B.U. Member Protection and T.B.U. Equity & Wellness Officers is vested in the T.B.U. Executive under the terms of the T.B.U. Constitution. The T.B.U. Council will be notified at the meeting following such alteration and/or addition.
 - 3.4.6 Should the T.B.U. Member Protection and/or T.B.U. Equity & Wellness Officer resign from their position, or from the Board, effective within the period of this agreement, it is understood that the T.B.U. will have no further responsibility for paying the T.B.U. Member Protection's or the T.B.U. Equity & Wellness Officer's remuneration via the

Board effective the date of resignation. Notice of intent to resign shall be submitted in writing to the T.B.U. President with recommendation of thirty (30) days in advance of the resignation date.

- 3.4.7 By mutual consent of the T.B.U. Council and the T.B.U. Member Protection or the T.B.U. Equity & Wellness Officer, their agreement can be terminated at any time.
- 3.4.8 Should the T.B.U., under exceptional circumstances, unilaterally terminate this agreement, the Teacher Bargaining Unit is responsible for the salary of the T.B.U. Member Protection or T.B.U. Equity & Wellness Officer for the remainder of the school year in which their agreement is terminated, or until the T.B.U. Member Protection or T.B.U. Equity & Wellness Officer returns to regular employment, whichever occurs first.
- 3.4.9 The position will be advertised in January of the year in which the term expires. The incumbent may apply for renewal at that time.
- 3.4.10 The Hiring Committee will interview candidates and make recommendations for appointment to the T.B.U. Council for ratification at the February Council meeting.
- 3.4.11 Each Staff Officer will have a signed contract of employment with the District 20 TBU for the duration of the Staff Officer's term.
- 3.4.12 Each Staff Officer will be subject to an annual performance review, the results of which will be presented to TBU Executive and TBU Council no later than their respective April meetings.

PROC – 4 FINANCIAL PROCEDURES

4.1 Spending

- 4.1.1 Funds to be spent are established by the Budget set at the Annual T.B.U. Assembly, based upon the recommendations from the T.B.U. Finance Committee.
- 4.1.2 Each line item in the Budget shall have an identified signing authority.
- 4.1.3 Prior to the Annual T.B.U. Assembly, signing authorities shall estimate their financial requirements for the operation of their committee for the succeeding year, and submit those estimates to the T.B.U. Finance Committee c/o the District Office on or before February 15th for use in preparation of the Budget.
- 4.1.4 Signing authorities shall be responsible for overseeing the disbursement of funds from their line item of the Budget. If meetings for the benefit of T.B.U. members are held outside Halton, the chair must clear the event with the T.B.U. Treasurer in advance.

4.1.5 Signing Authorities are defined as follows:

4.1.5.1 T.B.U. President: for the T.B.U. Staff Officers, Members of T.B.U. Executive, T.B.U. Standing Committee Chairs, and the Speaker of T.B.U. Council.

4.1.5.2 T.B.U. Staff Officer- Member Protection: for members of T.B.U. Collective Bargaining Committee

4.1.5.3 T.B.U. Standing Committee Chairs: for Members of their committees

4.1.5.4 T.B.U. Treasurer: for T.B.U. Council Members, T.B.U. Ad-hoc committee members and for other claims not covered by the above

4.1.6 Claims for expenditure reimbursement are submitted with receipts, except that all claims for babysitting be submitted on a receipt stating date, time, amount paid, the payee and the claimant expenses and kilometrage, on the T.B.U. Expense Claim Form. Expenditures requiring receipts must have the signature of the signing authority.

4.2 Expenditures Defined

4.2.1 Authorized expenses approved by Spending Authorities will be reimbursed within the allowable limits.

4.2.1.1 Claims Forms must be accompanied by original itemized receipts. Claims not in accordance with these guidelines are automatically adjusted.

4.2.1.2 Claims for reimbursement are submitted on the T.B.U. Expense Claim Form to the TBU President.

4.2.1.3 Members are encouraged to submit Claims Forms in a timely fashion.

4.2.1.4 Exceptions to these guidelines will be made when a member requires an accommodation on human rights grounds.

4.2.1.5 Whenever feasible, members should identify a need for accommodation to the appropriate spending authority for the event in advance.

4.2.1.6 The meal expenses of the TBU sponsored delegates to OSSTF functions will be reimbursed in the same manner as the provincially sponsored delegates by the OSSTF provincial office.

4.2.2 Travel

4.2.2.1 Commercial Flights

- 4.2.2.1.1 T.B.U. members are encouraged to use unionized airlines.
- 4.2.2.1.2 T.B.U. members should take advantage of seat sales if they are cost effective.
- 4.2.2.1.3 T.B.U. will only pay a change/cancellation fee if it is responsible for the change/cancellation.

4.2.2.2 Airport Transportation

- 4.2.2.2.1 T.B.U. members should use the free shuttle services to and from the airport hotels.

4.2.2.2.2 Limousines from the airport to the airport hotel, or vice versa, will not be reimbursed.

4.2.2.2.3 Taxis from the airport to the airport hotel, or vice versa, will not be reimbursed unless it is the only form of transport available.

4.2.2.3 Car

4.2.2.3.1 T.B.U. members are entitled to kilometrage reimbursement while using their cars on T.B.U business.

4.2.2.3.2 The reimbursement for car travel will only be for kilometres beyond the normal travel distance of a workday.

4.2.2.3.3 T.B.U. members are not entitled to travel expenses to attend General Meetings of the T.B.U. Membership, the Annual District Council, and the Annual T.B.U. Assembly.

4.2.2.3.4 The rate for a driver is 50 cents per kilometre.

4.2.2.3.5 Parking and Hwy 407 fees plus applicable taxes are allowable expenses. Only the actual kilometrage will be reimbursed – the transponder, Monthly Account Fee, and Video Toll Charge will not be covered.

4.2.2.4 **Car Rental**

4.2.2.4.1 Car rental charges will only be reimbursed if public transportation does not allow T.B.U. members to attend authorized functions, or if the cost of car rental plus fuel and parking is equal to or less than the regular reimbursement for car travel.

4.2.2.5 **Rail/Bus**

4.2.2.5.1 Coach fare will be reimbursed. The total costs must be equal to or less than the total cost to drive and park or fly. Executive will determine exceptions on an individual basis.

4.2.2.6 **Taxi**

4.2.2.6.1 Regular taxi charges necessary for authorized T.B.U. business will be reimbursed.

4.2.2.6.2 Taxi charges between cities will only be reimbursed to the maximum amount that would have been reimbursed for car travel.

4.2.3 **Guidelines for Meals and Refreshments**

4.2.3.1 Meals may be claimed when T.B.U. members are on T.B.U. business unless there is a laid-on meal.

4.2.3.2 If more than one member's meal is on the same bill, the names of each member claimed must be listed on the back of the bill.

4.2.3.3 All claims must be supported by an actual bill or itemized receipt, including the date and time.

4.2.3.4 Refreshments for meetings may only be claimed by the appropriate Spending Authority.

4.2.3.5 Gratuities up to 15% are included in the allowable meal allowances.

4.2.3.6 Per person allowances: Breakfast - \$15* Lunch - \$25 Dinner - \$50.

4.2.3.7 The cost of the hotel's breakfast buffet at which you are staying is acceptable.

4.2.3.8 The meal expenses of the T.B.U. sponsored delegates to OSSTF functions will be reimbursed in the same manner as the provincially sponsored delegates by the OSSTF provincial office.

4.2.4 Child or Dependent Care

- 4.2.4.1 Childcare or dependent care expenses are covered to allow T.B.U. members to attend authorized T.B.U. activities.
- 4.2.4.2 The hourly rate is to be set at up to the minimum wage for a childcare provider and for a personal support worker. When possible, receipts from the childcare or dependent care provider should be provided.

4.2.5 Branch President/Executive Honorarium

- 4.2.5.1 Honorariums of \$500.00 are to be provided to each Branch President and Unpaid Executive Member, independent of normal expenditures, as per the following guidelines:
 - 4.2.5.1.1 In cases of Branch Co-Presidents, the honorarium will be split 50/50 unless both Co-Presidents submit in writing an agreement to do otherwise;
 - 4.2.5.1.2 In cases of a Branch President leaving before school-year end, the honorarium will be pro-rated to time served and split with the incoming Branch President appropriately.
 - 4.2.5.1.3 In all cases, TBU Executive will consider as a guideline for recommending honorariums the following:
 - 4.2.5.1.3.1 Attendance of the Branch Presidents and Executive members at a minimum of 7 of 9 TBU Council meetings and the Annual General Meeting plus a minimum of 7 of 9 Executive meetings for Executive members.
 - 4.2.5.1.3.2 The will of the respective Branch's membership in electing or re-electing the Branch President to that position.
- 4.2.5.2 TBU Executive will review and approve Honorarium allocations at the last Executive meeting. If guidelines are not met and there are extenuating circumstances, the TBU Executive can review and make exceptions.

- 4.2.5.3 In the event of a non-recommendation, an appeal can be made to the TBU Council. If an appeal is to be considered, written notice will be required prior to the September TBU Council meeting (the first meeting of the next school year.)

4.3 Over Expenditures

- 4.3.1 Signing authorities who have underestimated their budget expenses may apply for additional funding by submitting the details and rationale to the T.B.U. President and T.B.U. Treasurer before the over-expenditure takes place. T.B.U. Executive will examine the request and the T.B.U. Executive has the authority to approve or reject the over-expenditure request.
- 4.3.2 All over-expenditures which may be supplemented by Provincial O.S.S.T.F., the Halton Board of Education, or other funding sources require the approval of T.B.U. Executive before the over-expenditure takes place. These over expenditures will appear in the line item, with a side note indicating the rebates that are applicable to that budgeted account.
- 4.3.3 An over expenditure of an T.B.U. Executive line item must be approved by T.B.U. Council before the over-expenditure takes place.

4.4 Branch Promotional Funds

- 4.4.1 The Branch Promotional Funds can be accessed by Branch Presidents (with appropriate receipts) by June 30 of the academic year, for expenditures related to the promotion and/or funding of OSSTF sponsored activities for branch members and will be drawn from the Correspondence and Promotion line item.
- 4.4.2 In consideration of the potential risk of provider and occupier liability, the use of these funds for expenditures on alcoholic beverages is strictly prohibited.
- 4.4.3 The Branch Promotional Funds will be \$5 dollars per member working at the branch as of September 30th of the academic year. For example, in the 2013-2014 academic year, White Oaks Branch had 138 members and would have \$690 available for Branch Promotional Funds.

4.5 Income

- 4.5.1 A Local Membership Levy is approved by T.B.U. Council in June and the levy is deducted from the cheque in September. For Members hired for the second semester, the levy is deducted from the cheque in February.

4.5.1.1 Funding will be allocated to the T.B.U., from the total amount rebated to District 20, detailed on the OSSTF Provincial Funding Master, according to PROC-4 in the District Procedures Handbook, i.e., after District expenses have been paid, the T.B.U. will be allocated its portion of the remaining income, based proportionately on FTE counts for each bargaining unit on the Provincial Funding Master.

4.5.2 Provincial Rebates

4.5.2.1 Provincial Funding Master: can be accessed to a maximum of 50% in September, an additional 45% in January and the 5% balance in August. The August Funding may rise or fall due to the fluctuation of members over the year.

4.5.2.2 Primary Rebate: is the portion of the Provincial rebate that is automatically sent to the District, as outlined in the Treasurer's Handbook.

4.5.2.3 Secondary Rebate: is applied for by the District. The rebate is based on receipts for travel, general maintenance, office, and personnel costs.

4.5.3 Other Rebates

4.5.3.1 Professional Development Funds

4.5.3.2 Provincial O.S.S.T.F. Special Projects

4.5.3.3 Provincial O.S.S.T.F. Excellence in Education

4.5.3.4 Provincial O.S.S.T.F. Political Action - Special District Programs

4.5.3.5 Annual Meeting of Provincial Assembly (AMPA)

4.5.4 Interest Income

4.5.4.1 Monies realized from investments

4.6 Investment

4.6.1 Funds necessary for operation and emergencies should be deposited in an interest-bearing bank account.

4.6.2 Excess funds should be invested in interest-bearing, principal-protected investments.

- 4.6.2.1 If investment returns available in 4.6.2 yield lower interest results than current mortgage interest on properties held by OSSTF D20 TBU, then excess funds should be applied to the mortgage.
- 4.6.3 At the June TBU Executive meeting, the TBU Treasurer will share with the Executive a variety of interest-bearing, principal-protected investment options. The TBU Treasurer will also recommend to the TBU Executive how much money should be kept in an interest-bearing bank account and how much should be invested in interest-bearing, principal-protected investments. The TBU Executive must then approve all new investments and/or changes to existing investments.
- 4.6.4 The CFO at OSSTF provincial office must be consulted, and advise in favour of, if the TBU Executive is considering an investment that is not and interest-bearing, principal-protected investment, and is not applying excess funds to the mortgage.

PROC – 5 SELECTION OF DELEGATES TO T.B.U. ASSEMBLY

- 5.1 In January, the Branch Presidents will advertise for volunteers in a written bulletin to the branch membership.
- 5.2 If there are more volunteers than positions, the members will elect the delegates from the volunteers permitting their names to stand, at a membership meeting no later than the second Monday in March. The volunteers with the most votes shall be declared elected.
- 5.3 If the number of volunteers is less than the number of positions, the Branch Presidents shall solicit members to complete the delegation. A motion to appoint these members as delegates will be brought to a Membership meeting no later than the second Monday in March.
- 5.4 Where the number of volunteers equals the number of positions, a motion to appoint these delegates will be brought to a membership meeting no later than the second Monday in March.

PROC – 6 SELECTION OF DELEGATES TO PROVINCIAL ASSEMBLY AND DISTRICT COUNCIL

- 6.1 Members will be appointed to Provincial Assembly Delegate positions at the December T.B.U. Council and District Council representatives at the TBU Council meeting prior to District Council meeting according to the following priorities. Applications for the position of delegates should be submitted to the TBU President at the Union Office by Tuesday of the week:
- 6.1.1 prior to the December T.B.U. Council for the Provincial Assembly;

- 6.1.2 prior to the T.B.U. Council preceding the District Council for District Council.
- 6.1.3 The T.B.U. President/Provincial Councillor;
- 6.1.4 Other members of the T.B.U. Executive - up to 4 voting positions
 - 6.1.4.1 up to 2 alternate positions
 - 6.1.4.2 to be decided by the T.B.U. Executive;
- 6.1.5 T.B.U. Staff Officer – Member Protection and T.B.U. Staff Officer - Equity & Wellness (*Provincial Assembly only*);
- 6.1.6 Branch Presidents representing branches not represented by the T.B.U. Executive, exclusive of the T.B.U. President. That is, the T.B.U. President is not considered as representing a branch;
- 6.1.7 Other Branch Presidents whose branch is represented once;
- 6.1.8 Other Branch Presidents;
- 6.1.9 T.B.U. Standing Committee Chairpersons from branches not represented;
- 6.1.10 A member at large from a branch not represented;
- 6.1.11 T.B.U. Standing Committee Chairpersons from branches represented once;
- 6.1.12 Other T.B.U. Standing Committee Chairpersons;
- 6.1.13 Members at large from branches not represented;
- 6.1.14 At this point, if voting positions still remain, they should be offered to members of the T.B.U. Executive who are alternates, if any;
- 6.1.15 Members at large from branches represented once;
- 6.1.16 Any members from previous categories who have not been appointed;
- 6.1.17 Members at large from branches represented more than once.

PROC – 7 AWARDS

7.1 Bob Smith Award

7.1.1 Description:

The Bob Smith Award consists of a plaque displayed in the District 20 TBU Federation Office with a shield engraved with the year and the recipient’s name. The recipient receives a framed certificate. The award will be made at the Annual TBU Assembly each year for which suitable nominations are received.

7.1.2 Selection Committee:

The TBU Executive will select the recipient from the nominations received.

7.1.3 Nominations:

A nomination may be submitted by any member of the TBU.

7.1.4 Criteria

The main criterion for this award is service to the Bargaining Unit over a considerable period of time in a variety of roles. Experience considered by the committee may include:

7.1.4.1 having served as Branch President, Council member, Executive member, Standing Committee member or member of a provincial standing committee;

7.1.4.2 having represented the Bargaining Unit at Provincial or Annual Assembly or regional workshops;

7.1.4.3 the impact of the candidate’s service on the Bargaining Unit, and/or his/her branches.

7.2 Inclusive Educator Award

7.2.1 Description

In order to raise awareness, understanding, and appreciation of diversity, and to help eliminate bias, prejudice, stereotyping, discrimination and harassment related to race, ethnicity, language, gender, sexual orientation, or religion in Halton schools, and to honour the many teachers at Syl Apps School who have, over the years, worked diligently to promote inclusiveness and anti-discrimination at Syl Apps, and to recognize

and encourage those secondary educators who continue such efforts in Halton's classrooms and schools, the Inclusive Educator Award will be made at the Annual Teacher Bargaining Unit Assembly each year for which suitable nominations are received. The award will consist of a plaque, provided by the Teacher Bargaining Unit, engraved with the recipient's name and the year

7.2.2 Selection Committee

The Executive of the Teacher Bargaining Unit will select the recipient from the nominations received.

7.2.3 Nominations

Nominations may be submitted by any Member of the Teacher Bargaining Unit. Nomination forms will be distributed to Branch Presidents every January. The deadline for submission of nomination forms to the District Office will be March 31.

7.2.4 Selection Criteria

The award will be presented to a Halton Secondary School educator, i.e., a teacher, who has made a significant contribution to creating an inclusive school climate. Contributions related to inclusiveness and anti-discrimination to be considered by the selection committee could include, but are not limited to:

7.2.4.1 Initiating or contributing to staff training and development

7.2.4.2 Developing a unit of study

7.2.4.3 Coordinating an activity or event, board-wide or school-wide

7.2.4.4 Providing access to appropriate role models and resource people

7.2.5 Eligibility

Any educator whose assigned duties are not predominately related to promoting appreciation of diversity, inclusiveness, and antidiscrimination will be eligible for this award.

7.3 Recognition of Federation Involvement

7.3.1 Federation Pins.

7.3.1.1 A Federation Pin shall be presented to members of T.B.U. Council, members of T.B.U. Executive and Chairpersons of Standing Committees at the beginning of their second term if they have not previously received one.

7.3.2 Certificate of Recognition of Service.

7.3.2.1 A certificate will be presented to members of T.B.U. Council, members of T.B.U. Executive and chairpersons of T.B.U. Standing Committees when the individual vacates the position.

7.3.2.2 Certificates will be presented to the recipients by the Teacher Bargaining Unit President at the regular June T.B.U. Council meeting of the school year in which the recipient is vacating the position.

7.3.3 District 20 T.B.U. Bargaining Unit Outstanding Service Award

7.3.1 All District 20 T.B.U. Bargaining Unit members are eligible for this award.

7.3.2 Any member may nominate another member.

7.3.3 Nominations shall be solicited by and forwarded to the Recognition Committee.

7.3.4 The Recognition Committee, in conjunction with the President, shall forward their recommendations to T.B.U. Council. Recommendations will be limited to nine per year.

7.3.5 Nominations shall be recognized in the newsletter.

7.3.6 Recipients will be recognized in the newsletter.

7.3.7 Suggested Criteria:

- Merit - participation on T.B.U. Council or T.B.U. Executive
- or ad-hoc committees or standing committees;
- outstanding service to fellow members;
- other service to the federation.

7.4 Recognition of Retiring Teachers

7.4.1 Retiring teachers will receive

7.4.1.1 a Federation pin or a gift valued at \$50.

- 7.4.1.2 Retirement dinner for retiree and partner, estimated budget \$6,000, to come out of member recognition line item.
- 7.4.2 The certificate and pin or gift will be presented by the Branch President at an appropriate staff function.
- 7.4.3 Teachers who meet all the following criteria will be recommended to the Provincial Executive for Honorary Associate Membership.
 - 7.4.3.1 significant involvement on T.B.U. Executive, T.B.U. Council and/or T.B.U. Standing Committees.
 - 7.4.3.2 fifteen (15) or more years of continuous membership in O.S.S.T.F.
 - 7.4.3.3 retirement in the year the Honorary Associate Membership is applied for.
- 7.4.4 Honorary Associate Memberships will be presented by the T.B.U. President at the beginning of the Annual T.B.U. Assembly.

7.5 Mentorship Awards

- 7.5.1 An essential part of the teaching profession is the ability and willingness of so many teachers to become mentors to their colleagues on a voluntary basis. Many of us have benefitted from this voluntary mentorship and acknowledge the positive effect it has had on our careers.

Mentorship is a personal developmental relationship in which a more experienced or more knowledgeable person helps to guide a less experienced or less knowledgeable person. However, true mentoring is more than just answering occasional questions or providing ad hoc help. It is about an ongoing relationship of learning, dialogue, and challenge. As such, mentorship is well worth.

To this end, the District 20 Teachers' Bargaining Unit will annually recognize mentors with an award at the President's Celebration Dinner in June.

Members of District 20 TBU can nominate another member as deserving of recognition for their mentorship on or before the May TBU Executive meeting by writing a letter to the TBU President outlining the reasons why the nominee should be recognized.

Criteria:

- 7.5.1.1 The nominator and nominee must be members of the District 20 Teachers' Bargaining Unit.

7.5.1.2 The mentorship has taken place in the current school year.

7.5.1.3 A member can be nominated only once during an academic year.

7.5.1.4 A member receiving the Mentorship Award cannot be nominated in subsequent years by a member who has already nominated them in previous years.

PROC – 8 COLLECTION OF STRIKE FUNDS

8.1 Membership Collection

8.1.1 Members of Halton District 20 T.B.U. may be requested by T.B.U. Council and the T.B.U. Executive to make a voluntary contribution for the purpose of moral and financial support for fellow members in other Districts, Divisions, or units across the province where a strike is in progress.

8.1.2 Funds collected from members in District 20, T.B.U. will be disbursed according to the following criteria:

8.1.2.1 The members to whom funds will be sent will have been on strike for a minimum of four (4) weeks.

8.1.2.2 A separate collection of funds for support to members on strike may be collected for each District, Division, Unit individually.

8.1.3 Receipts for strike funds collected will be issued at the request of the members.

8.1.4 A complete accounting of the total amount collected and distributed by District 20, T.B.U. will be provided by the T.B.U. Treasurer to T.B.U. Council, the T.B.U. Executive and through Branch Presidents to each Branch in District 20, T.B.U.

8.1.5 Any voluntary contribution other than those indicated in 1 through 4 may be approved by the T.B.U. Council.

8.2 Line Item Disbursement

8.2.1 Contributions from this account are to be made to Districts, Divisions or units which are on strike.

8.2.2 Contributions in excess of \$1,000 are to be approved by the T.B.U. Council.

8.2.3 Contributions up to \$1,000 may be made by the T.B.U. President. Further contributions to the same bargaining unit can only be made with the approval of the T.B.U. Council.

PROC – 9 DUTIES WITH RESPECT TO GRIEVANCES

9.1 Branch Grievance Officer

9.1.1 To ensure that the Branch members are aware of the provisions of the T.B.U. Collective Agreement.

9.1.2 To assist members with perceived problems with the T.B.U. Collective Agreement:

9.1.2.1 determine whether the problem is grievable, in consultation with a representative of the T.B.U. Grievance Committee

9.1.2.2 collect a written statement of the incident from all people involved

9.1.2.3 assist, if needed, in the preparation of the grievance at Step 1

9.1.3 To cooperate with the T.B.U. Grievance Committee:

9.1.3.1 report all grievances

9.1.3.2 report all incidents in the Branch which may be group or policy grievances

9.1.3.3 make suggestions for the improvement of the grievance procedure and processes

9.1.4 To help build an atmosphere in the Branch in which the use of the grievance procedure is perceived by all members as a healthy problem-solving procedure.

9.1.5 To maintain objectivity.

CAUTION - *Interpretation of the Acts, Regulations, Statutes and the T.B.U. Collective Agreement is a complicated process that requires research and knowledge. Don't attempt to give answers without a full interpretation of the applicable acts, regulations, and collective agreement in consultation with the T.B.U. Staff Officer for Member Protection.*

9.2 T.B.U. Grievance Committee

9.2.1 Terms of Reference as outlined in By-law 4, Section 3.

9.3 Grievance Committee Chairperson

9.3.1 Performs duties as set out for committee chairpersons; namely,

9.3.1.1 oversees the:

9.3.1.1.1 calling of meetings

9.3.1.1.2 setting of agendas

9.3.1.1.3 recording and filing of minutes in the District Office.

9.3.1.2 submits a committee budget to the T.B.U. Treasurer;

9.3.1.3 carries out the responsibility for disbursement from that budget;

9.3.1.4 reports in writing to the Membership at the Annual T.B.U. Assembly.

9.3.2 In cooperation with the District Administrative Assistant, maintains a historical file of grievances.

9.4 T.B.U. Chief Negotiator

9.4.1 Prepares all correspondence associated with the formal stages of the grievance process.

9.4.2 Prepares grievances for arbitration.

9.4.3 Acts as the liaison with the Contract Maintenance Subcommittee of O.S.S.T.F., (informs CMS of grievances proceeding to the formal stage, prepares summary reports for CMS each quarter).

9.4.4 Acts as a liaison to Executive.

9.4.5 Organizes professional development for the Grievance Committee.

9.5 T.B.U. Bargaining Unit President

9.5.1 As official representative of the Teachers Bargaining Unit signs all grievance correspondence.

9.5.2 Ensures that the Grievance Committee receives copies of all grievance correspondence.

PROC – 10 T.B.U. OFFICERS' SALARIES

10.1 The Teacher Bargaining Unit President will be paid a salary equal to cat. 4 max. x 1.23 and the Staff Officers be paid a salary equal to cat. 4 max. x 1.19.

PROC – 11 T.B.U. COLLECTIVE BARGAINING COMMITTEE MEMBERSHIP - SELECTION PROCESS

11.1 A selection team consisting of the T.B.U. President, one T.B.U. Executive member, two Branch Presidents and the T.B.U. Chief Negotiator (as non-voting Chair).

11.2 The selection team will determine:

11.2.1 the interview process to be used

11.2.2 the application form to be used (to include information about the position(s))

11.2.3 the advertisement to be sent to all teacher work sites

11.2.3 the timelines for the process.

11.3 Applications are received at the District Office.

11.4 Interviews will be conducted, and suitable candidate(s) determined for recommendation through the T.B.U. President and T.B.U. Executive to the May T.B.U. Council meeting.

11.5 Steps 2 c, d, 3 and 4 may be repeated should insufficient suitable candidates be available in the first round.

PROC – 12 PROCEDURES FOR THE ELECTION OF THE TBU PRESIDENT

12.1 The deadline for the receipt of nominations, at the TBU Office, for the position of President, will be at 4:30 p.m., 30 calendar days before the first date of the in-school vote to elect the President.

12.2 Nominated candidates for President are entitled to claim mileage costs for the purpose of school visits while campaigning.

12.3 Each candidate for President may arrange to take the equivalent of six days of release time for the purpose of school visits during the campaign period.

12.4 Campaign literature provided by candidates for President must be distributed by Branch Presidents or their designates into the workplace mailboxes of teachers in a timely fashion.

- 12.5 Candidates for President may produce up to three runs of campaign literature for the membership using District 20 office equipment and supplies.
- 12.6 One 90 minute Q&A debate
 - 12.6.1 to be held virtually
 - 12.6.2 moderated by a member of provincial office where possible, a neutral speaker from OSSTF PCC's membership
 - 12.6.3 with 3 minutes for opening statements, a Q&A session and 3 minutes for closing arguments
 - 12.6.4 the events will be recorded and placed on a media platform accessible to all D20 TBU members.
- 12.6 Branch Presidents and alternatives will follow the voting procedures outlined in PROC 14, a copy of which will be provided to each Branch President along with a Voters List.
- 12.7 Voting is by secret ballot and shall take place over two consecutive days in the week prior to the Annual Meeting. The exact dates will be determined by the TBU Council.
- 12.8 An Election Committee consisting of the Chief Negotiator, the Equity & Wellness Officer and one at-large member appointed by Council will oversee the running of the election. The Chief Negotiator will act as Chief Electoral Officer. In the event of serious voting irregularities occurring at any worksite(s) during the week prior to the TBU Annual Meeting, the Chief Negotiator may nullify the vote and conduct a second vote at the affected worksite(s).
- 12.9 Ballots will be counted at the location of and immediately prior to the TBU Annual Meeting. Candidates for President may appoint scrutineers to observe the counting of ballots. Discrepancies will be referred to the Election Committee for decision. Scrutineers must maintain confidentiality until the results of the balloting are announced.
- 12.10 The candidate receiving the most votes shall be the President.
- 12.11 The balloting results will be announced to the TBU Annual Meeting.
- 12.12 Any candidate may request a recount. In the event of a tie vote for most ballots cast (i.e., within ten or less votes), the ballots will be automatically recounted. If, after a recount, a tie remains, a secret ballot of the delegates will be conducted. Only those candidates who were tied in the balloting as having the most ballots cast shall have their names on

the ballot. Before such a vote occurs, the candidates will be provided an opportunity to address the delegates for a maximum of three minutes. After the speeches, Members will have an opportunity to ask the candidates questions. Each candidate will have one minute to respond to each question. The question period cannot exceed one half hour in length. In the event of a tie after a second vote, a coin toss shall determine the winner.

- 12.13 At the first meeting of the school year following an election year for President, the Executive will review the procedures for the election of the President, and make any recommendations designed to improve the process.

PROC – 13 Anti-Harassment Policy and Procedures

13.1 District 20 Anti-Harassment Statement

Employees and members of OSSTF District 20 have the right to a workplace and union environment free from harassment and bullying. This includes harassment and bullying by OSSTF employees and by other OSSTF District 20 members.

Harassment and discrimination are not joking matters. They have a destructive effect on a union environment, individual well-being, and union solidarity. Such actions are not only destructive; they can be illegal.

Harassment and discrimination can take many forms and may be verbal, physical, or psychological. They can involve a wide range of actions including comments, gestures or looks, messages, pictures, touching, or more aggressive actions. These acts may be direct or overt; they may be isolated or repeated. They are, however, always degrading, unwelcome, coercive, and unacceptable.

As members of OSSTF, as a union, and as an employer, our goal must be to protect human rights, to promote mutual respect and trust, and to foster inclusion. We cannot condone or tolerate intimidating, demeaning, hostile and/or aggressive behaviour against OSSTF employees or other members of OSSTF. We cannot condone these behaviours when we witness them. As OSSTF members, we must speak out against this conduct and stand together to protect human rights. We must take action.

OSSTF, as an organization, is committed to strengthening member solidarity, and, in addition to representing members' interests in the workplace, takes seriously its own responsibility to ensure that its employees and its members are treated with respect and dignity in all OSSTF workplaces and at all OSSTF District 20 events and meetings.

It should be noted that the normal exercise of supervisory duties, including direction, discipline, and performance evaluation, does not constitute harassment.

Members or employees who feel targeted by harassment or discrimination must be able to speak up and know their concerns will be responded to immediately, in accordance with provincial OSSTF Policies and Bylaws and the Resolution and Complaint Procedure as approved by OSSTF District 20.

13.2 Requirements for OSSTF District 20 TBU Meetings and Events

13.2.1 All OSSTF District 20 TBU events and meetings shall have a designated anti-harassment officer, appointed by the TBU President or Committee Chair. This officer will be identified at the beginning of each event/meeting. (For a series of regular meetings where the anti-harassment officer remains the same, this individual can be identified at the first meeting of the year and have his/her name placed on the agenda for the remainder of the year.)

13.2.2 A copy of the anti-harassment policy and procedures shall be distributed to all individuals at all events and meetings. (For a series of regular meetings, members can be provided with copies at the first meeting of the year.)

13.3 Role of the Anti-Harassment Officer

13.3.1 The anti-harassment officer provides initial assistance for a member or employee who believes s/he has experienced harassment.

13.3.1.1 Upon receiving a complaint from a member or employee, the anti-harassment officer shall interview the parties involved as soon as possible and collect all relevant information (incident, time, place, witnesses). If the parties wish to come to an informal resolution, the anti-harassment officer may provide mediation.

13.3.1.2 If an informal resolution cannot be reached, the anti-harassment officer shall assist the member or employee with filing a formal complaint. This formal complaint will be filed with the appropriate individual as outlined in the resolution and complaint procedure.

13.4 Resolution and Complaint Procedure

13.4.1 A member or employee who believes s/he has been the target of harassment or discrimination at any OSSTF District 20 meeting or event is encouraged to take immediate action to ensure this behaviour is stopped. All efforts will be made to keep the complaint and resulting procedure confidential to the parties involved in the process.

- 13.4.2 As a first step, the member or employee should make it clear to the respondent that s/he finds the behaviour offensive and ask that it be stopped. This can be done personally, either in writing or verbally, or with the assistance of a third party.
- 13.4.3 If the behaviour recurs or persists, or if a member or employee does not feel safe in approaching the respondent directly, s/he should speak with the designated anti-harassment officer and ask him/her to act. If no officer has been designated, the member should speak with the TBU President to ask that one be appointed. In the event that the incident occurred at a District function, the TBU President may wish to request assistance from another Bargaining Unit President and/or the District President.
- 13.4.4 The designated anti-harassment officer will investigate the complaint promptly, including separately interviewing the parties involved and any witnesses, with a view to resolving the problem informally. This can include mediation in order to allow the parties to resolve the issue.
- 13.4.5 If the complaint cannot be resolved informally, the complainant may choose to put the complaint and all relevant information in writing.
- 13.4.6 A formal complaint against a member of the TBU will be filed with the TBU President. With the assistance of the Field Secretary assigned to District 20, the President will investigate and decide on the outcome of the complaint.
- 13.4.7 The parties will be able to appeal a decision made by the TBU President through the TBU Anti-Harassment Appeals Committee as identified in By-Law 4, Section Three, (I) of the T.B.U. By-Laws.
- 13.4.8 A formal complaint against a member of another bargaining unit will be filed with the appropriate Bargaining Unit President. With the assistance of the Field Secretary assigned to District 20, the Bargaining Unit President will investigate and decide on the outcome of the complaint.
- 13.4.9 The parties will be able to appeal a decision made by a Bargaining Unit President through that bargaining unit's Anti-Harassment Appeals Committee, or, if no such committee exists in that bargaining unit, through the District Anti-Harassment Appeals Committee as identified in By-Law 4, Section Three, (G) of the District 20 By-Laws.
- 13.4.10 A formal complaint against an employee of District 20 will be filed with the District President. With the assistance of the Field Secretary assigned to District 20, the District President will investigate, report, and make recommendations, if required, to the District Executive Council. The District Executive Council will consider the recommendations and act accordingly. This can include, but is not limited to, progressive discipline. The District

President will keep the respective Bargaining Unit President(s) informed throughout the process.

- 13.4.11 The parties will be able to appeal a decision made by the District President through the District Anti-Harassment Appeals Committee as identified in By-Law 4, Section Three, (G) of the District 20 By-Laws.
- 13.4.12 A formal complaint made against an elected OSSTF District 20 bargaining unit officer can be brought to Judicial Council, through the Field Secretary assigned to District 20. Judicial Council will investigate and decide upon the outcome of the complaint.
- 13.4.13 Any formal complaint made against an employee of OSSTF Provincial Office will be filed with the General Secretary and will come under the purview of OSSTF Provincial Office policies and procedures.
- 13.4.14 None of the above restricts a member's or employee's right to file a complaint with the Ontario Human Rights Commission or make a complaint to police.

PROC – 14 VOTING PROCEDURES FOR THE ELECTION OF THE TBU PRESIDENT

- 14.1 Prior to the in-school vote for President, Branch Presidents will be provided with a Voters List for their workplace by the District Office. Only this list can be used to undertake the voting process. Occasional Teachers having at least one permanent contract section may vote.
- 14.2 The Branch President or alternate will identify for staff the time and location where in-school voting will occur.
- 14.3 A ballot box must be used to secure cast ballots. The ballot box must be monitored at all times during the voting process and stored in a secure location until it is taken to the Annual Meeting.
- 14.4 The Branch President or alternate will ensure that each Teacher voting in the election for President sign for their ballot on the Voters List. Teachers may decline their ballot. Only ballots provided by the District Office may be used for the vote.
- 14.5 All ballots must be accounted for on the Voters List. The number of ballots cast and the number of ballots unused must equal the number of ballots provided by the District Office. Discrepancies will be referred to the Election Committee for decision.
- 14.6 The Voters List with the total number of ballots cast and number of unused ballots must be faxed to the District Office by 4 pm on the second day of voting.

- 14.7 The ballot box must be monitored throughout the voting process and sealed when voting has ended.
- 14.8 Proxy voting is only allowed through the District Office.

PROC – 15 TBU District 20 LTD Assistance Fund

- 15.1 The TBU District 20 LTD Assistance Fund will be used only for matters related to Long Term Disability for Teachers currently enrolled in the policy or for those Teachers who have opted out of the policy because they are no longer eligible for the benefit.
- 15.2 Teachers seeking financial support from the TBU District 20 LTD Assistance Fund must first make application to the Provincial OSSTF Benevolent Fund. The completed application for the Benevolent Fund will be used to determine whether there is a further financial need that may be addressed through the Assistance Fund.
- 15.3 Financial assistance provided by the Assistance Fund will be in the form of a grant (2) with no requirement that the monies will be repaid.
- 15.4 The total amount of financial assistance cannot exceed \$2500 in one school year and \$5000 in a five-year period.
- 15.5 A standing committee will be established (i.e., LTD Assistance Fund Committee) consisting of three Voting members (one from Executive, one from Council and one member-at-large) to consider applications for assistance. The committee shall meet three times a year (November, March, June) and at any other time deemed necessary by the Equity & Wellness Officer.

PROC – 16 TBU Benevolent Support/Emergency Fund

16.1 Purpose, Eligibility & Source of Funding

- 16.1.1 This fund is to provide financial support to TBU members in a timely and equitable manner.
- 16.1.2. TBU members in good standing who are experiencing prolonged illness, accident or extreme emergency are eligible to apply.

16.2 Guiding Principles

- 16.2.1 The applicant must have already submitted application(s) to the OSSTF Provincial Benevolent Council for consideration. Some sample circumstances for consideration (but not limited to the following):

- 16.2.1.1 the applicant has exhausted the five-year maximum of \$5,000 eligible grant from Provincial Benevolent Council;
- 16.2.1.2 the applicant has exhausted all sick leave with pay and is in financial crisis: e.g., danger of eviction, termination of services by public utilities, unable to fill medical prescriptions due to lack of funds while waiting for reimbursement from insurance carrier (medical prescription, invoice from hydro, heating company to be attached to application);
- 16.2.1.3 the applicant is unable to work due to health reasons while waiting LTD approval and is not eligible for, or exhausted, EI sick benefits due to shortage of employment hours;
- 16.2.1.4 the applicant has declared personal bankruptcy and/or has been denied personal loan from a financial institution (statement from financial institution required).
- 16.2.2 Up to a lifetime maximum of \$2,500.00 per member will be approved.
- 16.2.3 Depending on the member's circumstances, the approved funding may be applied directly to the payment of hydro, heating, prescribed medication, medical supply or grocery bills.

16.3 Application Procedures

- 16.3.1 Members shall make applications to the Benevolent Support/Emergency Funds Committee.
- 16.3.2 A copy of the financial statement submitted to the OSSTF Benevolent Council must be attached to this application.

16.4 Responsibility Centre and Financial Reporting

- 16.4.1 The Benevolent Support/Emergency Funds Committee shall comprise of the Staff Officer – Member Protection and the Staff Officer – Equity & Wellness and two members at large.
- 16.4.2 The Committee shall keep all application information confidential.
- 16.4.3 The Chair of the Committee will report to TBU Executive at each subsequent scheduled meeting.

Template of form to be completed by member

District 20 TBU Benevolent Support/Emergency Funds

Eligibility:

1. This subsidy is available to levy paying TBU members in good standing.
2. Continued availability of this subsidy is subject to an annual review of funding sources by the TBU Executive.
3. Up to a lifetime maximum of \$2,500.00 per member will be approved.
4. Signed and completed applications are to be submitted, under confidential cover, to:
5. All applications will remain confidential.

Name: _____ OSSTF Number: _____

Work Location: _____ Work Tel.: _____

Position Title: _____ Home Tel.: _____

Nature of Application: Extreme Emergency Accident Prolonged
Illness

A copy of my financial statement submitted to OSSTF Benevolent Council is attached.

To assist the Committee in processing this application, please provide additional/pertinent information below:

Member's Signature

Date