



Union of Safety and Justice Employees
Syndicat des employé-e-s de la Sécurité et de la Justice

USJE POLICIES AND GUIDELINES

Amendments from the National Executive Meeting, February 2005
Amendments from the National Executive Meeting, September 2005
Amendments from the National Executive Meeting, February 2006
Amended by USJE National Executive – July 2012
Amended by USJE National Executive – March 2013
Amended by the USJE National Executive – July 2013
Amended by the USJE National Executive – March 2014
Amended by the USJE National Executive – March 2015

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July 2001 NE
Amended following 2002 Convention
Amended March 2013 NE
Amended July 2013 NE

EDUCATION POLICY

INTRODUCTION

In keeping with the Member Education Program vision of PSAC, Labour Councils, Federations of Labour and the Canadian Labour Congress, USJE provides training geared to the specific needs and concerns of our Local officers and activists.

The USJE training program was created in 2004 as a pilot program. At the 2008 USJE Convention in Edmonton the delegates voted unanimously to keep the program.

In July 2010, the National Executive created a USJE Standing Education Committee with the following representation:

- Members of the SEC shall be appointed from the USJE National Executive with representation from each Region (Atlantic, Québec, NCR/Ontario, Prairies, Pacific, and the Community);
- Each member of the committee will solicit from Regional Vice-Presidents (RVP's) in their region all information relating to education and training. Each committee member will forward that information to the USJE Standing Education Committee (SEC) for review and recommendations.

PURPOSE

Education is an integral and ongoing part of all union activity. It is about sharing information, analyzing our situations, gaining new insight and knowledge, developing our skills, and organizing for action.

Keeping with the direction of PSAC, the Education Program is fundamental to the achievement of our goals as a union. Through education, members gain the knowledge, skills and confidence they need to be effective organizers, communicators, advocates, representatives, and leaders. At workshops, seminars, courses and conferences members explore the issues, learn the principles, develop the skills and plan the actions that enable them to carry out the union's constitutional, legal, social and moral obligations.

Education plays a direct role in making the union relevant to the lives of the members, at their workplaces and in their communities. It does so in a number of ways: for example, it teaches new officers, be they stewards, local presidents, or regional vice-presidents, what their roles are and how to carry out their responsibilities effectively; it

identifies and develops new leaders so that there is an ever expanding base of union activity; it introduces the current and emerging issues around which membership action can be mobilized; it promotes equity , inclusion and the integration of the rich diversity of the membership; and it builds support for union campaigns and, on a broader scale, positive social change.

USJE is committed to providing members with quality trade union education and to ensuring that the necessary resources are in place to sustain a comprehensive, innovative and dynamic Program.

The Standing Education Committee of USJE will ensure that the intent of this Education Policy is carried out and will monitor the Policy's relevance and effectiveness.

EDUCATION FORUMS/FREQUENCY

Training opportunities include:

- the National Local Presidents' Meeting (held during the year following the year in which the Triennial National Convention takes place);
- Regional Conferences (held during the year prior to the Triennial National Convention);
- USJE funded training;
- Local-requested training.

PARTICIPANTS

Participants at education activities must be members in good standing. A minimum of 10 members in good standing, identified by the sponsor(s) of the training prior to the registration deadline, will be required to allow an education activity to proceed.

Participation at the National Local Presidents' Meeting and at Regional Conferences shall be in accordance with the USJE By-laws and Regulations. Participant selection at Local-sponsored education activities will be the responsibility of the Local(s).

With the exception of the Convention Preparation Training, members are entitled to attend training sessions on the same training topic once. Exceptions to this rule would only apply if:

- i. it has been six years since the member has had the training; or
- ii. their RVP supports the request; and
- iii. there is space available.

Observers will be accepted as participants subject to space-availability. Observers shall be chosen by their locals. All observer expenses shall be borne by the local.

PRINCIPLES

Respecting the goal of the PSAC Education Program, USJE will reflect and uphold a defined set of guiding principles. The principles include:

- Union education must be accessible, i.e., free of barriers due to geography, language, disability, income, family responsibility, working conditions.
- Union education must be equitable and inclusive and encourage the participation of all members.
- Union education must be flexible, adaptable and able to respond quickly to changing circumstances, for both the membership and the organization, by utilizing the most appropriate delivery model.
- Union education should develop critical thinking, raise consciousness, create knowledge, enhance skills, and value risk-taking.
- Union education should be democratic, interactive, action-oriented and member-centered.
- Union education should be integral to all union activity.

RESPONSIBILITIES OF THE STANDING EDUCATION COMMITTEE

- The SEC will identify trends to assist the National Executive and the Coordinator, Organizing/Training in the development of training needs for USJE Conferences and Workshops.
- The SEC will review a summary report of evaluations prepared by the Coordinator, Organizing/Training from completed conference/Workshop training and provide advice to the National Executive as appropriate.
- The SEC will review any other education-related issues referred to it from the National Executive.
- The SEC will provide advice on education methodology and will share experiences and review submissions from the regions.
- The SEC will liaise with the Coordinator of Organizing/Training to provide assistance and information and to ensure that the best utilization is made of available resources.

RESPONSIBILITIES OF THE CO-ORDINATOR OF ORGANIZING/ TRAINING

- In close collaboration with the Standing Education Committee, the Coordinator of Organizing/Training shall be responsible for implementing this policy while adhering to the USJE administrative guidelines and procedures;
- All USJE policies will be adhered to and actively applied at education functions (e.g., accessibility; harassment; no-smoking.).

RESPONSIBILITIES OF THE NATIONAL EXECUTIVE

As it has done for many years, the USJE also provides training as an integral part of both the National Local Presidents' Meeting and our Regional Conferences — each of which is held every three years. The planning of Local-requested training shall be done in conjunction with the respective Regional Vice-President and will take into consideration membership needs, local funds and other courses sponsored by other education programs. Each Regional Vice-President shall submit a Locals-requested annual training plan to the Coordinator of Organizing/Training for review and planning 30 days prior to the next National Executive Meeting.

FUNDING

The cost of USJE education training for membership participation will be supported through a set of expense entitlements.

The USJE Family Care Policy will apply to education activities.

The cost of the National Local Presidents' Meeting and Regional conferences shall be assumed by the National Office in accordance with the USJE By-laws and Regulations.

The cost of Local-requested education activities shall be assumed by the Local(s). The National Office will assume all costs incurred by the facilitator(s) from the National Office.

Any exceptions to the guidelines will be brought to the attention of the USJE Director of Finance and Administration for consideration.

July 2001 NE
Amended Feb 05 NE
Amended March 2014

The Union of Safety and Justice Employees (USJE)

INVESTMENT POLICY-MARCH 2014

Purpose

The purpose of this Investment Policy is to establish a policy for the Investment of Funds of the Union of Safety and Justice Employees (USJE). The goal is to accumulate funds for the use of the USJE as required for the benefit of their membership and employees.

Objectives

The main objective is to achieve capital preservation through high quality bonds and money market investments, while providing inflation protection and growth through high quality equities over the long term. The investment assets of USJE are to be comprised of corporations assessed with reasonable levels of risk and return that a prudent investor would adopt under comparable circumstances. This Investment Policy will apply to all Investments of the Organization.

Investment Management

The current Investment Manager for the organization is *TD Wealth Private Investment Counsel Inc.* 45 O'Connor Street, Suite 1100, Ottawa, Ontario K1P 1A4.

Management Fees

The basis of remuneration will be detailed at the time of the appointment of the Investment Manager.

Review and Reporting

The Investment Manager shall provide the organization with quarterly reports that include analysis and commentary on the performance of the portfolio.

The Investment Manager will meet at least annually with the National President and the Director of Finance and Administration.

Signing Officers

The USJE has appointed the following persons to act as signing officers on behalf of the Union.

- President

- Director of Finance and Administration

Any changes to the list of Authorized Persons shall be communicated to the Investment Manager by the Board within 30 days of the change.

Governance

The Investment Policy will be reviewed by the National President and the Director of Finance and Administration on an annual basis to ensure that it remains compatible with the organization's objectives and requirements. Any change to the Investment Policy will require the approval of the National Executive.

Copies of the Investment Policy will be provided to the Union's auditor and Investment Manager.

Investment Objectives

The primary objective in investing the assets of the organization shall be the preservation and enhancement of the value of the capital through prudent diversification of high quality investment, currencies and asset classes.

Investment Plan

The objective for this Plan is to produce longer term capital growth (10+years) through the implementation of investment strategies that focus on the preservation of capital and modest growth. The main objective is to preserve the capital that will be used to generate income for the use of the USJE. The secondary objective is to provide moderate growth for inflation protection over the long term.

Investment Constraints

Time Horizon

Plan assets to be invested for the long-term, viewed as 10+ years

Risk Tolerance

Due to the fiduciary obligations of the Union of Safety and Justice Employees, the organization's risk tolerance, including volatility and exposure to loss is low. The organization accepts that some short-term declines will be incurred to achieve greater long-term results but efforts to achieve this must not expose the portfolio to liquidity risk.

The USJE will consider the following criteria in planning investments:

1. General Economic conditions.
2. The possible effect of inflation or deflation.
3. The role that each investment or course of action plays within the overall investment portfolio.
4. The expected total return from income and the appreciation of capital
5. Needs for liquidity, regularity of income and the preservation or appreciation of capital.
6. An asset's special relationship or special value, if any, to one or more of the beneficiaries.

For risk minimization, no single equity investment shall represent more than 10% of the total value of the equity portion of the portfolio. As well, the debt of any single corporate bond issuer shall be limited to 10% of the fixed income portion of the portfolio.

Taxation

The USJE is a not-for-profit organization and is not taxed on income or capital gains. The organization has no ability to obtain tax credits or tax relief for withholding taxes on foreign income producing investments.

Asset Allocation

Investment Portfolio

Asset Class	Target Weight	Range	Benchmark Index
Equity	35%	20% - 50%	TSX60/S&P100/EAFE
Bonds	60%	50% - 80%	DEX Bond Index
Cash	5%	1% - 10%	DEX 91 Day T-Bill

Eligible Investments

Equities - Fully paid common shares of blue chip corporations with market capitalizations of at least \$100 Million. A maximum of 25% of the market value of the total portfolio will be in non-Canadian investments.

Bonds - Eligible corporate securities consist of bonds, debentures or other fixed investments with a minimum investment grade rating of BBB.

Short Term – Canadian and Provincial Government T-Bills and Bonds due within one year. Canadian money market with a minimum rating of R1 (Mid) on the Dominion Bond Rating Service or equivalent.

Exclude companies deemed to be anti-union. A list of non-eligible companies will be provided from the Union of Safety and Justice Employees/Public Service Alliance of Canada.

February 1998 NE

USJE Policy
on
Funding Of Attendance at Conference

The Union of Safety and Justice Employees at each National triennial Convention approves a budget for the following three years until the next convention. Contained within that budget are funds for USJE members and National Officers of the Union to attend certain conferences and meetings.

Expenses in accordance with USJE Regulation 8 are provided for to those members to attend authorized events. There are no financial provisions for members to attend partially sponsored conferences other than those previously provided for over the past number of years.

It is therefore the policy of the Union of Safety and Justice Employees not to provide for funding or the subsidizing of members to attend conferences and meetings that are not sponsored by the USJE.

Further, in situations where there is only partial funding by a sponsoring organization other than the Union of Safety and Justice Employees, no claim for further funding or subsidization will be available from the USJE for attendance at that conference or meeting.

USJE POLICY ON PRIVATIZATION

Definition

The Union of Safety and Justice Employees considers the term “privatization” to mean any transfer of services or programs provided by our members as employees of the Federal Government to another service provider.

USJE Position

The Union of Safety and Justice Employees is firmly opposed to all forms of privatization as a matter of principle, and will take all necessary actions to demonstrate this opposition, and prevent the privatization of the services and programs provided by its members. Further, the USJE is also committed to achieving the return to its bargaining units of all functions currently contracted-out by the various government departments employing its members.

Guidelines for Donations

In addition to annual contributions and financial assistance already set out in USJE's resolutions of record, the USJE may, from to time, provide financial support to organizations in areas such as education, health, and social services.

Process

Requests for funding and donations are reviewed by the National Executive at its regular meetings.

Requests should include the following information:

- organization's name;
- background information;
- amount requested.

For emergencies, such as contributions to disaster relief funds, requests may be reviewed electronically by the National Executive.

The National President and the Director of Finance and Administration can authorize contributions/donations not exceeding \$300.

Funding is not generally provided for the following:

- religious groups, unless providing a secular service open to all;
- advocacy groups;
- individuals and/or individual pursuits;
- fraternities, lodges, and other recreational or self-improvement organizations, where participation is intended primarily for the personal advancement or benefit of the participant.

Funding

The approved contributions/donations will be funded from the USJE's surplus.

July 2012 NE

Guidelines for financial assistance to USJE Locals for fight-back campaigns

The purpose of these Guidelines is to provide financial assistance, to a maximum of \$2,000, to USJE Locals who choose to embark on local fight-back campaigns that are deemed to be in the best interest of the USJE.

Process

Requests for financial assistance are reviewed and approved by the USJE National President and the Director of Finance and Administration on a case-by-case basis. These are to be channeled through the requesting Local's Regional Vice-President, who will then forward the request to the National President.

Requests must include the following information:

- Business Case Form
http://www.USJE-sesg.com/en/Documents/form_business_case_en.pdf
- Financial Breakdown of anticipated costs Form
http://www.USJE-sesg.com/en/Documents/form_financial_breakdown_en.pdf
- Anticipated Results

Forms can be filled out by the Locals and remitted electronically to their respective RVPs.

Locals should provide a minimum of 5 business days for approval of their business case.

The financial assistance for fight-back campaigns must not be earmarked for loss wage repayment.

Once the event has occurred, original receipts must be sent to the USJE National Office. Failure to provide receipts could result in dues being withheld. As well, the USJE National Office expects that a quick debrief of the event will be sent for posting on the USJE national website. Pictures would also be a welcome addition.

Cheques will be made payable to the Local.

GENERAL GUIDELINES FOR CLAIMING USJE EXPENSES

General

In order to ensure fairness, the following is a list of guidelines to be understood and used in preparation of expense claims to the Union of Safety and Justice Employees.

The authority for payment is derived from USJE Regulation 8 and where there appears to be any conflict between these guidelines and Regulation 8, it shall be understood that Regulation 8 shall apply.

The USJE, in attempting to apply reasonableness with economy, uses a general guideline that members normally should not have to depart from their homes prior to 6.30-7.00 a.m. or return to their homes much later than 10.00-10.30 p.m. Travel outside of those time frames will result in consideration to overnight the member.

Finally, there are a number of occasions when members travel together by PMV. In the event, this occurs, we expect only the driver to claim kilometric rates and we therefore ask that passengers/drivers be identified when claiming kilometric rates.

For claim procedures, please refer to the following sections of Regulation 8:

Section 4 – Claim Procedures

- (a) Expenses shall be claimed in accordance with procedures prescribed by the Director of Finance and Administration.
- (b) Claims not submitted within 60 days of the final day of the event may be determined by the Director of Finance and Administration as no longer being valid.

Section 5 – Requirements for Receipts

Any claim shall require a receipt or similar document to verify such expenditure except where the Regulation specifies otherwise or where receipts are not normally provided.

I - TRAVEL

1. Travel by PMV (Private Motor Vehicle)

Members who use PMV to travel and who are entitled to accommodation may claim the prescribed rate applicable governed by Regulation 8 Section 7, of the USJE Bylaws and Regulations.

2. Travel by Commercial Carrier

Members who travel by aircraft, train, bus or other commercial conveyance may claim taxi (receipt required) or PMV kilometric rates from their home to the commercial carrier's departure point and bus/taxi (receipt required) from the destination airport to the hotel accommodation and the reverse in returning home.

3. Long Distance Travel by PMV

Methods of transportation are usually determined by taking into account economy and speed. Members who elect to use their PMV instead of authorized air travel shall be compensated at the USJE prescribed rate applicable governed by Regulation 8 Section 7, of the USJE Bylaws and Regulations, (established for her/his place of residence) by the actual number of kilometres travelled. Such amount, however, shall not exceed the total cost of air fare and landing taxes of air transportation as determined by the Director of Finance and Administration. Additional costs such as compensation, hotel accommodation, meals, parking etc shall be paid in accordance with Regulation 8, Section 8, of the USJE Bylaws and Regulations.

*note – NJC Travel Directive 3.4.11 (c) will be followed.

4. Use of P.M.V. or Public Transportation in HQ Areas

Members who travel locally to the function from their home shall receive a flat rate of \$15.00/day for the use of public transportation or their PMV, or the kilometric rate if more than \$15.00. In the event that accommodation is requested (in advance) for the night of a social function, no travel allowance may be claimed for that day.

5. Parking

Charges for parking may be claimed upon the provision of a receipt from the parking authority.

II - ACCOMMODATION

1. Full Travel Accommodation

Members who reside more than 25 miles/42 kilometres from the meeting location shall be entitled to hotel accommodation where the function is located.

2. Accommodation Due to Social Function

Members who reside inside of the 25-mile/42-kilometre radius may opt in advance of the meeting, to have overnight accommodation if there is a social function scheduled which they will be attending.

3. Private Accommodation

The Director of Finance and Administration may grant the private accommodation rate set by Treasury Board to a member providing such a request was forwarded in advance of the meeting.

4. Incidentals

Incidental expenses allowance will be compensated at the rate set out in Regulation 8, Section 12 of the USJE Bylaws and Regulations.

5. Meals

A meal allowance equal to that in Regulation 8, Section 11 will apply for each day while in travel status.

IV - REMUNERATION

Payment equivalent to the daily rate of pay will be made for each day of travel and/or work on behalf of USJE.

In cases where there is less than one day required, the amount of claim should be adjusted accordingly (i.e.) for one half day off work the member would be eligible to claim one half his/her daily salary rate.

Members who receive a day's pay from their employer should not claim any additional remuneration from this Union.

Members will be required to submit a copy of approved leave form.

V - ADDITIONAL EXPENSES

Any expenses that are incurred and not applicable under the foregoing items should be presented in detail on a separate sheet of paper for approval.

VI - FINALIZATION OF EXPENSE CLAIMS

All claims must be finalized as soon as possible following the termination of the meeting and must include the hotel receipt where applicable. Failure to provide a completed claim may result in this office issuing a T-4 from to the recipient declaring that all of the amount of the advance including hotel and per diem will be considered as income and therefore taxable.

Claims submitted after the termination of the meeting should be sent to:

Director of Finance and Administration, Union of Safety and Justice Employees
Suite 603, 233 Gilmour Street, Ottawa, Ontario K2P 0P2