

COLLECTIVE AGREEMENT

BETWEEN:

Huron - Superior Catholic District School Board

- AND -

CANADIAN UNION OF PUBLIC EMPLOYEES
LOCAL 4148
(PLANT)

September 1, 2014 to August 31, 2019
Sault Ste. Marie, Ontario

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CUPE – PART A: CENTRAL TERMS

C1.00 STRUCTURE AND ORGANIZATION OF COLLECTIVE AGREEMENT

C1.1 Separate Central and Local Terms

The collective agreement shall consist of two parts. Part “A” shall comprise those terms which are central terms. Part “B” shall comprise those terms which are local terms.

C1.2 Implementation

Part “A” may include provisions respecting the implementation of central terms by the school board and the Union. Any such provision shall be binding on the school board and the Union. Should a provision in Part A conflict with a provision in Part B, the provision in Part A, Central Term will apply.

C1.3 Parties

- a) The parties to the collective agreement are the school board or school Authority and the Union.
- b) Central collective bargaining shall be conducted by the central employer and employee bargaining agencies representing the local parties.

C1.4 Single Collective Agreement

Central terms and local terms shall together constitute a single collective agreement for all purposes.

C2.00 DEFINITIONS

C2.1 Unless otherwise specified, the following definitions shall apply only with respect to their usage in standard central terms. Where the same word is used in Part B of this collective agreement, the definition in that part, or any existing local interpretation, shall prevail.

C2.2 The “Central Parties” shall be defined as the employer bargaining agency, the Council of Trustees’ Associations/Conseil d’Associations des Employeurs (CTA/CAE) and the employee bargaining agency, the Canadian Union of Public Employees/Syndicat Canadien de la Fonction Publique (CUPE/SCFP). CUPE/SCFP refers to the designated employee bargaining agency pursuant to subsection 20 (1) of the *School Boards Collective Bargaining Act, 2014* for central bargaining with respect to employees in the bargaining units for which CUPE/SCFP is the designated employee bargaining agency.

CTA/CAE refers to the designated employer bargaining agency pursuant to subsection 21 (6) of the *School Boards Collective Bargaining Act, 2014* for central bargaining with respect to employees in the bargaining units for which CUPE/SCFP is the designated employee bargaining agency. The CTA/CAE is composed of:

1. ACEPO refers to l'Association des conseils scolaires des écoles publiques de l'Ontario as the designated bargaining agency for every French-language public district school board.
2. AFOSC refers to l'Association franco-ontarienne des conseils scolaires catholiques as the designated bargaining agency for every French-language Catholic district school board.
3. OCSTA refers to the Ontario Catholic School Trustees' Association as the designated bargaining agency for every English-language Catholic district school board.
4. OPSBA refers to the Ontario Public School Boards' Association as the designated bargaining agency for every English-language public district school board, including isolate boards.

C3.00 LENGTH OF TERM/NOTICE TO BARGAIN

C3.1 Term of Agreement

In accordance with Section 41(1) of the *School Boards Collective Bargaining Act, 2014* the term of this collective agreement, including central terms and local terms, shall be from September 1, 2014 to August 31, 2017, inclusive.

C3.2 Term of Letters of Agreement/Understanding

All central letters of agreement/understanding appended to this agreement, or entered into after the execution of this agreement shall, unless otherwise stated therein, form part of the collective agreement, run concurrently with it, and have the same termination date as the agreement.

C3.3 Amendment of Terms

In accordance with Section 42 of the *School Boards Collective Bargaining Act, 2014*, the central terms of this agreement, excepting term, may be amended at any time during the life of the agreement upon mutual consent of the central parties and agreement of the Crown. It is understood the union will follow its internal approval process.

C3.4 Notice to Bargain

- a) Where central bargaining is required under the *School Boards Collective Bargaining Act, 2014*, notice to bargain centrally shall be in accordance with Sections 31 and 28 of that Act, and with Section 59 of the *Labour Relations Act, 1995*.

- b) Notice to commence bargaining shall be given by a central party:
 - i. within 90 (ninety) days of the expiry date of the collective agreement; or
 - ii. within such greater period agreed upon by the parties; or
 - iii. within any greater period set by regulation by the Minister of Education.
- c) Notice to bargain centrally constitutes notice to bargain locally.
- d) Where no central table is designated, notice to bargain shall be consistent with section 59 of the *Labour Relations Act, 1995*.

C4.00 CENTRAL DISPUTE RESOLUTION PROCESS

The following process pertains exclusively to disputes and grievances on central matters that have been referred to the central process. In accordance with the *School Board Collective Bargaining Act, 2014* central matters may also be grieved locally, in which case local grievance processes will apply. In the event that central language is being grieved locally, the local parties shall provide the grievance to their respective central agents.

C4.1 Statement of Purpose

- a) The purposes of the Central Dispute Resolution Process (CDRP) shall include the expeditious processing and resolution of disputes through consultation, discussion, mediation or arbitration, and the avoidance thereby of multiplicity of proceedings.

C4.2 Parties to the Process

- a) There shall be established a Central Dispute Resolution Committee ("The Committee"), which shall be composed of equal representation of up to four (4) representatives each of the employer bargaining agency and employee bargaining agency ("the central parties"), and up to three representatives of the Crown. The Committee will be co-chaired by a representative from each bargaining agency. All correspondence to the committee will be sent to both co-chairs.
- b) The Central Parties and the Crown will provide a written list of representatives appointed to the Committee with contact information every September. Any changes in representation will be confirmed in writing.
- c) A local party shall not be party to the CDRP, or to the Committee, except to the extent its interests are represented by its respective central party on the Committee.

- d) For the purposes of this section, “central party” means an employer bargaining agency or employee bargaining agency, and “local party” means an employer or trade union party to a local collective agreement.

C4.3 Meetings of the Committee

- a) The Committee shall meet at the request of one of the central parties.

C4.4 Selection of Representatives

- a) Each central party and the Crown shall select its own representatives to the Committee.

C4.5 Mandate of the Committee

The mandate of the Committee shall be as follows:

- a) **Dispute Resolution**
A review of any dispute referred to the Committee respecting the interpretation, application, administration, alleged violation, or arbitrability of central terms in the agreement, for the purposes of determining whether the dispute might be settled, withdrawn, referred to mediation/arbitration as a formal grievance, or referred to the local grievance procedure in accordance with this section.
- b) **Not Adjudicative**
It is clearly understood that the Committee is not adjudicative in nature. Unless otherwise agreed to by the parties, decisions of the committee are without prejudice or precedent.

C4.6 Role of the Central Parties and Crown

- a) The central parties shall each have the following rights:
 - i. To file a dispute with the Committee.
 - ii. To file a dispute as a grievance with the Committee.
 - iii. To engage in settlement discussions, and to mutually settle a dispute or grievance.
 - iv. To withdraw a dispute or grievance it filed.
 - v. To mutually agree to refer a dispute or grievance to the local grievance procedure.
 - vi. To refer a grievance it filed to final and binding arbitration.
 - vii. To mutually agree to voluntary mediation.

- b) The Crown shall have the following rights:
 - i. To give or withhold approval to the employer bargaining agency, to any proposed settlement.
 - ii. To participate in any matter referred to arbitration.
 - iii. To participate in voluntary mediation.

C4.7 Referral of Disputes

- a) Either central party must refer a dispute to the Committee for discussion and review

C4.8 Carriage Rights

- a) The parties to settlement discussions shall be the central parties. The Crown may participate in settlement discussions.

C4.9 Responsibility to Communicate

- a) It shall be the responsibility of a central party to refer a dispute to the Committee, or to arbitration, in a timely manner.
- b) It shall be the responsibility of each central party to inform their respective local parties of the Committee's disposition of the dispute at each step in the CDRP, including mediation and arbitration, and to direct them accordingly.

C4.10 Language of Proceedings

- a) Where a dispute arises uniquely under a collective agreement in the French language, the documentation shall be provided, and the proceedings conducted in French. Interpretative and translation services shall be provided accordingly to ensure that non-francophone participants are able to participate effectively.
- b) Where such a dispute is filed:
 - i. The decision of the committee shall be available in both French and English.
 - ii. Mediation and arbitration shall be conducted in the French language with interpretative and translation services provided accordingly.
- c) Arbitration decisions and settlements that may have an impact on French language school boards shall be translated accordingly.

C4.11 Definition of Dispute

- a) A dispute can include:
 - i. A matter in dispute between the central parties respecting the interpretation, application, administration, alleged violation, or arbitrability of central terms in the agreement.

C4.12 Notice of Disputes

Notice of the dispute will be submitted on the form provided in Appendix A and sent to the responding party, in order to provide an opportunity to respond. The Crown shall be provided with a copy.

- a) Notice of the dispute shall include the following:
 - i. Any central provision of the collective agreement alleged to have been violated.
 - ii. The provision of any statute, regulation, policy, guideline, or directive at issue.
 - iii. A comprehensive statement of any relevant facts.
 - iv. The remedy requested.

C4.13 Referral to the Committee

- a) A central party that has a dispute regarding the interpretation, application, administration, alleged violation, or arbitrability of a central term, shall refer it forthwith to the Committee by notice of dispute to the co-chair of the other central party, with a copy to the Crown, but in no case later than thirty (30) working days after becoming aware of the dispute. Where the responding party wishes to provide a written response prior to the committee meeting, that response shall be forwarded to the other Central party and the Crown.
- b) The Committee shall conduct a review of the dispute. The Committee will meet to review the dispute within twenty (20) working days.
- c) If the dispute is not settled, withdrawn, or referred back to the local grievance procedure within twenty (20) working days of the Committee meeting, the central party submitting the dispute may file the dispute as a grievance, and refer it to arbitration/mediation within ten (10) working days.

C4.14 Timelines

- a) Timelines may be extended by mutual consent of the parties.
- b) Working days shall be defined as Monday through Friday excluding statutory holidays.

- c) Disputes that arise during non-instructional days (Summer Months, Christmas Break, and March Break) will have timelines automatically extended.
- d) Local grievance timelines will be held in abeyance while the dispute is in the CDRP, in the event that the matter is referred back locally.

C4.15 Voluntary Mediation

- a) The central parties may, on mutual agreement, request the assistance of a mediator.
- b) Where the central parties have agreed to mediation, the cost shall be shared equally between the central parties.
- c) Timelines shall be suspended for the period of mediation.

C4.16 Arbitration

- a) Arbitration shall be by a single arbitrator.
- b) In order to have an expeditious process, the parties shall consider sharing prior to the hearing the following, “Written Briefs”, “Will Say Statements” “Agreed Statement of Facts” and the case law the parties intend to rely on. The parties will make best efforts to respond to disclosure requests in a timely fashion prior to the hearing.
- c) The central parties shall use the mutually agreed-to list of arbitrators set out in the Memorandum of Settlement between CUPE/SCFP and the CTA/CAE dated November 1, 2015. Arbitrators on the list will be used in rotation, based on availability, for the 2014-2017 collective agreement. On mutual agreement, the parties may add to or delete from the list during the term of the agreement, as required.
- d) The Parties will rotate through the list to select an arbitrator subject to their availability to hear the matter within six (6) months, on a date convenient to the parties. If none of the arbitrators on the list are able to convene a hearing within six (6) months, the parties shall appoint a mutually agreed to arbitrator.
- e) The central parties may refer multiple grievances to a single arbitrator.
- f) The cost of proceedings, including arbitrator fees and rental of space, shall be shared equally between the central parties.
- g) This does not preclude either Party from proceeding to expedited arbitration under the Labour Relations Act.

C5.00 BENEFITS

Parties have agreed to participate in the Provincial Benefit Trust set out in the appended Letter of Understanding subject to 4.2.1(c). The date on which the benefit plan commences participation in the Trust shall be referred to herein as the "Participation Date".

The Boards will continue to provide benefits in accordance with the existing benefit plans and terms of collective agreements in effect as of August 31, 2014 until the Employees' Participation Date in the Trust.

Post Participation Date, the following shall apply:

C5.1 Funding

- a) The funding per full-time equivalent will be calculated as per the appended Letter of Understanding.

C5.2 Cost Sharing

- a) The total funding in C5.1a) shall be divided as per the existing employer and employee cost sharing arrangements in terms of collective agreements in effect as of August 31, 2014.
- b) Any other cost sharing or funding arrangements as per previous local collective agreements in effect as of August 31, 2014 remain status quo.

C5.3 Payment in Lieu of Benefits

- a) All employees not transferred to the Trust who received pay in lieu of benefits under a collective agreement in effect as of August 31, 2014, shall continue to receive the same benefit.

C6.00 SICK LEAVE

C6.1 Sick Leave/Short Term Leave and Disability Plan

Definitions:

The definitions below shall be exclusively used for this article.

"Full year" refers to the ordinary period of employment for the position.

"Permanent Employees" – means all employees who are not casual employees, or employees working in a long-term supply assignment, as defined below.

"Long Term Supply Assignment" means, in relation to an employee,

- i. a long term supply assignment within the meaning of the local collective agreement, or

- ii. where no such definition exists, a long term supply assignment will be defined as twelve (12) days of continuous employment in one assignment.

“Casual Employees” means,

- i. A casual employee within the meaning of the local collective agreement,
- ii. If clause (i) does not apply, an employee who is a casual employee as agreed upon by the board and the bargaining agent, or
- iii. If clauses (i) and (ii) do not apply, an employee who is not regularly scheduled to work.

Notwithstanding the above, an employee working in a Long Term Supply Assignment shall not be considered a casual employee for purposes of sick leave entitlement under this article while working in the assignment.

“Fiscal Year” means September 1 to August 31.

“Wages” is defined as the amount of money the employee would have otherwise received over a period of absence.

a) Sick Leave Benefit Plan

The Board will provide a Sick Leave Benefit Plan which will provide sick leave days and short term disability coverage to provide protection against loss of income when ill or injured as defined below. An employee, other than a casual employee as defined above, is eligible for benefits under this article.

Sick leave days may be used for reasons of personal illness, personal injury, personal medical appointments, or personal dental emergencies only.

Employees receiving benefits under the *Workplace Safety and Insurance Act*, or under a LTD plan, are not entitled to benefits under a school board’s sick leave and short term disability plan for the same condition.

b) Sick Leave Days Payable at 100% Wages

Permanent Employees

Subject to paragraphs d), e) and f) below, Employees will be allocated eleven (11) sick days at one hundred percent (100%) of wages on the first day of each fiscal year, or the first day of employment.

Employees on Long Term Supply Assignments

Subject to paragraph d) below, Employees completing a full-year long term supply assignment shall be allocated eleven (11) sick days payable at one hundred percent (100%) of wages at the start of the assignment. An employee completing a long term supply assignment that is less than a full-year will be allocated eleven (11) sick days payable at one hundred percent (100%) reduced

to reflect the proportion the long term supply assignment bears to the length of the regular work year for the position.

c) Short-Term Disability Coverage – Days Payable at 90% Wages

Permanent Employees

Subject to paragraphs d), e) and f) below, permanent Employees will be allocated one hundred and twenty (120) short-term disability days at the start of each fiscal year or the first day of employment. Permanent Employees eligible to access short-term disability coverage shall receive payment equivalent to ninety percent (90%) of regular wages.

Employees on Long Term Supply Assignments

Subject to paragraph d) below, Employees completing a full-year long term supply assignment shall be allocated one hundred and twenty (120) short-term disability days payable at ninety percent (90%) of wages at the start of the assignment. An employee completing a long term supply assignment that is less than a full-year will be allocated one hundred and twenty (120) short-term disability days payable at ninety percent (90%) of wages reduced to reflect the proportion the long term supply assignment bears to the length of the regular work year for the position.

d) Eligibility and Allocation

A sick leave day/short term disability leave day will be allocated and paid in accordance with current Local practice

Any changes to hours of work during a fiscal year shall result in an adjustment to the allocation.

Permanent Employees

The allocations outlined in paragraphs b) and c) above will be provided on the first day of each fiscal year, or the first day of employment, subject to the exceptions below:

Where a permanent Employee is accessing sick leave and/or the short-term disability plan in a fiscal year and the absence continues into the following fiscal year for the same medical condition, the permanent Employee will continue to access any unused sick leave days or short-term disability days from the previous fiscal year's allocation.

A new allocation will not be provided to the permanent Employee until s/he has returned to work and completed eleven (11) consecutive working days at their regular working hours. The permanent Employee's new sick leave allocation will be eleven (11) days at 100%-wages. The permanent Employee will also be allocated one hundred and twenty (120) short term disability days payable at ninety percent (90%) of regular salary reduced by any paid sick days already taken in the current fiscal year.

If a permanent Employee is absent on his/her last regularly scheduled work day and the first regularly scheduled work day of the following year for unrelated reasons, the allocation outlined above will be provided on the first day of the fiscal year, provided the employee submits medical documentation to support the absence, in accordance with paragraph (h).

Employees on Long Term Supply Assignments

Employees completing long term supply assignments may only access sick leave and short term disability leave in the fiscal year in which the allocation was provided. Any remaining allocation may be used in subsequent long term supply assignments, provided these occur within the same fiscal year.

Employees employed in a Long Term Supply Assignment which is less than the ordinary period of employment for the position shall have their sick leave and short term disability allocations pro-rated accordingly.

Where the length of the long term supply assignment is not known in advance, a projected length must be determined at the start of the assignment in order for the appropriate allocation of sick leave/short term disability leave to occur. If a change is made to the length of the assignment, an adjustment will be made to the allocation and applied retroactively.

e) Refresh Provision for Permanent Employees

Permanent Employees returning from LTD or workplace insurance leave to resume their regular working hours must complete eleven (11) consecutive working days at their regular working hours to receive a new allocation of sick/short-term disability leave. If the Employee has a recurrence of the same illness or injury, s/he is required to apply to reopen the previous LTD or WSIB claim, as applicable.

The Local union and Local school board agree to continue to cooperate in the implementation and administration of early intervention and safe return to work processes as a component of the Short Term Leave and Long Term Disability Plans.

In the event the Employee exhausts his/her sick/short-term disability leave allocation from the previous year and continues to work part-time, their salary will be reduced accordingly and a pro-rated sick/short-term allocation for the employee's working portion of the current year will be provided. The new pro-rated sick/short-term leave allocation may not be used to top-up from part-time to full-time hours. Any changes to hours of work during a fiscal year shall result in an adjustment to the allocation.

For the purposes of d) and e) of this article, eleven (11) consecutive working days of employment shall not include a period of leave for a medical appointment, which is related to the illness/injury that had been the reason for the employee's previous absence, but days worked before and after such leave shall be considered consecutive. It shall be the employee's obligation to provide medical confirmation that the appointment was related to the illness/injury.

f) WSIB & LTD

An Employee who is receiving benefits under the Workplace Safety and Insurance Act, or under a LTD plan, is not entitled to benefits under a school board's sick leave and short term disability plan for the same condition unless the employee is on a graduated return to work program then WSIB/LTD remains the first payor.

For clarity, where an employee is receiving partial benefits under WSIB/LTD, they may be entitled to receive benefits under the sick leave plan, subject to the circumstances of the specific situation. During the interim period from the date of the injury/incident or illness to the date of the approval by the WSIB/LTD of the claim, the employee may access sick leave and short term leave and disability coverage. A reconciliation of sick leave deductions made and payments provided, will be undertaken by the school board once the WSIB/LTD has adjudicated and approved the claim. In the event that the WSIB/LTD does not approve the claim, the school board shall deal with the absence consistent with the terms of the sick leave and short term leave and disability plans.

g) Graduated Return to Work

Where an Employee is not receiving benefits from another source and is working less than his/her regular working hours in the course of a graduated return-to-work as the Employee recovers from an illness or injury, the Employee may use any unused sick/short-term disability allocation remaining, if any, for the portion of the day where the Employee is unable to work due to illness or injury. A partial sick/short-term leave day will be deducted for an absence of a partial day in the same proportion as the duration of the absence is to an employee's regular hours.

Where an employee returns on a graduated return to work from a WSIB/LTD claim, and is working less than his/her regular hours, WSIB and LTD will be used to top up the employee's wages, as approved and if applicable.

Where an employee returns on a graduated return to work from an illness which commenced in the previous fiscal year,

- and is not receiving benefits from another source;
- and is working less than his/her regular hours of work;

- and has sick leave days and/or short term disability days remaining from the previous year

The employee can access those remaining days to top up their wages proportional to the hours not worked.

Where an employee returns on a graduated return to work from an illness which commenced in the previous fiscal year,

- and is not receiving benefits from another source,
- and is working less than his/her regular hours of work,
- and has no sick leave days and/ or short term disability days remaining from the previous year

The employee will receive 11 days of sick leave paid at 100% of the new reduced working hours. When the employee's hours of work increase during the graduated return to work, the employee's sick leave will be adjusted in accordance with the new schedule. The Employee will also be allocated one hundred and twenty (120) short term disability days payable at ninety percent (90%) of regular salary proportional to the hours scheduled to work under the graduated return to work. The new pro-rated sick/short-term leave allocation may not be used to top-up from part-time to full-time hours.

h) Proof of Illness

A Board may request medical confirmation of illness or injury and any restrictions or limitations any Employee may have, confirming the dates of absence and the reason thereof (omitting a diagnosis). Medical confirmation is required to be provided by the Employee for absences of five (5) consecutive working days or longer. The medical confirmation may be required to be provided on a form prescribed by the Board.

Where an Employee does not provide medical confirmation as requested, or otherwise declines to participate and/or cooperate in the administration of the Sick Leave Benefit Plan, access to compensation may be suspended or denied. Before access to compensation is denied, discussion will occur between the Union and the school board. Compensation will not be denied for the sole reason that the medical practitioner refuses to provide the required medical information. A school Board may require an independent medical examination to be completed by a medical practitioner qualified in respect of the illness or injury of the Board's choice at the Board's expense.

In cases where the Employee's failure to cooperate is the result of a medical condition, the Board shall consider those extenuating circumstances in arriving at a decision.

i) Notification of Sick Leave Days

The Board shall notify employees and the Bargaining Unit, when they have exhausted their 11 days allocation of sick leave at 100% of-salary.

j) Pension Contributions While on Short Term Disability

Contributions for OMERS Plan Members:

When an employee/plan member is on short-term sick leave and receiving less than 100% of regular salary, the Board will continue to deduct and remit OMERS contributions based on 100% of the employee/plan member's regular pay.

Contributions for OTPP Plan Members:

- i. When an employee/plan member is on short term sick leave and receiving less than 100% of regular salary, the Board will continue to deduct and remit OTPP contributions based on 100% of the employee/plan member's regular pay.
- ii. If the plan employee/plan member exceeds the maximum allowable paid sick leave before qualifying for Long Term Disability (LTD)/Long Term Income Protection (LTIP), pension contributions will cease. The employee/plan member is entitled to complete a purchase of credited service, subject to existing plan provisions for periods of absence due to illness between contributions ceasing under a paid short term sick leave provision and qualification for Long Term Disability (LTD)/Long Term Income Protection (LTIP) when employee contributions are waived. If an employee/plan member is not approved for LTD/LTIP, such absence shall be subject to existing plan provisions.

k) Top-up Provisions

Employees accessing short term disability leave will have access to any unused sick leave days from their last fiscal year worked for the purpose of topping up wages to one hundred percent (100%) under the short term disability leave.

This top-up is calculated as follows:

Eleven (11) days less the number of sick leave days used in the most recent fiscal year worked.

Each top-up from 90% to 100% requires the corresponding fraction of a day available for top-up.

In addition to the top-up bank, top-up for compassionate reasons may be considered at the discretion of the board on a case by case basis. The top-up will not exceed two (2) days and is dependent on having two (2) unused Short Term Paid Leave Days/Miscellaneous Personal Leave Days in the current year. These days can be used to top-up salary under the short term disability leave.

When employees use any part of a short term disability leave day they may access their top up bank to top up their salary to 100%.

l) Sick Leave to Establish EI Maternity Benefits

If the Employee will be able to establish a new EI Maternity Benefit claim in the six weeks immediately following the birth of her child through access to sick leave at 100% of her regular salary, she shall be eligible for up to six weeks leave at 100% of her regular salary without deduction from the sick days or short term disability leave days (remainder of six weeks topped-up as SEB).

C7.00 CENTRAL LABOUR RELATIONS COMMITTEE

C7.1 Preamble

The Council of Trustees' Associations (CTA) and the Canadian Union of Public Employees (CUPE) agree to establish a joint Central Labour Relations Committee (Committee) to promote and facilitate communication between rounds of bargaining on issues of joint interest.

C7.2 Membership

The Committee shall include four (4) representatives from CUPE/SCFP and four (4) representatives from the CTA. The parties may mutually agree to invite the Crown and/or other persons to attend meetings in order to provide support and resources as required.

C7.3 Co-Chair Selection

CUPE/SCFP and CTA representatives will each select one co-chair. The two Co-Chairs will govern the group's agendas, work and meetings.

C7.4 Meetings

The Committee will meet within sixty (60) calendar days of the ratification of the central terms of the collective agreement. The Committee shall meet on agreed upon dates three (3) times in each school year, or more often as mutually agreed.

C7.5 Agenda and Minutes

- a) Agendas of reasonable length detailing issues in a clear and concise fashion will be developed jointly between the co-chairs, translated into the French language and provided to committee members at least ten (10) working days prior to the scheduled date of the meeting. Agenda items should be of general concern to the parties as opposed to personal concerns of individual employees. It is not the mandate of the Committee to deal with matters that have been filed as central disputes. With mutual consent, additional items may be added prior to, or at the meeting.
- b) The minutes will be produced by the CTA and agreed upon by the parties on an item-by-item basis. The minutes will reflect the items discussed and any

agreement or disagreement on solutions. Where the matter is deferred, the minutes will reflect which party is responsible for follow-up. The minutes will be translated into the French language and authorized for distribution to the parties and the Crown once signed by a representative from both parties.

C7.6 Without Prejudice or Precedent

The parties to the Committee agree that any discussion at the Committee will be on a without-prejudice and without-precedent basis, unless agreed otherwise.

C7.7 Cost of Labour Relations Meetings

The parties agree that efforts will be made to minimize costs related to the committee.

C8.00 CUPE/SCFP MEMBERS ON PROVINCIAL COMMITTEES

CUPE/SCFP appointees to Provincial Committees will not have their participation charged against local collective agreement union release time or days.

C9.00 ATTENDANCE AT MANDATORY MEETINGS/SCHOOL EVENTS

Where an employee is required through clear direction by the board to attend work outside of regular working hours, the provisions of the local collective agreement regarding hours of work and compensation, including any relevant overtime/lieu time provisions, shall apply.

Required attendance outside of regular working hours may include, but is not limited to school staff meetings, parent/teacher interviews, curriculum nights, Individual Education Plan and Identification Placement Review Committee meetings, and consultations with board professional staff.

C10.00 CASUAL SENIORITY EMPLOYEE LIST

On or before September 1, 2016, School Boards shall establish a seniority list for casual/temporary employees, where a list does not currently exist. This will be a separate list from permanent employees and shall have as its sole purpose to track length of service with the Board. Further, the list shall have no other force or effect on local collective agreements other than those that may already exist for casual/temporary employees in the 2008-12 local collective agreement.

C11.00 UNION REPRESENTATION AS IT RELATES TO CENTRAL BARGAINING

Negotiations Committee

At all central bargaining meetings with the Employer representatives the Union will be represented by the OSBCC negotiations committee.

The union will be consulted prior to the tendering process for the broader central bargaining location. The tendering process shall be conducted in accordance with the OPS Procurement Directive.

C12.00 STATUTORY LEAVES OF ABSENCE/SEB

C12.1 Family Medical Leave or Critically Ill Child Care Leave

- a) Family Medical Leave or Critically Ill Child Care leaves granted to an employee under this Article shall be in accordance with the provisions of the *Employment Standards Act*, as amended.
- b) The employee will provide to the employer such evidence as necessary to prove entitlement under the ESA.
- c) An employee contemplating taking such leave(s) shall notify the employer of the intended date the leave is to begin and the anticipated date of return to active employment.
- d) Seniority and experience continue to accrue during such leave(s).
- e) Where an employee is on such leave(s), the Employer shall continue to pay its share of the benefit premiums, where applicable. To maintain participation and coverage under the Collective Agreement, the employee must agree to provide for payment for the employee's share of the benefit premiums, where applicable.
- f) In order to receive pay for such leaves, an employee must access Employment Insurance and the Supplemental Employment Benefit (SEB) in accordance with g) to j), if allowable by legislation. An employee who is eligible for E.I. is not entitled to benefits under a school board's sick leave and short term disability plan.

Supplemental Employment Benefits (SEB)

- g) The Employer shall provide for permanent employees who access such Leaves, a SEB plan to top up their E.I. Benefits. The permanent employee who is eligible for such leave shall receive 100% salary for a period not to exceed eight (8) weeks provided the period falls within the work year and during a period for which the permanent employee would normally be paid. The SEB Plan pay will be the difference between the gross amount the employee receives from E.I. and their regular gross pay.
- h) Employees completing a term assignment shall also be eligible for the SEB plan with the length of the benefit limited by the length of the assignment.
- i) SEB payments are available only to supplement E.I. benefits during the absence period as specified in this plan.
- j) The employee must provide the Board with proof that he/she has applied for and is in receipt of employment insurance benefits in accordance with the *Employment Insurance Act*, as amended, before SEB is payable.

C13.00 VESTED RETIREMENT GRATUITY VOLUNTARY EARLY PAYOUT

- C13.1**
- a) An Employee eligible for a Sick Leave Credit retirement gratuity as per Appendix B shall have the option of receiving a payout of his/her gratuity on the employee's first pay date in the 2016/2017 school year, or on the employee's normal retirement date.
 - b) The employee must declare his/her intention to receive the earlier gratuity payout by June 30, 2016.

Pursuant to b) above, the following will apply:

- c) The earlier payout shall be equivalent to the present discounted value of the payout as per Appendix B. The present value shall be based on a discount rate of 7.87% and on the average retirement age of 61 less the employee's age as at June 30, 2016. The average retirement age shall be based on the 2015 OMERS NRA65 data for all CUPE members in district school boards.
- d) If an Employee is older than the average age noted in c) above as at June 30, 2016, the retirement gratuity payout will be discounted by 2% if they chose the early gratuity payout.
- e) Where the employee opts for an early payout of the retirement gratuity, an employee may request the retirement gratuity, or a portion thereof, be transferred to an RRSP or OMERS AVC (Additional Voluntary Contribution) account. The employer will transfer the retirement gratuity, or portion thereof, to an RRSP or OMERS AVC account based on appropriate documentation and forms, completed by the employee, from their financial

institution. The payout, whether transferred as described above or paid directly to the employee, is subject to withholdings in accordance with CRA requirements.

C14.00 SPECIALIZED JOB CLASSES

Where there is a particular specialized job class in which the pay rate is below the local market value assessment of that job class, the parties may use existing means under the collective agreement to adjust compensation for that job class.

APPENDIX A

CUPE / COUNCIL OF TRUSTEES' ASSOCIATIONS NOTICE OF CENTRAL DISPUTE

Name of Board where Dispute Originated:	
CUPE Local & Bargaining Unit Description:	
Policy <input type="checkbox"/> Group <input type="checkbox"/> Individual <input type="checkbox"/> Grievor's Name (if applicable):	
Date Notice Provided to Local School Board/CUPE Local:	
Central Provision Violated:	
Statute/Regulation/Policy/Guideline/Directive at issue (if any):	
Comprehensive Statement of Facts (attach additional pages if necessary):	
Remedy Requested:	
Date:	Signature:
Committee Discussion Date:	
Withdrawn <input type="checkbox"/> Resolved <input type="checkbox"/> Referred to Arbitration <input type="checkbox"/>	
Date:	Co-Chair Signatures:
This form must be forwarded to the Central Dispute Resolution Committee Co-Chairs no later than 30 working days after becoming aware of the dispute.	

APPENDIX B

Sick Leave Credit-Based Retirement Gratuities (where applicable)

- 1) An Employee is not eligible to receive a sick leave credit gratuity after August 31, 2012, except a sick leave credit gratuity that the Employee had accumulated and was eligible to receive as of that day.
- 2) If the Employee is eligible to receive a sick leave credit gratuity, upon the Employee's retirement, the gratuity shall be paid out at the lesser of,
 - a) the rate of pay specified by the board's system of sick leave credit gratuities that applied to the Employee on August 31, 2012; and
 - b) the Employee's salary as of August 31, 2012.
- 3) If a sick leave credit gratuity is payable upon the death of an Employee, the gratuity shall be paid out upon death consistent with the rate in accordance with subsection (2).
- 4) For greater clarity, all eligibility requirements must have been met as of August 31, 2012 to be eligible for the aforementioned payment upon retirement, and except where there are grievances pending, the Employer and Union agree that any and all wind-up payments to which Employees without the necessary years of service were entitled to under Ontario Regulation 01/13: Sick Leave Credits and Sick Leave Credit Gratuities, have been paid.
- 5) For the purposes of the following board, despite anything in the board's system of sick leave credit gratuities, it is a condition of eligibility to receive a sick leave credit gratuity that the Employee have 10 years of service with the board:
 - i. Near North District School Board
 - ii. Hamilton-Wentworth District School Board
 - iii. Huron Perth Catholic District School Board
 - iv. Peterborough Victoria Northumberland and Clarington Catholic District School Board
 - v. Hamilton-Wentworth Catholic District School Board
 - vi. Waterloo Catholic District School Board
 - vii. Limestone District School Board
 - viii. Conseil scolaire de district catholique Centre-Sud
 - ix. Conseil scolaire Viamonde

Other Retirement Gratuities

An employee is not eligible to receive any non-sick leave credit retirement gratuity (such as, but not limited to, service gratuities or RRSP contributions) after August 31, 2012.

LETTER OF UNDERSTANDING #1

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

Re: Status Quo Central Items

The parties agree that the following central issues have been addressed at the central table and that the language relating to these provisions shall remain status quo. For further clarity, if language exists, the following items are to be retained as written in the 2008-2012 collective agreements, subject to modifications made during local bargaining in 2012-2013, if any. The issues listed below shall not be subject to local bargaining or to amendment by the local parties.

Issues:

Paid Vacations and Holidays (including statutory holidays)

Work week

Work year (excluding local arrangements related to summer scheduling)

Hours of Work

Preparation Time

Staffing levels (including staffing levels related to permits and leases and replacement staffing)

Job Security as it Relates to Technological Change

Allowances

LETTER OF UNDERSTANDING #2

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

Re: Status Quo Central Items Requiring Amendment and Incorporation

The parties agree that the following central issues have been addressed at the central table and that the provisions shall remain status quo. The following language must, however, be aligned with current local provisions in order to reflect the provisions of CUPE's 2012-2013 MOUs. The following issues are not subject to local bargaining or amendment by the local parties. Any disputes arising from these provisions may form the subject of a central dispute.

PREGNANCY/PARENTAL LEAVES OF ABSENCE/SEB

The following pregnancy/parental/SEB language provides a change from an entitlement of six (6) weeks to an entitlement of eight (8) weeks.

Common Central Provisions

Maternity Benefits/SEB Plan

- a) A full-time and part-time permanent Employee who is eligible for pregnancy leave pursuant to the Employment Standards Act, shall receive *100% salary through a Supplemental Employment Benefit (SEB) plan for a total of *eight (8) weeks (*or insert local superior provision reflecting status quo) immediately following the birth of her child with no deduction from sick leave or the Short Term Leave Disability Program (STLDP).
- b) Full-time and part-time permanent Employees not eligible for a SEB plan as a result of failing to qualify for Employment Insurance will be eligible to receive 100% of salary from the employer for a total of eight (8) weeks with no deduction from sick leave or STLDP.
- c) Where any part of the eight (8) weeks falls during the period of time that is not eligible for pay (i.e. summer, March Break, etc.), the full eight (8) weeks of top up shall continue to be paid.

- d) Full-time and part-time permanent Employees who require longer than the eight (8) week recuperation period shall have access to sick leave and the STLDP subject to meeting the requirements to provide acceptable medical verification.
- e) Employees completing a long term supply assignment of 6 months or more shall be eligible for the SEB as described herein for a maximum of eight (8) weeks or the remaining number of weeks in their current assignment after the birth of her child, whichever is less.
- f) Employees not defined above have no entitlement to the benefits outlined in this article.

SHORT TERM PAID LEAVES

The parties agree that the issue of short term paid leaves has been addressed at the central table and the provisions shall remain status quo to the provisions in current local collective agreements. For clarity, any leave of absence in the 2008-2012 local collective agreement that utilized deduction from sick leave, for reasons other than personal illness shall be granted without loss of salary or deduction from sick leave, to a maximum of 5 days per school year. For further clarity, those boards that had 5 or less shall remain at that level. Boards that had 5 or more days shall be capped at 5 days. These days shall not be used for the purpose of sick leave, nor shall they accumulate from year to year.

Short term paid leave provisions in the 2008-12 collective agreement that did not utilize deduction from sick leave remain status quo and must be incorporated into the 2014-17 collective agreement.

Provisions with regard to short term paid leaves shall not subject to local bargaining or amendment by local parties. However, existing local collective agreement language may need to be revised in order to align with the terms herein.

WSIB TOP-UP

If a class of employees was entitled to receive WSIB top-up on August 31, 2012 deducted from sick leave, the parties must incorporate those same provisions without deduction from sick leave. The top-up amount to a maximum of four (4) years and six (6) months shall be included in the 2014-17 collective agreement.

Employees who were receiving WSIB top-up on September 1, 2012 shall have the cap of four (4) years and six (6) months reduced by the length of time for which the employee received WSIB top-up prior to September 1, 2012.

RETIREMENT GRATUITIES

The issue of Retirement Gratuities has been addressed at the Central Table and the parties agree that formulae contained in current local collective agreements for calculating Retirement

Gratuities shall govern payment of retirement gratuities and be limited in their application to terms outlined in Appendix B - Retirement Gratuities.

The following language shall be inserted unaltered as a preamble to Retirement Gratuity language into every collective agreement:

“Retirement Gratuities were frozen as of August 31, 2012. Employees are not eligible to receive a sick leave credit gratuity or any non-sick leave credit retirement gratuity (such as, but not limited to, service gratuities or RRSP contributions) after August 31, 2012, except a sick leave credit gratuity that the Employee had accumulated and was eligible to receive as of that day. The following language applies only to those employees eligible for the gratuity above.”

SICK LEAVE TO BRIDGE LONG TERM DISABILITY WAITING PERIOD

Boards which have Long Term Disability waiting periods greater than 131 days shall ensure there is language that accords with the following entitlement:

An Employee who has applied for long-term disability is eligible for additional short term disability leave days up to the maximum difference between the long-term disability waiting period and 131 days. The additional days shall be payable at 90% and shall be used only to bridge the employee to the long-term disability waiting period if, under a collective agreement in effect on August 31, 2012, the employee was required to wait more than 131 days before being eligible for benefits under a long-term disability plan and the collective agreement did not allow the employee the option of reducing that waiting period.

LETTER OF UNDERSTANDING #3

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

Re: Job Security: Protected Complement

The parties acknowledge that education workers contribute in a significant way to student achievement and well-being.

1. Effective as of the date of central ratification, the Board undertakes to maintain its Protected Complement, except in cases of:
 - a. A catastrophic or unforeseeable event or circumstance;
 - b. Declining enrolment;
 - c. Funding reductions directly related to services provided by bargaining unit members;
or
 - d. School closure and/or school consolidation.
2. Where complement reductions are required pursuant to 1. above, they shall be achieved as follows:
 - a. In the case of declining enrolment, complement reductions shall occur at a rate not greater than the rate of student loss, and
 - b. In the case of funding reductions, complement reductions shall not exceed the amount of such funding reductions, and
 - c. In the case of school closure and/or school consolidation, complement reductions shall not exceed the number of staff prior to school closure/consolidation at the affected location(s).

Local collective agreement language will be respected, regarding notification to the union of complement reduction. In the case where there is no local language the board will notify the union within twenty (20) working days of determining there is to be a complement reduction.

3. For the purpose of this Letter of Understanding, at any relevant time, the overall protected complement is equal to:
 - a. The FTE number (excluding temporary, casual and/or occasional positions) as at date of central ratification. The FTE number is to be agreed to by the parties through

- consultation at the local level. Appropriate disclosure will be provided during this consultation. Disputes with regard to the FTE number may be referred to the Central Dispute Resolution Process.
- b. Minus any attrition, defined as positions that become vacant and are not replaced, of bargaining unit members which occurs after the date of central ratification.
4. Reductions as may be required in 1. above shall only be achieved through lay-off after consultation with the union on alternative measures, which may include:
- a. priority for available temporary, casual and/or occasional assignments;
 - b. the establishment of a permanent supply pool where feasible;
 - c. the development of a voluntary workforce reduction program (contingent on full provincial government funding).
5. The above language does not allow trade-offs between the classifications outlined below:
- a. Educational Assistants
 - b. DECEs
 - c. Secretaries
 - d. Custodians
 - e. Cleaners
 - f. Information Technology Staff
 - g. Library Technicians
 - h. Instructors
 - i. Supervisors
 - j. Central Administration
 - k. Professionals
 - l. Maintenance/Trades
6. The parties agree that where local collective agreement language currently exists that provides a superior benefit specifically with regard to protected complement FTE number, that language will prevail.
7. This Letter of Understanding expires on August 30, 2017.

LETTER OF UNDERSTANDING #4

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

Re: Professional Development

The parties acknowledge the important skills and expertise that education workers contribute to Ontario's publicly funded schools and their commitment to improving student achievement.

Where the Ministry provides funds to local school boards specifically to provide professional development to employees represented by CUPE, local school boards shall consult with local CUPE representatives prior to finalizing and delivering the funded professional development.

LETTER OF UNDERSTANDING #5

BETWEEN

**The Council of Trustees' Associations/
Le Conseil d'associations d'employeurs
(hereinafter called 'CTA/CAE')**

AND

**The Canadian Union of Public Employees
(hereinafter called 'CUPE')**

RE: Scheduled Unpaid Leave Plan

The following Scheduled Unpaid Leave Plan (SULP) replaces the current Voluntary Leave of Absence program (VLAP) and is available to all permanent employees for the 2015-2016 and 2016-2017 school years. Employees approved for SULP days shall not be replaced.

For employees who work a 10-month year a school board will identify:

- 1) up to two (2) Professional Activity days in the 2015-2016 school year;
 - 2) two (2) Professional Activity days in the 2016-2017 school year;
- that will be made available for the purpose of the SULP.

For employees whose work year is greater than ten (10) months, a school board will designate days, subject to system and operational requirements, which will be available for the purpose of the SULP in each of the 2015-2016 and 2016-2017 school years. These employees will be eligible to apply for up to two (2) days leave in each of these years.

For the 2015-2016 school year, the available day(s) will be designated no later than thirty (30) days after central ratification. All interested employees will be required to apply, in writing, for the leave within ten (10) days of local ratification, or within ten (10) days from the date upon which the days are designated, whichever is later. For the 2016-2017 school year, the days will be designated by June 15, 2016. All interested employees will be required to apply, in writing, for leave for the 2016-2017 school year by no later than September 30, 2016. Approval of the SULP is subject to system and operational needs of the board and school. Approved leave days may not be cancelled or changed by the school board or the employee. Exceptions may be considered with mutual consent. Half day leaves may be approved, subject to the system and operational needs of the board and school.

For employees enrolled in the OMERS pension, the employer will deduct the employee and employer portion of pension premiums for the unpaid days and will remit same to OMERS.

The following clause is subject to either Teacher Pension Plan amendment or legislation:

Within the purview of the Teachers' Pension Act (TPA), the Minister of Education will seek an agreement from the Ontario Teachers' Federation (OTF) to amend the Ontario Teachers' Pension Plan (OTPP) to allow for adjusting pension contributions to reflect the Scheduled Unpaid Leave Plan (SULP) with the following principles:

- i) Contributions will be made by the employee/plan member on the unpaid portion of each unpaid day, unless directed otherwise in writing by the employee/plan member;
- ii) The government/employer will be obligated to match these contributions;
- iii) The exact plan amendments required to implement this change will be developed in collaboration with the OTPP and the co-sponsors of the OTPP (OTF and the Minister of Education); and
- iv) The plan amendments will respect any legislation that applies to registered pension plans, such as the Pension Benefits Act and Income Tax Act.

This Letter of Understanding expires on August 30, 2017.

LETTER OF UNDERSTANDING #6

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

AND

The Crown

Re: Education Worker Diverse and Inclusive Workforce Committee – Terms of Reference

PREAMBLE:

The parties recognize the importance of embracing diversity and moving beyond tolerance and celebration to inclusivity and respect in our workplaces. Organizations are strengthened when employers can draw upon a broad range of talents, skills, and perspectives. The parties further recognize that a diverse and inclusive workforce may contribute to student success.

I. MANDATE OF THE COMMITTEE

The mandate of the Education Worker Diverse and Inclusive Workforce Committee is to jointly explore and identify best practices that support diversity, equity, inclusion and to foster diverse and inclusive workforces reflective of Ontario's diverse communities.

II. DELIVERABLES

The Education Worker Diverse and Inclusive Workforce Committee (Committee) will produce a summary document that will identify and promote best practices that support diversity, equity, and inclusion.

The summary document, once endorsed by the Canadian Union of Public Employees (CUPE) and the Council of Trustees' Associations (CTA), will be translated into the French language and distributed to all school boards where there are CUPE-represented members employed and to all corresponding CUPE/SCFP locals no later than October 31, 2016.

III. SCOPE

The Committee will explore and identify best practices that promote the continued development of positive, respectful work environments committed to equity, inclusion and diversity.

All best practices identified in the summary document should be based on evidence of positive results/impact.

The committee's scope will include identifying best practices related to recruitment, promotion and retention of a diverse workforce. As part of their work the committee will consider relevant resources applicable to the education sector, such as PPM 119 of April 2013, and the recommendations of the Ontario First Nation, Métis, Inuit Education Policy Framework, 2007.

The committee's scope will not include employment equity and/or pay equity.

IV. MEMBERSHIP

The Committee shall include nine (9) members - five (5) representatives from CUPE/SCFP and four (4) representatives from the CTA. Up to two (2) advisors from the Ministry of Education shall act in a resource capacity to the committee. Other persons may attend meetings in order to provide support and resources as mutually agreed. Up to one (1) representative from each of the four (4) employee bargaining agencies at the other education workers tables will be invited to participate on the Committee.

V. CO-CHAIR SELECTION

CUPE/SCFP and CTA representatives will each select one co-chair. The two Co-Chairs will govern the group's work and meetings.

VI. MEETINGS

The Committee will meet within sixty (60) calendar days of the ratification of the central terms of the collective agreement. The Committee will meet three (3) times during its term, or more if mutually agreed. The term of the Committee shall end on or before October 31, 2016 unless mutually agreed to by the Parties to extend.

VII. OTHER

The parties agree that if there is a dispute between the parties regarding whether or not the committee has been properly established within the required timeframes, this dispute may be grieved through the central grievance process, and that this is the only dispute related to the committee and the work it is undertaking that could be the subject of a grievance.

LETTER OF UNDERSTANDING #7

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

Re: Long Term Disability (LTD) Plan Working Group

The parties acknowledge that increases in premiums for LTD plans are a significant issue.

The parties agree to review the issue of affordability of LTD plans for both boards and employees who pay LTD premiums (in whole or in part) in support of existing LTD plan arrangements.

A joint central committee of board staff and CUPE members shall be established to review options related to sustainability and affordability of LTD plans. Options may include, but are not limited to:

- i) Exploring a common plan through a competitive tendering process
- ii) Exploring other delivery options through a competitive tendering process
- iii) Reviewing joint proposals from local boards and units to effect changes to plan design to reduce costs.

The central parties agree that local boards and units may discuss and mutually agree, outside of the context of collective bargaining, to make plan design changes with a view to reducing premiums.

LETTER OF UNDERSTANDING #8

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

Re: Sick Leave

The parties agree that any existing collective agreement provisions with respect to the items listed below, that do not conflict with the clauses in the Sick Leave article in the Central Agreement, shall remain status quo for the term of this collective agreement:

1. Responsibility for payment for medical documents.
2. Sick leave deduction for absences of partial days.

The parties further agree that any graduated return to work plans that are approved no later than 30 days after the ratification of local collective agreement terms shall not be negatively impacted by the provisions of Article C6.1 g) for the fiscal year in which they were approved.

LETTER OF UNDERSTANDING #9

BETWEEN

**The Ontario Public School Board Association
(hereinafter called 'OPSBA')**

AND

**The Ontario Catholic School Trustees Association
(hereinafter called 'OCSTA')**

AND

**L'Association des conseils scolaires des écoles publiques de l'Ontario
(hereinafter called 'ACEPO')**

AND

**L'Association franco-ontarienne des conseils scolaires catholiques
(hereinafter called 'AFOCSC')**

AND

**The Canadian Union of Public Employees / Syndicat canadien de la fonction publique
(hereinafter called 'CUPE')**

AND

The Crown

RE: Benefits

The parties agree that, once all employees to whom this memorandum of settlement of the central terms applies become covered by the Employee Life and Health Trust (ELHT) contemplated by this Letter of Understanding, all references to life, health and dental benefits in the applicable local collective agreement shall be removed from that local agreement. The employee representatives, the employer representatives, and the Crown, intend to establish an Education Sector ELHT, (hereinafter, the "Trust"), to provide benefits to education workers in the Province of Ontario employed by District School Boards, District School Area Boards and Public School Authorities (hereinafter, the "Boards") in accordance with section 144.1 of the *Income Tax Act* (Canada) ("ITA"). Boards' benefit plans can only be moved into the Trust, such that the Trust will be in compliance with the ITA and Canada Revenue Agency administrative requirements for an ELHT (the "ELHT Requirements"). It is intended that the Trust be effective no later than February 1, 2017 and that benefit plans will participate in this Trust no later than August 31, 2017. The date on which a benefit plan commences participation in the Trust shall be referred to herein as the "Participation Date".

The Trustees, as defined in 2.1.0, shall consult with other Trusts and Boards to move all employee groups into the Trust(s) at the same time, subject to the Trust being ready to accept the employee group(s).

The parties acknowledge that the establishment of the Trust represents a substantial commitment both within and beyond the term of the current collective agreement. This letter of understanding is conditional upon its terms continuing in full force and effect beyond the

termination date of the collective agreement, and is made in detrimental reliance upon such continuation. The terms of this letter of understanding will form the basis for a trust agreement setting out the terms of the ELHT to be approved by the parties.

1.0.0 PRINCIPLES

- 1.1.0 The Trust will be governed by the employee representatives and the employer representatives, together with the Crown;
- 1.2.0 The Trust will be responsible for the delivery of benefits on a sustainable, efficient and cost effective basis;
- 1.3.0 Services provided by the Trust to be available in both official languages, English and French; and
- 1.4.0 Other employee groups in the education sector may join the Trust. The Trust will develop an affordable benefits plan that is based on the funding available to the employee groups.

2.0.0 GOVERNANCE

2.1.0 Board of Trustees

- 2.1.1 The Board of Trustees will be comprised of 9 voting members that include 5 CUPE employee representatives and 4 employer representatives, including the Crown. The Board of Trustees will include among its members 2 independent experts, 1 appointed by the employer representatives and 1 appointed by the employee representatives. CUPE will be responsible for the appointment and termination of the employee Trustees, and the employer representatives will be responsible for the appointment and termination of the employer Trustees.
- 2.1.2 The appointed independent experts will:
 - a. Be retained from outside of the following organizations: the Trust, the shared services office supporting the Trusts, the union, the Boards, the CTA and the Crown;
 - b. Have no conflict of interest in their role as trustee on the Benefit Plan Trust; and
 - c. Be accredited from one of the following fields: actuarial science, law or accounting; or in lieu of such affiliation hold the Certified Employee Benefit Specialist (CEBS) designation; and have demonstrated experience with employee benefit plans.
- 2.1.3 Other experts may be invited to the Trust in an advisory capacity and will not maintain any voting rights.
- 2.1.4 All voting requires a simple majority to carry.
- 2.1.5 CUPE shall determine the initial term and subsequent succession plan for their Trustees. The CTA and the Crown acting together, shall determine the initial term and subsequent succession plan for their Trustees. A succession plan will be designed for the Trustees so that the terms of no more than three Trustees expire in any twelve month period. The term of a Trustee shall be limited to a maximum of 9 years.

3.0.0 ELIGIBILITY and COVERAGE

3.1.0 The following employees represented by CUPE are eligible to receive benefits through this Trust:

- 3.1.1 The Trust will maintain eligibility for CUPE represented employees in accordance with the Local Collective Agreement (“CUPE represented employees”) as of August 31, 2014. The Trust will also be permitted to provide coverage to other employee groups in the education sector with the consent of their bargaining agents and employer or, for non-union groups, in accordance with an agreement between the Trustees and the applicable Board. These groups must request inclusion in the Trust, and must agree to comply with the Trust’s financial, data and administrative requirements.
- 3.1.2 Retirees who were, and still are, members of a Board benefit plan at August 31, 2013 based on the prior arrangements with the Board.
- 3.1.3 Retirees who became members of a Board benefit plan after August 31, 2013 and before the Board participation date are segregated in their own experience pool, and the premiums are fully paid by the retirees.
- 3.1.4 No individuals who retire after the Board participation date are eligible.
- 3.1.5 Retirees that join are subject to the provisions in 3.1.2 through 3.1.4.
- 3.2.0 The benefit plan may provide coverage for health (including but not limited to vision and travel), life and dental benefits including accidental death and dismemberment (AD&D), medical second opinion, and navigational support, subject to compliance with section 144.1 of the ITA. After the initial establishment of the Trust, other employee benefit programs may be considered for inclusion, only if negotiated in future central collective agreements.
- 3.3.0 Each Board shall provide to the Trustees of the Education Sector ELHT directly, or through its Insurance Carrier of Record, Human Resource Information System (HRIS) information noted in Appendix A within one (1) month of notification from the Trustees, in the format specified by the Trustees.

4.0.0 FUNDING

4.1.0 Start-Up Costs

- 4.1.1 The Government of Ontario will provide:
 - a. A one-time contribution to the Trust equal to 15% of annual benefit costs to establish a Claims Fluctuation Reserve (“CFR”). The amount shall be paid to the Trust on September 1, 2016.
 - b. A one-time contribution of a half month’s premium cost (4.15% of annual benefit costs) to the Trust, to cover start-up costs and/or reserves.
- 4.1.2 The one-time contributions in 4.1.1 (a) and (b) will be based on the actual cost per year for benefits (i.e. claims, premiums, administration, tax, risk or profit charges, pool charges, etc.) as reported on the insurance carrier’s most recent yearly statement for the year ending no later than August 31, 2015.
- 4.1.3 The Crown shall pay to CUPE \$3.5million of the startup costs referred to in s. 4.1.1 (b) on the date of ratification of the central agreement and shall pay to

CUPE a further \$3.5 million subject to the maximum amount referred to in s. 4.1.1 (b) by June 1, 2016. The balance of the payments, if required under s. 4.1.1 (b), shall be paid by the Crown to CUPE on the day the Trust becomes effective.

- 4.1.4 On the day the Board commences participation in the Trust, or as soon as reasonably and feasibly possible thereafter, all eligible and available surpluses in board-owned defined benefit plans will be transferred to the Trust in an amount equal to each employee's pro rata share based on the amount of the employee's co-share payment of each benefit. The remaining portion of the Board's surplus will be retained by the Boards.
- 4.1.5 Where there are active grievances related to surpluses, deposits and/or reserves, the amount in dispute shall be internally restricted by the Board until the grievance is settled.
- 4.1.6 All Board reserves for Incurred But Not Reported ("IBNR") claims and CFR, will remain with the existing carriers until those reserves are released by the carriers based on the terms of existing contracts.
- 4.1.7 Upon release of each Board's IBNR and CFR by the carriers, the reserves will be retained by the applicable Board. For the Administrative Services Only plans (ASO), a surplus (including any deposits on hand) that is equal to or less than 15% of the Board's annual benefit cost will be deemed to be a CFR and IBNR and will be retained by the applicable Board upon its release by the carriers. Where a surplus (including deposits on hand) exceeds 15% of the annual benefit cost, the remaining amount will be apportioned to the Board and the Trust based on the employers' and employees' premium share.
- 4.1.8 For policies where the experience of multiple groups has been combined, the existing surplus/deficit will be allocated to each group based on the following:
 - a. If available, the paid premiums or contributions or claims costs of each group; or
 - b. Failing the availability of the aforementioned financial information by each group, then the ratio using the number of Full Time Equivalent positions (FTE) covered by each group in the most recent policy year will be used.

The methodology listed above will be applicable for each group leaving an existing policy where the experience of more than one group has been aggregated. Policies where the existing surplus/deficit has been tracked independently for each group are not subject to this provision.

- 4.1.9 Boards with deficits will recover the amount from their CFR and IBNR. Any portion of the deficit remaining in excess of the CFR and IBNR will be the responsibility of the board.
- 4.1.10 In order to ensure the fiscal sustainability of said benefit plans, the Boards will not make any withdrawal, of any monies, from any health care benefit plan reserves, surpluses and/or deposits nor decrease in benefit plan funding unless in accordance with B-Memo B04:2015. It is the parties understanding that the Ministry of Education Memo B04:2015 applies and will remain in effect until Board plans become part of the Trust.

4.1.11 The Trust shall retain rights to the data and the copy of the software systems.

4.2.0 On-Going Funding

4.2.1 For the current term the Boards agree to contribute funds to support the Trust as follows:

- a. The Boards will continue to provide benefits in accordance with the existing benefit plans and co-pay arrangements until the Employees' Participation Date in the Trust.
- b. By January 31, 2016 for Board-owned defined benefit plans, the Boards will calculate the annual amount of i) divided by ii) which will form the base funding amount for the Trust;
 - i) "Total cost" means the total annual cost of benefits and related costs including but not limited to claims, administration expenses, insurance premiums, consulting, auditing and advisory fees and all other costs and taxes, as reported on the insurance carrier's most recent yearly statement, and if any, premium costs on other district school area board or public school authority statements, for the year ending no later than August 31, 2015. The aforementioned statements are to be provided to the Ministry of Education.
Total Cost excludes retiree costs.
The average number of Full-Time Equivalent (FTE) positions in the bargaining unit as at October 31st and March 31st for the period consistent with this clause.
 - ii) For purposes of (b) (ii) above, the FTE positions will be those consistent with Appendix H of the Education Finance Information System (EFIS) for job classifications that are eligible for benefits.
- c. All amounts determined in this Article 4 shall be subject to a due diligence review by CUPE. The Boards shall cooperate fully with the review, and provide, or direct their carriers or other agents to provide, all data requested by CUPE. If any amount cannot be agreed between CUPE and a Board, the parties to this agreement shall make every effort, in good faith, to resolve the issue using the data provided, supporting information that can be obtained and reasonable inferences on the data and information. If no resolution to the issue can be achieved, it shall be subject to the Central Dispute Resolution process.
 - i) In order that each party be satisfied that the terms of this LoA provide a satisfactory basis to deliver benefits in the future, each party reserves the right to conduct a thorough due diligence with respect to existing benefit arrangements (including benefit terms, eligibility terms, FTE positions in the bargaining unit, historic costs and trends). Prior to May 1, 2016 if either CUPE or the CTA concludes, in good faith, following its due diligence review, that the terms of the LoA do not provide a satisfactory basis for the provision of benefits, then

either CUPE or the CTA may declare this LoA to be null and void, in which case no Participation Dates for any Boards shall be triggered and the benefits related provisions of all local agreements, as they were before the adoption of this LoA, shall remain in full force and effect.

- ii) Prior to September 1, 2016, on any material matter, relating to Article 4.2.1 (a) or (b), CUPE or the CTA can deem this Letter of Understanding to be null and void. No Participation Dates for any Board shall be triggered and the benefits related provisions of all local agreements, as they were before the adoption of this Letter of Understanding, shall remain in full force and effect.
- d. On the participation date, the Boards will contribute to the Trust the amount determined in s. 4.2.1 (b) plus 4% for 2015-16 and 4% for 2016-17.
- e. On the participation date, for defined contribution plans, the Boards will contribute to the Trust, the FTE amount indicated in the collective agreements for the fiscal year 2013-14, plus 4% for 2015-16 and 4% for 2016-17.
- f. An amount of \$300 per FTE, in addition to (d) and (e) will be added to the base funding in 2016-17.
- g. With respect to 4.2.1 (b), and (d) above, the contributions provided by the Boards will include the employees' share of the benefit cost as specified by the Board's collective agreement until such time that the employees' share is adjusted as determined by the Trust and subject to the funding policy.
- h. The terms and conditions of any existing Employee Assistance Program/Employee Family Assistance Program shall remain the responsibility of the respective Board and not the Trust maintaining current employer and employee co-share where they exist. The Board shall maintain its contribution to all statutory benefits as required by legislation (including but not limited to Canada Pension Plan, Employment Insurance, Employer Health Tax, etc.).
- i. The FTE used to determine the Board's benefits contributions will be based on the average of the Board's FTE as of October 31st and March 31st of each year.
- j. Funding previously paid under (b), (d), (e) and (f) above will be reconciled to the agreed October 31st and March 31st FTE and any identified difference will be remitted to the Trust in a lump sum on or before the last day of the month following reconciliation.
- k. In the case of a dispute regarding the FTE number of members for whom the provincial benefits package is being provided, the dispute will be resolved between the Board and CUPE Central.
- l. As of the day that a Board commences participation in the Trust, the Board will submit an amount equal to 1/12th of the negotiated funding amount as defined in s. 4.2.1 (b), (d), (e) and (f) to the Plan's Administrator on or before the last day of each month.

- m. The Trust will provide the necessary information needed by Boards to perform their administrative duties required to support the Trust in a timely and successful manner.
- n. The Boards shall deduct premiums as and when required by the Trustees of the Education Sector ELHT from each member's pay on account of the benefit plan(s) and remit them as and when required by the Trustees to the Trust Plan Administrator of the Education Sector ELHT with supporting documentation as required by the Trustees.
- o. Funding for retirees shall be provided based on the costs or premiums in 2014-15 associated with those retirees described in 3.1.2 plus 4% in 2015-16 and 4% in 2016-17. Employer and employee co-shares will remain status quo per local collective agreements in place as of August 31, 2014 or per existing benefit plan provisions.
- p. Some CUPE members currently contribute to the payment of employee benefits at varying levels in accordance with local collective agreements, generally referred to as "Co-Pay". This amount is often expressed as a percentage of premiums. Should the Trust choose to reduce or eliminate the "Co-Pay", the Crown will provide funding equivalent to the reduction of the "Co-Pay" amount. The reduction to the percentage of premium, if any, will be converted to a per FTE amount based on the 2014-15 premiums. This election must be made by the last board's participation date.

5.0.0 SHARED SERVICES

- 5.1.0 CUPE agrees to adopt a shared services model that will allow other Trusts to join the shared services model. The shared services office of the Trust is responsible for the services to support the administration of benefits for the members, and to assist in the delivery of benefits on a sustainable, efficient and cost effective basis recognizing the value of benefits to the members.
- 5.1.1 Shared administrative services will be provided as determined by the Transition Committee for a period of three years from the commencement of the first participation date and will be competitively procured within 4 years from the employee representative group's last participation date but shall be no later than August 31, 2021.
- 5.1.2 Any procurement of services to support the administration of benefits conducted by the shared services office should include the procurement of these services for all Trusts to ensure the most efficient and cost effective service.

6.0.0 BOARD OF TRUSTEES' RESPONSIBILITIES

- 6.1.0 The Board of Trustees will be responsible for the operational and financial sustainability of the Trust, including, but not limited to:
 - a. The trustees' selection of the Trust auditors and the Trust actuaries;
 - b. The annual reports of the Auditors and actuaries;
 - c. The actuarial report, including any report obtained under Section 7.0.0 regarding recommendations on sustainability of the initial plan design.

- The first actuarial report shall be received no sooner than six months and no later than twelve months following the implementation of the initial plan;
 - d. The actuarial report, including any report obtained under Section 7.0.0 regarding recommendations on sustainability, of any subsequent changes to the plan design;
 - e. The design and adoption of the initial Benefit Plan and any amendments to the Benefit Plan;
 - f. Validation of the sustainability of the respective Plan Design;
 - g. Establishing member contribution or premium requirements, and member deductibles if any;
 - h. Identifying efficiencies that can be achieved;
 - i. The design and amendment of the Funding policy;
 - j. The investment Policy and changes to the Investment Policy; and
 - k. Procurement of adjudicative, administrative, insurance, consultative and investment services.
- 6.2.0 Under the Funding Policy, Trust surpluses may not be refunded or distributed in cash, but may be used, as determined by the Trust to:
- a. Fund future claims in conjunction with the fixed funding and term contained in the collective bargaining agreement;
 - b. Fund claims stabilization or other reserves;
 - c. Improve plan design;
 - d. Expand eligibility (subject to Section 3.1.2 through to 3.1.4); and
 - e. Reduce member premium share if any.
- 6.3.0 Under the Funding Policy, actual and projected funding deficiencies of the Trust will be addressed no later than the next regular plan renewal (as of September 1st) using one or more of the following methods, as determined by the Trust:
- a. Use of existing claims stabilization funds;
 - b. Increased member share premium;
 - c. Change plan design;
 - d. Cost containment tools;
 - e. Reduced plan eligibility;
 - f. Cessation of benefits, other than life insurance benefits; and
 - g. Identify other sources of revenue.
- 6.4.0 The Trustees shall adopt policies for the appointment, review, evaluation and, if necessary, termination, of their service providers.
- 6.5.0 The Trust shall provide “trustee liability insurance” for all Trustees.

7.0.0 ACCOUNTABILITY

- 7.1.0 Actuaries and external auditors will be appointed by the Trust. Audited financial statements and an actuarial evaluation report will be obtained for the Trust on an annual basis. The actuarial report will include projections for the Trust for a period of not less than 3 years into the future.

- 7.2.0 The Funding Policy shall require the Trustees to take necessary actions or decisions during a period in which the CFR is less than 8.3% of annual expenses over a projected three year period.
If the motion to adjust the plan design does not pass, the Trust will increase member share premiums to restore the balance to at least 8.3% of total annual expenses.
- 7.3.0 Copies of the audited financial statements and the actuarial evaluation report requested in section 7.1.0 will be shared with CUPE, OPSBA, OCSTA, ACEPO, AFOCSC and the Ministry of Education.

8.0.0 TRANSITION COMMITTEE

- 8.1.0 A transition committee comprised of the employee representatives and the employer representatives, including the Crown, will be established by January 31, 2016 to address all matters that may arise in the creation of the Trust.

9.0.0 PAYMENTS

- 9.1.0 The Crown will make a recommendation to the Lieutenant Governor in Council to amend the Grants for Student Needs funding regulation indicating that the funding amount provided for benefit of the Trust must be provided to the Trust in accordance with the Letter of Understanding.

10.0.0 ENROLMENT

- 10.1.0 For new hires, each Board shall distribute benefit communication material as provided by the Union to all new members within 15 to 30 days from their acceptance of employment.
- 10.2.0 For existing members, the Board shall provide the Human Resource Information System (HRIS) file with all employment information to the Trustees as outlined in Appendix A.
- 10.3.0 Where an HRIS file cannot be provided, the Board shall provide the required employment and member information to the Trust Plan Administrator in advance of the member commencing active employment or within the first 30 days of the employment date. The Board shall enter any subsequent demographic or employment changes as specified by the Trust Plan Administrator within one week of the change occurring.
- 10.4.0 The benefit administration for all leaves, including Long-Term Disability where applicable, will be the responsibility of the Trust Plan Administrator. During such leaves, the Board shall continue to provide HRIS information and updates as defined above.
- 10.5.0 Each Board shall provide updated work status in the HRIS file a minimum of 2 weeks in advance of the leave or within the first 15 days following the start of the absence.

11.0.0 ERRORS AND OMISSIONS RELATED TO DATA

- 11.1.0 Board errors and retroactive adjustments shall be the responsibility of the Board.
- 11.2.0 If an error is identified by a Board, notification must be made to the Trust Plan Administrator within seven (7) days of identification of the error.
- 11.3.0 Upon request by the Trust Plan Administrator, a Board shall provide all employment and member related information necessary to administer the provincial benefit plan(s). Such requests shall not be made more frequently than twice in any 12 month period.
- 11.4.0 The Trust Plan Administrator has the right to have their representatives review employment records related to the administration of the Trust a Board office during regular business hours upon 30 days written notice.

12.0.0 CLAIMS SUPPORT

- 12.1.0 The Board shall complete and submit the Trust Plan Administrator's Waiver of Life Insurance Premium Plan Administrator Statement to the Trust Plan Administrator for life waiver claims when the Trust Plan Administrator does not administer and adjudicate the LTD benefits.
- 12.2.0 Each Board shall maintain existing beneficiary declarations. When required, the Board shall provide the most recent beneficiary declaration on file to the Trust Plan Administrator. Any changes subsequent to the participation date shall be the responsibility of the Trust.

13.0.0 PRIVACY

- 13.1.0 In accordance with applicable privacy legislation, the Trust Plan Administrator shall limit the collection, use and disclosure of personal information to information that is necessary for the purpose of providing benefits administration services. The Trust Plan Administrator's policy shall be based on the Personal Information Protection and Electronic Documents Act (PIPEDA).

Appendix A – HRIS File

Each Board may choose to provide to the Trustees of the Education Sector ELHT directly, or provide authorization through its Insurance Carrier of Record to gather, the following information within one (1) month of notification from the Trustees. The following information shall be provided in the formats agreed to by the Trustees of the Education Sector ELHT and the employer representatives:

- a. complete and accurate enrolment files for all members, member spouses and eligible dependents, including:
 - i. names;
 - ii. benefit classes;
 - iii. plan or billing division;
 - iv. location;
 - v. identifier;
 - vi. date of hire;
 - vii. date of birth;
 - viii. gender;
 - ix. default coverage (single/couple/family).
- b. estimated return to work dates;
- c. benefit claims history as required by the Trustees;
- d. list of approved pre-authorizations and pre-determinations;
- e. list of approved claim exceptions;
- f. list of large amount claims based on the information requirements of the Trustees;
- g. list of all individuals currently covered for life benefits under the waiver premium provision; and
- h. member life benefit coverage information.

LETTER OF UNDERSTANDING #10

BETWEEN

**The Council of Trustees' Associations
(hereinafter the "CTA/CAE")**

AND

**The Canadian Union of Public Employees
(hereinafter "CUPE")**

RE: List of Arbitrators

The following is the list of Agreed-To Arbitrators for the Collective Agreement in effect from September 1, 2014 – August 31, 2017, as referenced in Article C4 of the Central Terms of the Collective Agreement.

English Language:

Christopher Albertyn
John Stout
Paula Knopf
Mort Mitchnick
Brian Sheehan

French Language:

Michelle Flaherty
Brian Keller
Kathleen O'Neil
Michel Picher
Bram Herlich

LETTER OF UNDERSTANDING #11

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

Re: Central Labour Relations Committee

The parties agree that the Central Labour Relations Committee will discuss the following topics:

- Provision of information relating to bargaining unit members, including scope, manner of disclosure and timing, in order to assist the parties in preparation for the next round of central bargaining
- Medical Intervention Training
- Staffing for Supervision
- Violence Prevention Training
- Concerns, if any, regarding systemic issues relating to allocation or application of sick leave/short term disability leave
- Any other issues raised by the parties

LETTER OF UNDERSTANDING #12

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

AND

The Crown

Re: Early Childhood Educators Work Group (FDK)

The parties and the Crown agree that within sixty (60) days following central ratification, a work group consisting of equal numbers of CTA/Crown and CUPE representatives shall convene to consider and make recommendations concerning Early Childhood Educators including, but not limited to the following:

- Hours of work
- Preparation time
- FDK class size
- Students with special needs
- Staffing levels
- Professional collaboration and development
- the feasibility of establishing Itinerant Lead positions within the bargaining unit.

The work group shall make joint recommendations to the parties no later than June 30, 2016.

LETTER OF UNDERSTANDING #13

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

AND

The Crown

Re: Ministry Initiatives

The parties acknowledge the ongoing implementation of the children's Mental Health Strategy, the Special Needs Strategy, and other initiatives within the province of Ontario.

The parties further acknowledge the importance of initiatives being implemented within the provincial schools system including but not limited to the addition of Mental Health Leads, and the protocol for partnerships with external agencies/service providers.

It is agreed and affirmed that the purpose of the initiatives is to enhance existing mental health and at risk supports to school boards in partnership with existing professional student services support staff and other school personnel. It is not the intention that these enhanced initiatives displace CUPE workers, nor diminish their hours of work.

LETTER OF UNDERSTANDING #14

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

AND

The Crown

Re: Provincial Health and Safety Working Group

The parties reconfirm their intent to participate in the Provincial Health and Safety Working Group. The purpose of the working group is to consider areas related to health and safety in order to continue to build and strengthen a culture of health and safety mindedness in the education sector. Areas for discussion may include:

- Violence in the Workplace;
- Occupational health and safety training, including training for CUPE members;
- Caring and Safe Schools as it relates to CUPE members;
- Health and safety considerations in high risk areas of the school; and
- Any other health and safety matters raised by either party.

The Crown commits to convene a meeting of the Working Group prior to December 31, 2015.

CUPE will be entitled to equal representation on the Provincial Health and Safety Working group.

Where best practices are identified by the committee, those practices will be shared with school boards.

LETTER OF UNDERSTANDING #15

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

AND

The Crown

RE: Violence Prevention Training

CUPE will be consulted, through the Central Labour Relations Committee, regarding the development/purchase of a training program on the prevention of violence for employees whose core duties require them to work directly in contact with students who may pose a safety risk. The Crown agrees to fund the development/purchase.

The Central Labour Relations Committee will consider the following points in developing the training module program including:

- Causes of violence;
- Factors that precipitate violence;
- Recognition of warning signs;
- Prevention of escalation; and
- Controlling and defusing aggressive situations.
- Employee reporting obligations

The training program will be made available to boards and CUPE no later than November 30, 2016.

Local boards will consult with local unions regarding the implementation of the training program.

LETTER OF UNDERSTANDING #16

BETWEEN

**The Canadian Union of Public Employees
(Hereinafter 'CUPE')**

AND

**The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')**

AND

The Crown

Re: Additional Professional Activity (PA) Day

The parties confirm that should there be an additional PA Day beyond the current 6 PA days in the 2015-16 and/or the 2016-17 school years, there will be no loss of pay for CUPE members (excluding casual employees) as a result of the implementation of these additional PA days. For further clarity, the additional PA day will be deemed a normal work day. CUPE members will be required to attend and perform duties as assigned. Notwithstanding these days may be designated as Sulp days.

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Article 1 - PURPOSE

- 1.01 The purpose of this Agreement is to establish mutually satisfactory relations between the Board and its employees, to provide machinery for the prompt and equitable disposition of grievances and to establish and maintain satisfactory working conditions, hours and wages for all employees who are subject to the provisions of this Agreement.

Article 2 - SCOPE

- 2.01 The Scope of this Agreement shall apply to all employees of the Huron-Superior Catholic District School Board engaged in plant maintenance and caretaker positions, save and except supervisors, and persons above the rank of supervisor.

Article 3 - DEFINITION OF EMPLOYEES

- 3.01 A Full-Time Employee is one who has successfully completed the probationary period and who regularly works forty (40) hours per week in a permanent full-time position.
- 3.02 A Part-Time Employee is one who has successfully completed the probationary period and who regularly works less than forty (40) hours per week in a permanent part-time position.
- 3.03 A Probationary Employee is one who is serving the probationary period as required under Article 13.
- 3.04 (a) A Casual Employee is one who works as a temporary replacement for a full-time or part-time employee, or who works in a facility where assistance is required on occasions. In order to be considered an Established Casual Employee, a person must have worked a minimum of 800 hours for the Board. These hours shall be applied to the required one thousand (1,000) hours for probation as established in Article 13.01. The hours worked, as outlined above, excludes hours worked during the training/orientation period, and any hours accumulated while on W.S.I.B. or any modified work exceeding 80 hours. Casual Employees shall be provided an orientation/training period of five (5) days when hired and shall include site specific (elementary/secondary) training by management.

Once an employee has achieved the established casual status, their name shall be added to an Established Casual Caretaker Date of Hire List. This Established Casual Caretaker Date of Hire List shall be applied for the sole purpose of eligibility for an interview for a permanent caretaker position and shall provide no greater benefit than established in Article 3.04 (b).

When hiring for a permanent caretaker position, the Employer will select the applicants from the Established Casual Caretaker Date of Hire List based on the earliest dates of hire (greatest length of service).

- (b) The rights and privileges of a Casual Employee, for the purpose of this collective agreement are exclusively limited to the following articles:

Purpose – Article 1
Union Recognition – Article 4

Human Rights – Article 5
Management Rights – Article 6
Grievance Procedure – Article 9
Personnel Files – Article 11.03
No Strike or Lock Out – Article 12
Hours of Work – Article 18.03 & 18.04(S)
Overtime – Article 18.07 & 18.08(S)
Rate of Pay – Article 18.01
Vacation – Article 19.03
Recognized Holidays – Article 20
Method of Pay Plan (Pay Day) – Article 26
General – Article 28
Term of Agreement – Article 31

- (c) Subject to the Board's exclusive right with respect to hiring and recruitment, the Board is committed to hiring current casuals into permanent caretaking positions. Casuals shall be given first consideration for permanent caretaking positions prior to external candidates.
- 3.05 The Board has the right to engage casual employees as required so long as they, in so doing, do not lessen the regular work week of a Full or Part-Time Employee. Time worked by casual employees shall not be considered as time served for probationary period, except as provided for in Article 13. Time worked by casual employees shall not be considered for seniority purposes.
- 3.06 Where a clause in this Agreement relates solely to secondary school caretakers, this will be signified by using (S) after the Article number.

Article 4 - UNION RECOGNITION

- 4.01 The Board hereby recognizes the Union as the sole Collective Bargaining Agent for all employees covered by Article 2, in respect to hours of work, wages and all other matters as set out in this Agreement.
- 4.02 The parties agree that there shall be no discrimination or coercion in a manner that is contrary to the Human Rights Code exercised by any Union member or Board staff.
- 4.03 (a) All employees of the employer governed by Article 2.01, as a condition of continued employment, shall remain members of the Union in good standing according to the constitution and by-laws of the Union.

All new employees shall, as a condition of employment, become and remain members in good standing in the Union within thirty (30) days.
- (b) The parties recognize that the Board shall not be forced to terminate or suspend the employment of an employee as a result of a dispute between the employee and the Union.
- 4.04 The Employer shall deduct from every employee governed by Article 2.01 any dues, initiation fees, or assessments levied in accordance with the Union Constitution and by-laws, and such deductions shall be remitted to the National Secretary-Treasurer or designate of the Canadian Union of Public Employees not later than the sixth of the following month. Such remittance shall be accompanied with an electronic list of

the names, addresses, phone numbers, hours worked, wage rate, wages, employee number, status and classifications of all employees from whose wages the deductions have been made. This list shall also indicate the amount of dues deducted from each employee. The employer shall forward a copy of this electronic list to the secretary-treasurer or designate, of the Local.

The Union shall indemnify and save the Employer harmless with respect to all claims and demands made against the Employer by an employee as a result of the deductions and remittance of dues by the employer pursuant to this Article.

- 4.05 No contract written or oral shall be entered into between an employee(s) and the employer, or any of its duly authorized representatives that directly conflicts with the terms of this agreement.
- 4.06 The Board agrees that no employee shall be laid off or receive a reduction in normal pay because of employees' work being subcontracted, leased, assigned, conveyed or transferred to any other person or company.

Article 5 - HUMAN RIGHTS

- 5.01 The Employer agrees that there shall be no discrimination exercised or practiced with respect to any employee in the matter of hiring, assigning wage rate, training, upgrading, promotion, transfer, lay off, recall, discipline, classification, discharge or any other action by reason of age, race, creed, colour, ancestry, national origin, religion, political affiliation or activity, sexual orientation, sex, marital or parental status, family relationship, place of residence, handicap, nor by reason of his/her membership or activity in the Union.

The above does not apply where the Employer is able to demonstrate a bona fide occupational requirement.

- 5.02 Any claim by an employee or the Union pertaining to a violation of the Human Rights Act or the Employment Standards Act, may be the subject of a grievance which shall be processed in accordance with the Grievance Procedure.
- 5.03 The rules, regulations, and requirements of employment shall be limited to matters pertaining to the work requirements of each employee. Employees will not be required to do personal services for a supervisor which are not connected with the operation of the Employer.
- 5.04 The Union and the Employer recognize the right of the employees to work in an environment free from sexual/personal harassment, and the Employer recognizes its responsibility to maintain a discrimination-free work place.

(a) Definition of Sexual Harassment

Sexual harassment shall be defined as any sexually oriented practice that undermines an employee's health, job performance, or work place relationships or endangers an employee's employment status or potential. Sexual harassment shall include, but not be limited to:

- (i) inappropriate touching, including touching which is expressed to be unwanted;

- (ii) suggestive remarks or other verbal abuse with a sexual connotation;
- (iii) compromising invitations;
- (iv) repeated or persistent leering at a person's body;
- (v) demands for sexual favours;
- (vi) physical assault.

(b) **Definition of Personal Harassment**

Personal harassment shall be defined as any behaviour which denies individuals their dignity and respect, and that is offensive, embarrassing and humiliating to said individual, or that which causes personal harassment of another employee in carrying out his/her duties or in the provision of his/her services.

Where an employee feels that he/she is being harassed, he/she shall inform the person in question that the behaviour in question is unwelcome. The employee shall have the right to have a union official or a member of the Board administration staff present at the meeting should he/she so desire.

- 5.05 This Article will not be construed as in any way limiting the employee's rights to seek redress through any other legal procedure available to him/her.

Complaints under this Article may be processed as grievances at Step 2 of the grievance procedure.

Article 6 - MANAGEMENT RIGHTS

- 6.01 The Union agrees that the Board has the right to manage all departments, to direct the forces, to hire, fire, promote, demote, transfer, assign, layoff, suspend or otherwise discipline employees subject to the right of the employees to lodge a grievance as provided herein.
- 6.02 The Board agrees that these functions shall be executed in a manner consistent with the general purpose and intent of this Agreement and subject to the right of any employee to lodge a grievance as set forth herein.
- 6.03 The Union agrees that the Board has the right to make and alter from time to time rules and regulations to be observed by the employees covered by this Agreement which are not inconsistent with the provisions of the Agreement. Any changes in such rules and regulations will not be implemented without prior notice and discussion with a committee of the union.
- 6.04 The Labour/Management Committee shall be composed of the Negotiating Committees of the Board and the Union. Meetings shall be conducted as necessary with either party requesting a meeting in writing coupled with a proposed agenda. It shall meet at the request of either party with at least 48 hours advance notice to explain Board policies, by-laws, regulations and matters of mutual concern.

Article 7 - UNION COMMITTEES AND STEWARDS

- 7.01 The Union shall select or otherwise appoint a Negotiating Committee comprised of three (3) Board employees and the National Representative, and an officer of the Local, for the purpose of negotiating all Collective Agreements between the employer

and the Union. The parties shall confirm with each other in writing the names of the representatives and substitutions which may be made from time to time.

- 7.02 The Board agrees to pay the wages of the three (3) Board employees named as the Union Negotiating Committee, up to a maximum of five (5) days, when those members are required to be absent from their place of employment to attend negotiating meetings with the Board dealing with direct negotiations of this Collective Agreement. The Board shall not be responsible for any additional expenses incurred such as, but not limited to, travel or accommodation.

- 7.03 The Grievance Committee shall be comprised of three (3) employees of the Board for the purpose of dealing with and processing complaints and grievances. The Committee shall have the right to include the National Representative if necessary. The Board agrees to pay the wages of the Grievor and/or the Grievance Committee when those members are required to be absent from their place of employment to attend grievance meetings or complaint meetings.

In the event of an arbitration, the Board agrees to pay the wages of the grievor(s) whose case is to go forward and the wages of two (2) members of the Grievance Committee. The Board is not responsible for transportation costs of either the grievor(s) or Grievance Committee.

- 7.04 The Union shall provide a list of all committee members in September and January of each year within thirty (30) days of any change in membership.

Article 8 - JOINT JOB EVALUATION COMMITTEE

The Huron-Superior Catholic District School Board and the Canadian Union of Public Employees, Local 4148 are committed to the process of Job Evaluation and ensuring compliance with the Pay Equity Act. The Job Evaluation committee will review the current process, establish terms of reference, review all classifications and ensure all job description are current. The committee will make recommendations to the Employer and the Union for considerations on streamlining the process to ensure compliance with the Pay Equity Act. Note these recommendations will be given consideration but do not bind either party. It is understood that the parties shall complete the process within 15 months, however this time frame may be extended by either party for up to nine months.

- 8.01 The Job Evaluation Committee will be comprised of a maximum of four (4) representatives from the Board and a maximum of four (4) representatives (one Clerical, one Educational Assistant, one ECE and one Plant representative) and the President from CUPE, Local 4148 and the National Representative. The Employer will incur no additional cost for the President.

- 8.02 The parties agree to ensure compliance with the *Pay Equity Act* and conduct a Pay Equity Maintenance review.

An annual review will be conducted to ensure maintenance is sustained and compliance is met. The parties will meet during the month of November of each year for the purpose of reviewing Pay Equity unless another date is mutually agreed on.

Article 9 - GRIEVANCE PROCEDURE

- 9.01 A grievance shall be defined as any difference arising out of the interpretation,

application, administration or alleged violation of the collective agreement.

In order for a grievance to be processed under the Grievance Procedure, the written statement of grievance shall contain the name(s) of the grievor(s), the facts giving rise to the grievance, the date or dates of the alleged violation of the agreement, and the provisions of the article(s) alleged to have been violated, and shall indicate the redress sought. The grievance must be signed by the grievor(s) and the Union Steward.

The requirements laid out above are not intended to limit nor restrict rights under the collective agreement nor access to the grievance arbitration procedure; these requirements are intended to provide the Board with information so as to be better able to address the matters at issue.

9.02 Step 1 - The Informal Complaint Meeting

The aggrieved employee(s) shall discuss the complaint with his/her immediate supervisor, accompanied by a union representative, if he/she so desires. Recognizing the importance of full discussion between the Supervisor and the employee in clearing up misunderstandings and preserving harmonious relations, every effort shall be made at this point to settle the complaint within five (5) working days. Should the employee feel that this complaint has not been satisfactorily resolved after he/she has discussed it with his/her Supervisor, he/she may request and shall receive from his/her Supervisor a signed "Record of Complaint" form.

A member of the Union Grievance Committee shall have the right to visit the work area during their investigation of a complaint, in coordination with the Manager of Plant Services/designate.

Step 2

Failing satisfactory settlement under Step 1, within Fifteen (15) working days following receipt of the Step 1 decision, the Grievance shall be submitted in writing to the Manager of Plant Services. For the outlying Districts of Michipicoten, Chapleau, Hornepayne and the North Shore, the grievance may be submitted to the Principal of the School to be forwarded to the Manager of Plant Services.

Within five (5) working days of receipt of the grievance, the Manager of Human Resources shall arrange a meeting between the Union grievance Committee and the Board Grievance Committee. A decision shall be rendered in writing within ten (10) working days of the meeting.

The employee's supervisor and the grievor may be present. A conference call shall be considered a meeting with respect to fulfilling the requirements of this Article.

Step 3

Failing satisfactory settlement under Step 2, the Grievance shall be referred to Article 10, Arbitration, provided such action is taken within a period of fifteen (15) working days of the response from the Board Grievance Committee. Where a dispute involving a question of general application or interpretation occurs, the Board and the Union may agree to bypass Step 1 of the Grievance Procedure.

- 9.03 It is mutually understood that the Board may bring forward at any meeting with the Grievance Committee any complaint in regards to the conduct of the Union, its officers, committee members, or any employee(s) covered by this Agreement. Failing satisfactory settlement of the dispute by the conferring parties it shall then be treated as a grievance subject to the grievance procedure.

Such notice shall be given to the Union in writing and the Union's Grievance Committee will meet with the Board's Grievance Committee within five (5) working days of the receipt of such notice. Failing satisfactory settlement, it may be referred to Arbitration.

- 9.04 It is further understood that the Canadian Union of Public Employees' national representative may be present at the request of either party at any grievance meeting.
- 9.05 It is further understood that any dispute or grievance shall not be the cause of any individual or group work stoppage and grievances shall not be discussed until the employee or employees participating return to work.
- 9.06 (a) It is agreed that there is no grievance unless the grievance has been submitted within twenty (20) working days of the event which gave rise to the grievance.
- (b) By mutual agreement, the time lines for grievances shall be suspended during the period of school breaks (i.e. Christmas, March Breaks and summer).
- 9.07 Any grievance not processed by the Union within the prescribed time limits shall be considered abandoned on the basis of the last decision and this grievance shall not be subject to further appeal.
- 9.08 The Union and its representatives shall have the right to originate a grievance on behalf of an employee or group of employees, and to seek adjustment with the employer in the manner provided for in the grievance procedure. Such a grievance shall commence at Step 2.
- 9.09 For the purpose of this Article a work day is defined as regular work day from Monday to Friday including Professional Activity Days but excluding statutory holidays.

Article 10 - ARBITRATION

- 10.01 (a) Both parties to this agreement agree that any grievance may be referred to binding arbitration by written notice of such referral to the other party within the time limits set out above, and at the same time appoint its nominee to the Arbitration Board. The other party shall appoint its nominee within a reasonable time. The two (2) nominees shall attempt to select, by agreement, a chairperson of the Arbitration Board.
- (b) The Union and the Board agree that the provisions of the Ontario Labour Relations Act may supersede 10.01(a).
- 10.02 The Arbitrator or Board of Arbitration shall not alter, modify, or amend this Agreement in any manner, and shall not make any decision inconsistent with the

provisions of this Agreement.

- 10.03 Each party shall be responsible for the expenses of its representative to the Board of Arbitration, and the expenses of the Chairperson of the Board of Arbitration shall be shared equally by the Board and the Union.
- 10.04 Wherever Arbitration Board is referred to in the agreement, the parties may mutually agree in writing to substitute a single arbitrator for the Arbitration Board at the time of reference to arbitration and the other provisions referring to the Arbitration Board shall appropriately apply.

Article 11 - DISCHARGE AND DISCIPLINE CASES

- 11.01 The Board reserves the right to discipline or discharge an employee for just and sufficient cause. A claim by a seniority employee of unjust discipline or discharge shall be treated as a grievance and the grievance procedure shall be followed as outlined in Article 9. Such grievances may be settled by confirming the Board's action or by reinstating the employee under any arrangement which is just and equitable in the opinion of the conferring parties or the Arbitration Board.
- 11.02 (a) Employees shall be notified in writing of any dissatisfaction concerning their work within 14 working days of the complaint. This notice shall include particulars of the work performance which led to such dissatisfaction. The Employee's reply to the expression of dissatisfaction shall become part of the record.
- (b) The Board will notify the employee(s) and the Union of all anticipated discipline or discharge actions in writing within fourteen (14) days of the event giving the name of the employee concerned and the reason for the anticipated discipline or discharge. In cases of discipline matters involving dismissal, loss of pay or written warnings, the employee shall receive written notification of the disciplinary action in the presence of the Group Vice-President. Where the Group Vice-President will not be available within three (3) working days, the Employer may require that the discipline be given in the presence of a different Grievance Committee Representative. A conference call shall be considered acceptable with respect to fulfilling the requirements of this article. Copies of all written warnings and notices of all disciplinary action shall be sent to the Group Vice-President and the National Representative.
- 11.03 An employee shall have the right to have access during normal business hours to his/her personnel file upon written notice to the Manager of Human Resources.
- Any disagreement as to the accuracy of information contained in the file may be subject to the Grievance Procedure and the eventual resolution thereof shall become part of the employee's record. No evidence from the employee's record may be introduced as evidence in any hearing, if such evidence relates to any disciplinary matter which took place more than twenty-four (24) months previous to the issue giving rise to the hearing. Notwithstanding the above, however, evidence relating to disciplinary action taken by the employer as a result of sexual or moral misconduct, may be considered.
- 11.04 The Board will schedule non-complaint meetings with employees during the

employee's hours of work. If such meetings are scheduled on the employee's time, attendance at the meeting will be at the employee's discretion.

- 11.05 Where there is clear and convincing evidence of the sexual harassment or sexual assault of a student by an employee, the stipulated penalty for this infraction shall be the discharge of the employee, and such termination shall be deemed to be for just cause. Should there be clear and convincing evidence of the above, no Board of Arbitration shall vary this penalty.

Article 12 - NO STRIKES OR LOCKOUTS

- 12.01 During the life of this Agreement the Union agrees there will be no strike, slowdowns, picketing or any other interference with work, and the Board agrees there will be no lockout. Strike and lockout will be as defined in the Ontario Labour Relations Act.

Article 13 - PROBATIONARY PERIOD

- 13.01 New full-time and part-time employees, before being established as permanent employees, must work a probationary period of one hundred and twenty (120) working days. On successfully completing the probationary period, the employee and the Secretary of the Union shall be notified in writing and the name added to the seniority list as of the starting date of the probationary period. However, if the casual employee has accumulated 1000 hours as a casual, excluding any hours accumulated while on W.S.I.B. or modified work exceeding 80 hours, the probationary period will be waived.

The Board shall notify the Union in writing of the reason for the discharge of a probationary employee.

- 13.02 Probationary employees shall receive the applicable caretaker's hourly rate as defined in Article 18.01.

Article 14 - SENIORITY

- 14.01 The Board shall prepare seniority lists as follows:

- (a) For Full-Time Employees showing the date of hire to the full-time position.
- (b) For Part-Time Employees showing the date of hire to the part-time position.
- (c) For laid-off employees who held a seniority position immediately prior to their most recent layoff.

All seniority full-time and part-time employees will accrue seniority from the date of hire to a permanent seniority position, except that an employee's established seniority is not reinstated where it has been lost under the provisions of Article 14.03 below.

- (d) Casual employees do not accrue seniority.

- 14.02 The list(s) will be issued to each seniority employee and to the Group Vice-President in January of each year. The seniority list(s) will be considered correct for all

purposes unless the seniority employee disputes its accuracy within three (3) calendar weeks from the date the list(s) were mailed to the employees. The employee must file a written notice to the Manager of Plant Services outlining the grounds of his/her objection. Seniority employees will not forfeit his/her seniority rights under any circumstances except those outlined below.

In addition to Central item C10.00 Casual Seniority Employee List

The Employer shall maintain a separate non-seniority list for relief employee. An up-to-date list will be sent to the Union each October.

14.03 An employee's established seniority shall be lost and they shall be deemed terminated when such employee:

- (a) Quits.
- (b) Is discharged for just cause.
- (c) Is laid off for a period in excess of thirty-six (36) consecutive months.
- (d) Fails to return to work within ten (10) working days of being recalled.
- (e) Is absent from work for more than three (3) days without a bonafide reason or without notifying the supervisor.
- (f) (i) Is absent from work due to illness or accident subject to the following conditions:
 - (1) during the first twenty-four (24) months of such absence the Board will continue to pay the premium cost of benefits set out in Article 23.
 - (2) at the end of such twenty-four (24) month period the provision of all benefits except for Life Insurance for such employee will cease. After twenty-four (24) months of such absence a seniority employee for whom the Board is no longer required to contribute toward the premium for benefits as specified in Article 23, may continue to participate in said benefits up to age sixty-five (65), subject to the terms and conditions of the respective carriers of such plans including continuing eligibility, and provided the employee pays to the Board the full cost of the premium(s) each month.
 - (3) the employee will continue to accumulate seniority during the twenty-four (24) month period after which time employment will be terminated.
- (ii) Should an employee be medically certified as fit to return to work for full duties and this is confirmed by a Board appointed medical practitioner the employee shall be provided a caretaker position at the appropriate rate of pay under the following conditions:
 - (1) Seniority. The employee shall not accrue any additional seniority from the date of termination to the date of

reinstatement.

- (2) Retirement Gratuity. No employee will be entitled to more than one retirement gratuity from the Board.
- (3) An employee will not be permitted to bump another employee. The employee returning to work will be eligible to apply for any permanent position that becomes available after his/her return to work.

14.04 An employee who is appointed to or accepts a position outside of the Bargaining Unit shall retain seniority and continue to accumulate seniority for a period of twelve (12) months. After twelve (12) months in such position such employee shall cease to have any seniority rights in the Bargaining Unit.

Article 15 - LAYOFF AND RECALL

15.01 (a) Definition of Layoff

An employee is laid-off when

- (i) an employee's regular working hours are reduced
 - (ii) an employee's position has been declared redundant by the Board
- (b) In the event of a layoff that involves a reduction in hours as per 15.01(a)(i) above, the employee may elect to either accept the reduction in hours and remain in their position or to exercise their bumping rights.
- (c) Under no circumstances shall any employee be allowed to bump up into a Level 1 or Level 2 position. In addition, no Level 2 employee shall be allowed to bump a Level 1 employee.
- (d) In the event of a layoff due to redundancy, caused by either the closure or partial closure of a school or the elimination of the position (as per 15.01(a)(ii)), or in the event of a layoff caused by a reduction of hours where the employee elects to exercise his/her bumping rights, the following process shall be implemented:
- (i) The Manager of Plant Services shall arrange a meeting to be held at the Board office (or at another appropriate location) at which time the final determination of all bumping and corresponding posting of positions related to or stemming from the layoff shall occur.
 - (ii) All employee shall be given four (4) weeks' notice of the meeting by way of letter sent to the employee's most recent address on the records of the Human Resources Department. Notice of such meetings will also be posted in the schools.

In an effort to promote harmonious relations, the parties may mutually agree to waive the four (4) week notice period of the meeting and agree on a meeting date. All employees will be given notice of this meeting, as soon as possible, by way of hand-delivered letter. Notice of such meeting shall also be posted in all schools.

- (iii) The employee(s) to be laid-off and all employee(s) with less seniority than the employee(s) to be laid-off are required to attend and participate in the meeting. Employee(s) who have greater seniority than the employee(s) to be laid-off are encouraged to attend these meetings in order to have the opportunity to post for vacancies which may be available.
- (iv) Employees who would be required to travel beyond the boundaries of their predecessor Board to attend the meeting will be permitted to participate in the meeting by way of conference call. Employee(s) who are unable to attend due to sickness, pregnancy/parental leave or funeral leave shall make their ten (10) most preferred positions known to the Manager of Plant Services, in writing, at least four (4) days prior to the meeting.
- (v) Employees who are directed to attend this meeting by the Manager of Plant Services shall be required to attend the meeting regardless of whether said meeting occurs on a regularly scheduled work day for that employee. Employees who are not scheduled to work during the time of the meeting will not be paid for attendance at the meeting.
- (vi) The bumping process will allow the laid-off employee to bump into any position held by an employee with less seniority provided the employee possesses the qualifications, skills and ability to perform the work.
- (vii) Part-time employees will not be permitted to bump full-time employees.
- (viii) After the bumping process has been completed and all permanent positions have been filled, the Manager of Plant Services will determine whether any of the positions filled during the meeting have been claimed by employees who are on modified work, W.S.I.B. leave, Long Term Disability, Pregnancy or parental leave, or other forms of leave under Article 17, leaving a temporary vacancy for that position. Should there be any such temporary vacancies, the Manager of Plant Services will then fill these vacancies, during this same meeting.

It is understood that an employee in a temporary position who is displaced from their permanent position by the bumping process, must select and report to their new permanent position. However, this does not prevent such employee from selecting a temporary vacancy as described above.

- (ix) Should the Manager of Plant Services determine that there are other vacancies which are available, the posting procedure for these vacancies may also be completed during this meeting, provided that at least two (2) weeks' notice (prior to the meeting date) has been given to all employees by way of letter sent to the employee's most recent address on the records of the Human Resources Department.

The two (2) week notice period may be waived through a mutual

agreement between the parties.

- (x) Employees in attendance at the meeting will have the opportunity to post into vacancies or temporarily vacant positions on a seniority basis provided that the employee has the necessary qualifications, skills and ability to perform the work.
- (xi) An employee who accepts a temporary position as per (viii) and (x) above must remain in that position for a minimum of four (4) months except in cases where the regular employee returns to work within the four (4) month period or the employee temporarily assigned is the successful candidate for a permanent full-time position.
- (e) In the event of a lay-off of an employee(s) that is not likely to affect other employee(s) outside of the laid off employee's community, the Manager of Plant Services will first meet with the employees of the area in which the layoff is to occur (to determine if other employees are to be affected) prior to arranging the meeting described in 15.01(d). The Group Vice-President may be present at this meeting during working hours, however, any travel and related expenses will not be borne by the Employer.

Employees at this first initial meeting, i.e. to be laid-off or bumped, shall be informed of all positions in the Board that are held by persons with less seniority in order to determine whether employees from outside of that community are to be affected. Should there be employees in other areas that are to be affected, the meeting described in 15.01(d) will be arranged.

- 15.02 (a) When seniority employees are being recalled to work they will be recalled in reverse order of layoff, as they are established on the seniority list according to Article 14 provided that the employee possesses the necessary qualifications, skills and ability to perform the work. They shall be notified of recall by Registered Letter mailed to their last address on the records of the Human Resources Department.
- (b) A recall is where a laid off employee is awarded a permanent full-time or part-time position and does not include casual work that involves filling in temporarily on a full time basis where the position is temporarily vacant.
 - (c) Seniority employees shall be placed on the recall list for thirty-six (36) consecutive months from their effective date of layoff. If after thirty-six (36) months they are not recalled, they shall be removed from the recall list. There is no obligation on the Board to rehire employees who have been removed from the recall list after thirty-six (36) months.
 - (d) Any seniority employee on the recall list who refuses to accept an available position within the community in which they were formerly employed shall be terminated. For the purposes of this article, community is defined as:
 - (i) the former Board area of Sault Ste. Marie
 - (ii) the former Board area of Michipicoten
 - (iii) the former Board of Chapleau
 - (iv) Blind River - Elliot Lake together
 - (v) Massey - Espanola together

(vi) Hornepayne

Exceptions to this would include seniority employees declining due to illness or pregnancy as certified by a qualified physician or any other reasons deemed acceptable by the Board.

15.03 (a) An employee shall be given the opportunity, but shall not be required to accept, a recall to a position which is outside of their community as defined in 15.02(d) above.

(b) An employee will not be required to accept a recall that is less than seventy-five percent (75%) of the hours the employee was regularly scheduled to work prior to being laid off.

An employee who declines a recall, however, shall not be permitted to bump into a position at any later date. The employee shall continue to have recall rights for thirty-six (36) months as per Article 15.02. Thus, an employee who refuses recall shall lose their seniority as per Article 14.03, thirty-six (36) months after a lay-off.

15.04 Employees who are laid-off and placed on the lay-off list as per Article 14.01(c) above, shall have access to casual call-out work on a priority basis, in accordance with the stipulations listed below.

(a) Where laid off employees work in a temporary capacity at full time hours, this shall not be considered a recall.

(b) The Board will provide the list described in Article 14.01(c) to the person responsible for calling out employees to casual work.

(c) Where a full-time employee is off work currently and is on LTD, extended sick leave or WSIB and the corresponding postings for temporary vacancies have been filled thereby leaving a vacancy in the system, and it is known to the Board and that vacancy will exist for the next three (3) consecutive months, the Board will place the laid off caretaker with the most seniority into that position on a temporary basis. This shall not be considered a recall from layoff. The employee will not be a full-time employee as described in Article 3.01 of the Collective Agreement and will not be entitled to participate in the Board's benefit plan. The employee will be paid at the full-time rate for the position in question. The employee will not be eligible for vacation entitlement but will be paid vacation as per Article 19.02 of the Collective Agreement.

(d) Where a full-time employee goes off work on sick leave, LTD or WSIB and the corresponding postings for temporary vacancies have been filled thereby leaving a vacancy in the system, and it is unknown whether that vacancy will exist for the next three (3) months, the Board will place the laid off caretaker with the most seniority into the position on a temporary basis. This shall not be considered a recall from layoff. The employee will not be a full-time employee as described in Article 3.01 of the Collective Agreement and will not be entitled to participate in the Board's benefit plan. The employee will initially be paid at the casual rate for this position but will be paid retroactively at the regular rate for all time worked in the position should that

employee remain in the position for a period exceeding three (3) consecutive months. The employee will not be entitled to vacation entitlement but will be paid vacation pay as per Article 19.02 of the Collective Agreement.

- (e) The Board will continue to assign work caused by short term vacancies due to sickness or vacations on the part of full-time employees to employees that are listed on the board's casual call-out list. This work shall be paid at the casual rate regardless of its total duration. Where such vacancies are as a result of extended illness, the position will be posted as a temporary vacancy as per Article 16.04(a).

In order to facilitate access to this work on the part of laid off employees, the Board will create two lists of employees eligible for casual call-out work: the first list will contain the names of laid-off caretakers in order of seniority, the second will contain the names of employees who have never had seniority. The person responsible for making call-outs for casual work will be instructed to first contact employees from the first list for work, in order of seniority, before contacting employees on the second list. When a laid-off caretaker is called out to work, he or she will work the duration of the assignment.

- (f) It is understood that the Board is under no obligation to balance the amount of hours worked by laid off employees or to ensure that the laid off employees with the most seniority actually have the opportunity to work more hours than those with less seniority.
- (g) At the end of the thirty-six (36) month period during which a seniority employee is covered under the provisions of this article and retains recall rights, the Board shall have the option of either terminating the employee as per Article 14.03(c) or inviting the employee to remain on the second casual call-out list as referred to in 15.04(e) above. Such employee loses all formerly accrued seniority and possesses no preferential status with respect to future hiring.

15.05 Premiums for benefits shall not be paid while an employee is laid-off.

15.06 Premiums for benefits shall not be paid, while laid-off employees are working in a temporary vacancy, even where the employee is working hours that are equal to those worked by Full-Time employees.

15.07 In the event of a school closure in the City of Sault Ste. Marie only, where, as a result of this school closure, there has been a layoff of a full-time employee, the Board will retain a maximum of one (1) employee as a floater per school closure to a total maximum of three (3) floaters, subject to the following conditions:

- (a) the most senior laid off employee shall be required and obligated to work the hours scheduled by the Board;
- (b) said employee shall continue to have their benefits paid by the Board irrespective of Article 15.05 or 15.06 above for a period of twelve (12) months only from the date of lay off;
- (c) this provision shall not be engaged as a result of any school closure outside of the City of Sault Ste. Marie;

- (d) as per Article 14.03(c), the employee shall lose their seniority and be deemed terminated thirty-six (36) months after the initial date of layoff, notwithstanding the provisions of this Article;
- (e) after the twelve (12) month period during which premiums for benefits are paid, the employee, though not having premiums for benefits paid, shall have access to priority call out work as per Article 15.04.

Article 16 - VACANCIES, NEW POSITIONS AND PROMOTIONS

16.01 (a) Caretaker/Day Worker Positions

In the event that qualified employees are available in the bargaining unit, qualifications and ability to perform the work will be considered when promoting employees to a caretaker or day worker position. Where the ability of the employees concerned is relatively equal, the senior candidate will be given preference.

(b) Maintenance Positions

The Board possesses managerial discretion as to the selection of maintenance personnel. The Board is not required to post maintenance positions nor to fill vacancies should they arise.

In the event that the Board determines that there is a vacancy, it will post notices in Board work sites to allow employees to forward applications. The Board reserves all rights as to whether or not an employee shall be interviewed for the position.

- 16.02 (a) All vacancies or newly created positions within the scope of this Agreement shall be posted in all the work sites and a copy of the posting forwarded to the Secretary of the Union. All postings will also be posted on the Board's website. Vacancies and newly created positions shall be posted for seven (7) working days. Employees wishing to make application, providing they are available for work on the date the position commences, shall do so within the required time limit, forwarding written application to the Manager of Plant Services. The Manager of Plant Services must receive the written application within the specified time period of the posting. All seniority applicants shall be notified by the Board as to who the successful applicant or applicants are as soon as possible after the selection is made. The provisions of this Article do not apply to vacancies which may arise during the months of June, July and August.

Employees on vacation or sick leave of five (5) working days or less at the time of the closing of the posting and including the closing date of the posting shall have three (3) working days after their return to work to apply for the position.

Where there is a vacancy in the month of June, up until June 15th, the posting procedure will be completed and the successful applicant will remain in their current or assigned position until the commencement of the following school year.

- (b) Successful candidates to job postings (permanent or temporary) must assume the position for which they applied. If you are the successful candidate for more than one position, you must select only one position, and you must assume that position. When an employee assumes a position (permanent or temporary) they may elect to return to their previous position within ten (10) working days, if they choose, by advising the Manager of Plant Services. In addition, an employee cannot apply for the position which they have just vacated.
 - (c) Part-time, laid-off or casual employees who were employed under the conditions of Article 16.02(a) and 16.02(b) will revert to their former status on the return of the Full-Time Employee who was absent.
- 16.03 Upon request, an unsuccessful applicant for a posting shall be granted a meeting with the Manager of Plant Services to discuss the posting in the presence of a Union official.
- 16.04 (a) The Board reserves the right to make temporary appointments for a maximum of twenty-five (25) working days in cases of absences or any job openings. These openings shall be posted not later than eighteen (18) working days after the opening occurs following which the appointment to the opening shall be made according to 16.01 and 16.02.
- Where leaves of absence or other absences are made known to the employer ten (10) working days prior to such leaves, the employer shall post the position as such in order to place the employee at the beginning of the leave.
- (b) An employee who accepts a temporary position must remain in that position for a minimum of four (4) months except in the cases where the regular employee returns to work within the four (4) month period or the employee temporarily assigned is the successful candidate for a permanent full-time position.
 - (c) The Board has the right to re-assign caretakers to other positions on a temporary basis and the hourly rate shall be the one normally paid for this position or the caretaker's regular pay, whichever is the higher. This clause will be exercised at the discretion of the Board. Employees shall not be re-assigned without their consent, except where the Board is of the opinion that this is necessary in order to maintain harmonious relations within the work site in question, or to investigate a disciplinary matter or in order to allow the Board to comply with its obligations under the Human Rights Act. Where the above exceptions are not invoked, however, and there are no caretakers willing to be temporarily re-assigned, the Board shall re-assign the most junior caretaker.
- 16.05 Casual employees, replacing caretakers who are absent for a limited time, will be scheduled to work at the discretion of the Board. After a position has been posted under Article 16.04, the casual employee shall be scheduled the same number of working hours as the employee he/she is replacing, until the position is filled.

When replacing full-time caretakers for periods in excess of three (3) working days but not more than twenty (20) working days, the Board will offer such appointments

to established part-time employees provided they work in the community in question (as defined in Article 15.02(d)), before offering such appointments to laid off employees and then casual employees.

16.06 Additional Day Worker positions which are created by the Board for the summer months and where it is known at least five (5) working days in advance of a temporary absence of a Day Worker that is of known duration and that will be at least one (1) week in duration, shall be filled in the following manner:

- (a) Seniority Part-Time Day Workers currently working in the position shall be given the first opportunity to fill any full-time positions that may be created.
- (b) Any further positions will be offered to the remaining caretakers in order of their seniority, provided they possess the necessary qualifications, skills and ability to perform the work. Candidates must hold and provide the Employer with a photocopy of a valid Ontario driver's license.

An employee who refuses three assignments of temporary Day Worker within one (1) school year and does not provide a reason acceptable to the Board for each of the three refusals shall be deemed to have resigned from the temporary Day Worker relief list and will so be notified. The Union will be provided, on a monthly basis, with a list of all employees who have declined temporary Day Worker assignments.

Temporary Day Workers assignments shall be assigned during the period Sunday to Saturday.

- (c) When summer Day Worker positions are filled by seniority employees the rate of pay will be consistent with the provisions of the Collective Agreement.

16.07 Where it is known at least five (5) working days in advance of a temporary absence of a day shift secondary school caretaker, that is of known duration and that will be at least three (3) days in duration, the Manager of Plant Services will arrange to allow the most senior full-time caretaker who works in the same building, on the afternoon shift or the night shift to temporarily replace the caretaker who is absent.

16.08 It is further agreed that part-time, laid-off and casual employees of the Board shall be given first option to perform regular caretaking duties such as cleaning during Christmas and Spring break or the summer period prior to the hiring of students.

Article 17 - LEAVE OF ABSENCE

17.01 Union Business or Public Office

- (a) All leaves of absence shall be without pay and without cost to the Board. The Board shall invoice the Union for the costs of wages, vacation and insurance benefit premiums with respect to all leaves of absence.
- (b) An employee elected or appointed to represent the Union at a conference, convention or other union business shall be granted a leave of absence, without loss of seniority providing such leaves involve no more than three (3) seniority employees at one time and provided that only one (1) employee from each of the former Board areas of Chapleau, Michipicoten, Hornepayne

and North Shore is absent at one time.

- (c) Where an employee in the bargaining unit is elected or appointed as a union officer (executive member) of the Local, such an employee may submit a request for an unpaid leave of absence (up to full-time) to the Manager of Plant Services. Such a leave will be granted and, where the union requests that the Board administer the pay, benefits and sick leave arrangements for the employee related to the leave, the Board will continue the salary, benefits and sick leave arrangements in accordance with the Collective Agreement.

Where the leave granted is for twelve (12) months or more, the employee shall return to the permanent position held prior to going on leave. Should the permanent position held prior to going on leave no longer be available, at any time during the leave, the employee will be required to select a permanent position as part of the staffing process in accordance with Article 15.01. The employee will accumulate seniority during any leave of absence.

- (d) All requests for leaves of absence shall be made in writing by the Group Vice-President/designate of the Local to the Manager of Plant Services giving at least one (1) week notice wherever possible. Replies shall also be given in writing by the Manager of Plant Services.
- (e) A seniority employee who is elected or selected for a full-time position with the Union or any body with which the Union is affiliated, shall be granted leave of absence by the Board but without pay or without cost to the Board for a period up to two (2) years. Such leave may be renewed upon written request during his/her term of office. Such absence shall be without loss of seniority for recall and placement purposes but such employee shall not accumulate nor use sick leave during the entire leave of absence.
- (f) The Employer recognizes the right of an employee to participate in public affairs. Therefore upon written request, the Employer shall allow a leave of absence without pay and without loss of benefits or seniority so that the employee may be a candidate in federal, provincial or municipal elections. The employee will reimburse the board for the cost of benefits.

An employee who is elected to public office shall be allowed a leave of absence without pay and without loss of seniority during the term of office. Such leave shall not exceed 4 years. A seniority employee granted a leave of absence under this clause shall have their benefits terminated. An employee shall not accumulate nor use sick leave during the entire leave of absence.

- (g) Where an employee in the bargaining unit is elected or appointed as CUPE WISB, such an employee may submit a request for an unpaid leave of absence (up to full-time). Such a leave will be granted and, where the Union requests that the Board administer the pay, benefits and sick leave arrangements for the employee related to the leave, the Board will continue the salary, benefits and sick leave arrangement in accordance with the Collective Agreement.

17.02 Funeral Leave

- (a) A seniority employee shall be entitled to leave of absence without deduction

of salary up to a maximum of three (3) working days for the purpose of attending a funeral of a member of his/her immediate family, if the deceased lived in the community of the employee or within one hundred and sixty (160) kilometers of the employee's residence.

- (b) A seniority employee shall be entitled to a leave of absence without deduction of salary up to a maximum of five (5) working days for the purpose of attending a funeral of a member of his/her immediate family if the deceased member lived one hundred and sixty (160) kilometers or more from the employee's residence.
- (c) If a seniority employee cannot attend a funeral for a member of their immediate family which is further than one hundred and sixty (160) kilometers from his/her residence, then the funeral allowance specified in 17.02(a) shall be granted. The seniority employee must take the allowance specified within one week of the funeral.

Immediate family is defined as being: parents, parents-in-law, husband, wife, children, step children, sons-in-law, daughters-in-law, brothers, sisters, grandparents and grandchildren, brothers-in-law, sisters-in-law. Foster children living in the employee's home at the time of their death shall also be considered as immediate family.

- (d) A seniority employee shall be entitled to a leave of absence, without deduction of salary, for one (1) working day for the purpose of attending the funeral of a relative outside of the immediate family.

Outside immediate family is defined as being: aunts, uncles, cousins, nieces and nephews.

- (e) It is understood that the provisions of this Article will also apply if such an occurrence falls within the vacation period of an employee; the employee shall receive the leave of absence with pay in addition to his/her vacation period. Any employee on sick leave or compensation will not be deducted sick leave credits for the days of funeral leave entitlement.
- (f) In the circumstances above in 17.02 (a) (b) (c) (d) and (e), the employee shall be required to complete the standardized form provided by the Board.

17.03 Pregnancy/Parental Leave

(In addition to Central Letter of Understanding #2)

- (a) Upon written request to the Manager of Human Resources, Pregnancy and/or Parental Leave shall be granted to employees, without pay, in accordance with the current Employment Standards Act.
- (b) Where possible, at the completion of the statutory Pregnancy/Parental Leave, the employee shall return to his/her former position or to a comparable position in the same community in which the employee worked prior to the leave.

For the purposes of this clause, the following areas constitute a "community": Massey and Espanola together; Elliot Lake and Blind River together; the city

of Sault Ste. Marie; the former Board jurisdiction of Chapleau; Hornepayne; the former Board jurisdiction of Michipicoten.

Should a comparable position not exist within the community in which the employee formerly worked immediately before the pregnancy or parental leave, the employee shall have the opportunity to exercise their rights elsewhere within the bargaining unit.

- (c) The Board shall continue to pay the premiums for benefits for the maximum allowed under the Employment Standards Act for Pregnancy and Parental Leave. These benefits will be provided for part-time employees in accordance with Article 23.01(a).
- (d) An employee shall be granted a leave of absence without deduction of salary to a maximum of two (2) days upon the birth/adoption of a child or children. This leave shall be taken:

the day previous to the birth or adoption

or

the day of the birth or adoption

or

within five (5) working days of the birth or adoption

or

within five (5) working days of the child's release from hospital following birth or adoption.

17.04 **Court Appearances**

- (a) In the event of a seniority employee being accused of an offence which requires a court appearance, the employee shall be given an automatic leave of absence without loss of seniority, but without pay.
- (b) A seniority employee who is jailed and awaiting trial shall be given an automatic leave of absence without pay for the period of incarceration.
- (c) An accused employee who is found guilty and sentenced for a criminal offence shall be removed from the Board records and employment. Such action shall be at the Board's discretion. If such employee's job is forfeited, the Board shall fill the vacancy, according to Article 16.

17.05 **Other Leaves**

Leaves of absence without pay for any reason other than those noted in Articles 17.01, 17.02, 17.03 and 17.04 may be granted upon written application to the Manager of Plant Services at least one (1) week prior to the requested leave. Such leaves are granted at the discretion of the Board. In case of emergency the one week prior notice will be waived. At the discretion of the Board, the leaves described below will be subject to the described time limits:

- (a) where a leave is granted to allow an employee to pursue another job opportunity, such leave shall not exceed three (3) months;
- (b) where a leave is granted to pursue higher education, such leave shall not

exceed one (1) year;

- (c) where a leave is granted as a result of the job transfer or relocation of a spouse, such leave shall not exceed one (1) year.

Consideration of such leaves will be done in a fair and impartial manner.

17.06 When an employee is granted a leave of absence, for any reason, except for emergency situations, while they are in a temporary posting, and such leave of absence extends beyond the posting period (20 working days), upon return from their leave of absence, they shall return to their permanent position and not the temporary posting they held prior to their approved leave of absence.

17.07 Court/Jury Duty

- (a) A seniority employee who is summoned to attend court as a witness, as the result of a work-related incident, shall be paid the difference between the hours they would have been scheduled to work and the payment received for any such services. The seniority employee will present proof of service and the amount of pay received, if any.
- (b) The Board shall pay a seniority employee who is required to serve for jury selection, as a juror or a subpoenaed witness the difference between the hours they would have been scheduled to work and the payment received for such services. The seniority employee will present proof of service and the amount of pay received.

17.08 Citizenship Leave

An employee shall be allowed one-half (1/2) day with pay to attend a formal hearing to become a Canadian citizen.

17.09 Compassionate Leave

An employee may be granted a leave of absence for compassionate leave to a maximum of two (2) days per occasion at the discretion of the Board designated official without loss of pay or deduction from cumulative sick leave.

If the Board designated official is not available, the employee shall notify his/her immediate supervisor of the reasons for his/her absence. Upon return the employee shall notify the Board designated official in writing of the reasons for the absence and the Board designated official shall determine if compassionate leave is to be granted.

Article 18 - WAGE RATES, CLASSIFICATIONS, HOURS OF WORK AND OVERTIME

18.01 Wages are as per Schedule "A"

18.02 Shift Premium

Caretakers who are assigned to, and are currently working, split shifts, afternoon shifts or night shifts, will be paid a shift premium as follows:

Effective September 1, 2015 - .73¢/hour

Effective September 1, 2016	-	.74¢/hour
Effective February 1, 2017	-	.74¢/hour

During the summer, or at any other time, when these caretakers are not working split shifts, afternoon shifts or night shifts, they shall be paid at the regular full-time base rate and shall not be entitled to a shift premium. However, the shift differential shall be paid over the course of the entire work year in equal installments over the twenty-six pay periods, allowing those full time caretakers whose positions normally attract a shift premium to enjoy a constant rate throughout the year (Effective September 1, 2015 - .56¢, September 1, 2016 - .57¢, February 1, 2017 – 57¢).

Maintenance, part-time and casual employees are not entitled to any shift premium.

18.03 Hours of Work - Elementary Caretakers, Education Centre Caretaker and Day Workers

- (a) While schools are in session, the hours of work for full-time caretakers shall normally be an eight (8) hour shift from 7:00 am to 10:30 am and from 2:00 pm to 6:00 pm with a 3.5 hour lunch break and two (2) paid fifteen minute rest periods.
- (b) The caretaker assigned to the Catholic Education Centre will work the split shift, throughout the calendar year, with the hours of work being 7:00 a.m. to 10:30 a.m. and from 2:00 p.m. to 6:00 p.m. with a 3.5 hours lunch break and two (2) paid fifteen minute rest periods, except for during the time when the Catholic Education Centre is closed, at which time the caretaker may elect to work from 7:00 a.m. to 3:00 p.m. with a 30 minutes lunch break.
- (c) The normal hours of work for dayworkers shall be from 7:00 am to 3:00 pm with a 30 minute lunch break and two (2) paid fifteen minute rest periods.
- (d) When the schools are not in session, the hours of work shall be from 7:00 am to 3:00 pm for full-time caretakers with two (2) paid fifteen minute rest periods and a 30 minute lunch break.
- (e) Full-time caretakers who work the split shift will be paid eight (8) hours' pay for seven and a half (7.5) hours' work with one (1) fifteen minute rest period for every 3.5 hours worked.

18.04(S) Hours of Work - Secondary

- (a) The day shift hours of work for full-time secondary school caretakers shall be an eight (8) hour shift scheduled between 7:00 am and 3:00 pm with a thirty (30) minute paid lunch period and two (2) paid fifteen minute rest periods. The afternoon shift hours of work for full-time secondary school caretakers shall be an eight (8) hour shift scheduled between 3:15 pm and 11:15 pm with a thirty (30) minute paid lunch period and two (2) paid fifteen minute rest periods.
- (b) (i) The night shift hours at St. Mary's College shall be an eight (8) hour shift between 11:30 pm to 7:30 am with a thirty (30) minute lunch break and two (2) paid fifteen minute rest periods. The night shift will normally be scheduled between 11:30 pm Sunday and 7:30 am Friday

while night school is in session. The Board will not require more than two (2) night shift positions at St. Mary's College. The Board will maintain its current practice of paying overtime for functions at St. Mary's College, ie. dances.

No modified work programs will be scheduled on the night shifts.

- (ii) When night school is not in session, the hours of work will normally be between 3:15 pm to 11:15 pm, Monday to Friday. The Board reserves the right to schedule some night shifts, if deemed necessary.

Further to the above, those caretakers scheduled for the night shift at St. Mary's College will have the option of electing to continue on the night shift or electing to revert to the 3:15 pm to 11:15 pm shift. However, should one caretaker elect to revert to the 3:15 pm to 11:15 pm shift, then both caretakers in that school would revert to the 3:15 pm to 11:15 pm shift.

- (c) During the summer, Christmas and spring vacations, when schools are not in session, the hours of work for all secondary school caretakers will be scheduled between 7:00 am and 3:00 pm with a thirty (30) minute lunch period and two (2) paid fifteen minute rest periods. At other times during the school year when schools are not in session, the hours of work for all secondary school caretakers will be scheduled between 7:00 am and 3:00 pm with a thirty (30) minute paid lunch period and two (2) paid fifteen minute rest periods. The Board reserves the right to schedule caretakers for afternoon shifts, if deemed necessary.

18.05(M) Hours of Work - Maintenance Employees

The hours of work shall generally be between the hours of 7:00 am and 3:00 pm with a thirty (30) minute lunch period and two (2) paid fifteen minute rest periods, but the Board reserves the right to alter these hours at its discretion.

18.06 Community Use Appreciation Allowance

- (a) Full-time seniority dayworkers and caretakers in the elementary schools shall be paid a community use appreciation allowance. Allowance is defined as an allowance paid in recognition of community use, with payments made as follows:
 - (i) Appreciation Allowance for school having one and two uses per week
Effective September 1, 2015 - \$332.00 per year
 - (ii) Appreciation Allowance for school having three or four uses per week
Effective September 1, 2015 - \$416.00 per year
 - (iii) Appreciation Allowance for school having five, six or seven uses per week
Effective September 1, 2015 - \$501.00 per year

- (iv) Appreciation Allowance for school having eight, nine or ten uses per week

Effective September 1, 2015 - \$585.00 per year

- (v) Appreciation Allowance for school having eleven uses or more per week

Effective September 1, 2015 - \$670.00 per year

- (vi) Appreciation Allowance for Board Room use

Effective September 1, 2015 - \$416.00 per year

- (vii) The minimum Appreciation Allowance paid to a caretaker will be

Effective September 1, 2015 - \$264.00 per year

- (viii) All full-time dayworkers shall receive the appreciation allowance for the Education Centre/Mount.

- (b) To be eligible to receive the allowance provided for in 18.06(a) above, the caretaker in question must perform the duties which correspond to the community usage of the school for the majority of the payment period as described in (c) and (d) below.

- (c) Fifty percent (50%) of the Appreciation Allowance will be made in the December 15th pay period of each year for the period September to December and based on the number of uses as registered on November 15th.

- (d) Fifty percent (50%) of the Appreciation Allowance to be made in the June 15th pay period of each year for the period January to June and based on the number of uses as registered on March 31st.

- (e) In schools with two (2) caretakers, the uses will be calculated according to the area used and both caretakers may receive an Appreciation Allowance based on the scale in 18.06(a).

- (f) Those secondary school caretakers who have not earned the equivalent amount as a result of overtime required for community, school or board use or function, will be eligible to receive and will be paid the minimum appreciation allowance.

18.07 Overtime rates of time and one-half shall be paid for all authorized work in excess of eight (8) hours per day or forty (40) hours per week. Sunday work shall be at the rate of double time.

- (a) Overtime shall be kept to a minimum and overtime required in an elementary school shall be offered to the caretaker(s) as follows:

- (i) Scheduled overtime will be offered to the caretaker(s) assigned to the school concerned in order of seniority and subject to the ability to

perform the work required.

- (ii) Non-scheduled overtime required within the same day shall be offered to the caretaker(s) who are working in the building on that day in order of seniority and subject to the ability to perform the work required.

In the event the full-time seniority caretaker(s) assigned to this building decline to work overtime, it shall then be offered to the part-time seniority caretaker(s) (as per Article 3.02) or casual employees who are working in this building.

18.08(S) (a) Overtime required in a secondary school shall be offered first to the full-time employees assigned to this building in order of seniority, subject to the ability to perform the work required. In the event that full-time employees of this building decline to work overtime, it shall then be offered to the part-time or casual employees who are working in the same school.

- (b) In the event that full-time or part-time or casual employees decline to work overtime as per Article 18.08(S)(a), the overtime shall then be offered to full-time caretakers according to seniority and subject to the ability to perform the work required.

18.09 (a) A seniority employee who is called out during his/her time off shall be entitled to a minimum of two (2) hours pay at the applicable overtime rates.

- (b) Seniority employees who are scheduled by the Board for overtime work on weekends shall be scheduled for not less than four (4) consecutive hours.

18.10 The Board shall provide a travel allowance according to Board Policy when employees are required to use their own automobiles for work purposes, at the request of the Board, during working hours. A form shall be provided to the employees to submit their mileage for payment to the Manager of Plant Services on a monthly basis.

District caretakers, who are required to report to a workplace outside of their regular workplace/community, shall be paid the above allowance subject to travel arrangements approved by the Manager of Plant Services.

18.11 When use of schools permits are issued by the Board to persons other than Board employees, notification shall be given to the caretaker of the school concerned, by copy of such permit.

18.12 **Meal Allowance**

All employees called upon to work three (3) hours or more overtime beyond their regular scheduled shift, a meal allowance of seven dollars (\$7.00) shall be paid by the Board.

Article 19 - VACATIONS

19.01 All full-time seniority employees within the classifications covered by this Agreement shall receive vacation at their regular rate of pay in accordance with the schedule listed below. For vacation purposes, continuous full time service will be calculated as

of the anniversary date of each employee.

Notwithstanding the above and pursuant to this Article, service will be defined as the length of continuous active full-time employment from the date a seniority employee is appointed to a full-time position, excluding periods of layoff. However, where the laid-off employee has been working continuous full-time hours under the "Priority Call-Out" provisions of Article 15.04 and is later recalled, he or she shall not lose credit for vacation purposes on account of having been laid off.

- (a) After one (1) year service, two (2) weeks vacation with pay
- (b) After five (5) years service, three (3) weeks vacation with pay
- (c) After ten (10) years service, four (4) weeks vacation with pay
- (d) After fifteen (15) years service, five (5) weeks vacation with pay
- (e) After twenty (20) year service, six (6) weeks vacation with pay
- (f) Employees shall receive the vacation periods as set out above but shall forfeit a portion of vacation pay for continuous unpaid absences in excess of one (1) week.
- (g) In addition to their regular vacation, all seniority full-time employees shall receive one extra week of vacation at age 63 years each year to 65 years prior to retirement (non-cumulative each year). Entitlement of extra vacation shall be on the employee's birthday and shall be a maximum of three (3) weeks.

19.02 Part-time employees shall be paid the percentage equivalent to the above vacation entitlements during each pay period. Such employees shall take an unpaid leave of absence to allow them time off in accordance with the provisions of the Employment Standards Act.

19.03 Employees who do not qualify for vacation entitlement will receive vacation pay in accordance with the Employment Standards Act. However, such employees can arrange to have time off work, which will not impact on full-time employees, by mutual agreement with the Manager of Plant Services.

- 19.04 (a)
- (i) For the city of Sault Ste. Marie, not more than fifteen (15) caretakers may be off at the same time for the months of July and August. All written requests must be received by May 1st of each year. In the scheduling of vacation during the summer months, a seniority employee must schedule vacation for a minimum period of one (1) week. However, each employee may be granted up to two (2) vacation days that may be taken individually during this period.
 - (ii) For the city of Sault Ste. Marie, not more than twelve (12) caretakers may be off at the same time for Christmas break and March break and all written requests must be received by November 1st and February 1st of each year.
 - (iii) For the city of Sault Ste. Marie, not more than eight (8) caretakers

may be off at the same time at times other than July and August, Christmas break and March break.

- (iv) All vacations for the periods noted in (i) and (ii) above will be granted based on seniority.
 - (v) The Manager of Plant Services shall confirm vacation approval or denial within fourteen (14) days of expired deadline outlined in (i) and (ii) above. Where vacation is denied, the employee will be given the opportunity to resubmit a request for vacation and such vacation will be granted based on seniority.
 - (vi) Written requests for vacation at times other than noted in (i) and (ii) above must be submitted to the supervisor at least one (1) week in advance. Vacation will be granted on a first come, first served basis.
 - (vii) For the districts outside of Sault Ste. Marie, not greater than one caretaker per school may be off at any given time.
 - (viii) Changes in vacation schedule may be arranged with one (1) week written notice to the Manager of Plant Services for good and sufficient reason.
 - (ix) Those employees who are traveling overseas during July and August will be exempt from the limits prescribed in (i) above.
 - (x) Employees affected by the maximum noted in (a)(i) above, will be contacted, in order of seniority, to resubmit vacation. Normally, this process will be completed no later than May 20th and the employee will be given a minimum of forty-eight (48) hours notice to resubmit vacation.
- (b) The provisions of clause (a) above shall apply to maintenance employees, except that, in addition, in the city of Sault Ste. Marie, there can be no more than two (2) maintenance employees off on vacation leave at any time.
 - (c) Upon the request of the employee, sick leave may be substituted for vacation where it can be established that an illness or accident requiring hospitalization occurred while on vacation. Only time spent in hospital may be substituted.
- 19.05 The annual vacation allowance may be accumulated to a maximum of one and one-half (1 1/2) times the employee's annual vacation allowance. Each employee will notify the Manager of Plant Services in writing, on a form provided, one (1) month prior to his/her anniversary date of his/her desire to carry vacation over to the next vacation year.
- 19.06 An employee may not forego the vacation for which he/she is being paid.
- 19.07 A schedule of vacation dates shall be drawn up by the Manager of Plant prior to June 15th and mailed to all employees.
- 19.08 Employees will receive payment while on vacation as per Article 26 (Payment of Wages).

19.09 Vacation rates of pay for full-time seniority employees shall be at their effective hourly rate of pay in accordance with the Collective Agreement.

Article 20 - RECOGNIZED HOLIDAYS

20.01 All work requested from seniority employees by the Board on the following recognized holidays will be paid for at the rate of time and one-half ($\frac{1}{2}$) of normal rate, over and above the regular pay for the recognized holiday. A seniority employee called out to work on such holidays listed below shall be entitled to a minimum of four (4) hours of pay at the aforementioned rates.

- | | |
|------------------------------|------------------------------|
| 1. New Years' Day | 8. Thanksgiving Day |
| 2. Good Friday | 9. Christmas Day |
| 3. Easter Monday | 10. Boxing Day |
| 4. Victoria Day | 11. Any other day proclaimed |
| 5. Dominion Day (Canada Day) | as a holiday by the Federal, |
| 6. Civic Holiday | Provincial or Municipal |
| 7. Labour Day | Government |

20.02 In the event of any of the above mentioned holidays falling on a Saturday or Sunday, the day substituted by the Federal, Provincial or Municipal Government shall be observed. For all such holidays, seniority employees shall have the day off with pay at their regular rate of pay for their regularly scheduled hours of work. Seniority employees must work the last scheduled day before the listed holiday and the next scheduled day after the holiday to qualify for holiday pay, unless the employee is off sick, on vacation, or on any approved leave, other than leave of absence for personal reasons. An employee who is off sick must submit a doctor's certificate to qualify for holiday payment.

20.03 All seniority employees shall be off, with pay, on Christmas Eve and New Year's Eve, provided they do not fall on a scheduled school day, as a substitution for the removal of Remembrance Day by the Provincial Government as a recognized holiday. In the event of a call out by the Board on either of those two days, the provisions of Article 20.01 shall apply for pay purposes. In the event that Remembrance Day is re-instituted by the Provincial Government, then the former Article 18.03 in the March 1, 1980 to February 28, 1983 Sault Ste. Marie Agreement shall be re-instituted.

Where a school day is scheduled on Christmas Eve or New Year's Eve, preventing an employee from enjoying this holiday, the Board will allow the employee to take a different day which is to be scheduled at a time to be determined by the Manager of Plant Services.

20.04 For the purpose of recognized holidays listed in Article 20.01, casual employees shall be paid in accordance with the provisions of the Employment Standards Act.

Article 21 - SICK LEAVE PROVISIONS

(In addition to Central Item C6.00 Sick Leave and Central Letter of Understanding #8)

21.01 Definition of Sick Leave

- (a) Sick leave means the period of time an employee is absent from work without loss of pay by virtue of being sick or disabled, or under examination or

treatment of a physician, chiropractor or dentist, or because of an accident for which compensation is not payable under the Workplace Safety & Insurance Act.

- (b) Employees who are in receipt of Long Term Disability benefits, or who are laid off, or on authorized sick leave or authorized leave of absence for a period of greater than ninety (90) consecutive days will not be eligible for the Sick Leave Allowance entitlement for the period they are on such leave, layoff or benefit.

The above does not apply to Workplace Safety & Insurance Board benefits for the first twelve (12) months of absence.

21.02 Sick Leave Plan

For current sick leave language, refer to Central Item C6.00 Sick Leave

Previous Language:

- (a) All seniority employees working on a regular and continuous basis are entitled to sick leave commencing the first full month of employment as follows:
 - (i) Seniority employees who work forty (40) hours per week, twelve (12) months per year, shall receive a total annual sick leave allowance of fifteen (15) days, provided at the rate of one and one-quarter (1 ¼) days per month, cumulative to 150 days.
 - (ii) Part-time seniority caretakers who work less than forty (40) hours per week, twelve (12) months per year, shall have their sick leave allowance pro-rated in accordance with the number of hours regularly worked and the stipulations of Article 21.02 (b).
- (b) A seniority employee absent from work due to illness pursuant to this Article will have one sick day credit deducted from his/her Sick Leave Allowance for each scheduled day he/she is absent from work. No wages shall be paid to employees for absence beyond the number of days to their credit in the Sick Leave Plan.
- (c) Part-time employees, as described in Article 21.02 (a)(ii), will have their Sick Leave entitlement pro-rated.
- (d) The Board reserves the right to request a medical certificate from any employee.

Previous Language:

- (e) For the purposes of 21.02(a)(i) above, employees of a predecessor Board who are employed with the Huron-Superior Catholic District School Board as of the date of ratification who possess a sick day bank of greater than one hundred and fifty (150) days, shall have their sick day bank grandparented and capped. The number of days in the employee's bank on the date of ratification shall become that employee's maximum sick leave bank to a maximum of two hundred (200) days.

- 21.03 A seniority employee suffering from illness or disability for long duration and whose Sick Leave Credits are exhausted, will receive benefits equal to and according to the rules and regulations of the *Canada Employment Insurance Act* until he/she returns to work or is eligible for Long Term Disability or until the end of the 15th week of illness or as amended by the *Canada Employment Insurance Act*.
- 21.04 An annual holiday bonus will be granted consisting of 50% of the caretaker's unused annual sick leave allowance up to a maximum of five (5) days. The holiday bonus must be taken in the year applicable. To receive this bonus, the caretaker's absence record will be calculated on a September 1st through August 31st basis annually.

21.05 Sick Leave Record

Previous Language:

In September of each school year, the Employer shall advise each employee in writing of the amount of sick leave accrued to his/her credit.

Article 22 - WORKPLACE SAFETY AND INSURANCE

22.01 Workplace Safety and Insurance Benefits

- (a) An employee who has applied for WSIB benefits and who is awaiting approval of his or her claim from the Workplace Safety and Insurance Board shall have the option of:
- (i) Receiving Workplace Safety & Insurance payment from WSIB, if and when approved.
- OR
- (ii) It is agreed that, when an employee is eligible for and receives approval of a claim by the Workplace Safety & Insurance Board, the employee is entitled to one hundred percent (100%) of their usual wages and benefits from the day the accident occurred, for the duration of the employee's absence from work without deduction from sick leave credits.
- (b) Where an employee receives workers' benefits as determined by the Workplace Safety and Insurance Board, such payments shall be directed to the Board.
- (c) The denial of workers' benefits does not preclude the use of sick leave as determined by the collective agreement.

22.02 Workplace Safety and Insurance Wage Continuance Provisions

- (a) The following provision applies to an employee
- (i) who is absent from work as a result of illness or injury sustained at work; and
 - (ii) who has made a claim to the Workplace Safety & Insurance Board with respect to the illness or injury sustained at work; and

- (iii) who has been awaiting approval of the claim; and
- (iv) who would otherwise be entitled to payment pursuant to the provisions of the Cumulative Sick Leave Plan (Article 21.02) or the C.E.I.C. Sick Leave Plan (Article 21.03).

For greater clarity, this provision does not apply to an employee already in receipt of Workplace Safety & Insurance payment at the time of the claim.

- (b) If the employee is unable to perform his or her regular duties or modified work as a result of the illness or injury and a WSIB Functional Abilities Form from the employee's physician to this effect has been submitted to his or her supervisor, the employee may apply for payment on the form provided by the employee's supervisor and to be returned to the Human Resources Department. Upon receipt of the form the application will be processed for payment to which the employee would be entitled from the Workplace Safety & Insurance Board if the claim was approved. Payment by the School Board will be from the date of the claim and will be provided only

- (i) If the employee provides a WSIB Functional Abilities Form from the Doctor
 - (1) of illness or injury sustained at work satisfactory to the Board designated official; and
 - (2) that the employee is unable to perform his or her regular duties or modified work as a result of the illness or injury; and
- (ii) If the employee completes and submits the form provided by his/her supervisor.

This form which has been provided to the employee by his/her supervisor will serve as the application for payment as well as the agreement between the employee and the Huron - Superior Catholic District School Board that any payments provided by the School Board pursuant to this provision will be refunded to the School Board following final determination of the claim by the Workplace Safety & Insurance Board.

Payments will only be made by the School Board to the extent that the employee would be entitled to payment pursuant to the Cumulative Sick Leave Plan (Article 21.02) or the C.E.I.C. Sick Leave Plan (Article 21.03) if the Workplace Safety & Insurance claim was not approved. Any payment under this provision will continue for a maximum duration equal to that which the employee would be covered pursuant to the Cumulative Sick Leave Plan (Article 21.02) or the C.E.I.C. Sick Leave Plan (Article 21.03).

- (iii) If the claim for Workplace Safety & Insurance is not approved and the School Board had advanced monies pursuant to the above, the monies paid as an advance will be applied towards the payment to which the

employee would be entitled under the Cumulative Sick Leave Plan (Article 21.02) or the C.E.I.C. Sick Leave Plan (Article 21.03), including statutory deductions (i.e. income tax, C.E.I.C., C.P.P., OMERS, etc.). Appropriate deductions will be made to the sick leave credits, if applicable.

22.03 When a seniority employee at the request of the Board must seek from a Doctor, certification relating to an illness or disability, the Board will pay for such a certificate.

Article 23 – BENEFITS

(In addition to Central Item C5.00 Benefits and Central Letter of Understanding #9)

23.01 (a) Premiums for benefits shall be as described below:

- (i) For full-time employees working thirty-five (35) hours per week and twelve (12) months per year, 100% of the premiums shall be paid by the Board.
 - (ii) For part-time employees working less than thirty-five (35) hours per week and/or less than twelve (12) months per year, the premiums paid for by the Board will be pro-rated on the basis of normal permanent allotted hours of work per week and months of work per year.
 - (iii) Part-time employees who are normally scheduled to work less than seventeen and a half (17.5) hours per week are not eligible to participate in the benefits plan.
- (b) The Board's benefit plans are available only to seniority full-time and part-time employees and are not available to relief employees. The Board shall not contribute to the premiums for benefits for laid off employees. Employees who have not been recalled to work by October 15th of any school year shall have their participation in the benefits plan terminated.
- (c) Employees who have pro-rated benefits under the provisions of (a)(ii) above shall be responsible for reimbursing the Board for their portion of the premiums and the Board shall be authorized to deduct such payments for an employee's pay.

Employees are not permitted to temporarily discontinue coverage during temporary layoffs, such as Christmas, March Break or the summer months.

Participation in the benefit coverage by eligible employees who work less than 35 hours per week shall be at the written option of the employee. The employee shall advise the Board in writing of the option chosen.

23.02 (a) The Board is not the insurer of employee benefits. All insured benefits shall be as described in the insurance company's brochures which shall be distributed to all eligible seniority employees. All benefits shall be subject to the rules, regulations, descriptions and limitations as set out in the Master Contracts held by the Board. In any dispute, such Master Contracts shall prove binding on all parties.

- (b) Employees who do not enroll in the benefit plans within thirty-one (31) days of becoming eligible or of cessation of coverage elsewhere, are considered to be late applicants. Late applicants must submit medical evidence to the Insurance Company by completing the Evidence of Insurability form. Further medical evidence may be requested by the carrier. Once approved for the benefit plan, coverage will be subject to the terms and conditions of the Master Contract.
- (c)
 - (i) **Life Insurance Plan:** Three (3) times normal earnings exclusive of overtime to a maximum of \$100,000.
 - (ii) Eligible seniority employees shall be allowed to purchase at their own expense a Voluntary Group Life Insurance benefit equal to one (1) times the employee's basic annual earnings to a maximum of \$75,000.
- (d) **Long Term Disability Plan:** Eligible seniority employees who have been enrolled in the LTD plan shall be provided with a Long Term Disability benefit providing seventy-five percent (75%) of normal monthly earnings after the thirteenth (13th) week of disability, to retirement age. Disability shall be defined as inability to perform the essential duties on one's job for a period of two (2) years, or inability to be otherwise employed after this period. After a period of two (2) years, all benefits except Life Insurance are terminated.

Employees who are eligible for LTD benefits must apply for and use these LTD benefits rather than accumulated sick leave credits. It is the responsibility of the employee to ensure that she or he has made application for LTD benefits in a sufficiently timely manner to be granted benefits by the employee's fourteenth (14th) week of absence. The employer shall forward the applicable forms to the employee after thirty (30) calendar days of illness.

Employees who have made application for LTD benefits as of the fourteenth (14th) week of absence shall continue to receive a salary of seventy-five percent (75%) of wages, deducted from sick leave credits (75% sick leave credit = 1 day of absence), provided that the employee has sick leave credits available. The employee shall reimburse the Board for any advance payments made under this provision upon approval of LTD benefits. If the employee does not have any sick leave credits available, she or he will be entitled to receive benefits equal to and according to the rules and regulations of the Canada Employment Insurance Act as per Article 21.03.

- (e) **Dental Plan:** Benefits to be based on the Ontario Dental Association fee schedule for the previous year.

The Board shall provide for orthodontic care for the employee and the employee's eligible dependents under the aforesaid policy. Such orthodontic care shall entitle the employee to a 60% reimbursement of total costs incurred by an employee and eligible dependents as defined by the insurer to a maximum of two thousand (\$2,000.00) dollars per person for the lifetime of each eligible employee or his or her dependent. Reimbursement to the employee hereunder shall be in accordance with the Ontario Dental Association's published schedule of fees for the previous year or such schedule as accepted by the insurer from time to time throughout the life of

this agreement.

- (f) **Major Medical & Prescription Drug Plan:** The drug plan shall be a generic prescription drug plan with \$1.00 deductible per prescription. Vision care coverage shall be subject to a four hundred dollar (\$400) maximum benefit every two (2) years.

Hospital coverage for employees and dependents covered under this plan shall be for a private hospital room, where available.

- (g) When a seniority employee at the request of the Board must seek from a Doctor certification relating to an illness or disability, the Board will pay for such a certificate.

23.03 The provisions of this benefits plan shall come into effect within thirty (30) days of the date the agreement has been ratified by both CUPE and the Board.

Article 24 - PENSION PLAN

Ontario Municipal Employees Retirement Systems (OMERS)

- 24.01 (a) All full-time employees are required to become members of the OMERS as a condition of employment.
- (b) Part-time employees may become members of OMERS in accordance with OMERS regulations.
- 24.02 (a) For those employees who are members, the employer shall make contributions to OMERS in accordance with OMERS requirements and regulations.
- (b) The Board is authorized to make deductions from earnings of all employees belonging to the retirement system in accordance with OMERS regulations.
- 24.03 (a) The employer shall report and make calculations regarding pensionable earnings and contributions in accordance with OMERS regulations.
- (b) For the purpose of calculating OMERS basic pension, all perquisites allowable by OMERS will be included in salary.
- 24.04 L.T.D. shall terminate on the employee's 65th birthday. All other benefits terminate on employee's retirement date.

Article 25 - TOOLS AND EQUIPMENT

- 25.01 The Board will supply all tools and equipment and cleaning materials essential and necessary in order to carry out the work in maintaining the schools.
- 25.02 Those employees classed as Dayworkers and Maintenance Employees shall, for their own protection, be reimbursed for the full cost of two (2) pairs of safety boots or shoes (one (1) winter and one (1) summer) each year, provided a receipt is provided to the Manager of Plant Services. These must be C.S.A. approved.

25.03 The Board shall supply each employee protective rain gear to be used for special purposes as required.

25.04 Clothing Allowance

Each full-time and part-time seniority employee shall receive an annual clothing allowance. Those seniority employees on a year leave of absence, Long-term Disability or WSIB for a full year shall not be eligible for this allowance. If an employee is on a leave of absence, Long-term Disability or WSIB for a period of at least six months, he/she shall receive one-half (1/2) of the allowance. The annual allowance shall be as follows:

\$150.00 per year

Article 26 - METHOD OF PAY PLAN (PAYDAY)

- 26.01 (a) Employees shall be paid on a bi-weekly pay schedule. Where a payday falls on a recognized holiday, the Board shall pay employees on the last regular banking day prior to the recognized holiday.
- (b) The Board shall provide direct deposit of salary for all employees covered by this collective agreement to a bank, trust company or credit union within the jurisdictional area of the Board according to the employee's choice. The onus shall be on the employee to provide the Board with the necessary banking information in order that they may be paid by submitting a Direct Deposit form from their financial institution or by submitting a void cheque together with the Board form titled "Payroll Direct Deposit Service Request Form."
- (c) Pay cheque stubs shall indicate earnings and gross pay for the period. Overtime and vacation pay shall also be indicated if applicable.

Article 27 - PRINTING OF AGREEMENT

- 27.01 (a) The Union and the Board shall share equally the costs of printing the Agreement, which shall be done as soon as possible following the signing of the Agreement. Each employee shall receive a copy of the Agreement, and in addition, the Union shall receive officially signed copies plus additional copies in booklet form as requested.
- (b) The Board agrees to acquaint new employees with the fact that a Union agreement is in full force and effect and issue a copy of the agreement to each employee the first day they are hired with a written notice to the Union Secretary of the employee's name, address and phone number.

Article 28 - GENERAL

- 28.01 Caretakers are to be guided in their duties by the Rules and Regulations, as amended from time to time, as set out by the Plant Department and instructions from their Supervisor and/or Principal. Principals who have complaints about the work or procedures followed by the caretakers, when such work or procedures are in compliance with the Rules and Regulations, or instructions from the supervisor, should direct such complaints to the Manager of Plant Services.

28.02 Correspondence

All correspondence arising out of this agreement or incidental thereto shall pass to and from the designated Board personnel and the Group Vice-President and Recording Secretary of CUPE, unless specified otherwise within this Agreement. The National Representative shall receive a copy of all correspondence relating to grievances, discharge and discipline and Rules and Regulations.

28.03 Procedure Regarding Inclement Weather

The following procedures will apply with respect to employees who, because of severe weather conditions, either report late for work or are unable to report at all.

All employees are expected to make every effort to report for work on time, notwithstanding severe weather conditions. However, in such circumstances quoted above, it is agreed that employees who arrive late for their scheduled work day, but report prior to the mid-point of their scheduled work day, will be paid for the day, provided such late arrival is directly attributable to the aforementioned severe weather conditions. Employees who report after the mid-point of their work day will be paid for hours worked. If an employee does not report for work, he/she shall not be paid for the day.

With respect to employees who are unable to report for work due to the aforementioned severe weather conditions, or who report after the mid-point of their work day, it is agreed that notwithstanding the provisions of the collective agreement, such employees may be given the opportunity to work additional hours at straight time rates in order to make up part or all of such lost time. Any additional hours shall be scheduled and approved by the Manager of Plant Services.

It is further agreed, however, that in the event that employees are authorized to be absent from work by a supervisor, such employees shall be paid for any time lost because of such authorization.

When all or some of the schools are closed as a result of inclement weather by the Director or Supervisor and this announcement is made prior to the beginning of classes, employees shall not be required to report for duty. Wages shall not be affected and no sick leave benefits shall be deducted. However should an employee be off on sick leave the day prior to and the day following such closure, the employee will be deducted a sick leave day.

Article 29 - SUMMER CREWS

- 29.01 (a) For cleaning schools during the summer, caretakers shall be placed on crews and shall be responsible for their own respective schools. When one member of the crew is absent for any reason and therefore reduces the cleaning time allotted for the respective schools, he/she shall be replaced for the length of his/her absence, and, where possible, at the time of his/her absence, by a part-time, laid off, casual or summer student employee.
- (b) Secondary school caretakers shall normally remain in their respective schools during July and August. The caretakers will be arranged in crews to jointly clean the areas assigned to them.

- (c) The Board reserves the right to transfer the caretakers to meet the emergency needs or when construction takes place within any of the schools.
- (d) When scheduling summer work which requires greater than one person due to its physical nature, the Board will schedule this work at times when there is greater than one caretaker working.

Article 30 - BULLETIN BOARDS

30.01 The Board will provide space on the existing bulletin boards in every work site.

Where no bulletin board exists the Board shall ensure that one is provided within a reasonable period of time.

Article 31 - TERM OF AGREEMENT

31.01 This agreement shall be binding and remain in effect from September 1, 2014 through to August 31, 2017 and shall continue from year to year thereafter unless either party gives notice in writing.

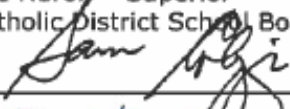

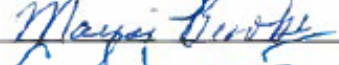

31.02 Notice of Change

Either party desiring to propose changes to this agreement shall, within one hundred and fifty (150) days prior to the expiry date, give notice in writing to the other party.


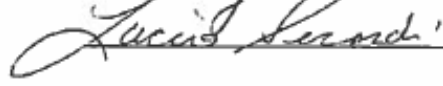
If notice of amendments is given by either party, the parties shall meet for the purpose of negotiations at the earliest mutually agreeable date prior to the expiration date of this agreement.

IN WITNESS WHEREOF the parties hereto have set their hands the day and year first above written.

The Huron - Superior
Catholic District School Board

Canadian Union of Public
Employees, Local 4148, Plant

Schedule "A" - Wage Rates

Employees shall be paid in accordance with the following wage schedule:

	Effective September 1, 2015	Effective September 1, 2016	Effective February 1, 2017
Level 1 Maintenance Employee	\$28.67 per hour	\$28.96 per hour	\$29.10 per hour
Level 2 Maintenance Helper	\$24.78 per hour	\$25.03 per hour	\$25.15 per hour
Level 3 Day Worker	\$22.10 per hour	\$22.32 per hour	\$22.43 per hour
Level 4 Seniority Full-Time Caretaker	\$22.10 per hour	\$22.32 per hour	\$22.43 per hour
Level 5 Seniority Part-Time Caretaker	\$20.18 per hour	\$20.38 per hour	\$20.48 per hour
Level 6 Casual Employee (no seniority)	\$18.58 per hour	\$18.77 per hour	\$18.86 per hour

LETTER OF UNDERSTANDING (A)

BETWEEN:

The Huron-Superior Catholic District School Board

- and -

**Canadian Union of Public Employees and its Local 4148
(Plant)**

RE: Ontario Health Insurance Plan

It is agreed that the Board will reinstate the policy of paying one hundred (100%) percent of the rates of the Ontario Health Insurance Plan should the O.H.I.P. rates change from being employer based through the Employer Health Tax, to being employee based. The O.H.I.P. benefit will be reinstated in accordance with Article 20.01(c) and Article 21.05 of the 1988-90 Collective Agreement.

Dated this 8th day of October, 2015.

For the Board

For the Union

Sam Colizza

Vicky Evans

Kathleen McAuley

Lucio Secondi

Marian Brooks

Chris Spina

LETTER OF UNDERSTANDING (B)

BETWEEN:

The Huron-Superior Catholic District School Board

- and -

**Canadian Union of Public Employees and its Local 4148
(Plant)**

The Huron-Superior Catholic District School Board and the Canadian Union of Public Employees, with a view to promoting harmonious relations, agree as follows:

- 1) For employees of the Huron-Superior Catholic District School Board that were formerly employed with the Sault Ste. Marie District Roman Catholic Separate School Board and who were hired prior to March 1, 1986:

On retirement or termination of employment due to permanent physical or mental disability, a Gratuity will be paid based on fifty percent (50%) of the number of accumulated Sick Leave Credit days credited to the seniority employee, times the daily rate of pay at the time of retirement or termination of employment due to permanent physical or mental disability. Seniority employees whose duties with the Board commenced on or after March 1, 1986 will be excluded from this plan and will not be entitled to a Retirement Gratuity. Upon the death of an employee, earned credits shall be payable to his/her estate. The maximum amount payable shall be \$15,000.

The minimum Gratuity paid for ten or more years of service will be \$600.00.

For the purposes of this plan, sick leave credits may be accumulated up to a maximum total of two hundred (200) days.

- 2) For the following employees of the Huron-Superior Catholic District School Board formerly employed with the North Shore District Roman Catholic Separate School Board: Theresa Lettieri; and Yvon Sanche, the retirement gratuity plan described below will be grandparented. No other employees will be eligible for this plan.

A retirement gratuity will be paid to each full time employee, who retires on pension, on his/her retirement at sixty-five (65) years of age or upon his/her retirement after thirty (30) consecutive years of service with this Board or because of total and permanent disability and to the estate of a full-time employee who has completed ten (10) consecutive years of service with this Board or predecessor Boards. The retirement gratuity will be calculated as follows:

10	years' service,	10%	cumulative sick leave x	1/260 th of annual salary
11	"	12%	"	"
12	"	14%	"	"
13	"	16%	"	"
14	"	18%	"	"
15	"	20%	"	"
16	"	22%	"	"
17	"	24%	"	"
18	"	26%	"	"
19	"	28%	"	"
20	"	30%	"	"
21	"	32%	"	"
22	"	34%	"	"
23	"	36%	"	"
24	"	38%	"	"
25	"	40%	"	"
26	"	42%	"	"
27	"	44%	"	"
28	"	46%	"	"
29	"	48%	"	"
30	"	50%	"	"

For the purposes of this plan, sick leave credits shall be accumulated to a maximum of 260 days for full time/full year employees who were in the Board's employ prior to 1980 09 01 and to a maximum of 200 days for ten-month employees who were in the Board's employ prior to 1980 09 01.

This plan will ensure to the benefit of employees who were in the employ of the North Shore District Roman Catholic Separate School Board on 1980 09 01.

Dated this 8th day of October, 2015.

For the Board

For the Union

Sam Colizza

Vicky Evans

Kathleen McAuley

Lucio Secondi

Marian Brooks

Chris Spina

LETTER OF UNDERSTANDING (C)

BETWEEN:

The Huron-Superior Catholic District School Board

- and -

**Canadian Union of Public Employees and its Local 4148
(Plant)**

RE: OMERS Contributory Earnings

The following definition of contributory earnings is provided for information purposes only and is non-grievable. Contributory earnings must include all regular recurring earnings as determined by the OMERS Pension Plan as may be amended from time to time.

For all pension and other compensation purposes the parties agree that contributory earnings must include all regular recurring earnings including the following:

- base wages or salary;
- regular vacation pay if there is corresponding service;
- normal vacation pay for other-than-continuous full-time members. Include vacation hours in credited service;
- retroactive pay (including any pay equity adjustment) that fits with OMERS definition of earnings for all members, including active, terminated, retired and disabled members;
- lump sum wage or salary benefits which may vary from year to year but which form a regular part of the compensation package and are expected normally to occur each year (e.g. payment based on organizational performance, some types of variable pay, merit pay, commissions);
- market value adjustments (e.g. percentage paid in addition to a base wage as a result of market conditions, including retention bonuses if they are part of your ongoing pay strategy and not a temporary policy);
- ongoing special allowances (e.g. flight allowance, canine allowance);
- pay for time off in lieu of overtime;
- danger pay;
- acting pay (pay at a higher salary rate for acting in place of an absent person);
- shift premium (pay for shift work);
- ongoing long service pay (extra pay for completing a specified number of years of service);
- sick pay deemed to be regular wages or salary;
- salary or wage extension for any reason (e.g. illness), provided service is extended (the member must be "kept whole" e.g. continuation of salary and benefits). If the member becomes employed in another position and begins contributing to any registered pension plan (except CPP), the balance of the extension period becomes unpurchasable service;
- stand-by pay/call-in pay (pay for being on call, not pay for hours worked when called in);
- living accommodation premiums provided (if paid as a form of compensation and not as a direct expense reimbursement);
- ongoing taxable payments to pay for costs (e.g. educational or car allowance);

- taxable premiums for life insurance;
- taxable value of provided vehicle or car allowance (e.g. if an employer provides an allowance (that is, expenses are not reimbursed) then the allowance is considered part of contributory earnings. If an employer reimburses mileage, this reimbursement represents payment for gasoline, maintenance, insurance, wear and tear on the vehicle and licence fees and should not be included as part of contributory earnings);
- payments for unused accumulated sick days or vacation time, only on retirement and only if credited service is extended. When you include lump-sum payments for unused sick days or vacation time as contributory earnings, you must also extend the retirement date and the credited service by the number of days covered by the payment. The member's pension will begin on the first day of the month following the revised retirement date.

Dated this 8th day of October, 2015.

For the Board

Sam Colizza

Kathleen McAuley

Marian Brooks

Chris Spina

For the Union

Vicky Evans

Lucio Secondi

LETTER OF UNDERSTANDING (D)

BETWEEN:

The Huron-Superior Catholic District School Board

- and -

**Canadian Union of Public Employees and its Local 4148
(Plant)**

The Board is committed to providing a safe work environment for all employees and recognizes its responsibilities under the Occupational Health and Safety Act and will adhere to Board Policy and procedural Guidelines with respect to violence in the workplace.

Dated this 12th day of January, 2016.

For the Board

For the Union

Sam Colizza

Vicky Evans

Kathleen McAuley

Lucio Secondi

Marian Brooks

Chris Spina

LETTER OF UNDERSTANDING (E)

BETWEEN:

The Huron-Superior Catholic District School Board

- and -

**Canadian Union of Public Employees and its Local 4148
(Plant)**

RE: Return to Work

The Parties are committed to providing an opportunity for an early and safe return to meaningful work of an employee who has been absent due to WSIB lost time; short term sick leave; long term sick leave and medical requests for workplace accommodation and will adhere to the employer's current practices, which shall include at the onset notification to the employee of their right to have Union representation throughout the process.

Dated this 12th day of January, 2016.

For the Board

For the Union

Sam Colizza

Vicky Evans

Kathleen McAuley

Lucio Secondi

Marian Brooks

Chris Spina

EXTENSION AGREEMENT

BETWEEN:

Ontario Public School Boards Association (OPSBA)

AND

Ontario Catholic Schools Trustee Association (OCSTA)

AND

L'Association des conseils des écoles publiques de l'Ontario (ACÉPO)

AND

L'Association franco-ontarienne des conseils scolaires catholiques (AFOCSC)

hereinafter:

COUNCIL OF TRUSTEES' ASSOCIATIONS/CONSEIL DES ASSOCIATIONS D'EMPLOYEURS

"CTA/CAE"

AND

THE CANADIAN UNION OF PUBLIC EMPLOYEES

hereinafter: "CUPE"

AND AGREED TO BY:

THE CROWN/LA COURONNE

1. The parties and the Crown agree that, subject to errors and omissions, and subject to the ratification processes applicable for each party, this Extension Agreement forms the basis of full and final settlement for an extension of collective agreement terms, inclusive of both central and local terms, with the effective date of September 1, 2017 to August 31, 2019. For further clarity, the ratification of this Extension Agreement is conditional upon the acceptance that local collective agreement terms remain status quo for the period September 1, 2017 to August 31, 2019. Ratification is also conditional upon legislative changes enabling ratification of an extension of collective agreement terms, as noted below. The parties and the Crown agree to recommend the terms of this Extension Agreement as set out herein to their respective principals.

Certain aspects of the terms described herein require legislative changes and as such are subject to the legislative process. Such changes have not yet been made, nor introduced to the Legislature of Ontario. Therefore the content of this agreement should be considered to be subject to such changes, when and if made and if such enabling changes are not made, or alter the terms of this agreement in any fashion, this Extension Agreement shall be considered null and void.

2. Ratification of the Extension Agreement by both parties and agreement of the Crown shall be deemed to have occurred on the date of ratification by CUPE and by the CTA, whichever is later, and by agreement of the Crown. The parties will endeavor to complete the central ratification and agreement processes by February 1, 2017, subject to enabling legislation.

It is further understood that the following parties,

- Conseil scolaire de district catholique de l'Est ontarien and CUPE Local 4155.
- Durham District School Board and CUPE Local 218 (Continuing Education Unit)

shall conduct their ratification vote of the central terms and conditions of this agreement by February 1, 2017.

Upon completion of the 2014-2017 round of local bargaining, the parties noted above shall conduct their ratification vote. Thereafter, the parties noted above shall conduct their ratification vote of the local terms and conditions of this extension agreement.

3. The terms of this Extension Agreement shall be effective on September 1, 2017 except as otherwise provided herein.
- The expiry date of Letters of Understanding (LOU) #3 and #5 shall be revised as noted in Appendix 1 and the terms of LOUs #3 and #5 shall continue in effect, uninterrupted, until August 30, 2019.
 - LOU #16 as noted in Appendix 1, shall be amended such that "2015-16 and/or the 2016-17" shall be replaced by "2017-18 and/or 2018-19".
 - The parties agree that it is desirable to deliver LTD benefits in a sustainable and affordable fashion. Therefore, in the event that the parties, as set out in LOU #7, arrive at a mutually agreeable solution or options for the implementation of sustainable and affordable LTD plans, such options may be put into place as soon as feasible.
 - Letters of Understanding/Agreement contained in or pertaining to language from the 2014-17 collective agreements shall continue in force and effect for the term of this agreement. However, where there is reference to an expiry date, the expiry date will be extended by two (2) years.
4. Prior to ratification by any party, it is agreed that this document will be translated into French in order that parties are able to ratify in their language of operation.

5. The collective agreement shall continue to consist of two parts. Provisions of Part A and Part B shall continue until August 31, 2019 without amendment, except as noted herein and in Appendix 1 attached to this Extension Agreement.

6. COMPENSATION

School boards shall adjust their current salary grids, wage schedules and position of responsibility allowances only, in accordance with the following schedule:

- September 1, 2017
 - 1.5%
- September 1, 2018
 - 1%
- February 1, 2019
 - 1%
- August 31, 2019
 - 0.5%

Payment for September 1, 2017 lump sum:

In recognition of potential expenses for professional development, supplies or equipment or for other professional expenses, all employees covered by this agreement will be paid a lump sum of 0.5% of wages earned in the 2016-2017 school year. CUPE agrees that it will conduct a survey of its members on the usage of these funds and provide the results to the Crown.

Method of payment for September 1, 2017 lump sum:

0.5% of earned wages earned in the 2016-17 school year as a lump sum payment to all employees (including those on the casual list) of this bargaining unit who are employed or on an approved leave, paid sick leave or statutory leave as at September 5, 2017. This excludes employees whose income replacement would be impacted while on leave.

Permanent employees on a statutory leave for any part of 2016-17 will not be adversely affected. The lump sum of 0.5% of annualized 2016-2017 salary/wages will be adjusted

as if they earned their normal salary/wage for the period of the time on the statutory leave.

Employees on an approved deferred salary leave in the 2017-2018 year on September 5, 2017, (eg. 4 over 5) shall nevertheless receive a lump sum of 0.5% of wages paid in 2016-2017.

The lump sum payment shall be provided by November 1, 2017.

The parties agree that, if the percentage increases in aggregate for general salary noted above are less than the aggregate percentage increases for general salary agreed to at other teacher table(s) or education worker table(s) for the years 2017-18 and 2018-19, the general salary increases for 2017-18 and 2018-19 agreed to at the other table(s) will be allocated to CUPE education worker members. For greater clarity, this provision applies only to aggregate across the board increases to salary grids, wage schedules and position of responsibility allowances as described in this article.

7. BENEFITS

Effective September 1, 2017, funding will be provided in the amount of \$5,075 per FTE plus inflationary increases in each of the following years, adjusted to reflect the actual participation date:

- September 1, 2017 : 4%
- September 1, 2018 : 4%

These inflationary increases will result in a funding amount of \$5,278.00 per FTE effective September 1, 2017 and \$5,489.12 per FTE effective September 1, 2018. There will be a reconciliation process based on the financial results for the year ending on August 31, 2019 equal to the lesser of the total cost of the plan per FTE and \$5,489.12 per FTE. This reconciliation will adjust the amount per FTE as of September 1, 2019.

The parties agree that, if the benefits inflationary increases noted above are less than the aggregate percentage increases agreed to at other teacher table(s) or education worker table(s) for the years 2017-18 and 2018-19, the benefits inflationary increases for 2017-18 and 2018-19 agreed to at the other table(s) will be allocated to CUPE education workers.

8. INVESTMENTS IN SYSTEM PRIORITIES

a) Special Education Staff Amount

In recognition of the role that education assistants, child and youth workers/counsellors and professional student services personnel play in supporting special education, the Crown will, conditional upon the approval by the Lieutenant-Governor-in-Council (if applicable), make a system investment in 2017-2018 which will continue in the 2018-2019 school year, to be utilized for special education needs. The amount for CUPE is \$26,078,257 province wide in each year.

The school board's share of the special education staffing amount shall be allocated for each CUPE bargaining unit based on the FTE of that bargaining unit for the following staffing categories: educational assistants, child and youth workers and professional student services personnel compared to the board's total FTE of educational assistants, child and youth workers and professional student services personnel. The attached chart (Appendix 2) provides an estimation of the funding as a result of this system investment.

b) Other Staffing Amount

In recognition of the role that office, clerical and technical, and custodial and maintenance employees play in promoting safe, healthy and caring schools, the Crown will, conditional upon the approval by the Lieutenant-Governor-in-Council (if applicable), make a system investment in 2017-2018, which will continue in the 2018-2019 school year. The amount for CUPE is \$31,360,432 in each year.

The school board's share shall be allocated for each CUPE bargaining unit based on the FTE of that bargaining unit for the following staffing categories: office, clerical and technical, custodial and maintenance education workers compared to the board's total FTE of office, clerical and technical, custodial and maintenance education workers. The attached chart (Appendix 2) provides an estimation of the funding as a result of this system investment.

For each a) and b) above, the following shall apply:

- - No later than May 15, 2017, each board and local shall meet and engage in consultation to discuss the use of funds and allocation to CUPE bargaining units consistent with the terms of this agreement. The board will share the total amount and the calculation of the amount applicable to each CUPE bargaining unit based on FTE. Boards and locals shall discuss the number and cost of CUPE

positions generated by this funding. It is agreed that these funds are to be used for permanent CUPE staff, consistent with board needs.

- Staffing processes used as a result of this additional funding shall be consistent with school boards' existing staffing processes.

9. APPRENTICESHIP/PROFESSIONAL DEVELOPMENT

The Crown shall create a one-time Education Programs – Other (EPO) grant for distribution, consistent with the Ontario Public Sector Transfer Payment Accountability Directive, in the amount of \$4.5 million. Funds from this EPO shall be allocated to school boards during the 2018-2019 school year, on the basis of joint applications received from school boards and CUPE locals for apprenticeship under the Ontario College of Trades and/or professional development opportunities.

The purpose of the funds are to:

- Provide on-the-job training for employees as apprentices, and/or
- Provide current employees of the boards opportunities to upgrade their skills.

A joint committee comprised of representatives of the central parties and the Crown, will be created to develop an application process that will be shared with boards and locals. The committee will develop the following:

- Criteria of allocation
- Application process
- Eligibility of program
- Reporting
- Equitable distribution

It is understood that the purpose of the Apprenticeship/Professional Development program is not to reduce current complement/positions.




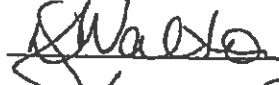
10. COMMUNITY USE OF SCHOOLS

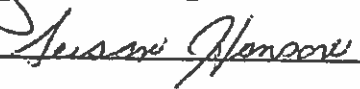
Conditional upon the approval by the Lieutenant-Governor-in-Council (if applicable), the Crown will increase the community use of schools funding, in the Grants for Student Needs, by 3% in the 2017-2018 school year (as shown in Appendix 3), and the new level of funding will continue into the 2018-2019 school year. It is intended that this funding be used to staff schools with CUPE custodians during community use, consistent with local collective agreements and existing board policies, procedures and practices. Where current practices do not provide CUPE custodial staff for community use events, and where policies and procedures allow, the funding will be used to provide CUPE custodial staffing to the extent of the available funds.

Signed at Toronto, this 20th day of December, 2016.

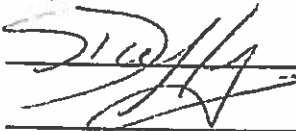
CUPE

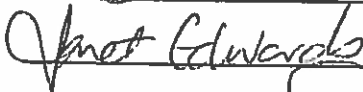




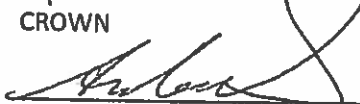


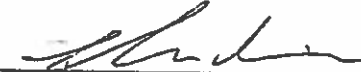
CTA/CAE

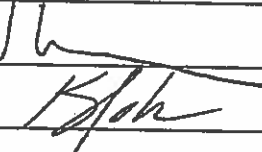






CROWN











APPENDIX 1

LETTER OF UNDERSTANDING #3

BETWEEN

The Canadian Union of Public Employees
(Hereinafter 'CUPE')

AND

The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')

Re: Job Security: Protected Complement

The parties acknowledge that education workers contribute in a significant way to student achievement and well-being.

1. Effective as of the date of central ratification, the Board undertakes to maintain its Protected Complement, except in cases of:
 - a. A catastrophic or unforeseeable event or circumstance;
 - b. Declining enrolment;
 - c. Funding reductions directly related to services provided by bargaining unit members; or
 - d. School closure and/or school consolidation.
2. Where complement reductions are required pursuant to 1. above, they shall be achieved as follows:
 - a. In the case of declining enrolment, complement reductions shall occur at a rate not greater than the rate of student loss, and
 - b. In the case of funding reductions, complement reductions shall not exceed the amount of such funding reductions, and
 - c. In the case of school closure and/or school consolidation, complement reductions shall not exceed the number of staff prior to school closure/consolidation at the affected location(s).

Local collective agreement language will be respected, regarding notification to the union of complement reduction. In the case where there is no local language the board will notify the union within twenty (20) working days of determining there is to be a complement reduction.

3. For the purpose of this Letter of Understanding, at any relevant time, the overall protected complement is equal to:
 - a. The FTE number (excluding temporary, casual and/or occasional positions) as at date of central ratification. The FTE number is to be agreed to by the parties through consultation at the local level. Appropriate disclosure will be provided during this consultation. Disputes with regard to the FTE number may be referred to the Central Dispute Resolution Process.
 - b. Minus any attrition, defined as positions that become vacant and are not replaced, of bargaining unit members which occurs after the date of central ratification.

4. Reductions as may be required in 1. above shall only be achieved through lay-off after consultation with the union on alternative measures, which may include:
 - a. priority for available temporary, casual and/or occasional assignments;
 - b. the establishment of a permanent supply pool where feasible;
 - c. the development of a voluntary workforce reduction program (contingent on full provincial government funding).
5. The above language does not allow trade-offs between the classifications outlined below:
 - a. Educational Assistants
 - b. DECEs
 - c. Secretaries
 - d. Custodians
 - e. Cleaners
 - f. Information Technology Staff
 - g. Library Technicians
 - h. Instructors
 - i. Supervisors
 - j. Central Administration
 - k. Professionals
 - l. Maintenance/Trades
6. The parties agree that where local collective agreement language currently exists that provides a superior benefit specifically with regard to protected complement FTE number, that language will prevail.
7. This Letter of Understanding expires on August 30, 2019.



LETTER OF UNDERSTANDING #5

BETWEEN

The Council of Trustees' Associations/
Le Conseil d'associations d'employeurs
(hereinafter called 'CTA/CAE')

AND

The Canadian Union of Public Employees
(hereinafter called 'CUPE')

RE: Scheduled Unpaid Leave Plan

The following Scheduled Unpaid Leave Plan (SULP) replaces the current Voluntary Leave of Absence program (VLAP) and is available to all permanent employees for the 2015-2016, 2016-2017, 2017-2018 and 2018-2019 school years. Employees approved for SULP days shall not be replaced.

For employees who work a 10-month year a school board will identify:

- 1) up to two (2) Professional Activity days in the 2015-2016 school year;
 - 2) two (2) Professional Activity days in the 2016-2017, 2017-2018 and 2018-2019 school years;
- that will be made available for the purpose of the SULP.

For employees whose work year is greater than ten (10) months, a school board will designate days, subject to system and operational requirements, which will be available for the purpose of the SULP in each of the 2015-2016, 2016-2017, 2017-2018 and 2018-2019 school years. These employees will be eligible to apply for up to two (2) days leave in each of these years.

For the 2015-2016 school year, the available day(s) will be designated no later than thirty (30) days after central ratification. All interested employees will be required to apply, in writing, for the leave within ten (10) days of local ratification, or within ten (10) days from the date upon which the days are designated, whichever is later. For the 2016-2017, 2017-2018 and 2018-2019 school years, the days will be designated by June 15, of the preceding school year. All interested employees will be required to apply, in writing, for leave for the 2017-2018 and 2018-2019 school year by no later than September 30, of the respective school year. Approval of the SULP is subject to system and operational needs of the board and school. Approved leave days may not be cancelled or changed by the school board or the employee. Exceptions may be considered with mutual consent. Half day leaves may be approved, subject to the system and operational needs of the board and school.

For employees enrolled in the OMERS pension, the employer will deduct the employee and employer portion of pension premiums for the unpaid days and will remit same to OMERS.

The following clause is subject to either Teacher Pension Plan amendment or legislation:

Within the purview of the Teachers' Pension Act (TPA), the Minister of Education will seek an agreement from the Ontario Teachers' Federation (OTF) to amend the Ontario Teachers' Pension Plan (OTPP) to allow for adjusting pension contributions to reflect the Scheduled Unpaid Leave Plan (SULP) with the following principles:

- i) Contributions will be made by the employee/plan member on the unpaid portion of each unpaid day, unless directed otherwise in writing by the employee/plan member;
- ii) The government/employer will be obligated to match these contributions;
- iii) The exact plan amendments required to implement this change will be developed in collaboration with the OTPP and the co-sponsors of the OTPP (OTF and the Minister of Education); and
- iv) The plan amendments will respect any legislation that applies to registered pension plans, such as the Pension Benefits Act and Income Tax Act.

This Letter of Understanding expires on August 30, 2019.



LETTER OF UNDERSTANDING #16

BETWEEN

The Canadian Union of Public Employees
(Hereinafter 'CUPE')

AND

The Council of Trustees' Associations
(Hereinafter the 'CTA/CAE')

AND

The Crown

Re: Additional Professional Activity (PA) Day

The parties confirm that should there be an additional PA Day beyond the current 6 PA days in the 2017-2018 and/or the 2018-2019 school years, there will be no loss of pay for CUPE members (excluding casual employees) as a result of the implementation of these additional PA days. For further clarity, the additional PA day will be deemed a normal work day. CUPE members will be required to attend and perform duties as assigned. Notwithstanding these days may be designated as Sulp days.



APPENDIX 2

CONFIDENTIAL to LABOUR RELATIONS

2017-18 - Investments in System Priorities* - CUPE			ESTIMATED SHARE OF INVESTMENTS	
Index	DSB No	DSB Name	Special Education Staff Amount	Other Staffing Amount
1	1	DSB Ontario North East	\$ -	\$ 179,033
2	2	Algoma DSB	\$ -	\$ 167,955
3	3	Rainbow DSB	\$ -	\$ 210,040
4	4	Near North DSB	\$ -	\$ 278,152
5	5.1	Keewatin-Patricia DSB	\$ -	\$ 138,627
6	5.2	Rainy River DSB	\$ -	\$ 39,347
7	6.1	Lakehead DSB	\$ 877	\$ 134,464
8	6.2	Superior-Greenstone DSB	\$ -	\$ -
9	7	Bluewater DSB	\$ 2,170	\$ 223,412
10	8	Avon Maitland DSB	\$ -	\$ -
11	9	Greater Essex County DSB	\$ 11,940	\$ 302,930
12	10	Lambton Kent DSB	\$ 634,457	\$ 474,931
13	11	Thames Valley DSB	\$ 1,708,478	\$ 1,401,242
14	12	Toronto DSB	\$ 4,631,173	\$ 4,322,594
15	13	Durham DSB	\$ 1,631,000	\$ 1,313,288
16	14	Kawartha Pine Ridge DSB	\$ 886,013	\$ 679,951
17	15	Trillium Lakelands DSB	\$ 490,309	\$ 422,644
18	16	York Region DSB	\$ 2,532,058	\$ 2,358,311
19	17	Simcoe County DSB	\$ 2,064	\$ 558,479
20	18	Upper Grand DSB	\$ -	\$ 323,664
21	19	Peel DSB	\$ 1,914	\$ 2,901,780
22	20	Halton DSB	\$ -	\$ 508,928
23	21	Hamilton-Wentworth DSB	\$ 7,931	\$ 533,391
24	22	DSB of Niagara	\$ 905,813	\$ 722,815
25	23	Grand Erie DSB	\$ 678,656	\$ 569,342
26	24	Waterloo Region DSB	\$ -	\$ -
27	25	Ottawa-Carleton DSB	\$ -	\$ -
28	26	Upper Canada DSB	\$ 761,500	\$ 661,172
29	27	Limestone DSB	\$ 498,415	\$ 416,683
30	28	Renfrew County DSB	\$ 2,758	\$ 231,540
31	29	Hastings and Prince Edward DSB	\$ 439,781	\$ 125,784
32	30.1	Northeastern Catholic DSB	\$ 110,616	\$ 70,456
33	30.2	Nipissing-Parry Sound Catholic DSB	\$ -	\$ 31,587
34	31	Huron-Superior Catholic DSB	\$ 212,490	\$ 159,325
35	32	Sudbury Catholic DSB	\$ -	\$ 77,013
36	33.1	Northwest Catholic DSB	\$ 94,308	\$ 44,211
37	33.2	Kenora Catholic DSB	\$ -	\$ -
38	34.1	Thunder Bay Catholic DSB	\$ -	\$ -
39	34.2	Superior North Catholic DSB	\$ -	\$ -
40	35	Bruce-Grey Catholic DSB	\$ -	\$ -
41	36	Huron-Perth Catholic DSB	\$ 156,382	\$ 92,075
42	37	Windsor-Essex Catholic DSB	\$ 164,128	\$ 51,707
43	38	London District Catholic School Board	\$ 518,683	\$ -
44	39	St. Clair Catholic DSB	\$ 491,287	\$ 351,505
45	40	Toronto Catholic DSB	\$ 262,591	\$ 184,604
46	41	Peterborough V N C Catholic DSB	\$ 1,681,560	\$ 1,923,345
47	42	York Catholic DSB	\$ 427,986	\$ 348,892
48	43	Dufferin-Peel Catholic DSB	\$ 1,119,071	\$ 953,055
49	44	Simcoe Muskoka Catholic DSB	\$ -	\$ 1,616,074
50	45	Durham Catholic DSB	\$ -	\$ 263,815
51	46	Halton Catholic DSB	\$ 411,116	\$ 394,046
52	47	Hamilton-Wentworth Catholic DSB	\$ 665,366	\$ 601,286
53	48	Wellington Catholic DSB	\$ 767,944	\$ 225,873
54	49	Waterloo Catholic DSB	\$ -	\$ 78,262
55	50	Niagara Catholic DSB	\$ 496,185	\$ 188,792
56	51	Brant Haldimand Norfolk Catholic DSB	\$ 535,724	\$ 445,648
57	52	Catholic DSB of Eastern Ontario	\$ -	\$ -
58	53	Ottawa Catholic DSB	\$ 380,778	\$ 328,351
59	54	Renfrew County Catholic DSB	\$ 943,985	\$ 370,954
60	55	Algouquin and Lakeshore Catholic DSB	\$ -	\$ 58,120
61	56	CSD du Nord-Est de l'Ontario	\$ 367,903	\$ 299,211
62	57	CSD du Grand Nord de l'Ontario	\$ 118,272	\$ 90,427
63	58	CS Viamonde	\$ -	\$ 59,932
64	59	CÉP de l'Est de l'Ontario	\$ -	\$ 157,669
65	60.1	CSD catholique des Grandes Rivières	\$ 13,672	\$ 352,604
66	60.2	CSD catholique Franco-Nord	\$ -	\$ 97,856
67	61	CSD catholique du Nouvel-Ontario	\$ -	\$ 40,391
68	62	CSD catholique des Aurores boréales	\$ -	\$ 123,461
69	63	CS catholique Providence	\$ -	\$ -
70	64	CSD catholique Centre-Sud	\$ 310,074	\$ 278,703
71	65	CSD catholique de l'Est ontarien	\$ -	\$ 197,356
72	66	CSD catholique du Centre-Est de l'Ontario	\$ 902	\$ 238,404
Estimated Totals			\$ 26,078,257	\$ 31,360,432

*Subject to ratification by all parties and subject to approval by the Lieutenant Governor in Council.

- Figures shown reflect best estimates available at this time.

- Special Education Staff Amount is based on the share of the board's total education assistants, child and youth workers and professional student services personnel FTE represented by CUPE.

- Other Staffing Amount is based on the share of the board's total office, clerical and technical, and custodial & maintenance education workers staff FTE represented by CUPE.

- Investments in System Priorities is time-limited and will only be provided for the term of the extension (2017-18 and 2018-19).

- The number of FTE will vary by board based on actual costs including but not limited to salary, benefits, vacation and allowances.

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APPENDIX 3

CONFIDENTIAL TO LABOUR RELATIONS

2017-18 -- Community Use of Schools Investment - CUPE			
Index	OSBNo	OSB Name	Investment in CUS - \$840k System Investment
1	1	DSB Ontario North East	\$ 4,951
2	2	Algoma DSB	\$ 4,417
3	3	Rainbow DSB	\$ 6,140
4	4	Near North DSB	\$ 4,719
5	5.1	Keewatin-Patricia DSB	\$ 2,820
6	5.2	Rainy River DSB	\$ -
7	6.1	Lakeland DSB	\$ 3,792
8	6.2	Superior-Greystone DSB	\$ -
9	7	Bluewater DSB	\$ 7,113
10	8	Avon Maitland DSB	\$ -
11	9	Greater Essex County DSB	\$ 222
12	10	Lambton Kent DSB	\$ 9,693
13	11	Thames Valley DSB	\$ 29,002
14	12	Toronto DSB	\$ 85,953
15	13	Durham DSB	\$ 25,822
16	14	Kawartha Pine Ridge DSB	\$ 12,589
17	15	Tri-Run Lakeland DSB	\$ 6,961
18	16	York Region DSB	\$ 45,435
19	17	Simcoe County DSB	\$ 17,471
20	18	Upper Grand DSB	\$ 11,029
21	19	Peel DSB	\$ 55,581
22	20	Halton DSB	\$ 21,477
23	21	Hamilton-Wentworth DSB	\$ 17,826
24	22	DSB of Niagara	\$ 14,460
25	23	Grand Erie DSB	\$ 10,719
26	24	Waterloo Region DSB	\$ -
27	25	Ottawa-Carleton DSB	\$ -
28	26	Upper Canada DSB	\$ 12,895
29	27	Unistone DSB	\$ 8,416
30	28	Renfrew County DSB	\$ 4,763
31	29	Hastings and Prince Edward DSB	\$ 6,802
32	30.1	Northeastern Catholic DSB	\$ 1,143
33	30.2	Nipissing-Parry Sound Catholic DSB	\$ 1,291
34	31	Huron Superior Catholic DSB	\$ 2,064
35	32	Sudbury Catholic DSB	\$ 2,384
36	33.1	Northwest Catholic DSB	\$ 518
37	33.2	Kenora Catholic DSB	\$ -
38	34.1	Thunder Bay Catholic DSB	\$ -
39	34.2	Superior North Catholic DSB	\$ -
40	35	Bruce-Grey Catholic DSB	\$ 1,608
41	36	Huron-Perth Catholic DSB	\$ 47
42	37	Windsor-Essex Catholic DSB	\$ -
43	38	London District Catholic School Board	\$ 7,185
44	39	St. Clair Catholic DSB	\$ 3,211
45	40	Toronto Catholic DSB	\$ 34,196
46	41	Peterborough V N C Catholic DSB	\$ 5,638
47	42	York Catholic DSB	\$ 20,341
48	43	Dufferin-Peel Catholic DSB	\$ 31,209
49	44	Simcoe Muskoka Catholic DSB	\$ 7,466
50	45	Durham Catholic DSB	\$ 8,163
51	46	Halton Catholic DSB	\$ 11,833
52	47	Hamilton-Wentworth Catholic DSB	\$ 165
53	48	Wellington Catholic DSB	\$ 2,950
54	49	Waterloo Catholic DSB	\$ 87
55	50	Niagara Catholic DSB	\$ 8,288
56	51	Brant Haldimand Norfolk Catholic DSB	\$ -
57	52	Catholic DSB of Eastern Ontario	\$ 4,814
58	53	Ottawa Catholic DSB	\$ 231
59	54	Renfrew County Catholic DSB	\$ 1,816
60	55	Algonquin and Lakeshore Catholic DSB	\$ 4,558
61	56	CSD du Nord-Est de l'Ontario	\$ 1,119
62	57	CSD du Grand Nord de l'Ontario	\$ 1,977
63	58	CS Viamonde	\$ 4,747
64	59	CÉP de l'Est de l'Ontario	\$ 6,144
65	60.1	CSD catholique des Grandes Rivières	\$ 3,613
66	60.2	CSD catholique Franco-Nord	\$ 1,260
67	61	CSD catholique du Nouvel-Ontario	\$ 3,574
68	62	CSD catholique des Aurores boréales	\$ -
69	63	CS catholique Providence	\$ 4,228
70	64	CSD catholique Centre-Sud	\$ 6,415
71	65	CSD catholique de l'Est ontarien	\$ 5,191
72	66	CSD catholique du Centre-Est de l'Ontario	\$ 7,802
Total			\$ 638,320

Notes:

- Provincial system investment of Community Use Of Schools (CUS) based on 2017-18 projected figures with a 3% increase in the allocation.
- Figures shown reflect best estimates available at this time and are subject to change.
- Based on the share of the board's total FTE related to School Operation Staff (as reported in 2016-17 Estimates Appendix H) represented by CUPE.

LETTER OF AGREEMENT

BETWEEN

The Council of Trustees' Associations/
Le Conseil d'associations d'employeurs
(hereinafter called 'CTA/CAE')


AND


The Canadian Union of Public Employees
(hereinafter called 'CUPE')

The parties agree that the Letter of Agreement herein replaces the Letter of Understanding #9 re: Benefits, of the 2014-2017 agreement on central terms signed on November 2, 2015, and is effective upon execution.

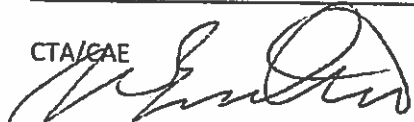
Signed at Toronto, this 20th day of December, 2016.

CUPE






CTA/CAE

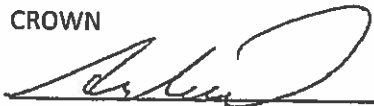


Janet Edwards



Janet Edwards

CROWN



LETTER OF UNDERSTANDING #9
BETWEEN
THE ONTARIO PUBLIC SCHOOL BOARDS' ASSOCIATION
(HEREINAFTER CALLED 'OPSBA')
AND
THE ONTARIO CATHOLIC SCHOOL TRUSTEES' ASSOCIATION
(HEREINAFTER CALLED 'OCSTA')
AND
L'ASSOCIATION DES CONSEILS SCOLAIRES DES ÉCOLES PUBLIQUES DE L'ONTARIO
(HEREINAFTER CALLED 'ACEPO')
AND
L'ASSOCIATION FRANCO-ONTARIENNE DES CONSEILS SCOLAIRES CATHOLIQUES
(HEREINAFTER CALLED 'AFOCSC')
AND
THE CANADIAN UNION OF PUBLIC EMPLOYEES / SYNDICAT CANADIEN DE LA FONCTION
PUBLIQUE
(HEREINAFTER CALLED 'CUPE')
AND
THE CROWN

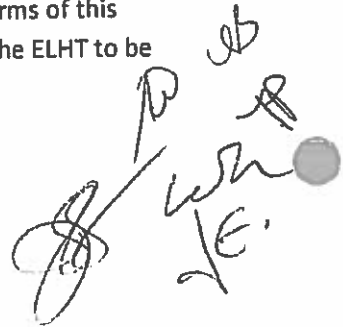
RE: BENEFITS

The parties agree that, once all employees to whom this memorandum of settlement of the central terms applies become covered by the Employee Life and Health Trust (ELHT) contemplated by this Letter of Understanding, all references to life, health and dental benefits in the applicable local collective agreement shall be removed from that local agreement.

The employee representatives, the employer representatives, and the Crown, intend to establish an Education Sector ELHT, (hereinafter, the "Trust"), to provide benefits to education workers in the Province of Ontario employed by District School Boards, District School Area Boards and Public School Authorities (hereinafter, the "Boards") in accordance with section 144.1 of the *Income Tax Act* (Canada) ("ITA"). Boards' benefit plans can only be moved into the Trust, such that the Trust will be in compliance with the ITA and Canada Revenue Agency administrative requirements for an ELHT (the "ELHT Requirements"). It is intended that the Trust be effective no later than May 1, 2017 and that Boards will participate in this Trust on a common date no later than February 1, 2018. The date on which the Boards commence participation in the Trust shall be referred to herein as the "Participation Date".

The parties acknowledge that the establishment of the Trust represents a substantial commitment both within and beyond the term of the current collective agreement. This letter of understanding is conditional upon its terms continuing in full force and effect beyond the termination date of the collective agreement, and is made in detrimental reliance upon such continuation. The terms of this letter of understanding will form the basis for a trust agreement setting out the terms of the ELHT to be approved by the parties.

SUBJECT TO ERRORS AND OMISSIONS December 20, 2016 22h00

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1.0.0 PRINCIPLES

- 1.1.0 The Trust will be governed by the employee representatives and the employer representatives, together with the Crown;
- 1.2.0 The Trust will be responsible for the delivery of benefits on a sustainable, efficient and cost effective basis;
- 1.3.0 Services provided by the Trust to be available in both official languages, English and French; and
- 1.4.0 Other employee groups in the education sector may join the Trust. The Trust will develop an affordable benefits plan that is based on the funding available to the employee groups.

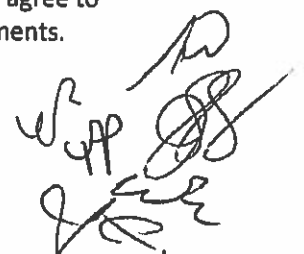
2.0.0 GOVERNANCE

2.1.0 Board of Trustees

- 2.1.1 The Board of Trustees will be comprised of 9 voting members that include 5 CUPE employee representatives and 4 employer representatives, including the Crown. The Board of Trustees will include among its members 2 independent experts, 1 appointed by the employer representatives and 1 appointed by the employee representatives. CUPE will be responsible for the appointment and termination of the employee Trustees, and the employer representatives will be responsible for the appointment and termination of the employer Trustees.
- 2.1.2 The appointed independent experts will:
 - a. Be retained from outside of the following organizations: the Trust, the shared services office supporting the Trusts, the union, the Boards, the CTA and the Crown;
 - b. Have no conflict of interest in their role as trustee on the Benefit Plan Trust; and
 - c. Be accredited from one of the following fields: actuarial science, law or accounting; or in lieu of such affiliation hold the Certified Employee Benefit Specialist (CEBS) designation; and have demonstrated experience with employee benefit plans.
- 2.1.3 Other experts may be invited to the Trust in an advisory capacity and will not maintain any voting rights.
- 2.1.4 All voting requires a simple majority to carry.
- 2.1.5 CUPE shall determine the initial term and subsequent succession plan for their Trustees. The CTA and the Crown acting together, shall determine the initial term and subsequent succession plan for their Trustees. A succession plan will be designed for the Trustees so that the terms of no more than three Trustees expire in any twelve month period. The term of a Trustee shall be limited to a maximum of 9 years.

3.0.0 ELIGIBILITY and COVERAGE

- 3.1.0 The following employees represented by CUPE are eligible to receive benefits through this Trust:
 - 3.1.1 The Trust will maintain eligibility for CUPE represented employees in accordance with the Local Collective Agreement ("CUPE represented employees") as of August 31, 2014. The Trust will also be permitted to provide coverage to other employee groups in the education sector with the consent of their bargaining agents and employer or, for non-union groups, in accordance with an agreement between the Trustees and the applicable Board. These groups must request inclusion in the Trust, and must agree to comply with the Trust's financial, data and administrative requirements.

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- 3.1.2 Retirees who were, and still are, members of a Board benefit plan at August 31, 2013 based on the prior arrangements with the Board.
- 3.1.3 Retirees who became members of a Board benefit plan after August 31, 2013 and before the Board participation date are segregated in their own experience pool, and the premiums are fully paid by the retirees.
- 3.1.4 No individuals who retire after the Board participation date are eligible.
- 3.1.5 Retirees that join are subject to the provisions in 3.1.2 through 3.1.4.
- 3.2.0 The benefit plan may provide coverage for health (including but not limited to vision and travel), life and dental benefits including accidental death and dismemberment (AD&D), medical second opinion, and navigational support, subject to compliance with section 144.1 of the ITA. After the initial establishment of the Trust, other employee benefit programs may be considered for inclusion, only if negotiated in future central collective agreements.
- 3.3.0 Each Board shall provide to the Trustees of the Education Sector ELHT directly, or through its Insurance Carrier of Record, Human Resource Information System (HRIS) information noted in Appendix A (which follows) within one (1) month of notification from the Trustees, in the format specified by the Trustees.

4.0.0 FUNDING

4.1.0 Start-Up Costs

- 4.1.1 The Government of Ontario will provide:
 - a. A one-time contribution to the Trust equal to 15% of annual benefit costs to establish a Claims Fluctuation Reserve ("CFR"). The amount shall be paid to the Trust on the Participation Date.
 - b. A one-time contribution of a half month's premium cost (4.15% of annual benefit costs) to the Trust, to cover start-up costs and/or reserves.
- 4.1.2 The one-time contributions in 4.1.1 (a) and (b) will be based on the actual cost per year for benefits (i.e. claims, premiums, administration, tax, risk or profit charges, pool charges, etc.) as reported on the insurance carrier's most recent yearly statement for the year ending no later than August 31, 2015.
- 4.1.3 The Crown has provided to CUPE \$3.5 million of the \$7.0 million startup costs referred to in s.4.1.1 (b) in October 2016. The balance of the \$7.0 million payment shall be paid by the Crown to CUPE upon signing of this LOU. The balance of any other payments, if required under s. 4.1.1 (b), shall be paid by the Crown to CUPE on the day the Trust becomes effective.
- 4.1.4 On the day the Board commences participation in the Trust, or as soon as reasonably and feasibly possible thereafter, all eligible and available surpluses in board-owned defined benefit plans will be transferred to the Trust in an amount equal to each employee's pro rata share based on the amount of the employee's co-share payment of each benefit. The remaining portion of the Board's surplus will be retained by the Boards.
- 4.1.5 Where there are active grievances related to surpluses, deposits and/or reserves, the amount in dispute shall be internally restricted by the Board until the grievance is settled.
- 4.1.6 All Board reserves for Incurred But Not Reported ("IBNR") claims and CFR, will remain with the existing carriers until those reserves are released by the carriers based on the terms of existing contracts.

- 4.1.7 Upon release of each Board's IBNR and CFR by the carriers, the reserves will be retained by the applicable Board. For the Administrative Services Only plans (ASO), a surplus (including any deposits on hand) that is equal to or less than 15% of the Board's annual benefit cost will be deemed to be a CFR and IBNR and will be retained by the applicable Board upon its release by the carriers. Where a surplus (including deposits on hand) exceeds 15% of the annual benefit cost, the remaining amount will be apportioned to the Board and the Trust based on the employers' and employees' premium share.
- 4.1.8 For policies where the experience of multiple groups has been combined, the existing surplus/deficit will be allocated to each group based on the following:
- If available, the paid premiums or contributions or claims costs of each group; or
 - Failing the availability of the aforementioned financial information by each group, then the ratio using the number of Full Time Equivalent positions (FTE) covered by each group in the most recent policy year will be used.
- The methodology listed above will be applicable for each group leaving an existing policy where the experience of more than one group has been aggregated. Policies where the existing surplus/deficit has been tracked independently for each group are not subject to this provision.
- 4.1.9 Boards with deficits will recover the amount from their CFR and IBNR. Any portion of the deficit remaining in excess of the CFR and IBNR will be the responsibility of the board.
- 4.1.10 In order to ensure the fiscal sustainability of said benefit plans, the Boards will not make any withdrawal, of any monies, from any health care benefit plan reserves, surpluses and/or deposits nor decrease in benefit plan funding unless in accordance with B-Memo B04:2015. It is the parties understanding that the Ministry of Education Memo B04:2015 applies and will remain in effect until Board plans become part of the Trust.
- 4.1.11 The Trust shall retain rights to the data and the copy of the software systems.

4.2.0 On-Going Funding

- 4.2.1 For the current term, the Boards agree to continue to provide benefits in accordance with the existing benefit plans and co-pay arrangements until the Employees' Participation Date in the Trust.
- 4.2.2 In order that each party be satisfied that the terms of this LOU provide a satisfactory basis to deliver benefits in the future, each party reserves the right to conduct a thorough due diligence with respect to existing benefit arrangements (including benefit terms, eligibility terms, FTE positions in the bargaining unit, historic costs and trends).
- 4.2.3 As of the day that a Board commences participation in the Trust, the Board will remit an amount equal to 1/12th of \$5,075 per FTE to the Plan's Administrator and on the first day of each month thereafter.
- 4.2.4 In addition to the contributions provided by the Boards noted in 4.2.3 above, the Boards will also remit the employees' share of the benefit cost, if any, as deducted from the employees' pay and as specified by the Trust.
- 4.2.5 The terms and conditions of any existing Employee Assistance Program/Employee Family Assistance Program shall remain the responsibility of the respective Board and not the Trust maintaining current employer and employee co-share where they exist. The Board shall maintain its contribution to all statutory benefits as required by legislation (including but not limited to Canada Pension Plan, Employment Insurance, Employer Health Tax, etc.).

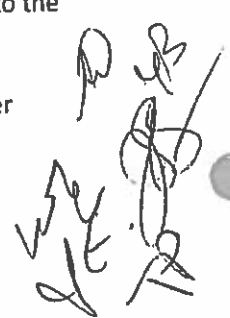
- 4.2.6 The FTE used to determine the Board's benefits contributions will be based on the average of the Board's FTE as of October 31st and March 31st of each year.
- 4.2.7 For purposes of 4.2.6 above, the FTE positions will be those consistent with Appendix H of the Education Finance Information System (EFIS) for job classifications that are eligible for benefits.
- 4.2.8 Amounts previously paid under 4.2.3 and 4.2.4 above will be reconciled to the agreed October 31st and March 31st FTE and any identified difference will be remitted to the Trust in a lump sum on or before the last day of the month following reconciliation.
- 4.2.9 In the case of a dispute regarding the FTE number of members for whom the provincial benefits package is being provided, the dispute will be resolved between the Board and CUPE. If no resolution to the issue can be achieved it shall be subject to the Central Dispute Resolution Process.
- 4.2.10 The Trust will provide the necessary information needed by Boards to perform their administrative duties required to support the Trust in a timely and successful manner.
- 4.2.11 Funding for retirees shall be provided based on the costs or premiums in 2014-15 associated with those retirees described in 3.1.2 plus 4% in 2015-16 and 4% in 2016-17. Employer and employee co-shares will remain status quo per local collective agreements in place as of August 31, 2014 or per existing benefit plan provisions.

5.0.0 SHARED SERVICES

- 5.1.0 CUPE agrees to adopt a shared services model that will allow other Trusts to join the shared services model. The shared services office of the Trust is responsible for the services to support the administration of benefits for the members, and to assist in the delivery of benefits on a sustainable, efficient and cost effective basis recognizing the value of benefits to the members.
- 5.1.1 Administrative services and Insurance provider(s) services will be competitively procured as soon as administratively feasible.
- 5.1.2 Any procurement of services to support the administration of benefits conducted by the shared services office may include the procurement of these services for other Trusts to ensure the most efficient and cost effective service.

6.0.0 BOARD OF TRUSTEES' RESPONSIBILITIES

- 6.1.0 The Board of Trustees will be responsible for the operational and financial sustainability of the Trust, including, but not limited to:
 - a. The trustees' selection of the Trust auditors and the Trust actuaries;
 - b. The annual reports of the Auditors and actuaries;
 - c. The actuarial report, including any report obtained under Section 7.0.0 regarding recommendations on sustainability of the initial plan design. The first actuarial report shall be received no sooner than six months and no later than twelve months following the implementation of the initial plan;
 - d. The actuarial report, including any report obtained under Section 7.0.0 regarding recommendations on sustainability, of any subsequent changes to the plan design;
 - e. The design and adoption of the initial Benefit Plan and any amendments to the Benefit Plan;
 - f. Validation of the sustainability of the respective Plan Design;
 - g. Establishing member contribution or premium requirements, and member deductibles if any;



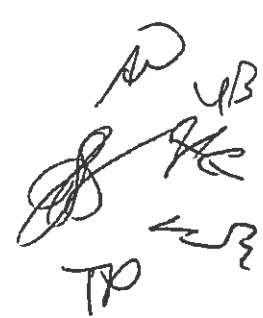
- h. Identifying efficiencies that can be achieved;
 - i. The design and amendment of the Funding policy;
 - j. The investment Policy and changes to the Investment Policy; and
 - k. Procurement of adjudicative, administrative, insurance, consultative and investment services.
- 6.2.0 Under the Funding Policy, Trust surpluses may not be refunded or distributed in cash, but may be used, as determined by the Trust to:
- a. Fund future claims in conjunction with the fixed funding and term contained in the collective bargaining agreement;
 - b. Fund claims stabilization or other reserves;
 - c. Improve plan design;
 - d. Expand eligibility (subject to Section 3.1.2 through to 3.1.4); and
 - e. Reduce member premium share if any.
- 6.3.0 Under the Funding Policy, actual and projected funding deficiencies of the Trust will be addressed no later than the next regular plan renewal (as of September 1st) using one or more of the following methods, as determined by the Trust:
- a. Use of existing claims stabilization funds;
 - b. Increased member share premium;
 - c. Change plan design;
 - d. Cost containment tools;
 - e. Reduced plan eligibility;
 - f. Cessation of benefits, other than life insurance benefits; and
 - g. Identify other sources of revenue.
- 6.4.0 The Trustees shall adopt policies for the appointment, review, evaluation and, if necessary, termination, of their service providers.
- 6.5.0 The Trust shall provide "trustee liability insurance" for all Trustees.

7.0.0 ACCOUNTABILITY

- 7.1.0 Actuaries and external auditors will be appointed by the Trust. Audited financial statements and an actuarial evaluation report will be obtained for the Trust on an annual basis. The actuarial report will include projections for the Trust for a period of not less than 3 years into the future.
- 7.2.0 The Funding Policy shall require the Trustees to take necessary actions or decisions during a period in which the CFR is less than 8.3% of annual expenses over a projected three year period.
If the motion to adjust the plan design does not pass, the Trust will increase member share premiums to restore the balance to at least 8.3% of total annual expenses.
- 7.3.0 Copies of the audited financial statements and the actuarial evaluation report requested in section 7.1.0 will be shared with CUPE, OPSBA, OCSTA, ACEPO, AFOCSC and the Ministry of Education.

8.0.0 TRANSITION COMMITTEE

- 8.1.0 A transition committee comprised of the employee representatives and the employer representatives, including the Crown, will be established by January 31, 2016 to address all matters that may arise in the creation of the Trust.

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9.0.0 PAYMENTS

- 9.1.0 The Crown will make a recommendation to the Lieutenant Governor in Council to amend the Grants for Student Needs funding regulation indicating that the funding amount provided for benefit of the Trust must be provided to the Trust in accordance with the Letter of Understanding.

10.0.0 ENROLMENT

- 10.1.0 For new hires, each Board shall distribute benefit communication material as provided by the Union to all new members within 15 to 30 days from their acceptance of employment.
- 10.2.0 For existing members, the Board shall provide the Human Resource Information System (HRIS) file with all employment information to the Trustees as outlined in Appendix A (which follows).
- 10.3.0 Where an HRIS file cannot be provided, the Board shall provide the required employment and member information to the Trust Plan Administrator in advance of the member commencing active employment or within the first 30 days of the employment date. The Board shall enter any subsequent demographic or employment changes as specified by the Trust Plan Administrator within one week of the change occurring.
- 10.4.0 The benefit administration for all leaves, including Long-Term Disability where applicable, will be the responsibility of the Trust Plan Administrator. During such leaves, the Board shall continue to provide HRIS information and updates as defined above.
- 10.5.0 Each Board shall provide updated work status in the HRIS file a minimum of 2 weeks in advance of the leave or within the first 15 days following the start of the absence.

11.0.0 ERRORS AND OMISSIONS RELATED TO DATA

- 11.1.0 Board errors and retroactive adjustments shall be the responsibility of the Board.
- 11.2.0 If an error is identified by a Board, notification must be made to the Trust Plan Administrator within seven (7) days of identification of the error.
- 11.3.0 Upon request by the Trust Plan Administrator, a Board shall provide all employment and member related information necessary to administer the provincial benefit plan(s). Such requests shall not be made more frequently than twice in any 12 month period.
- 11.4.0 Within thirty (30) days following a request by the Trustees, a Board shall permit a chartered professional accountant acting on the Trustees' behalf to carry out an inspection, audit or examination of the books of account, documents, payrolls, records, and other materials relating directly to its participation in this Trust.

12.0.0 CLAIMS SUPPORT

- 12.1.0 The Board shall complete and submit the Trust Plan Administrator's Waiver of Life Insurance Premium Plan Administrator Statement to the Trust Plan Administrator for life waiver claims when the Trust Plan Administrator does not administer and adjudicate the LTD benefits.
- 12.2.0 Each Board shall maintain existing beneficiary declarations. When required, the Board shall provide the most recent beneficiary declaration on file to the Trust Plan Administrator. Any changes subsequent to the participation date shall be the responsibility of the Trust.

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13.0.0 PRIVACY

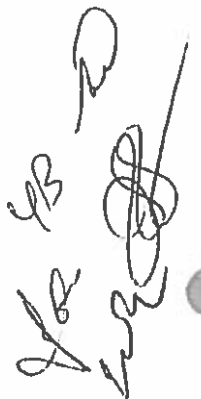
13.1.0 In accordance with applicable privacy legislation, the Trust Plan Administrator shall limit the collection, use and disclosure of personal information to information that is necessary for the purpose of providing benefits administration services. The Trust Plan Administrator's policy shall be based on the Personal Information Protection and Electronic Documents Act (PIPEDA).

YB
[Signature]
WVK
ZJZ
TP

APPENDIX A - HRIS FILE

Each Board may choose to provide to the Trustees of the Education Sector ELHT directly, or provide authorization through its Insurance Carrier of Record to gather, the following information within one (1) month of notification from the Trustees. The following information shall be provided in the formats agreed to by the Trustees of the Education Sector ELHT and the employer representatives:

- a. complete and accurate enrolment files for all members, member spouses and eligible dependents, including:
 - i. names;
 - ii. benefit classes;
 - iii. plan or billing division;
 - iv. location;
 - v. identifier;
 - vi. date of hire;
 - vii. date of birth;
 - viii. gender;
 - ix. default coverage (single/couple/family).
- b. estimated return to work dates;
- c. benefit claims history as required by the Trustees;
- d. list of approved pre-authorizations and pre-determinations;
- e. list of approved claim exceptions;
- f. list of large amount claims based on the information requirements of the Trustees;
- g. list of all individuals currently covered for life benefits under the waiver premium provision; and
- h. member life benefit coverage information.

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