



AUPE  **47TH**
ANNUAL
CONVENTION
Moving Forward in Solidarity

**CONVENTION
REPORTS &
RESOLUTIONS**

October 24, 25 & 26, 2024

**To represent and support
AUPE members through
solidarity and mobilization.**

Mission Statement, Alberta Union of Provincial Employees

FOREWORD

To elected officers, delegates, life members, observer, guests and staff,

Greetings and welcome to your Convention!

You come to Convention in very interesting times. A time that continues to demand our solidarity, commitment, hard work, and action like never before. And because we are all dedicated to organizing and supporting our members to make significant gains in collective bargaining, we gather in the spirit of *"Moving Forward in Solidarity"*.

We know you take your role here seriously and that you are committed to working together to achieve our collective goals. Whether you are a veteran of AUPE Conventions or a first-time participant, you all have an essential role to play. You are an integral part of our democracy in action. And, like any healthy democracy, it requires that you participate, engage and make tough decisions in an environment of mutual respect and support for one another. That is why you are here. We want you to embrace the many opportunities to help move your union forward and to enhance your own bonds of solidarity with your fellow workers.

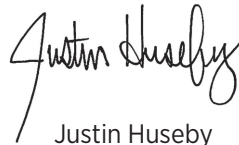
Convention is a massive undertaking for all involved and we want to sincerely thank all the staff who work so hard every year to help make your Convention a success.

But, ultimately, that success rests in your hands, to be part of an exciting opportunity to continue our journey to help build the power and solidarity that will be crucial to the success of our membership.

Welcome to your Convention!



Guy Smith
President



Justin Huseby
Executive Secretary-Treasurer

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STATEMENT OF EQUALITY

Equality and equity are core union values, and as such AUPE is committed to ensuring that individuals can meaningfully participate and contribute to union activities. Participants are expected to challenge and debate issues and not individuals, as well as engage in behaviours that protect and celebrate our diversity.

AUPE will neither condone nor tolerate behaviour that undermines the dignity or self-esteem of an individual or create an intimidating, hostile or unsafe environment that interferes with the ability of others to participate in union activities. These behaviours prevent us from working together to strengthen our union.

We encourage individuals to acknowledge discrimination and harassment by challenging or reporting inappropriate behaviour. In doing so we promote our own solidarity and equality.

If you feel your rights or the rights of others are being violated, and you are not able to address it, please seek assistance from an AUPE staff member or officer.

AGENDA

THURSDAY, October 24

8:30 am - 9:00 am

Call to Order

- Credentials Report
- Acknowledgement of Treaty Land
- Statement of Equality
- Minute of Silence
- “O Canada” & “Solidarity Forever”
- Review of Fire Drill Procedure
- Rules of Order
- Voting Procedures
- Adoption of Agenda
- Acceptance of 46th Annual Convention Minutes
- Presentation of Locals

9:00 am - 9:20 am

President’s Address

9:20 am - 10:20 am

Officers’ Reports

10:20 am - 11:00 am

Board Transportation and Travel to the Alberta Legislature

11:00 am - 12:15 pm

Rally at Alberta Legislature

12:15 pm - 12:45 pm

Board Transportation and Travel to Expo Centre

12:45 pm - 1:45 pm

Lunch (Organized) - Hall E

1:45 pm - 2:00 pm

Credentials Report

- Announcements

2:00 pm - 2:30 pm

Audited Financial Statements 2023/2024

2:30 pm - 3:00 pm

Report of the Finance Committee

- General Resolution 2-1
- General Resolution 2-2

3:00 pm - 3:30 pm

Proposed Budget 2024/2025

3:30 pm - 4:30 pm

Report of the Legislative Committee

- Constitutional Resolution 1-1
- Constitutional Resolution 1-2
- Constitutional Resolution 1-3
- Constitutional Resolution 1-4
- Constitutional Resolution 1-5
- Constitutional Resolution 1-6
- Constitutional Resolution 1-7
- Constitutional Resolution 1-8
- Constitutional Resolution 1-9
- Constitutional Resolution 1-10
- Constitutional Resolution 1-11
- Constitutional Resolution 1-12
- Constitutional Resolution 1-13
- Constitutional Resolution 1-14
- Constitutional Resolution 1-15
- General Resolution 2-3

FRIDAY, October 25

9:00 am – 9:05 am

Credentials Report

9:05 am – 10:35 am

Legislative Committee/Unfinished Business

- Constitutional and General Resolutions

10:35 am – 10:55 am

Report of the Young Activists Committee

10:55 am – 11:15 am

Report of the Occupational Health and Safety Committee

11:15 am – 11:35 am

Report of the Human Rights Committee

11:35 am – 12:00 pm

Report of the Pay and Social Equity Committee

- General Resolution 2-4
- General Resolution 2-5

12:00 pm – 1:00 pm

Lunch (Organized) – Hall E

1:00 pm – 1:15 pm

Credentials Report

- Announcements

1:15 pm – 1:35 pm

Report of the Environmental Committee

1:35 pm – 1:55 pm

Report of the Pension Committee

1:55 pm – 2:15 pm

Report of the Women’s Committee

- General Resolution 2-6
- General Resolution 2-7
- General Resolution 2-8
- General Resolution 2-9

2:15 pm – 2:35 pm

Report of the Committee of Political Action

2:35 pm – 2:55 pm

Report of the Membership Services Committee

2:55 pm – 4:00 pm

Presentation of Life Memberships

Saturday, October 26

9:00 am – 9:15 am

Credentials Report

- Announcements

9:15 am – 9:35 am

Report of the Members’ Benefits Committee

9:35 am – 9:55 am

Report of the Anti-Privatization Committee

9:55 am – 10:30 am

Greetings from:

- Public Interest Alberta
- Friends of Medicare
- Parkland Institute

10:30 am – 12:00 pm

Legislative Committee/Unfinished Business

- Constitutional and General Resolutions

12:00 pm – 1:00 pm

Lunch (Organized) - Hall E

1:00 pm – 1:15 pm

Credentials Report

- Announcements

1:15 pm – 2:30 pm

Legislative Committee/Unfinished Business

- Constitutional and General Resolutions

2:30 pm – 3:00 pm

Good and Welfare

- Adjournment – “Solidarity Forever”

SONGS

O' Canada

O' Canada!
Our home and native land!
True patriot love in all of us command.
With glowing hearts, we see thee rise,
The true north strong and free!
From far and wide,
O' Canada, we stand on guard for thee.
God keep our land glorious and free!
O' Canada, we stand on guard for thee.
O' Canada, we stand on guard for thee.

Solidarity Forever

1. When the union's inspiration through the workers' blood shall run,
There can be no power greater anywhere beneath the sun.
Yet what force on earth is weaker than the feeble strength of one?
But the union makes us strong.

Chorus: Solidarity Forever!
Solidarity Forever!
Solidarity Forever!
For the union makes us strong.

2. It is we who ploughed the prairies; built the cities where we trade,
Dug the mines and built the workshops; endless miles of railroad laid.
Now we stand outcast and starving; 'midst the wonders we have made;
But the union makes us strong.

Chorus

3. Now the women of the union; they have always joined the fight,
And we'll fight for women's issues; and we'll fight for women's rights.
And together we will struggle 'til we win equality,
For women make the union strong.

Chorus

4. They have taken untold millions that they never toiled to earn,
But without our brain and muscle not a single wheel can turn.
We can break their haughty power; gain our freedom when we learn,
That the union makes us strong.

Chorus

5. In our hands is placed a power greater than their hoarded gold;
Greater than the might of armies; magnified a thousand-fold.
We can bring to birth a new world from the ashes of the old.
For the union makes us strong.

Chorus

6. They divide us by our colour; they divide us by our tongue,
They divide us men and women; they divide us old and young,
But they'll tremble at our voices, when they hear these verses sung
For the union makes us strong.

Chorus

OFFICERS' REPORT

President Guy Smith



Greetings to delegates, honoured guests, life members, observers and staff. Welcome to your Convention!

What an exciting time to gather again in strength and determination and continue *“Moving Forward in Solidarity”*. We come together standing on the firm foundation we have all built over the past year through hard work, dedication, and a passion to organize and mobilize our members to be successful in bargaining.

I am excited and inspired by all the activity and fortitude we have seen from our members over the past few months. But at time of writing (late July) I am also full of anticipation of what might yet come as we fight for higher wages and better working conditions.

At this point we have only traveled part way along the road map as laid out in the Provincial Executive (PE) Strategic Plan. By Convention we will have a much better understanding of the path we have traveled and what the destination looks like. For the first time in our history we have embarked on an ambitious plan of action to unite and build the collective forces of all our bargaining units. This plan sets the framework for how we can support each other on the key bargaining demands and how to we can fight for those demands.

We will either have collective agreements in place that truly incorporate the fundamental bargaining demands of our members or we will be engaging in, or preparing for, job actions. Regardless, the work that has been done and the entire focus of the union has been to build and support the confidence and capacity in our membership to fight for higher wages and better working conditions. By Convention, we will be able to see the success we have achieved through all of our work.

In addition to our overall focus on bargaining, the past year has also been saturated with new and ongoing challenges our members face providing front-line services to Albertans and their communities. There continues to be an overall lack of support and regard for the crucial public services that are the foundation of a strong province and vibrant communities.

The current government, much like their predecessors, has not only refused to recognize the importance and vitality of strong public services; but has actively pursued increased privatization and denigration of those services. Constant change through dismantling, reorganization and reducing services have had a demoralizing and exhausting impact on AUPE members who are the heart, brain, and backbone of a strong, safe, and protected Alberta.

In turn, there is a building collective frustration and anger that is forcefully driving the mood at the bargaining table, in communities, and in the streets across the province.

You are all activists and leaders, and I want to thank for the work that has been done up to this point and into the future. I know you have been on your worksites engaging and mobilizing your members. I know you have been having those crucial conversations with your fellow workers about the need to be united and strong. I know you have been there for them throughout the year to answer their questions, to support them through challenging times, and to be a beacon of hope and leadership in the constant struggles our members face.

Thank you. You, and many others like you across the province are the bedrock of our union – the largest and most diverse in western Canada. By being here at Convention you are continuing your commitment and activism to ensure that our union is *“Moving Forward in Solidarity”* –together.

Your Executive Committee Team

The Executive Committee came out of last year's Convention invigorated and committed to preparing for the struggles we are now in the midst of. With three new members on the executive (Justin, Curtis, and James) we were afforded new voices, perspective, and ideas – which are all a welcome addition to how the team works together. I want to recognize how the new members of the team emerged themselves into their roles, embraced the very steep learning curve, and rose to the challenges and expectations thrust upon them. They have taken on these roles with enthusiasm and determination, and I personally want to thank them for helping to make the executive team as strong and committed as it is.

Likewise, the returning members of the team continued to grow and gain experience in increasingly challenging environments and enthusiastically embraced their assigned responsibilities. I have always focused on mentoring and supporting the members of the executive and have taken every opportunity to help increase their skills and knowledge. I have seen them all grow in their roles: whether it be assigning media, spearheading special projects, confronting issues as they arise, connecting and working with their assigned regions and Locals, interacting with other unions and labour leaders, facilitating countless AGMs, speaking at numerous town halls, or leading member direct action, they have all proven themselves to be strong leaders—effectively guiding the largest and most dynamic union in Alberta.

As the Executive Committee team focuses on leading our membership through the fight for increased wages and better working conditions, please be assured that we are all prepared and determined to support our members throughout to win the fight.

I encourage you to read the individual reports of all the Executive Committee members, to get a full perspective of the tremendous work they have done over the past year.

Your Provincial Executive Team

There is no doubt that the current Provincial Executive (PE) was assigned some of the most important and impactful responsibilities of any PE in our history. From the first meeting after last year's Convention right up to today, PE has collectively taken on the responsibility as the union's governing body with commitment and fortitude.

This work started immediately after last year's Convention with the adoption of the most ambitious strategic plan we have ever produced. With 82,000 AUPE members in bargaining in 2024 we knew that our predominant focus needed to be on ensuring our members were fully supported to fight to make significant gains in bargaining. The PE Strategic Plan, broken out into 18 specific strategies, laid the foundation for all the work that needed, and continues, to be done. Much of this work has been assigned to our staff and AUPE operations; and I want to thank all of them for their commitment and dedication to ensuring that the strategic plan was, and is, being put into action.

Like staff, members are playing an important role in ensuring the PE Strategic Plan is activated and effective. From ensuring negotiating teams in all sectors are working closely and sharing information with each other; to the over 50 town halls held across the province, the dozens of rallies, information pickets and events; from the mapping of worksites and potential picket lines; to the mass amounts of communications and media interactions; from the distribution of lawn signs; to providing increasingly focused education; from the change in policies to ensure our members on a picket line are financially supported; to the clear and consistent messaging; everyone has consistently worked to make AUPE's path to success clear.

Along with the work being done by members and staff, the Locals continue to develop and activate their own specific strategic plans which also help support the overall objectives of engaging, mobilizing, and supporting our members. I want to thank and recognize the Locals for all of their ongoing efforts.

Solidarity and Beyond

In addition to the huge amount of work being done to build our internal strength, solidarity and action, we continue to build and maintain solidarity with other unions and allies. Most of those unions are in bargaining this year too, with a total of 250,000 Alberta public sector workers (including the 82,000 AUPE members) at the bargaining table in 2024. Furthermore, our allies in the private sector are also preparing for huge rounds of bargaining.

Therefore, there is a huge opportunity that must be seized. By working together, supporting each other, and coordinating actions there is significant potential for all public sector workers to win the gains they need and deserve. AUPE is committed to this solidarity, and our labour partners have reciprocated this pledge of solidarity throughout our numerous meetings and conversations.

However, we must also be aware that whatever happens with other unions it will not determine where we need to go as AUPE. As I have written above, we are determined to fight hard at the bargaining table, on worksites, and in communities, and if necessary, on the picket lines. Due to our size and our focused determination and preparedness we may be looked upon to again lead the massive struggles we are engaged in. If this is the case, we take on this responsibility earnestly and confidently.

Our work to build bonds of solidarity with our fellow unions throughout the province and across the country is critical. Whether it is with Alberta public sector unions and associations, private sector unions (such as those in the Building Trades of Alberta), or with our neighbouring unions like the British Columbia General Employees Union , I know we are supported and will return that support when called upon.

Welcome to Your Convention!

As I stated earlier it is hard to fully predict what our situation will be the day we enter Convention hall. But I do know that for the past year we have engaged in consistent preparation, and we are ready to do whatever it takes to make the significant and legitimate gains at the bargaining table a reality.

I also know that the vibrancy, passion, and dedication that all of you have displayed on your worksites and communities over the past year will resonate through Convention hall in a show of strength and determination that will ensure that our union will continue *“Moving Forward in Solidarity”*.

In solidarity,

Guy Smith

President

Chair, Executive Committee

OFFICERS' REPORT

Executive Secretary-Treasurer Justin Huseby



Greetings Convention 2024!

I am humbled and honoured to have been selected as your Executive Secretary-Treasurer (EST) at our 2023 Convention. You have entrusted a substantial responsibility and duty of care to me, and I work every day with this in mind in the pursuit to strengthen the foundations for the success and wellbeing of AUPE members. I am in awe of the work that all AUPE members do and sincerely thank you for your tireless work and advocacy making our province better for working people.

In my first 10 months (at time of report writing), there has been a lot of work done. It is hard to believe but the last time AUPE had to transition to a new EST was 11 years ago, when then VP Jason Heistad was elected as EST. My first day on the job was Monday, October 30, 2023, two calendar days after Convention 2023 ended. I wasted little time getting to work to understand and analyze many aspects of our organization.

Since some delegates did not attend Convention 2023, I want to share with you that I have a substantial history with AUPE in many roles. In my 20 plus years as a member, I have been Local chair, Local vice chair, Local treasurer, and Members' Benefits Committee chair. Prior to my election in October 2023, I was the Provincial Executive representative from my AUPE *'alma mater'* Local 052.

Here are some highlights on a sample of the many initiatives underway:

During my first three months (November 2023 – January 2024), I had a lot of meetings with our staff, advisors, and counsel (financial and legal). I spent considerable time getting acquainted with our staff, departments, regional offices and partners. I reviewed AUPE accounts and portfolios, this included AUPE financial accounts, insurance status(es), and Area Council activity. In addition to being the chair of your Finance Committee, I chair your Members' Benefits Committee, am an ex-officio member of the Pension Committee and lead several internal staff working groups (including strike administration, and Convention planning). I feel it would be futile to try to list everything, but your EST touches almost all aspects of the organization. I assure you that there are no idle days, and no two days are the same. I am grateful to the support staff who support our members and our AUPE programs and services and I look forward to getting to know them better as I enter the second half of my term.

Convention 2024

I am proud to lead the Convention planning for 2024 and grateful for the incredible teamwork of AUPE staff to put this on. While the Convention Advisory Committee helps steer Convention improvements, there are dozens of staff who work behind the scenes to help us have a successful event. Thank you to each and every one of you.

Convention 2024 will have a few changes, including a reduction of one hospitality night. While the attendance numbers from the previous year warrant this, please know that a double booking is what prompted this. Regardless, you will have some extra time to settle in when you arrive to Convention and gather with your Local.

Furthermore, to help ease some of the 'Wednesday rush' felt by all Convention stakeholders, out of town buses are leaving earlier on the Wednesday and will stop at the Expo Centre for registration before taking delegates to their hotel. It is one of the proposed improvements that I am eager to see if the results help delegates and their Local leaders. Additionally, we will have electronic voting for some reports and resolutions.

Although this is not an "election year," we are trying out a system that may be useful for the 2025 Convention.

Given that we already have some practice with the 2023 electronic approach, the 2024 one is different but was successfully implemented at the BCGEU Convention. There is a demonstration and practice that will occur following the rules of order section of our Convention agenda.

Defence Fund

A large focus of my first few months on the job was to enhance the impact of the Defence Fund on your negotiation positions, and work on a long-term sustainable funding strategy. A Defence Fund needs to be usable and consistently funded. Neither of those conditions were achievable with the former terms of your Strike/Lockout Policy and an absence of a dedicated funding structure. If we don't have a well-resourced Defence Fund and Strike/Lockout Policy, employers will not take your strike preparations seriously.

Recent amendments include:

- a) Strike Pay is currently \$700/week (prorated)
 - Previously, your strike pay was \$400/week
 - b) Strike Pay accumulation begin on day one
 - Previously, there was a five-day waiting period before the clock to start accumulating strike pay was triggered
- Members should note they will still receive some eligible employer issued health benefits while on strike (if applicable), though the expense would be covered by the Defence Fund but separate to their strike pay.

I want to share responses to three questions/comments I often receive when members learn about the strike pay changes:

- 1) Question: "Will 'almost doubling' AUPE strike pay bankrupt our Defence Fund?"

Answer: No. The average 'cost per member' on strike has not changed in the financial model. What has changed is what is specifically covered.

Prior to the 2024 amendments, members could receive \$400 in strike pay/week and some eligible health benefit coverage. However, there were expenses that could (in theory) be reimbursed via member expense claims including meals, miles, as well as and additional allowances depending on children in care.

If it wasn't changed, this would result in thousands of individual member expense claims needing to be verified and processed separate to the strike pay every week. Strike line leaders would be focused on paperwork processing instead of keeping orderly and engaged picket lines. Streamlining the entitlements to strike pay makes for a more effective strike administration. Make no mistake, we are below our target defence fund size and any future large draw down on the fund will need to be adjusted. However, the overall average cost per member in the funding model has not changed.

- 2) Question: "If the average 'total cost per member' on strike is the same as before, has our Defence Fund taken on more risk?"

Answer: In terms of more investment risk: "No". The investment risk still follows the investment policy and was not altered as part of this initial assessment.

In terms of the risk that the fund will be used, the answer is "Yes". Remember that the purpose is so members have a usable defence fund to help secure long term contract gains. In other words, even though the total cost per member has not increased, the likelihood of your Defence Fund being used has increased. I argue this is a good thing.

Although every dollar that is drawn from a specific fund means there is one dollar less to grow that fund, we members must remind ourselves that our Defence Fund has a special dedicated purpose. Members need to know they can rely on a robust and well-resourced Defence Fund in the event of a strike or lockout.

To help there is a new funding strategy for the Defence Fund that was approved in policy by your Provincial Executive. In short, at least \$3 million in dues is allocated annually to help shore up the fund, assuming Convention affirms the proposed budget.

If delegates do not sustainably dedicate at least \$3 million a year from dues or other avenues, we will have to revisit the existence of the strike fund or entitlements including strike pay.

- 3) Comment: "PE made strike pay is \$700 per week but some members don't even make that in a week!"

Response: Yes, that is true in some cases. But employers should feel shame when a worker's strike pay is closer to a living wage than employer pay for some members.

Many employers already devalue and discredit working people currently in lower wages. As unionists, we need to consciously ensure we are not unintentionally perpetuating this when we look at our strike pay. Please don't fall into divisive thinking traps like this and use every opportunity to respond to similar perspectives on behalf of fellow workers. Just because someone may only make \$600/week doesn't mean that is all they should receive for strike should they fulfill their obligations. We need to leverage the strike pay so they can earn more than a living wage at the conclusion of job action.

While I'm on the topic of living wages, remember that a living wage should not be the final goal to attain for lower wage workers...it needs to be the new minimum! Every single AUPE member regardless of their income should make a commitment to see that living wages are at least the minimum for everyone. Some members may be confused as what is the difference between minimum wage and living wage. A living wage is what people need to earn to cover the actual cost of living in their community, where as a minimum wage is the legislated minimum employers must pay. When employers only pay minimum wage it can be another way of saying they would pay workers even less if it wasn't against the law.

I am proud of the work your Finance Committee and Provincial Executive have done in establishing a funding strategy for your Defence Fund, so that in addition to investment gains, portions of dues are budgeted to go into strengthening the fund for the future.

As of July 31, 2024, you have roughly \$ 73.3 million for your defense fund in the event of a strike or lockout. The target size of your defence fund is \$219 million (refer to PS 5-2 *Policy Statement on Defence Fund Transfers*).

To achieve this, the defence fund strategy calls for a minimum transfer of \$3 million in dues revenue into the Defence fund (see proposed budget) in addition to realized and unrealized investment gains.

Strike/Lockout Administration

Your strike line administration is being worked on with an internal working group. This includes updates to how the strike policy would apply as well as updated information on strike preparation. We are working on updating strike check-in/out, updating procedures with the designated essential workers (if applicable), and streamlining strike cheque payment processes. I look forward to updates on progress on the AUPE website in the fall.

Regional Offices & Facilities

Work on audio/visual service improvements for the regional offices commenced shortly after I was elected. However, enhanced network capacity is essential in the regional offices and plans are under way to improve this. We're also in the middle of negotiations on securing additional contiguous space in Lethbridge and Red Deer for the members to hold Local, Chapter and Area Council meetings. This could also help courses to be held out of those facilities.

Unfortunately, we had to close the physical Medicine Hat office temporarily. Relocating to space that can accommodate the office needs and our members has proven to be challenging. We have had to walk away from two separate deals as they did not meet our member interests. At the time of report writing, a new agreement with a new location has been signed and I look forward to updating the Provincial Executive at the meeting in September.

Provincial Executive

In January 2024, I facilitated a customized seminar/workshop on AUPE's finances for your Provincial Executive. This included going through how the AUPE financial statements are linked, what they each tell us and helping differentiate between.

There have been four PE meetings between Convention 2023 and the writing of this report. Every PE meeting is an effort to show preparation and background information to support recommendations that either myself, your Executive Committee, or your Finance Committee have put forward that relate to the finance portfolio or impact financial governance. My EST and Finance Committee reports to PE are all available and your PE representative can provide you a copy.

The first 10 months have been a marathon, I believe your PE has set a few records on motions debated at their April and June meetings and I commend my fellow PE representatives for their preparation, due diligence, and constructive debate on AUPE issues.

Local Treasurer and Chair Training

I facilitated two separate workshops for all Local chairs and treasurers. The workshop focused on financial statement training (similar to the session your PE received), and it was an opportunity for reviewing recent updates to financial policies and administration. Participants also had an opportunity to hear from one of our financial records examiners (Hua). Regrettably, not all Locals chose or were able to partake, though most of the feedback coming out of the sessions were positive as members felt they had a better handle on the 2023 AUPE financial statements and recent financial policy updates.

Often folks will ask why “HQ” doesn’t offer Chapter treasurer training. The reason is that the policies of the roughly 400 Chapters are overseen by their respective Local and each Local has varying policies and practices. For example, some Locals have chapter bank accounts, while others choose not to. Your Local treasurer is the first point of contact for Chapter treasurers for administering Chapter funds with AUPE and Local policies and procedures.

Area Councils (AC)

There has been a number of changes to the Area Council thus far. Your PE passed amendments to the rebate policy that included a reduction to the rebate amounts (Area Council’s had ~\$1.2 million in reserves at the time. A further examination of Area Council funding status will be in the finance report. However, the “two year use-it-or-lose-it” clause has been repealed as part of an effort to help Area Councils reach their community members and improve outcomes with their role in helping enhance social solidarity amongst union members.

I facilitated a total of six Area Council workshops throughout the province enabling an opportunity for every single every AC executive team member to come together to learn on the roles, share ideas and improve outcomes.

I am proud to report that at the moment, only two of the 44 Area Councils do not have an “active status.” This is a testament to the hard work your AC volunteers in your communities do to help make union events and activities thrive in their communities. I also want to acknowledge the work of your regional vice-presidents in helping support the maintenance or renewed launch of area councils across the province.

Public Service Pension Plan (PSPP)

I will leave the update on the plan status to your Pension Committee, but I am currently the vice chair of the PSPP Sponsor Board and one of four employee representatives. The Government of Alberta and University of Alberta/ Calgary combined make four employer representatives. The PSPP Sponsor Board oversees many things, including:

- making and amending the Plan rules
- setting the contribution rates to the Plan
- establishing the Plan funding policy

Ultimately AUPE’s goal is to get our members to a two per cent pension. I am the lead on the employees on the plan design working group, which is looking at plan changes, though it is a tough slog given the employers don’t want to move on anything of substance, including getting closer to equity with the pensions available to other staffing groups. For more information on the PSPP including governance, please visit <https://www.pspp.ca>.

I do want to summarize a unique opportunity I seized to speak to all AIMCo staff in late June. In addition to speaking about asset policy mix and pension governance, I took the opportunity to emphasize four messages to the AIMCo staff in Edmonton, which was simultaneously cast to their staff in Toronto and in London U.K.

In Summary

1. Unlike some other pension plans, we do not have a “legislated backstop”. This means there is no external safety net to fall back on if things go wrong or the plan fails. Our careful management and prudent investment strategies are what stand between our members and any potential financial shortfall.
2. [AIMCo] building and maintaining trust with our members needs to be paramount. Our members rely on us to make wise, informed decisions that will benefit them in the long run. Every action taken should be aimed at earning and preserving this trust. Transparency, accountability, and clear communication are key components in this effort.
3. Always remember that every dollar we manage is member money. It is not just numbers on a report; it is actually future well-being of our members, their families, and society at large. This perspective should guide every investment decision, policy change, and strategic initiative considered and pursued by your organization.
4. By keeping these points in mind, we can continue to fulfill our mission with integrity and dedication, ensuring that our member’s deferred salaries are managed wisely and securely for their future.

Parkland Institute

President Smith has appointed me to the board of directors of the Parkland Institute at the University of Alberta where I, along with other labour and academic leaders, help set the direction of the Institute. The Parkland Institute is an Alberta research network that examines public policy issues and is based out of the Faculty of Arts at the University of Alberta.

Established in 1996, The Parkland Institute created to...conduct research on economic, social, cultural and political issues facing Albertans and Canadians, publish research and provide informed comment on current policy issues to the media and the public, sponsor conferences and public forums on issues facing Albertans, and bring together academic and non-academic communities. As an AUPE education sector worker, it is important to me that every Parkland Institute report is academically peer reviewed to ensure the integrity and accuracy of the research. I am proud of the work that is created despite the challenges of legislated interference in our union matters.

Please check out this report "*A Thumb on the Scale: Alberta Government Interference in Post-Secondary Bargaining*" regarding the public sector bargaining landscape. A copy of this report will be included in your Convention package. Please visit <https://www.parklandinstitute.ca/> for more information and other reports.

Other Ongoing Initiatives

There are some other items being worked on, including dozens of IT projects, moving the AUPE Policies and Procedures Manual so that every member can access through the portal, a recently launched HR Information System (HRIS), AUPE insurance analysis and updates, and LPN insurance project. Post Convention, I will look forward to working on a new risk management plan to present to PE, in addition to continuing to help allocate our limited resources are effectively being managed.

Acknowledgments

I really want to acknowledge the incredible drive and determination of all AUPE staff. Whether you provide members facing services, or behind the scenes, thank you for the work you do for our members.

A big "Thank you!" to Tammy, Kaitlin, and Katie for their non-stop work in supporting our executive team, PE and Locals. We depend on you a lot and words can't express the gratitude that I have for your skills, dedication, and professionalism.

At the at substantial risk of inadvertently excluding the dozens of AUPE staff, volunteers and members I want to say thank you to everyone who contributed to the Convention project. Convention impacts every AUPE department, you have appreciation and gratitude for making it successful.

I do want to acknowledge the Convention advisory team who helped lead the planning and implementation of the Convention project: Gil, Stephanie, Heather, Wendy, Kasia, Nick D., Carl, Tammy, Kaitlin, Katie, and Destiny: Thank you!

Finally, I need to thank Destiny for her drive and determination to help us create outcomes for the members. I rely heavily on her support, but she never wants to be acknowledged. Sorry, not sorry!

More Questions for Your EST

If you have any questions for me on my report, please don't feel you have to wait until Convention to ask. Please email me at j.huseby@aupe.org and I will work to reply as soon as I can.

I will be regularly posting answers to Finance related questions in advance of Convention. The section on Finance FAQ will be found on the important documents section starting September 16, 2024. <https://aupe.org/convention#15127>

It will be a busy September and October. Let's take care of one another.

In solidarity,

Justin Huseby
Executive Secretary-Treasurer
Chair, Finance Committee
Chair, Members' Benefits Committee
Sponsor Board Member/Vice Chair, Public Service Pension Plan
Board Member, Parkland Institute

OFFICERS' REPORT

Vice-President Sandra Azocar



To the officers, delegates, life members, observers and guests of the Alberta Union of Provincial Employees 47th Annual Convention, greetings union family.

I would like to bring my greetings of solidarity and to give a warm welcome to all those attending the 47th Annual Convention of the Alberta Union of Provincial Employees.

This year has flown by and as always, I find it extremely difficult to attempt to encapsulate all that I have seen, heard and experienced as I travel across this great province of ours. To say that this has been a busy year would not do justice to all the work we have undertaken as we move through the most consequential round of bargaining for our union and the labour movement at large.

As part of the executive division of work, I continued to be responsible for the Northwest part of the province and as the Vice-President Liaison to Locals 002, 006, 012, 043, 047, and 056 . It goes without saying that working with the members of these Locals has been an incredible privilege and I want to thank each one of them for allowing me to grow and learn from the issues facing their members. I want to thank them for placing their trust in me to bring their issues forward into the public sphere.

Throughout my travels I get to hear first-hand the affordability issues facing members, often forcing them to juggle multiple jobs just to make ends meet. Our members work extremely hard, day in and day out to provide the best possible services to Albertans, and yet no matter what sector we are talking about their labour is often not valued to the extent that it should be.

Short staffing continues to impact all sectors. Local 006 members are currently facing a crisis in which entire communities are not being served because there are simply no workers. Experienced members are leaving in droves as they can no longer tolerate the working conditions that have been created by the employer.

In the health care sector, working short and heavy workloads combined with a growing population are pushing workers to the brink of exhaustion, burnout, and illness. Without meaningful actions to hire, recruit, and retain staff in the public health care system Alberta will continue to experience service disruptions due to short staffing, bed closures, and reduced emergency room hours—which ultimately puts all Albertans at risk.

Local 005 members continue to work with skeleton crews while trying to keep northern Alberta from burning. The inaction surrounding fire prevention preparedness has been on full display as we witnessed yet another busy wildfire season. This inaction led to the loss of much of Jasper, and to many Albertans, including AUPE members, losing their homes and property.

Again, cuts and low stagnant wages have served to create a work environment where there are serious retention and hiring issues among experienced firefighters. We continue to lose members to places like BC where they are being offered better working conditions and pay.

My respect and gratitude go out to each one of our members that fight wildfires, and to all those that support the work behind the scenes coordinating and overseeing the emergency response. I would also like to extend this gratitude to all our members who worked to help evacuate patients, and provided services even as their own personal lives, property, and communities were at risk due to the fires.

As public sector workers, we keep the province running even in the face of adversity. As the song says, “without our labour, not a single wheel can turn.” I cannot say enough about the fortitude and resilience that our members have.

The vastness of the northern part of our province can be overwhelming when travelling through roads that are not always meant for winter driving. I have come to appreciate the solitude that comes with such serene and striking visuals. The quietude that envelopes me at times can be both comforting and daunting and serves to remind me of nature's grandeur.

This blend of natural beauty and the members that I am fortunate enough to meet create unique experiences and make every trip memorable. Our members, with their dedication and strong work ethic, not only sustain their families but also contribute to the fabric of their communities. Thank you for all you do for Albertans day in and day out.

Political Involvement/Advocacy

As a non-partisan union, we recognize and respect the political diversity of our members. However, to ensure our survival as part of Alberta's and Canada's labour movement we must continue to be politically educated and involved. We must continue to protect the gains we have won through collective bargaining and to promote justice and equal economic opportunities for all.

As leaders in this union, we have a responsibility to understand the policies and legislation that have a significant impact on our daily lives, especially in the workplace. Understanding these policies and laws is crucial for workers and unions to effectively navigate and advocate for our rights and interests.

Refocusing of Public Health Care

While we have been extremely busy bargaining our current government has been busy passing legislations and policies that seriously undermine and weaken our public services and democracy.

When it comes to health care, this government used the anger that people feel about AHS to justify privatization plans. The frustration people feel when they must wait unnecessarily long periods of time for needed surgery; or spend hours in emergency rooms; or have no access to family doctor and have to travel for hours to larger centers to access health care is justifiable, but the government should work to fix these issues rather than imploding AHS. At a time when the focus should be on dealing with the core issues facing our health care system, whether it is short staffing; or a lack of systemic/organizational/political will to deal with surgical wait times, this government chose to try to dismantle Alberta's public health care system.

The plan to break up and fragment Alberta's health care system into four pillars (sectors) came to fruition under Bill 22, Health Statutes Amendment Act. Staff that are identified as working in these 'agencies' (sectors) will be transitioned over to the respective ministry, with a sector minister overseeing the delivery of services.

During the May 15th town hall meeting the health minister, and her staff, repeatedly committed to working with unions and indicated that there would be 'stability' through this transition period. The reality has been that these changes have been made with 'notification' not consultation. The government has made it abundantly clear that it has no respect for workers or for their unions. An unnecessary distraction that does not inspire confidence in the members being shuffled over to new employers amid bargaining.

While the sector minister for Recovery Alberta was announced, the ministers in charge of the Primary Care, Continuing Care, and Acute Care agencies have yet to be appointed. It was revealed at the town hall meeting that no decisions have been made yet regarding these important appointments.

These changes attempt to build on the narrative that AHS is top heavy while at the same time creating a beast that will be even more top heavy, with more CEO's, boards, and management. This restructuring will not produce any cost savings and will create an administrative nightmare.

The instability and uncertainty that has been created by these changes will drive more health care workers away from their jobs and will do nothing to improve morale, retain or to recruit workers. So far, 126 AHS staff from capital planning, system planning, continuing care, and procurement were terminated and presented with 'equivalent' job offers within Alberta Health Services. This new job will cost workers 200 hours of lost pay a year, and a significant number of them will be red circled. This means they are going to be put in a situation where they don't get any wage increases unless they are negotiated.

As we move through this restructuring, we will be seeing a lot more members transitioned into new sectors and ministries. This government wants to push these changes through in the next two years – and all the labour provisions that they have identified in Bill 22 have two-year time limit, leaving front-line staff uncertain about their future under these new agencies.

Front-line workers are not averse to change, change is a constant in everyone's lives, however when we add the burnout that our members are currently feeling and the stress that working short creates this major systemic overhaul will do absolutely nothing to help members feel seen and valued.

Bill 22 The Health Statutes Amendment Act is a destructive restructuring plan which will only wreak more chaos in our public health care system, and provides cover for further privatization.

With the adage 'an injury to one is an injury to all' in mind it is clear we all need to stand up for public health care and public services. We need to stand up for our jobs. I would propose that the biggest challenge facing our members is how far are we willing to go to protect our jobs and the services we provide to Albertans.

Recovery Alberta

In April 2024, with much media fanfare, we heard the announcement of the creation of Recovery Alberta. One of the first sectors that has been created through the restructuring of AHS. Union involvement was after thought, and it was only after the media event where the announcement was made that leaders from impacted unions were given limited information.

It was clear from the way that this announcement was made that the government felt that there was no need to consult with front-line workers before doing what they had already decided to do. Major systemic changes while bargaining was ongoing and before legislation was introduced or regulations were even created.

The creation of these sectors impacts approximately 3,500 AUPE members, 2,000 of whom work in nursing care and 1,500 in general support services. Members were left without any knowledge of how these changes would impact their day-to-day work or how services would be delivered.

This ideologically driven government has already decided to focus on only one model of treating addictions, the recovery model. While recovery centres can be part of the solution to the a addictions crisis, it is short sighted to make them the only tool available. There is plenty of evidence that harm-reduction and safe-supply approaches save lives and help end addictions.

Mental health is health care. And mental health services can play a big part in addictions recovery, by removing this area from the purview of health care it opens the door for privatization and to more of the costs being passed down to those that need the services the most, but can afford them the least.

Media

Earned media gives us a powerful platform to spotlight and address the concerns of our members. It allows us to amplify their voices, advocate for their needs, and influence public perception and policy. This visibility can lead to increased support, greater awareness, and potentially more effective solutions to the challenges they face.

Throughout this year I have had the opportunity to bring member's issues to the public's attention. Local 006 critical staffing issues as well as the impact that the restructuring of AHS will have on our members and Albertans, have been at the forefront of our earned media.

The following is a list of some of the news outlets that have covered the press releases I have been involved with:

- CBC - both TV and Radio
- Medicine Hat News x 2
- St. Albert Gazette x 2
- Southpeace News x 5
- Red Deer News Now
- Lakeland Today
- CTV News x2
- 630 Ched
- Town and Country Today (Westlock)
- Smoky River Express

Bargaining/Negotiation Issues

At the time of writing this report, the outcome of one of the biggest rounds of negotiations this union has seen, had yet to be determined.

Recognizing that any bargaining gains we may win do not occur at the table, but rather at the worksite, in communities across the province, and in the streets if necessary; our focus has been to educate, organize, and mobilize our members to be ready for a fight. By empowering our members with knowledge and resources we are helping to ensure that we are well equipped to advocate for our rights and interest during the bargaining process.

Holding “Time for Action” town hall meetings provided an opportunity to start building a foundation to start member engagement. It gave a good understanding of the regional areas that needed support for growth. One thing that was clear however, is that members understood the need to take a stand if we want to see real gains at the tables. Gains that ultimately improve not only our lives, but the lives of all Albertans.

When we stand up for fairness, we improve our communities and the lives of all Canadians. Our incomes support local businesses (who create local jobs) and bolster the local tax base, which supports public services that add to everyone’s quality of life.

The benefits we are fortunate to enjoy (dental insurance, extended health care coverage and legal insurance, to name a few) attract and support dentists, opticians, chiropractors, therapists, health specialists, and family lawyers whose services are available to everyone in the community.

When we retire, the incomes earned from years of contributions into pension plans also provide money to spend in the community. More importantly, they provide income security, which means fewer seniors having to rely on their families or social programs to get by. Same goes for the health, drug, and survivor benefits that many retirees enjoy because they had a union when they worked.

Strategic Planning

Navigating through AUPE’s strategic planning process has been a rewarding experience. It has been encouraging to see Locals that have implemented the agreed-upon tactics are witnessing increased membership involvement and a strengthen sense of union community.

Identifying challenges and areas needing support has been crucial for growth, and having a clear direction and action plan has served to empower Locals to navigate these obstacles effectively. As we continue this journey, the hope of seeing stronger, more unified Locals is inspiring. Thank you to all Locals for your work and engagement in this process.

Grievance Review Board

In the vice-president roles at the Grievance Review Board (GRB), we see the shortfalls of existing contracts. The insights from the GRB process highlight a critical aspect of labour relations, the impact of collective agreements on workers’ rights and grievances. It is evident that the limitations within some of the contacts can hinder members from effectively voicing their concerns, which can be frustrating for both workers and representatives alike.

The emphasis on the need for improvements at the bargaining table is essential. By addressing these shortfalls during negotiations, there is an opportunity to create agreements that prioritize and protect the interests of the membership more effectively.

The GRB process makes clear as to why it is crucial for members to recognize the power of their collective agreements and how these documents can shape their experience in the workplace.

Standing Committees

For this term I was fortunate to remain the chair for AUPE Women’s Committee, as well as the Pay and Social Equity Committee. The committee reports will outline in detail the work being done by these two committees, and the resolutions brought forward for your consideration will help to set the foundation for the tasks that as committee’s we have set out.

I want to take this opportunity to support the idea that all standing committees play an integral part in this union. They help to build collectivism and provide a space for union activists to improve the lives of our members, their families, and communities.

Other Related Duties

Alberta Labour History Institute (ALHI)

This group of dedicated labour activists and academics continue to work hard on various projects that highlight the history of workers in this province. I invite you to follow their work by going to <https://albertalabourhistory.org/>. The ALHI website highlights all the projects that they are currently working on. Being part of this board provides me with the opportunity to meet amazing activists that know the ins and outs of seeking funding for a variety of work that the institute engages in.

Alberta Pharmacare Working Group

The Alberta Pharmacare Working Group (APWG) was founded on December 4, 2017, with 11 organizations originally and that has now grown to 20. The APWG collectively represents over 300,000 Albertans, AUPE representing 98,000 members alone.

Throughout 2024, the Alberta Pharmacare Working Group worked tirelessly to put pressure on the federal government to follow through on the decades-long promises to implement a National Pharmacare Plan. It was our hope that the Confidence-and-Supply Agreement (CASA) agreement between the federal NDP and the Liberals would have ensured that a pharmacare legislation would be in place by the end of this year.

In late February, the federal NDP and Liberal government reached a deal on pharmacare that would include single payer coverage of contraceptives and diabetes medication and equipment. Bill C-64 was tabled and includes crucial steps towards universal pharmacare including single payer, first dollar coverage for these drugs and a plan to move forward with important initiatives such as bulk purchasing.

Unfortunately, our provincial government had previously announced they intended to opt Alberta out of any national pharmacare program. They did this before any details were publicly announced and before negotiations with the provinces had even started.

Since then, the UCP government tabled Bill 18, designed to rein in the federal government's ability to fund programs in Alberta, further signaling their unwillingness to work together for the health and wellbeing of Albertans.

Our advocacy will need to continue if we want Alberta to be part of a deal that would see the first significant expansion of our health care system in decades.

Friends of Medicare

I'm very pleased to report that for the 2023-2025 term I have been assigned to sit on the board of Friends of Medicare. With the restructuring of AHS and the ongoing and not-so-stealthy privatization of our health care system, the advocacy work by this organization has become even more important.

Friends of Medicare continues to be at the forefront of calling out policies and legislations that are leading to the erosion of our public health care system. They continue to be oft quoted and have strong coverage in traditional and social media.

Though the breadth of issues that make up our health care system are vast and complex, like any good medical team would we've triaged and consolidated our priorities into workable areas that require immediate attention: privatization, seniors' care, addictions and mental health, and pharmacare.

If you want to explore the incredibly important work that this organization does further, please visit friendsofmedicare.org and become a member. Protecting and promoting the expansion of our public health care system should be at the top of all our personal agendas.

Summary and Many Thanks

I would like to first and foremost thank everyone of you for affording me the opportunity to be part of AUPE's leadership team. I'm humbled and committed to the work that is ahead of us all.

On a very personal note, I want to start out by recognizing my now adult children, my siblings, my mom, my friends, and my partner JP; all who support my work and my unregulated schedule. These are the people that always keep tabs on me and make sure I survive the roads on the many days that I travel away from Edmonton. I also want to give a big shout out to the three tiny humans who make my life much happier, Sean, Adam, and Benny. It is for them that I do what I do.

My gratitude goes out to Tammy Lamoureux, our work would not be the same without her support, extreme patience, flexibility, hard work, professionalism, and smiles. Tammy's demeanour is greatly appreciated, especially when I provide her with thousand and one excuses to miss deadlines. My gratitude also goes out to Destiny Baines and Kaitlin Harrison for their patience and ongoing hard work.

Many thanks to all the AUPE staff members. They all deserve a special recognition, as without their expertise, professionalism our union could not function as such. They make things happen, and it has always been a great experience to work with such dedicated professionals.

And last but not least, my thanks to the rest of the AUPE Executive, President Smith, EST Justin Huseby, Vice-Presidents Jackson, Graham, Gostola, Gault and Borodey. Thank you for the much-needed laughs when things get tough.

In solidarity,

Sandra Azocar
Vice-President, Northwest Region
Chair, Pay and Social Equity Committee
Chair, Women's Committee
Board Member, Friends of Medicare

ACTIVITY REPORT

Meetings of Note - October 2023 – February 2024

- Local 095-Local 045 Summer BBQ
- Migrante Gala
- Local chairs meeting
- Multi-Health meeting
- GOA Bargaining Conference
- Local 056 council – 2 days
- Local 006 council meeting
- Public Health care Bargaining Conference
- Whitecourt Local 043/012 meeting
- Strategic Planning Review Local 056
- Private Health Care Bargaining Conference (presented)
- Stop Hate rally - Edmonton
- Local 071 council meeting
- Local 056/001 meeting - Whitecourt
- Candidate town halls – 2 days
- Local 002 /002 meeting
- Local 043/012 meeting - Whitecourt
- Local 043 council meeting
- Day of Reconciliation event – HQ Edmonton
- Credential Trainer meeting (virtual)
- Grievance Review Board
- Peace River food truck – Local 056/043
- Pre-PE Operations meeting
- CBC Media interview
- Local 006 Convention preparation
- Executive retreat – 2 days
- Local 095 Calgary
- Various Convention/election council meetings
- Convention – 6 days
- Holidays – Nov 3 – Nov 22
- Executive retreat
- Local 006 meeting
- Alberta Labour History AGM
- Local 043 council meeting – 2 days
- Local 043 holiday party
- Local 006/005 member engagement meetings – 2 days
- MSO interviews
- Grievance Review Board
- Provincial Executive meeting – 2 days

Meetings of Note - February – April 2024

- Travel day to LaCrete (Sunday)
- Local 005/004 AGM - La Crete
- Travel back from La Crete
- Joint AGM (GP) organizing meeting
- CBC interview
- Book Launch Event – Kenneyism by Jeremy Appel
- Grievance Review Board
- Drive to Grande Prairie (Sunday)
- Local AGM
- Executive meeting (virtual)
- Local 047/006 AGM - Mayerthorpe
- Drive to Whitecourt – Local 043/012 AGM
- Drive back to Grande Prairie
- Joint AGM
- Meeting with MLA Dianna Batten – NDP Children Services Critic
- Pink Shirt Day video
- Local 047 Executive meeting
- Local 020/001 AGM (virtual)
- Local 047 council meeting
- Local 047 meeting
- Local 043 council meeting - 2 days
- Liberty Pistano's retirement event

- Joint AGM in Peace River
- Travel to High Prairie - joint Local 056/08 and Local 001/008 AGM
- Local 118/ Manning AGM (virtual)
- Budget Day event
- Edson AGM
- Meeting with Jim Petrie
- Local 005 Firefighting Campaign meeting
- Travel to La Crete (Sunday)
- Local 118/008 AGM - La Crete
- Local 045 council meeting presentation (virtual)
- Community Meeting La Crete/Covenant Health/MLA Dan Williams
- Local 056/012 AGM La Crete
- Multi-Health meeting
- CSU52 strike practice rally – YEG
- Women's Committee meeting
- IWD / DOVE Award evening event
- IWD rally
- Executive Committee meeting (virtual)
- Edson AGM
- Travel to Grande Prairie – sign making
- Health care action – Pomeroy Hotel – Travel back from Grande Prairie
- Lunch and Learn Local 002/006/001
- Staff interviews
- FOM board meeting
- CBC Interview – changes to health care
- Whitecourt Joint AGM Local 005/001
- Medicine Hat News interview
- City News Edmonton
- Edson AGM
- Hinton AGM
- Local 006/012 HP YAC discussion
- Tabling of FOM Home Care petition – Legislature
- Evansburg AGM
- Alberta Prime Time interview
- Townhall prep meeting
- Executive Committee meeting
- Local 052 council meeting (virtual)
- Pay and Social Equity Committee meeting
- Local 006/011 Calgary AGM

Meetings of Note – April – June 2024

- PE Calgary – 2 days
- Meeting with Peggy Wright /Luanne Metz/David Sheppard (Addictions and Mental Health)
- Local 006/014 AGM
- Expedited Grievance Review Board
- Pharmacare webinar
- Alberta Pharmacare Working Group
- Local 071/012 – Local 056/001 AGMs - Whitecourt
- High Prairie Town Council presentation
- Local 006 /012 – High Prairie/Slave Lake
- Women's Committee meeting
- Day of Mourning celebration
- Local 043/001 AGM - High Level
- Local 006 Executive meeting
- WC Subcommittee Local 118 meeting
- Grievance Review Board
- Grandparent's Day BBQ update meeting
- Local 002 AGM – 2 days - Canmore
- Local 012 AGM
- Local 006 rally - Minister of Children Services Office
- Executive Committee meeting
- Friends of Medicare meeting
- Local 047 AGM - 2 Days
- Women's Committee - Prairie School selection
- Women's Committee meeting

- Local 095 AGM - 2 days - Canmore
- Negotiations update meeting
- Bargaining video shoot - Edson
- Local 043 x 2 Days
- Drop in by Local 054 – spoke on AHS restructuring
- Drop by Local 042 Council meeting – spoke on AHS restructuring
- Grande Cache worksite visit
- Domestic Violence meeting
- CIIRT meeting
- Beaverlodge worksite visit
- Hythe worksite visit
- Spirit River worksite visit
- Valleyview worksite visit
- Pay and Social Equity Committee meeting
- Devonshire Workers Rally - Edmonton
- Local 060 AGM
- W4Empowerment meeting
- Local 006 AGM
- Local 001 pop-in
- Women’s Committee meeting
- Robocall recording
- Local 084 presentation on AHS restructuring
- Local 047 Subcommittee meeting
- Local 056 AGM - 2 days
- Local 040 presentation on AHS restructuring
- Camrose rally – Local 040 members
- High Prairie bargaining town hall meeting
- Executive Committee meeting
- Hinton bargaining town hall meeting
- Edson bargaining town hall meeting
- Local 043/004 meeting – Grande Prairie
- YAC GP event
- Valleyview bargaining town hall meeting
- Whitecourt bargaining town hall meeting
- Pay and Social Equity Committee meeting
- Edmonton bargaining town hall meeting
- Wetaskiwin bargaining town hall meeting
- Provincial Executive - 2 days

Meetings of Note – June – October 2024

- High Level bargaining town hall meeting
- Manning bargaining town hall meeting
- Peace River bargaining town hall meeting
- Grande Prairie bargaining town hall meeting
- Local chairs meeting – Calgary
- Multi-Health meeting - Calgary
- Grievance Review Board
- Fairview bargaining town hall meeting
- Leduc TFA rally
- Executive Committee meeting
- Red Deer TFA rally
- BBQ CBI Local 047/008
- Local 002 strategic planning review
- Local 054 Chapter meeting
- BBQ Local 040/017
- Local 054/011 Family BBQ
- Local 046/011 Ice Cream Fun Day – Grey Nuns Hospital
- Westlock TFA rally
- St. Albert TFA rally
- Canmore TFA rally
- Misericordia/Villa Caritas rally
- Women’s Committee meeting - 2 days
- Ponoka TFA rally / CC BBQ
- High Prairie TFA rally
- Executive Committee meeting

- GOA virtual town hall meetings x4
- Women’s Committee meeting – hard launch of Strike a Change for Seniors Campaign
- GOA BBQ – Neil Crawford Center
- Local 046/008 BBQ
- Local 071 – Slave Lake
- Pre-PE Operations meeting
- Pay and Social Equity Committee meeting
- Grandparent’s Day Picnic
- Provincial Executive – 2 days
- Edmonton TFA rally
- Executive Committee meeting
- Friends of Medicare meeting
- Local 006 council meeting
- Local 043 council meeting – 2 days
- Local 056 council meeting – 2 days
- Local 012 meeting
- Local 047 meeting – 2 days
- Grievance Review Board
- Friends of Medicare Gala
- Multi-Health meeting
- Executive retreat
- Pre-PE Operations meeting
- Provincial Executive meeting
- 2024 Convention

OFFICERS' REPORT

Vice-President Bobby-Joe Borodey



Greetings to my union friends and siblings,

Welcome to the 2024 AUPE Annual Convention – all of us who have the privilege of attending have been given a unique opportunity to help shape the future of our union. At the time of writing this report (late July), it is important to note that the coming months will be uncertain, at times frightening, and will not be without anxiety, but most importantly, will also be transformative. None of what we accomplish would be possible without the commitment, passion, and competence that each and every one of you possess. Your dedication and hard work have not gone unnoticed, and I am immensely proud of all that we have achieved and will achieve together. You are not only needed and valued, but deeply appreciated for the vital roles you play in our union. Let us delegates, life members, guests, volunteers, and staff use this Convention as a time to recognize our accomplishments, share our experiences, and envision the exciting possibilities that lie ahead.

Assignments

Region

It has been an honour to be assigned to the Edmonton region for the last year, and I wish to extend my heartfelt thanks to the members for their warm welcome and exceptional hospitality. This vibrant region, home to 40,000+ passionate and dedicated members, encompasses not only the city of Edmonton, but also Leduc, Sherwood Park, Fort Saskatchewan, St. Albert, Spruce Grove, and Stony Plain. With four Area Councils, 99 Chapters, and members from 19 of our 34 Locals, our union siblings in this region demonstrate unity, action and solidarity consistently. Despite continued challenges such as disrespect in the workplace, unsafe working conditions, and gross underpayment, members remain organized, resilient, and committed to achieving our collective goals. Your efforts continue to inspire me, and I am so proud of your unwavering dedication. Thank you, Edmonton and surrounding communities.

Local Liaison

It's been a privilege to be the Vice-President Local Liaison for Local 003 – Correctional and Regulatory Services, Local 038 – Northern Alberta Institute of Technology (NAIT), Local 042 – Good Samaritan Society, Local 046 – AHS and Covenant Edmonton Zone Nursing Care, Local 049 – Capital Care Group, and Local 054 – AHS Edmonton Zone General Support Services. It's been awe-inspiring to attend these Local's meetings, social events, and strategic planning sessions. Thank you to the Local executive, and councils for your respect, and kindness. Together we have learned from each other, been impactful in the lives of our colleagues, and made a difference in the labour movement. Thank you, Locals 003, 038, 042, 046, 049, and 054.

Standing Committees

It is a tremendous honour to chair both the Legislative Committee and the Human Rights Committee. These committees are crucial to our union's mission, and I am continually inspired by the amazing leaders who have stepped up to serve. The dedication and hard work of these committee members are truly remarkable, and they play an essential role in shaping our union's direction and advocating for our members' rights. I am proud of each member for their commitment to justice, equity, and legislative advocacy. Their passion and leadership make a significant difference, and I am grateful to work alongside these leaders. Thank you, Human Rights and Legislative Committee members.

The Year That Was

Since we last met in October 2023, we as a union have experienced great change, but what remains consistent is that I still thoroughly enjoy being an AUPE vice-president. And while my responsibilities are varied and numerous, what continues to remain true is that working alongside members is the most informative and rewarding part of the role. Engaging with folks, listening to stories, and witnessing the unwavering passion, commitment, and hard work of the membership is truly inspirational. Each day I am reminded of the strength and resilience of our union family, and it fuels my dedication to advocate for our shared goals. It's member's contributions to the labour movement that make our union stronger, and I am grateful for the opportunity to support and work with such a dedicated and dynamic community.

Activity Report

The list below is a snapshot of the activities and events I have participated in with members, staff, labour allies, and the larger community since I last reported to Convention in 2023.

(Please note: This list is inclusive but not exhaustive, it is not in chronological order, and my participation may have been in person, virtual, or both depending on the timing and frequency of the activity.)

- Grievance Review Board (GRB) hearings
- Time for Action AUPE rallies
- Worksite driven AUPE rallies
- Labour ally rallies
- Information pickets
- Chapter meetings (executive and general)
- Local meetings (executive and council)
- Inaugural Chapter Annual General Meetings
- Site visits
- Bargaining conferences
- Direct action initiatives/drives
- Collective Agreement information sessions
- Human Rights Committee meetings
- PRIDE events (parades and BBQs)
- National Day for Truth and Reconciliation event
- Young Activist Committee meetings (prior to Convention 2023)
- Legislative Committee meetings
- Executive Committee meetings
- Provincial Executive meetings
- Area Council meetings and events
- Local chairs meetings
- Multi-Health meetings
- Time for Action town halls
- Bargaining town halls
- Meetings with labour allies
- AUPE employment interviews
- Edmonton Region Chapter Annual General Meetings (x100)
- Local Annual General Meetings
- Edmonton Region Area Council Annual General Meetings (x4)
- Lunch and Learns
- Meet and Greets
- Chapter BBQ's
- Seasonal dinners/functions
- Member appreciation events
- Operations meetings
- Local strategic planning meetings
- Steward courses
- One on one meetings with the president
- Bargaining preparation meetings
- Grandparent's Day Picnic
- Chief Steward election meetings

- AUPE Annual Convention 2023
- Acting president
- Chapter AGM training sessions
- Member Relations mediated sessions
- Media training
- Article 29 investigation panel
- Post Secondary student interviews
- Internal Imaging Campaign planning
- Town hall preparation meetings
- Day of Mourning participation
- Local education training
- Bargaining update meetings/workshops
- Convention preparation meetings
- Media interviews

Media

The media plays a crucial role in amplifying our message and ensuring that the public understands the issues we face as union members. It has been an honour to represent you and articulate our collective concerns to the media, bringing our voices to a wider audience. Through these platforms, we can share our stories, advocate for fair treatment, and highlight the importance of our work. Together we will continue to engage with the media to ensure that our message is received loud and clear, uniting our members and garnering the support we need from the public. Below is a list of the media releases I have been directly involved in:

- University of Calgary opts out of National Day for Truth and Reconciliation – September 28, 2023
- AUPE Condemns Alberta government’s attack on transgender youth – February 5, 2024
- Alberta sheriffs seek answers as government announcing policing changes – March 14, 2024
- Employees at Red Deer Polytechnic vote to join AUPE – June 5, 2024
- Legal Aid crisis could cause devastation for services and staff – July 4, 2024
- Various Media releases regarding upcoming rallies, and town halls

AGMs

I want to extend a heartfelt thank you to the Chapter, Local, and Area Council executive members who played a crucial role in making this AGM season a success. With 99 Chapters, 6 Locals, and 4 Area Councils, it was no small feat to schedule, help facilitate, and attend all the Edmonton region Annual General Meetings. This achievement was made possible by the kindness, dedication, and perseverance of our component leaders. Once again, I am deeply grateful for their support and commitment.

Looking Ahead – Time for Action

Bargaining for a collective agreement is always a complex process, but it is particularly challenging during these difficult times. Inflationary pressures have caused the price of gas, housing, food, and essential living supplies to rise drastically. Living in a post-pandemic era, coupled with increasingly poor leadership from our provincial government, has created a perfect storm that challenges the work we do on behalf of Albertans. As we navigate economic uncertainties and other pressures, it’s essential that we stay strong and united with our colleagues.

We stand at a critical juncture in our fight for fair treatment and respect in the workplace. As we approach potential strike action, it is more important than ever to rally together in solidarity and support. Our strength lies in our unity. When we stand as one, we send a powerful message to our employers: we will not accept anything less than what we deserve. We must make it clear that we are ready to take decisive action if our demands are not met. Striking is never an easy decision, but it is sometimes necessary to achieve the changes we need. We cannot afford to settle for the status quo. We have earned fair wages, reasonable working conditions, and respect for our contributions.

Our employers must understand that we are done being disrespected. We cannot afford to back down now; the possibility of a strike is real, and we must be ready. However, to be strike ready requires strategic preparation, and a consistent approach to building momentum. To those who have participated in our Time for Action town halls and the subsequent rallies, I thank you for your commitment and courage. Your voices have been heard, your actions have inspired others, and your presence and energy have been invaluable. It is imperative that we continue to build on this momentum. We need every member to stand up and be counted.

We are 82,000 strong, united in our fight for fair treatment and better wages. This is a unique opportunity to make our voices heard, and we cannot let it go to waste. Showing solidarity in the workplace is crucial as we continue to bargain for fair and better collective agreements. Whether it's wearing red to symbolize our unity, gathering with colleagues, participating in union-led events and initiatives, or taking AUPE education courses, each action strengthens our collective resolve. These demonstrations of solidarity not only boost our morale but also send a powerful message to our employers about our determination and unity. Remember, this journey is a marathon, not a sprint. It will take time and perseverance, but if we remain steadfast and united, we will achieve the success we seek. Together, we can secure a future that reflects our value and hard work. AUPE will lead the way, setting the trend for bargaining across the labour movement. Regardless of the union, we all deserve wages that reflect our hard work and dedication. Together, we can create the change we seek.

In the days ahead, stay informed, stay united, and stay strong. Participate in meetings, join rallies, and engage with your fellow members. The more we show our solidarity, the more powerful our message becomes. When we fight together, we win together.

Gratitude

The term "the union" is frequently used but doesn't always clearly identify who is being referenced. It's important to understand that "the union" isn't just one person or a single group of individuals; it's a team of people working together for the betterment of workers. With that in mind, I want to express my gratitude to the various groups and members that make up "the union."

It has been an honour to work alongside brothers Smith, Huseby, Gault, Graham, and Jackson as well as sisters Gostola, and Azocar. Their support, guidance, sense of humor, and leadership have been invaluable to me, both professionally and personally. I feel incredibly fortunate to have such wonderful colleagues and friends. Thank you.

In an organization as complex as AUPE, it's essential to have subject matter experts who can assist the membership with their needs, concerns, and overall growth. Fortunately, AUPE is blessed with a talented compliment of staff with a wealth of knowledge, experience, and compassion, all dedicated to our "members come first" philosophy.

Membership services officers, organizers, negotiators, IT support, resource staff, professional administrators, communication and research officers, maintenance professionals, managers, and directors are just some of the people working tirelessly to support our members and their work. Together, AUPE staff and members are committed to improving working conditions for themselves, Albertans, and the entire labor movement. Without our exceptional AUPE staff, achieving these goals would be challenging. Thank you.

Additionally, I want to extend a special thank you to Carl Soderstrom, Tammy Lamoureux, Destiny Baines, Katie Cheung, and Kaitlin Harrison. You are among the most passionate, intelligent, and dedicated people I have ever had the pleasure of working with. Thank you.

To my friends and family (including my dog Ollie), thank you for putting up with me. I've heard that "I'm a lot of work," and while I'm not sure how true that is, I love each of you for sticking with me. Without your patience, support, and honesty, I wouldn't be the person I am today. Thank you.

And finally, I want to thank the people who truly make AUPE an amazing union—YOU, the members. Our union is made up of a strong Provincial Executive, dedicated Component Officers, and beautifully diverse grassroots members who bring unique and inspiring perspectives to the labour movement. I have learned so much from all of you within AUPE, and you are the reason I am on this leadership journey. From the bottom of my heart, thank you.

In closing I want to reiterate once again that I am incredibly proud, grateful, and humbled to serve as your elected union vice-president. It is a profound honour to represent such a dedicated and passionate group of individuals who tirelessly work to uphold our shared values and advance our collective goals. Your trust and support empower me to advocate on your behalf and ensure that our voices are heard. I am continually inspired by your commitment and solidarity, and it is my privilege to work alongside you in striving for a better future for all of us. I believe the future of AUPE is bright, and I look forward to standing beside each of you wherever our path takes us. Thank you for this extraordinary opportunity to serve you.

Respectfully submitted in solidarity,

Bobby-Joe Borodey
Vice-President, Edmonton Region
Chair, Human Rights Committee
Chair, Legislative Committee

OFFICERS' REPORT

Vice-President James Gault



Greetings to all delegates, observers, and guests, Welcome to the 47th AUPE Annual Convention properly titled *“Moving Forward in Solidarity”*.

I would like to extend a warm welcome to all the first-time Convention attendees here today. Over the next few days, you will embark on an incredible journey with fellow delegates, possibly meeting members from your own Local you have not met before, along with 1000 members from across our great union. Whether this is your first Convention or your tenth, we are thrilled to have you here. Taking time out of your busy lives to be here is a powerful act. I trust you will have a wonderful time and are prepared for the important work you are being asked to do on behalf of members across your Chapters and the union. To those who have attended before, welcome back. I hope you also have a great time and take the opportunity to build solidarity by connecting with someone new in your group, helping them through this process, most importantly, we will strengthen the bonds of solidarity that unite us.

I would like to express my sincere gratitude for the opportunity to be elected to the role of vice-president and the honor to represent the Northeast region of our province and all our members throughout Alberta. As the liaison with Locals 005, 050, 060, 069, and 118, my goal is, and always will be, to represent you to the best of my ability. I am committed to continuing to learn and grow in this role and to provide support to the members whenever needed.

AGM Report

AGMs were well attended for the most part, and thankfully the roads were pretty good for driving. I have heard the stories of winter driving in the north, and I am grateful it was only a few times that the roads were closed. The region divides west at Slave Lake, north to Fort Chipewyan (Fort McMurray is the furthest I travelled), east to Lloydminster, and south to the town of Viking. It's a large area and requires a lot of driving, but it has been worth it to meet the members and engage in many activities throughout this year.

During the AGM season, we were able to fill in vacancies that had occurred in a few of our Chapters, ensuring they are running smoothly. There were 39 Chapters in the Northeast and 12 Area Councils. We successfully separated one Chapter into two: Local 040 Chapter 004 (Mundare) and Local 040 Chapter 019 (Vegreville), giving us 40 chapters now. This achievement would not have been possible without the hard work of many Local executives, Chapter executives, and members who attended and conducted site visits to encourage member participation. This AGM season would not have run as smoothly without all your help.

I would like to also thank all the Chapters, Locals, and Area Councils that worked with me and were supportive in finding dates that accommodated a busy AGM schedule throughout the Northeast. It was the role of the vice-presidents again this year to book the AGMs and we had the majority of our meetings in person, this meant many trips back and forth between towns, it was an adventure. It was exciting to see new members come forward and fill in vacancies where needed. I also want to thank AUPE staff for their guidance and support throughout this year.

I have attended various meetings and events, either in person or hybrid, depending on the time and scheduling. This is not a comprehensive list of all that a workday contains but simply a snapshot of the last year. If you have any questions, feel free to call, email, text, or speak to me in person.

- Grievance Review Board (GRB) hearings
- Local meetings – in person and hybrid
- Northeast Region chapter meetings
- Area Council AGMs

- Strategic plan tactic development meetings
- Article 29 investigation panel training meetings
- Article 29 investigation panels
- Site visits – if requested or time was available
- Local and Chapter AGMs
- Time for Action town halls
- Lunch and Learns
- Stewards course
- Media training
- Convention planning
- Seasonal events
- Edmonton Area Council
- Chapter BBQ's meet and greets
- Chapter meetings and social events
- Labour ally rallies
- Bargaining conferences for the education sector
- National Day for Truth and Reconciliation
- Committee on Political Action meetings (once every 4-6 weeks)
- Numerous media interviews
- Executive Committee meetings (once every two to four weeks)
- Pre-PE Operations meetings
- Provincial Executive meetings (approx. once every two months)
- Local chairs meetings (approx. once every two months)
- Multi-Health meetings (approx. once every two months)
- Interview panel for AUPE staff positions
- Executive retreat, Pigeon Lake
- Rallies throughout the province
- Pride Events - Parade and BBQs
- Meeting with 12 Ottawa Senators who were touring Canada while in Fort McMurray

Here are some of the places I attended for meetings in the past twelve months: Fort McMurray, Lac La Biche, Cold Lake, Bonnyville, Lloydminster, Vermilion, St. Michael, Two Hills, St. Paul, Vegreville, Lamont, Smoky Lake, Edmonton, Athabasca, Westlock, Barrhead, and Slave Lake.

Direct Action

We have had many rallies throughout the Northeast, engaging other unions to show solidarity as we stand against employers who disrespect and take advantage of their employees.

Fort McMurray Local 056/013 held a rally at Northern Lights Regional Health Center during a “Wear Red Day” in April 2024. Several unions from the area attended to show solidarity and highlight the importance of our members and the dangers posed by the UCP's health care policies. With approximately 130 people in attendance, this was one of the largest rallies of the year.

I attended the May Day rally in Edmonton and spoke to the groups gathered about the importance of standing together, the value unions bring to workplaces today, and the need to remember the past to prevent greed and profits from destroying public services or workers' work-life balance.

Bonnyville Local 040 Chapter 002 held an information picket in June to show the employer their willingness to stand together against unfair treatment. It was the first time planning and holding a rally for a few of the members, and it was a great experience standing with them.

When my schedule permitted, I attended other rallies close to my residence.

We have had a great deal of media reports concerning wildfires, as we have had in previous years, I have provided a brief look at some of the reports we have put out, along with articles that were follow ups from the media asking about our input on what's been happening. We can only provide the information to the media; we have no control how they report it. I am thankful that the media has agreed with us on many topics.

- AUPE Media Release: Alberta government fails to fix wildfire woes, March 1, 2024
- Wildfire fighters sound alarm ahead of 2024 wildfire season, February 15, 2024

- Alberta still not fully staffed to fight fires, April 24, 2024
- Wildland firefighters to Albertans: We need your help, May 7, 2024
- Is Alberta ready to fight forest fires? Albertans need answers, April 29, 2024

A few of the outside releases that have followed up with AUPE:

- Edmonton Journal
- National Post Alberta wildfire-season
- CBC Radio
- Rabble News
- Global News
- Alberta Prime Time
- Red Deer News
- Toronto Star

This year we also worked with Local 005 to create a wildland firefighter's social media campaign. The campaign included stickers members could wear featuring a QR code that sent a letter of support for wildland staff to MLAs when scanned. The letter also demanded that the government properly pay wildland staff to attempt to retain the experienced firefighters who have been leaving Alberta for better compensation in other provinces.

Jasper Fire

I want to take a moment to acknowledge the recent wildfire in Jasper, a tragic event that has had a profound impact on our province and our members. Our hearts go out to the many individuals and families who have lost their homes and livelihoods in this devastating disaster. The rebuilding process has already begun, and our thoughts are with everyone affected as they start to rebuild their lives.

Throughout this crisis, our union members, representing various Locals and roles, have been on the frontlines, serving Albertans with unwavering dedication. The loss of Morgan Kitchen, a brave and committed firefighter, has deeply resonated within our community. His untimely passing is a poignant reminder of the inherent risks faced by those who protect us every day. At just 24 years old, Mr. Kitchen made the ultimate sacrifice, giving his life in the service of others.

I had the solemn honor of attending his funeral alongside Vice-Presidents Azocar and Graham. While this was not the first responder death I have attended, each one leaves a lasting impression, underscoring the tremendous weight of their sacrifice. Our union stands with all those who have been affected, and we remain committed to supporting the ongoing recovery efforts.

Time for Action Rallies

The vice-presidents took part in Time for Action rallies held across the province, providing members with information concerning bargaining and next steps. We conducted over 50 rallies, met with members, and planned the rallies that I mentioned earlier. I was privileged to conduct town halls in these regions, which were well attended with great questions from members. These town halls provided an opportunity for members to hear about our stance at the time. As of writing this in July, I do not know where we will be with bargaining by the time this report is read at Convention, but we are currently holding rallies and continuing to stand with members in the fight for better pay, benefits, and work-life balance. Working with organizing has been great and Tracy Noble has again been an amazing help with making sure these rallies go as smooth as possible.

- June 5: Fort McMurray town hall
- June 6: Lac La Biche town hall
- June 10: Cold Lake town hall
- June 11: Athabasca town hall
- June 12: Lloydminster town hall
- June 17: Westlock/Barrhead town hall
- June 18: Slave Lake town hall
- June 19: St. Paul town hall
- June 20: Vegreville town hall

After the town hall meetings our campaign also held various rallies across the province, with four in the Northeast, and we are currently working on three more rallies in Athabasca, Lac La Biche, and Cold Lake respectively. I greatly appreciate Tracy Noble for all the hard work she did on the fly to make sure everything was ready for these townhalls and rallies.

- Fort McMurray, July 8th at the provincial building
- Westlock, July 16th at the courthouse
- Barrhead, July 18th at the provincial building
- St. Paul, July 26th at the courthouse and hospital

When my schedule permitted, I attended other rallies close to my residence.

This is my first year as a vice-president, and it has been an honor and a privilege to be elected. The executive team has been great and aided when needed. Guy, Justin, Bobby-Joe, Bonnie, Curtis, Darren and Sandra thank you for the help along the way and guidance when needed. The AUPE staff along with Carl and Jim and Terry have been exceptional in ensuring that information is correct and providing insights when needed. Without them, this position would be much more challenging and not as enjoyable.

I am particularly grateful for the support of Tammy Lamoureux, Destiny Baines, Kaitlin Harrison, and Tammy Tangedal. They have ensured that everything in my calendar runs smoothly, and rooms are booked, even when needed at the last minute. Their efficiency and positive attitude have been invaluable.

Member Involvement and Strategic Planning

I would also like to thank the members, observers, and life members. Without you, this union would not function. It takes volunteers and a sacrifice of your personal time to take part in union tasks, and your support and commitment are greatly valued. Together, you make the union strong and help protect your fellow workers.

From working on committees to collaborating with Katie Cheung, who has done an amazing job with strategic planning, it has been inspiring to watch the Locals I liaison with form strategic plans to reach their members and increase involvement. Each of the Locals I represent has worked diligently on their plans, and we have seen growth in union activity.

Looking Forward

As we move forward, I am excited about the opportunities and challenges that lie ahead. Our union is strong because of the dedication and hard work of its members. Together, we will continue to advocate for fair treatment, better working conditions, and the rights of all our members.

I encourage each of you to stay engaged, support one another, and continue building the solidarity that makes our union strong. Let's work together to ensure that we are well-prepared for the challenges ahead and that we continue to make progress in improving the lives of all our members.

Thank you once again for your trust and support. It is an honor to serve as your vice-president, and I look forward to working with all of you in the coming year.

In solidarity,

James Gault,
Vice-President, Northeast Region
Chair, Committee on Political Action

OFFICERS' REPORT

Vice-President Bonnie Gostola



Delegates, observers, and guests of AUPE.

Welcome to the 2024 Convention to all delegates, observers, guests, and other participants.

I want to lead off by sending my heartfelt condolences to those who have been affected by the devastating fire that roared through Jasper during the summer. I want you to know that I am here for you, as a person who also faced a devastating event of this nature in the recent past. Sometimes we need to be there as a shoulder, as a sounding board, and as an advocate for change.

This past year has probably been the busiest I have ever experienced as a vice-president in AUPE. With the change of assignment, bargaining, and AGM season I was not able to “settle” into my role, as is the usual habit after re-election. The new executive hit the ground running, diving right into bargaining conference preparations. I was asked to and gladly accepted the assignment to the Calgary region. I also was assigned to sit on the board of Public Interest Alberta (PIA) and on the PIA Seniors’ Task Force. Finally, I was happy to continue chairing two of AUPE’s Standing Committees: the Environmental Committee, and the Occupational Health and Safety Committee.

Central Region Representation

I finished up with meetings of members in the Central region as those commitments were made prior to the 2023 Convention, and I felt it important to fulfill my responsibilities to those groups. I was also part of several meetings for the Area Councils in the Central region, including Black Elk, Red Deer, and Olds. While I was in conversations with the Drayton Valley Area Council, I was not able to get a date nailed down to hold their AGM, but I know that in follow up with Darren Graham, that meeting was done, and their Area Council is up and running. I also continued my liaison work with the Locals assigned to me; attending meetings with Local 001, 009, 040, 044, and 057. Locals 040 and 044 were able to host a meeting of the stewards to elect their chief steward, I was also part of the election of the Local 118 chief steward. Chapter meetings were also being held during this time. I was able to attend Chapter meetings with members from Locals 001, 002, 040, 043, 044, 045, and 057. Thank you to the executives of these Chapters, who have engaged their members and are getting results with useful information and feedback. It was my honour to be the vice-president assigned to the Central region for the past four years, I made some amazing friendships, watched members go from grassroots to activists, and saw some amazing activists turn into leaders. I know the region will continue to be well represented by Vice-President Darren Graham.

Bargaining 2024

I attended bargaining conferences for the four sectors, including two for health care–AHS and separate employers Locals–totaling five conferences. I was asked to present one session at the health care conference for AHS Locals. Beginning the process of building energy and enthusiasm going into 2024 bargaining was amazing.

In June, the executive team started going to the communities where our members work and live with “Time for Action” town halls. I was the lead on six of those town halls, held in High River, Strathmore, Cochrane, Drumheller, and Calgary. The planning for and the execution of those town halls was important and took time to prepare and then deliver. These town halls inspired several communities to host rallies in support of bargaining. My wardrobe started to include a lot of red, the colour of fire, resistance, perseverance, and support for all of the 82,000 members in bargaining this year. I completed a YouTube video on the issue of workloads and working short, a thank you video, and a call to attend the rallies.

Calgary Region

I hit the ground running, and the word went out quickly to members about my assignment to the Calgary region. I was excited to continue working with the members in Local 001, and to reignite the work with Locals 039, 045, 048, 052, and 095. The challenge of the most massive round of bargaining we have ever seen, coupled with the continued threats to our members in education, the GOA, and health care demanded dedicated strategies to keep fighting for every job and gain that our members deserve.

In early December, I sent out an email to all the Chapter chairs for the Calgary region asking them to start booking their AGMs. We were able to start the majority of our AGMs on time in mid-January. I followed up with reminder emails to chapters that were behind schedule in mid-January, and again mid-February. In total, I attended 72 Chapter AGMs, as well as three second calls, and the Calgary Area Council AGM. There were only five Chapters that required second calls. I attended all six Local Councils in my assignment.

I want to thank every Local, Chapter, and Area Council that contributed to a very successful AGM season this year. It is due to their hard work and dedication to the union, along with Locals taking on the second call meetings, that allowed me to get the AGMs done in a timely manner. It should also be noted that many of this year's AGMs met or exceeded their quorum requirements, which is also a credit to the Chapter leadership. I would like to welcome all the new executive committee members who have stepped into vacant roles. I give a lot of credit and kudos to the Chapter executives and the Locals who worked hard on their strategic plans and focused on member engagement. The new members asked lots of questions, mostly around bargaining.

Now the negatives. It was a tough spring as more worksites are being asked to do more with less. I fielded a lot of questions around all the unknowns, especially in health care. AHS sent out notices to members challenging them to limit their overtime, because AHS has been told to limit their spending. AHS management asked nurses to look at becoming Tik Tok contributors instead of taking overtime shifts to supplement their incomes. We are hearing and seeing agencies cutting their staffing compliments and changing care compliments on many sites. This is especially distressing when we hear of companies that are contracted by AHS to provide home care are giving up those contracts. This affects many of our members in health care. We are also hearing of issues of privatization of those contracts. This is all falling under the shake-up of AHS and changing the priorities of care. The utter disregard and empathy for hard-working front-line staff and the clients they care for is frightening. This is not just in health care. I am hearing from members in government as well. The wildfires burning in the province have been raised as a huge concern as it became more clear that this government was not prepared and refused to heed the warnings shouted at them by AUPE. Child care, elder care, and care of those receiving funding from the Government of Alberta has been thrown into total disarray by the current government. They are making ideological changes to the administration of basic human necessities. They are failing Albertans by not recognizing mental health issues, like addictions, as health issues. They are failing Albertans by not providing basic medical facilities in rural Alberta. As you can imagine, our members want answers and the employer continues to refuse to answer those questions to our satisfaction.

I am working with the Chapters in Calgary, encouraging them to continue to do member engagement. I have expressed my desire to attend any meetings or events that I can to assist the members and the Chapter executives. I have been redoubling efforts to engage members in bargaining initiatives for the 82,000 members from every sector. I have sent out a letter to every Chapter chair, reminding them to look at booking their next meeting, lunch and learn, information session, etc. I have asked the Local Council representatives to take the message back to their Chapter executives that we must continue to engage the members in meaningful conversations focusing on what is important to the members on the worksite. I am starting to book meetings that will allow the members to come to meetings and learn, ask questions, and become involved. My newest mantra is "unions are not a spectator sport; they require active participation by each individual to attain any kind of success." Whether it be filing a grievance to protect the collective agreements we already have, or to walk a picket line to demand better, we all must participate if we are to achieve this success. I remind members that the union is there and the door is open; to get involved and to understand what the "union does for me" all they have to do is "walk through the door!"

The work with the Locals also continues as we are starting to look at building on the newest strategic plan coming from the Provincial Executive. That plan calls for even more work to be done to engage members, to build communication lines around bargaining, and to prepare members for what is coming when—and I say when intentionally—negotiations fail.

As we ramp up the bargaining members are demanding more information, and I am happy to be a resource for those members. I continue to give out my email and phone number to members.

I encourage them to reach out when they are facing issues, or just need more information on what AUPE is, or want to know how they can be more active in their union. Over the summer my calendar was filled with social events like BBQs, but members are also reaching out to book meetings for the benefit of their worksites. I am very encouraged by the reception the letter I sent out received. This summer of building solidarity for bargaining, for education, for health and well-being should prove to be an amazing one.

OHS and the Environmental Committees

It was a privilege to be a part of these great committees. Each is unique and has a unique mandate for the members. The members on these committees are dedicated to making all of our work lives better. I have reports on the work of these committees and will ask the readers to refer to those later in the report booklet.

There is a lot of work being taken on by both these committees, I encourage every member to read those sections and get a feel for what every committee in AUPE is working on.

Public Interest Alberta

Agencies like Public Interest Alberta (PIA) and Friends of Medicare (FOM) show their value as allies to AUPE. These groups are public facing watchdogs, addressing the government policies by building awareness campaigns that are aimed at the Alberta public. They are able to reach a far bigger audience, especially the public, with their campaigns than the unions are able to individually. The most important issue PIA has taken on is the threat to pensions. The Alberta government has threatened to leave the Canada Pension Plan and create an Alberta Pension Plan, which is a great concern to our members and all Albertans. Another significant threat is the division of Alberta Health Services, moving many important portfolios to Alberta Health where there will be no accountability to Albertans. This board meets every two months.

The Public Interest Alberta Seniors' Task Force is looking at the proposed changes to the structure of AHS and how that will affect seniors, especially those in care. The change to the funding model for private-for-profits is especially concerning as there will be no oversight for the spending afforded to those companies. AHS will no longer be distributing the funding. Answers to questions around this issue have not been forwarded, even though the proposed changes to continuing care and home care health care models were supposed to be initiated in April. The obvious lack of planning, especially around implementation of this poorly thought-out plan, pushed this back to September. This task force meets about every two months.

GRB Panels

The Grievance Review Board (GRB) is an internal process where grievances are reviewed by the vice-presidents, with assistance of AUPE Labour Relations staff, and external council. This is a well-respected labour review process to allow members who have outstanding grievances to have their say as to why they feel their grievance should advance to arbitration. As a vice-president, I am committed to sitting on the three-member panel that make up the Grievance Review Board. This year has been especially challenging as the board has been charged with getting more grievances settled than we have ever done in the past. The vice-presidents have also taken on the expedited GRB sessions, working to settle many outstanding grievances on behalf of the members. This is an arduous task for both our members and our staff. Generally, I have sat on at least one panel every month since November of 2023. I have also been on one expedited GRB.

Media Releases and Interviews

Throughout the past year I have once again taken every opportunity to speak on behalf of the members on issues that affect them. Most recently, the conversations have been around the town halls and rallies around the Calgary region. I have also had the opportunity to speak to various groups around the province. I represented AUPE at the annual Norquest College HCA Conference, held in Edmonton on October 18. I also represented AUPE in Calgary at the annual May Day rally.

Other Activities of Note

Early in the year, I took the lead on two Article 29 investigations. I thank my fellow vice-presidents who also sit on these investigations. Although no one ever wants to be the subject of these types of investigations, they are a necessary process to keep the concept of harmony and peace as outlined in our statement of equality and in the execution of the articles in our constitution. They are time consuming, requiring thoughtful consideration of what is in the best interest of AUPE and the members who are this union.

I was also charged with taking on as acting president for a few weeks in January and really got a taste for what the role of president entails. Thank you, President Smith, for entrusting me with that responsibility.

Conclusion

I must acknowledge the hard work of the entire executive team. President Smith challenged us to do more this year around bargaining, and this team has risen to that challenge. We have worked together, lock step, to get the members charged up and ready for what is to come. The three newest members of the team, Justin, James, and Curtis jumped into the fray like old hands. Sandra, Bobby-Joe, and Darren have continued to be amazing leaders. I cherish the team we have become in such a short amount of time. Thank you for your friendship and comradery, it makes the work we do so much easier to tackle when we are in it together. Thank you to the staff who look after this team: Tammy Lamoureux, Destiny Baines, and Kaitlin Harrison have kept this team on track and for that I am grateful. It takes a lot off of our plates when we know they are in the office. Thank you to all the staff at AUPE who provide the necessary knowledge and expertise to help every one of the members.

This year has flown by, it has been the year of engagement. It has been filled with amazing highs and frustrating lows. I have seen our members rise to every challenge put in their way. I have given out over 1,500 business cards to members, encouraging them to contact me, and they have! I am so glad that members feel comfortable reaching out asking their questions. It is cliché to say “the hardest days are right in front of us,” but as we go into the fall and early winter, we know the struggle to get fair and reasonable agreements is only going to intensify. Bargaining teams are telling us of the struggles to gain respect from across their tables. I also know our members deserve everything they are demanding at these tables. I will continue to work with members to educate, to agitate, to inoculate, and to unify until such time as agreements are reached or until our members decide to take action. It is “TIME FOR ACTION”! I am ready and I will be there with you when the time comes to put boots on the ground.

Respectfully submitted in solidarity,

Bonnie Gostola
Vice-President, Central Region
Chair, Environmental Committee
Chair, Occupational Health and Safety Committee
Board Member, Public Interest Alberta (PIA)
Board Member, PIA Seniors' Task Force

OFFICERS' REPORT

Vice-President Darren Graham



Welcome to Convention 2024.

Thank you delegates for stepping forward to be the voice for our Convention! Your dedication, commitment and hard work over the next few days will set direction for our great union as we debate resolutions to move us forward in solidarity.

As always, I encourage any of you that are new to Convention to ask questions of those who have been here before and take the opportunity to engage in your Convention. We may not agree on every issue debated over the next three days, but we should agree that the decision of Convention is the chosen direction of the members. Let's use this time together to build each other up, renew our bonds of solidarity with each other, and continue our active participation.

I would like to extend a warm welcome to the observers, life members, guests, volunteers, and staff, as your dedication past and present has helped create one of the largest and best unions in Canada.

Central Region

I am happy to have been assigned to the Central region for this term, as well as the chair for the Membership Services and Pension Committees. As part of my duties, I am the Local Liaison for Local 009, 020, 040, 044, 057, and 084.

The Central region covers the area from Calgary to Leduc, and from the mountain parks over to the Saskatchewan border. This region consists of 70 Chapters and 10 Area Councils which keeps me very active in the region. It has been great to be back working in central Alberta as I live in Red Deer and I am enjoying reconnecting, meeting, and working with the returning and new activists in the area. The Locals I am a liaison with continue to work on their strategic plans and are building new tactics to strengthen their Local's workplace power with a focus on negotiations.

Annual General Meetings

The Annual General Meetings (AGMs) assigned to me in the Central region were all completed within the timelines outlined in the constitution including the Area Council AGMs. Quorum was achieved at the majority of the first call AGMs. Two Chapters did not meet quorum after second calls and the Locals are reviewing the structure of those Chapters. I am happy to report that all Area Councils in the Central region are active and are working to hold events to bring members together.

Town Halls and Rallies

I want to thank all the members who came out and attended the town halls in the Central region. Over the month of June, town halls were held in Camrose, Drayton Valley, Red Deer, Olds, Drumheller, Rocky Mountain House, Stettler, Wainwright, Wetaskiwin, Hanna, and Ponoka. I also want to thank Vice-President Bonnie Gostola for helping conduct the Drumheller town hall so that we could hold two town halls on the same day. The support that came out of these town halls was great and in the Central region you, the members, have stepped forward to organize very successful rallies within your communities.

My appreciation goes out for the member engagement and for all of you that put your hands up to work with our Organizers to plan the Time for Action rallies! Throughout the Central region you have been raising your voices about the issues and challenges you are facing at the work sites, and the disrespect being shown at many of the negotiation tables. I am proud to be a vice-president of a union that supports members who want to stand up and raise awareness of the issues at their worksites and the services they provide. Strengthening our working conditions strengthens the services we provide to Albertans.

Pension and Membership Services Committee

Part of my duties as a vice-president includes the honour of being the chair of the Pension and Membership Services Committees. These are very busy committees and I enjoy working with the members of both committees. The work these committees do to move pension issues forward, and in dealing with membership concerns at large is very important. Both committees are doing great work and are constantly working on better ways to engage with the membership. I encourage you to review the committee reports and seek answers to your questions from one of the committee members or staff resources.

LAPP Sponsor Board

I am AUPE's representative on the Local Authorities Pension Plan (LAPP) Sponsor Board. With the joint governance model in place the Sponsor Board is legislated to make decisions about the plan including pension benefits, contributions, and eligibility rules. If you are one of our members in LAPP please visit www.lapp.ca and review the tools and information available for your individual pensions.

Grievance Review Board (GRB)

One of the duties as a vice-president is to participate in Grievance Review Board panels to review grievances that have been put forward. The GRB meets monthly, or sometimes more often, to ensure that AUPE members are represented in a fair and just manner under labour law. The GRB is made up of three vice-presidents, with support from legal counsel and senior staff from AUPE. The board applies principles so that all members are ensured that the union's duty of fair representation is met and that the grievances have been thoroughly reviewed. This great responsibility is not taken lightly, and I am thankful for the process that has been developed by AUPE over the years.

Negotiations

At the time this report was written, negotiations were well underway for approximately 82,000 AUPE members. We are now starting to hit walls with our employers – who are being controlled by the government. For those of you who have been entrusted to be the voices of your members, your hard work and dedication is one of the cornerstones of the union and I commend you for standing strong for the membership and pushing for fair contracts. We are “union strong,” with members supporting one another across all sectors to achieve strong agreements. Thank you for taking part in the union activities available to you and showing your employers that you are engaged and active in your union.

Other Activities

Other than the activities I mentioned above, I have also attended:

- Provincial Executive meetings
- Member engagement events with Chapters, Locals and Area Councils
- Local Council meetings
- Area Council meetings
- Holiday events
- Executive Committee meetings
- Grievance Review Board meetings
- Membership Services Committee meetings
- Pension Committee meetings
- Local Authority Pension Plan - Sponsor Board meetings
- Staff interviews
- Local chairs meetings
- Multi-Health meetings
- Operations meetings
- Rallies

I enjoy attending and engaging with the membership at events held by the components and sharing the successes of those events with other components, so that we can continue to build and create a variety of events and ways for members to engage with their union.

Media

We have seen good media coverage throughout the Central region, making the news for many of the rallies that have been held and this is thanks to you, the members, for organizing rallies to show your collective voices. Keep up the fantastic job! “There ain’t no power, like the power of the people, and the power of the people won’t stop!”

Thank You

Thank you to the executive team: Guy, Justin, Bonnie, Sandra, Curtis, Bobby-Joe, and James for your support throughout the year.

Thank you to Carl, and the rest of our management team for supporting me in my role, and thank you to the rest of our incredible staff for what you do for the members every day. A thank you also goes out to the staff at the regional offices in Red Deer and Camrose!

Thank you to Tammy, Destiny, and Kaitlin for the reminders and support at the executive level. Finally, I would like to recognize every member that I have met and worked with over the last year. You inspire me every day and I am honored to serve and work with you.

In solidarity,

Darren Graham
Vice-President, Central Region
Chair, Anti-Privatization Committee
Sponsor Board Member, Local Authorities Pension Plan

OFFICERS' REPORT

Vice-President Curtis Jackson



Greetings!

"I just want to scream hello! My God it's been so long, never dreamed you'd return. But now here you are, and here I am." ~ Pearl Jam

Solidarity, and welcome to the 47th Annual AUPE Convention! To the new delegates, this is your democracy in action. Convention is the highest level of governance within our union, and it sets the path for the next year. This is your opportunity to share with your fellow members what you believe your union should focus on. This is your opportunity to make decisions based on the best interests of the 100 members you have been elected to represent. For the returning delegates, welcome back! I sincerely hope you have had a generally positive year in which you have taken time not only to engage in union activity, but to also take care of yourselves. To the honoured life members, thank you for paving the way for future activists, and for mentoring those who have tried to carry on your legacies while breaking new ground. It is always a delicate balance. To the observers, I truly hope Convention fills you with new and renewed enthusiasm in union engagement. I encourage you take advantage of every opportunity over the next few days.

This Convention represents my first as a sitting vice-president. It is with the dual feelings of nervousness and excitement that I share with you my first ever Convention report.

Assignments

"This is a union town, a union town, all down the line, and if they come to strip our rights away, we'll give 'em hell every time!" ~ Tom Morello and The Nightwatchmen

South Region

The region I have been assigned starts at the west side of the province from the Trans-Canada Highway at the British Columbia border and extends east while skirting south of Calgary to Highway 9 at the Saskatchewan border. From this line, everything south to the United States border makes up the South Region. South Region AUPE members belong to Locals 001, 002, 003, 004, 005, 006, 009, 012, 020, 039, 040, 041, 045, 048, 050, 052, 053, 060, 071, 084, 095, 118 and live in the union towns of Acadia Valley, Aetna, Aldersyde, Banff, Barnwell, Barons, Bassano, Beaver Mines, Bellevue, Blackie, Blairmore, Bow City, Bow Island, Brant, Brooks, Burdett, Canmore, Cardston, Cayley, Cereal, Cessford, Champion, Cheadle, Chestermere, Claresholm, Cluny, Coaldale, Coalhurst, Cochrane, Coleman, Coutts, Cowley, Dead Man's Flats, Del Bonita, Desert Blume, Diamond City, Diamond Valley, Duchess, Dunmore, Elkwater, Esther, Etsizom, Exshaw, Foremost, Fort Macleod, Frank, Gem, Gleichen, Glenwood, Granum, Grassy Lake, Hays, High River, Hilda, Hill Spring, Hillcrest, Iddesleigh, Iron Springs, Irvine, Jenner, Kananaskis, Lac Des Arcs, Lake Louise, Lake Newell Resort, Langdon, Lethbridge, Longview, Lundbreck, Lyalta, Madden, Magrath, Maleb, Manyberries, Medicine Hat, Millarville, Morley, Mountain View, Namaka, Nanton, New Dayton, Nobleford, Okotoks, Oyen, Patricia, Pickering, Picture Butte, Pincher Creek, Purple Springs, Rainier, Ralston, Raymond, Redcliff, Redwood Meadows, Rolling Hills, Rosemary, Scandia, Sedalia, Seven Persons, Shaughnessy, Stand Off, Standard, Stavelly, Stirling, Strathmore, Suffield, Taber, Tilley, Turin, Twin Butte, Vauxhall, Vulcan, Walsh, Warner, Water Valley, Waterton, and Youngstown in addition to our rural members in all the municipal districts and counties (with extreme apologies to any I have missed!) - I feel like Geoff Mack, as I really have been everywhere, man!

When assigned to the South region, I was able to take advantage of my knowledge of the region, which includes its members, employers, and labour history. Each region within Alberta has unique characteristics that can provide challenges in agitating, educating, inoculating, organizing, and unionizing.

I have devoted unprecedented hours to meet with every component and Area Council within the South region during the AGM season, and my work has gone further. I have conducted multiple site visits across the region in which I have engaged with members in every sector. The benefit of site visits is meeting with members who may not necessarily have ever come out to a union meeting in the past. In fact, I know there are delegates sitting with us today whose first involvement was at a site visit in the last year. This sort of growth in member involvement is priceless, and I intend to continue to conduct site visits, lunch and learn, attend wing nights, and provide updates to union members regularly. I have come to embrace the duties outlined by Article 11.05(c) of the AUPE Constitution and would like to extend a special thank you to the Component Officers and members of the South region for empowering me to promote our great union!

Locals

In addition to the Chapters and Area Councils that fall within the borders of the South region, I have also been assigned as the Vice-President Local Liaison for Locals 004 (GoA Trades and Related Services), 041 (AHS South Zone Nursing Care), 053 (University of Lethbridge), 058 (AHS South Zone GSS), and 071 (Colleges and School Divisions). Each one of the Locals I am assigned to had very successful AGMs that met quorum and were also able to either review or update their strategic plans. Each of the Locals I represent have remained strong in the face of low wages, threats of privatization, service cuts, high workloads/working short, and fatigue and burnout.

For the post-secondary Locals in the south (053 and 071), special attention needs to be paid to the cuts in funding that our colleges and universities are experiencing, on top of the increases to their operating costs as a result of inflation which directly threatens job security, workload, and work-life balance. The University of Lethbridge has lost 21% of its funding since 2019. As a result, contracting out and privatization to find efficiencies increases the level of risk our members in post-secondary face.

For the health care Locals in the south (041 and 058), special attention needs to be paid to the restructuring of health care within Alberta and the additional threats that this restructuring brings, including changing of employers, respecting collective agreements, and potential for contracting out and privatization.

Within the Government of Alberta, Local 004 faces ongoing contracting out and privatization. What was once a massive Local has been reduced to less than 500 members. Not only does AUPE need to continue to support our trades people, AUPE needs to re-ignite the fight against privatization and contracting out of these much-appreciated public sector workers.

Annual General Meetings

I completed 54 successful Annual General Meetings (AGMs) in the South region this year. My gratitude goes to my fellow Vice-President Bonnie Gostola for covering two back-to-back AGMs that were scheduled at a time I could not make.

Standing Committees

As per Article 11.04 of the AUPE Constitution, I have been assigned the Anti-Privatization Committee and the Young Activists Committee. Both committees have their own report. I continue to be inspired by the work that the members of the standing committees do, and the commitments they make are greatly appreciated.

Grievance Review Board

One of the most challenging roles as a vice-president is that of holding a vote on the Grievance Review Board (GRB). Analyzing GRB summaries and determining what will be and what likely will not be successful is an incredibly challenging task. More than that, at times a line in the sand needs to be drawn, and while the “weasel words” in some of our collective agreements are not in the favour of the grievor, proceeding to arbitration is an important part of the process. In addition to this, the ability of the GRB to send suggestions for contract language clean-up to negotiators is invaluable and helps us build stronger agreements in the future. In a perfect world, we would fight and win every grievance, but until then, I hope we have as many successful arbitrations as possible. To build a membership that is well-versed on grievances, I encourage every delegate who is not already a steward to consider taking the Contract Interpretation course and beginning their journey towards becoming a steward. Remember, AUPE courses are free, and you will receive time-off for union business to complete them!

Bargaining

*“But it will never come close to the rage built up inside of me, fist in the air in the land of hypocrisy”
~ Rage Against the Machine*

Interference

It's no surprise to anyone in this province that every single table in bargaining right now is being offered 7.5% over the next four years, and that employers refuse to budge. Bargaining has never been so strictly controlled by the Government of Alberta as it is right now. While the original legislation for the Provincial Bargaining and Compensation Office (PBCO) was introduced under Rachel Notley's NDP government, Danielle Smith's UCP government has taken full advantage of the power and control that PBCO has given them. This simply underlines the need for us to come together as union members regardless of politics. The only people we can truly rely on to achieve meaningful and positive change to our collective agreements and our wages are us, together.

I want to take this opportunity to break down what 7.5% over 4 years means for you. The proposal is 2% for years one and two. However, Danielle Smith's UCP Government budget forecasts an inflation rate of 2.5% over the next year. This means you could expect to continue to experience wages below the cost-of-living increases over the next year if you accepted the wage offer, and this does nothing to begin to address the cost-of-living shortfalls you have experienced over the last decade.

It has never been clearer than it is right now that workers need a Cost-of-Living Adjustment (COLA) to protect against the disastrous impacts of inflation. Consider too, your pensions are not enough to retire anymore due to inflation. Learn the words, and shout them loud: NO COLA? NO CONTRACT!

This is the most important fight we have ever engaged in. If we are unsuccessful here and now, we will set a precedent in which we will continue to be exploited for our labour. You are worth more!

Time for Action Town Halls

The South region hosted 14 Time for Action town halls. Again, my thanks to fellow Vice-President Bonnie Gostola for covering three of them on my behalf. Consistently, the South region had approximately 10%-member attendance rates at these town halls. The feedback has been similar in every town, members know they are worth more, they know this will take a fight, and for the most part, they are ready for that fight.

One thing that grew out of the town halls in the south was the statement that we live in union towns. Unionized workers contribute to their communities, the money they earn typically stays within Alberta, and it elevates their neighbours, friends, and family members. Union towns are vibrant towns, and I am proud to belong to a union whose members contribute to a healthy and vibrant province!

Time for Action Town Rallies

A natural progression from the town halls were the Time for Action rallies. In the South region, 12 rallies have been planned. As of the submission of this report, nine have been successfully held. The membership that has attended these rallies are loud, fierce, and ready to fight. These rallies have been a great starting point for us to build something bigger.

I am proud to unveil three new chants that we have created in the South region! Feel free to use them at your rallies!

“WORKERS ARE TIRED, THEIR BACKS ARE SORE, GET TO THE TABLE AND PAY US MORE!”

“HEY LOOK, WHAT'S THAT? UNION WORKERS FIGHTING BACK!”

“BOSSES ARE TRYING TO KEEP US DOWN, BUT LETHBRIDGE IS A UNION TOWN!”

Media Presence

“Where there’s somebody fighting for a place to stand, or a decent job or a helping hand, wherever somebody’s struggling to be free, look in their eyes, mom, you’ll see me.” ~Bruce Springsteen

Traditional Media

I am very proud of the presence I have in traditional media. Since being elected I have had several interviews published in newspapers, including the Medicine Hat News, the Lethbridge Herald, the Claresholm Local Press, the Brooks Bulletin, Lethbridge News Now, Red Deer News Now, the High River Times, and the Rocky Mountain Outlook.

In addition to print media, I have completed video interviews with CHAT News in Medicine Hat and Bridge City News in Lethbridge.

One of the two pieces that stand out to me the most are the articles co-completed by my fellow vice-presidents. Vice-President Sandra Azocar and put a spotlight on the crisis in Children and Family Services with a press release. This press release led to interview requests for myself and Vice-President Azocar. Working together, we were able to give a holistic view of a recruitment and retention problem, which has been made worse by the disaster that is the growth model.

The second piece that stands for me is an interview done by the High River Times with myself and my fellow Vice-President Bonnie Gostola. We were able to build on each other’s points and emphasize the strength of AUPE members at the High River rally.

Social Media

I continue to maintain a pro-union footprint across social media, having shared articles, updates, and pictures on Facebook, X, Instagram, and short videos on TikTok. TikTok is a promising platform, in one day I was able to achieve 10,000 unique views to a bargaining update video I recorded in a parking lot after the first AHS Nursing Care bargaining update was released. So many pro-union comments were posted on this video that the trolls were overwhelmed and forced to delete their comments. I look forward to continuing to explore the possibilities of social media to spread pro-union sentiment!

Collaboration with Labour Allies

“We are the champions, my friends, and we’ll keep on fighting till the end.” ~ Queen

Parkland Institute

One of the first conferences I attended as a vice-president was the Parkland Institute Conference in November 2023 in Edmonton. I was able to network with labour allies and grow my knowledge around the use, and power, of earned media. I truly believe that when AUPE makes the news, we have earned it, and it makes it so much harder for our opponents to criticize us. Independent media is also one of the few ways we can avoid the pitfalls of cognitive bias and politicking in the news. There is never full truth in bought media.

CUPE

I had the opportunity to visit CUPE at their AGM in Medicine Hat, and support CUPE at a rally outside Premier Danielle Smith’s staged office in Medicine Hat. Premier Smith has not used the office at all, located on Division Avenue North, and it is a complete waste of taxpayer dollars.

I also led AUPE members in supporting CUPE’s educational assistants at their rally in Okotoks in April 2024. Building solidarity with our labour allies and fellow unions is an important step in ensuring we have their support in turn when we need it the most.

Activities

“I’ll be there for you, ‘cause you’re there for me too” ~ The Rembrandts

Rather than give an extensive list, please reach out to your Provincial Executive representative if you would like the play-by-play on my activities they are reported in my PE reports. Highlights include attending the Post-Secondary Bargaining Conference in Calgary, attending multiple Grievance Review Board meetings throughout the year, attending the Parkland Conference in Edmonton, meeting with the Anti-Privatization and Young Activists Standing Committees, and making multiple site-visits every month.

In Closing

“Wheat kings and pretty things, wait and see what tomorrow brings” ~ The Tragically Hip

I cannot say it enough. Thank you, my fellow AUPE members, for sharing this vision with me, for supporting me, and for giving me the opportunity to represent you. The spirit that the members at large show daily is inspirational and cannot be overstated. Together, we are unstoppable.

Thank you to the AUPE staff, and specifically to Tammy Lamoureux, Destiny Baines, Kaitlin Harrison, and Carl Soderstrom. Without your assistance I couldn't have achieved half of what I have done over the last year.

Thank you to those who paved the way – the former presidents, vice-presidents, and ESTs. Modelling the way for future activists is the best way to succession plan!

Thank you to the Provincial Executive, Local chairs, and Component Officers across the province. Your unwavering dedication to your fellow AUPE members does not go unnoticed. I appreciate working with each of you and each unique strength you bring to this great union.

Finally, thank you to President Smith, Executive Secretary-Treasurer Huseby, Vice-Presidents Azocar, Borodey, Gault, Gostola and Graham. I appreciate the faith you show, the support you give, the knowledge you share, and the respect you offer.

In solidarity,

Curtis Jackson
Vice-President, South Region
Chair, Anti-Privatization Committee
Chair, Young Activists Committee

STANDING COMMITTEE REPORTS

ANTI-PRIVATIZATION COMMITTEE

Committee Members

Curtis Jackson – Chair
Annabelle Alger, Local 054, Edmonton
Jennifer Cull, Local 044, Rimbey
Ashlea Golding, Local 006, Lethbridge
Jennifer Gutierrez, Local 095, Calgary
Braydon Lane, Local 058, Medicine Hat
Amanda McIvor, Local 006, Tilley
Angela Smyth, Local 045, Airdrie
Jay-Lee van der Berg, Local 043, Fort McMurray
Nancy Woods, Life Member, Sherwood Park
Madison Beblow – Staff Advisor
Tammy Tangedal – Administration

Meeting Dates: December 2023 - October 2024

- January 16, 2024 - Edmonton
- March 25, 2024 – Edmonton
- May 2, 2024 - Calgary
- August 12, 2024 - Edmonton
- September 25, 2024 – Calgary
- October 18, 2024 - Virtual

Past

Much of the Anti-Privatization Committee's work over the past year has been to re-evaluate where the committee has been in the past and the tools that have been used. Originally, the committee's vision was to meet with Locals who are facing threats of privatization and develop fight back strategies. With 82,000 members in bargaining this year, feeding information back to negotiating teams was discussed. In addition to this, the committee spent much of its time reviewing threats that came in because of the Request for Proposal (RFP) tracker. These threats were then forwarded to Local chairs with suggestions from the committee as to how to approach them. Typically, this was a recommendation to file a grievance.

Unfortunately, due to the short timelines involved in filing grievances, this approach was very cumbersome and did not present the outcomes we as a committee would have hoped for. In addition to this, by the time a request for proposals was on the RFP tracker it was essentially too late to fight against it. It is clear the tracker was not meant to be used as a monitoring tool.

Present

Life member Nancy Woods is assigned to the Anti-Privatization Committee (following Convention 2023, life members are permitted to sit on standing committees), provided the Anti-Privatization Committee with the Privatization Early Response Model (PERM) that was developed by a former Anti-Privatization Committee over 12 years ago. Nancy was able to find old print versions of the PERM and the committee reviewed and updated the model. The work that had gone into the PERM by the Anti-Privatization Committee over a decade ago still holds up and needed only minor edits to bring it up to date.

The updated PERM info sheet is available for print requests. Members of the Anti-Privatization Committee will be available to help components work through the PERM when reports of privatization are received. In such a way, responses can be tailored to each components individual needs.

Future

A question that has been raised multiple times is, “How does the Anti-Privatization Committee fight back against privatization? Isn’t it too late once privatization has begun?” This has been on the forefront of conversation; however, the answer to this question is what will guide the Anti-Privatization Committee’s work in the future. Using what happened with laboratory services in Alberta as a model, as well as recent exploration of a public insurance provider, it is becoming clear that privatization is not the end of the fight. Campaigns can be developed to reclaim public services from failed privatization attempts. The most obvious target for reclamation is laundry services within the health sector. We have been receiving pictures of laundry items returned as “clean” from K-Bro Linen services. We have also been receiving reports of lost items. Finally, the Anti-Privatization Committee is aware that most hospitals have purchased smaller washers and dryers to launder their own lift straps, as K-Bro had been losing these and they are more than \$1,000 to replace.

The committee intends to explore the question of why this province is paying a private contractor to do laundry for the health sector when the private contractor cannot be trusted to do it properly, keep track of items, and loses expensive publicly-owned assets? The campaign to de-privatize laundry services is currently in development. We are exploring the development of similar campaigns for other failing privatization attempts as well. Once campaigns go live, the Anti-Privatization Committee is asking that members support these campaigns by sharing them on social media, and talk about them with their family, friends, and neighbours.

In the meantime, we ask you to proudly display your “We Support Public Services” lawn signs and engage in the conversation around public services being controlled by the Albertans who fund them, and not by corporations only interested in profit.

Please visit the Anti-Privatization Committee website for information on the PERM, tips on fighting back against privatization, to fill out the privatization reporting form, and for future de-privatization campaign information.

<https://www.aupe.org/about/committees/anti-privatization-committee>

Recognitions

The Anti-Privatization Committee would like to thank Hitomi Suzuta for her work as the staff advisor from November 2023 - August 2024. Hitomi accepted a new position within AUPE and was unable to continue as the staff advisor. Thank you so much for your guidance and knowledge, Hitomi!

The Anti-Privatization Committee would also like to thank the former committee members, observers who have attended meetings, Local liaisons, and members at large who have contributed to the committee’s work over the past year.

In solidarity, I submit this report on behalf of the Anti-Privatization Committee.

Curtis Jackson
Vice-President, South Region
Anti-Privatization Committee Chair

www.aupe.org/apc

COMMITTEE ON POLITICAL ACTION (COPA)

Committee Members

James Gault – Chair
Nellie Alcaraz, Local 006, Calgary
Nancy Burton, Local 045, Cochrane
Elaine Cairns, Local 002, Spruce Grove
Paulette Gillespie, Local 118, Cereal
Oscar Jara, Local 095, Calgary
Bruce Macdonald, Life Member, St. Albert
Jennifer Power, Local 043, Grande Prairie
Laura Sadler, Local 095, Calgary
James Sullivan, Local 095, Calgary
Zoey Jones – Staff Advisor
Tammy Tangedal – Administration

Meeting Dates

- January 12, 2024 - Inaugural Meeting
- March 01, 2024
- April 3-5, 2024 - Course: Democracy in the Workplace
- May 27, 2024
- Scheduled for September 2024

First, I would like to take a moment to thank our staff administrative professional Tammy Tangedal. Tammy always makes sure our time-offs are correct, hotels are booked, and our paperwork complete; she is a great help at the meetings, and we appreciate all her guidance. Her input has been beneficial and greatly appreciated by the committee.

We would also like to thank Alexander Delorme and Zoey Jones. They have both made valuable contributions and are a big part of COPA's success. They both have the ability to take the ideas from the committee and form it into amazing words and platforms. They are a great asset to the committee and always make our meetings an enjoyable experience.

The Committee on Political Action is dedicated to advancing the interests of AUPE members through strategic and educational initiatives. Our mandate encompasses several key areas critical to the political engagement and advocacy of our members, including the review of social and political practices, political education, encouraging member participation, and advocacy on political concerns. This report provides a comprehensive overview of our activities, key events, and future directions for 2025.

Committee Mandate and Activities

Mandate Overview

1. **Review and Promote:** We continuously review relevant social and political practices and promote the education and social action of our members on political issues. This includes analyzing the current political landscape and its impact on our union's interests.
2. **Political Education:** We aim to enhance members' understanding of political processes and their implications, providing them with the necessary knowledge to engage effectively in political discourse.
3. **Encourage Participation:** We actively encourage and support the social action and political participation of members. By promoting engagement in political activities, we seek to advance the collective interests of the union and strengthen our advocacy efforts.
4. **Advocacy on Political Concerns:** COPA represents members in addressing matters related to the political process. We advocate on their behalf to ensure that their concerns and interests are effectively addressed.
5. **Recommend Priorities:** We periodically recommend priorities for the union's political education activities. These recommendations focus our efforts and resources on the most pressing issues affecting our members.
6. **Election Reform:** COPA is committed to pursuing election reform to establish a fair system of proportional representation for Alberta voters. We believe that equitable representation is essential for a just and democratic political system.

Key Events

Inaugural Meeting (January 12, 2024)

The inaugural meeting of COPA was held on January 12, 2024. Key highlights included:

- Election of Vice Chair: Nancy Burton was elected as vice chair, bringing her extensive experience and enthusiasm to the role.
- Member Introductions: All committee members were introduced, fostering a collaborative atmosphere.
- Review of Committee Role and Political Activity: We reviewed COPA's mandate within AUPE and discussed our involvement in political activities.
- Focus Areas: Education emerged as a key focus, particularly on the election process and its impact on workers and Albertans.
- Engagement with Elections: Strategies for engaging with upcoming federal and municipal elections were discussed, emphasizing voter education.
- Collaboration with Other Committees: Opportunities to work with other AUPE committees were explored to achieve shared goals.
- Advanced Education: A commitment to advanced education for committee members was made to enhance their effectiveness.

The meeting was held in a hybrid format due to weather conditions, which facilitated participation and engagement. We are also updating our webpage to improve communication with AUPE members.

Parkland Institute Report: “A Thumb on the Scale”

The Parkland Institute's report, “A Thumb on the Scale,” presents a critical analysis of the UCP government's approach to public sector bargaining. Key findings and analysis include:

- Government Interference: The report reveals how the UCP government, led by Premier Danielle Smith, has implemented measures to undermine the bargaining process. These tactics are designed to weaken the negotiating power of public sector workers and create division among them.
- Public Sector Employers Act (PSEA): Enacted in 2019, the PSEA allows the Minister of Finance to issue secret, binding directives to public sector employers. This “secret mandate” prevents unions and the public from accessing or being informed about these directives, marking a significant departure from previous practices and challenging fair labor practices.
- Consequences for Workers and Albertans: The report highlights that these measures are causing increased turnover in the public sector and severe disruptions in the lives of Albertans. The erosion of fair bargaining practices is leading to worsening work conditions, unrealistic workloads, and stagnation in achieving a living wage.

COPA's Response and Actions

Report Availability: The full text of “A Thumb on the Scale” is available on our webpage for member review. We encourage all members to read the report to understand the challenges we face.

Educational Focus: COPA is committed to educating members about the report's findings and the broader political context affecting labor conditions.

Ongoing Advocacy: We will continue to advocate for fair bargaining practices and collaborate with other committees to address the issues raised by the report.

Democracy at Work Course (April 3-5, 2024)

The “Democracy at Work” event took place on April 3 & 4, 2024, at our headquarters. This two-day pilot course, in collaboration with the Anti-Privatization Committee, was designed to deepen our understanding of union democracy and organizational politics. We would like to express our sincere appreciation to the education team and Cole Rockerts for allowing us to take part in the course.

Course Structure and Participation

Formats: The event was held in both in-class and hybrid formats to accommodate different participation. Members from COPA and the Anti-Privatization Committee participated in the sessions, enabling a comprehensive learning experience despite varied participation modes.

Key Objectives and Outcomes

Understanding Union Democracy: The course offered valuable insights into union democracy principles, stressing the importance of informed and active participation in organizational politics. Members gained a better understanding of how democratic processes within the union influence decision-making and policy development.

Impact of Politics: A central theme of the course was the impact of political decisions on both personal and professional spheres. The course highlighted how political ideologies and policies directly affect bargaining rights, work-life balance, and the cost of living. Recognizing these impacts is essential for union members to navigate their roles effectively.

Educational Role of COPA: By participating in this course, COPA members were able to review and understand the content and delivery methods before the course is rolled out to all members. This preparatory involvement will help us refine our approach to educating members about the significance of politics in union matters.

Feedback and Future Implementation

Participant Feedback: Feedback indicated that an in-person format would enhance the course experience, especially for discussions and small group work. Future iterations will emphasize in-person interactions to improve engagement and learning outcomes.

Reflection and Next Steps: The course underscored that politics significantly influences every aspect of our lives. As COPA members, we have a duty to ensure that fellow union members are informed about the political landscape and its implications. We aim to educate members not only about political processes but also about distinguishing between policies driven by genuine ideology and those influenced by ego or other non-substantive factors.

Future Directions and Educational Goals

In 2025, COPA will intensify its efforts in political education, focusing on:

- **Informed Engagement:** Ensuring that AUPE members understand key political issues and their implications for their work and lives.
- **Democratic Process:** Facilitating meaningful participation in the democratic process to strengthen member advocacy.
- **Non-Partisan Evaluation:** Providing unbiased information on policies from all political parties to help members make informed decisions.

We look forward to participating in AUPE's 2024 Convention, where we will lead discussions and provide valuable insights to delegates. Our objective is to ensure that every AUPE member can understand key issues, engage in the democratic process, and communicate their views within their communities.

Conclusion

The Committee on Political Action remains committed to advancing AUPE members' interests through education and advocacy. By understanding the intersection of politics and union activities, we aim to enhance member engagement and ensure effective representation in the political arena.

Politics is a fundamental aspect of AUPE members' lives, influencing their jobs, work conditions, and personal well-being. Our role is to provide clear, unbiased information and facilitate meaningful engagement in political matters that affect our members.

In solidarity and on behalf of COPA,

James Gault

Vice-President, Northeast Region

Committee on Political Action Chair

ENVIRONMENTAL COMMITTEE

Committee Members

Bonnie Gostola - Chair
Jennifer Bowlby, Local 005, Boyle
Danielle Dumont, Local 003, Fort Saskatchewan
John Holmes, Local 052, Calgary
Christine Madigan, Local 054, Edmonton
Aaron Petty, Local 002, Edmonton
Jacqueline Powell, Local 057, Lacombe
Tanya Rollins, Local 038, Edmonton
Junel Samalio, Local 040, Edmonton
Guy Quenneville – Staff Advisor
Kendra Perrior – Administration

The Environmental Committee met on January 17, April 2, May 7, and June 26 and September 24.

Our focus this term is to work on Resolution 2-6, which was carried at Convention 2023. Each of our committee members were tasked to pick topics they felt were important to share with the membership. These were discussed within the group and storylines selected. These future narratives would be researched by the committee then included in *Direct Impact* (DI). Due to it being a bargaining year, our committee decided to wait on these articles due to the focus, understandably, being on bargaining and attention with Locals. Our focus shifted to visual educational materials and incorporating this into our existing social media presence. Future works, and those in progress for next term, are webinars with subject matter experts and add-ons to existing training and other online learning in the form of a course or presentation. The committee wishes to get back to this work starting in 2025. Some topics the committee has examined are the costs of transitioning to green energies, food security, carbon capture, solar energy, electric vehicles, un-natural (natural) disasters, and what the climate crisis means for Albertan's.

We set out to come up with strategies to better engage and educate the membership through developing educational materials along with informative articles. The committee wanted to provide a better flow of information not only through social media but with *Direct Impact*, visual works, and webinars. These resources are designed to break down topics specific to the environment, how it intersects with labour, and how it impacts our membership.

The focus of the committee has been to establish timelines and complete items from previous meetings. Most of the work has now been incorporated into the strategic plan, which will direct the work of the committee. Education, and how we get information to the members is the primary focus of the committee this term. The bulk of the education will take the form of print material, social media posts, and in-person sessions with Local councils and Chapters. The committee is working on reestablishing the Facebook page, but there was a struggle to get the page's administration changed over to the current members. The solution was to create a new page and/or to have more environmental content on the AUPE Facebook platform and Instagram page.

Letters to like-minded groups: We established a list of like-minded groups and organizations, and the letter we drafted last term was sent out to those agencies in mid-June. To date we have had no response to those letters.

The committee is also drafting a policy to reflect the general resolution passed at Convention in 2023. This is not going to be a rushed document, but rather, a well thought out policy that will stand the test of time. The committee has put a completion timeline on the document of Spring 2025.

Discussions with Locals: The committee members are assigned to Locals to help with outreach and education. They will act as contacts for environmental initiatives that can be sent out to the communities where our members work to get involvement in community events.

Business Cards: At the April PE meeting we saw a play by a group where they also presented a fold-up card with a volume of information on it. The Environmental Committee loved the concept in this card and the potential information that could be conveyed in such a small package. It is the intent of the committee to complete a document that will be ready for delivery to members at or shortly following Convention.

Strategic Plan

The strategic plan's section related to the Environmental Committee identified two strategies for the term: to build awareness through education and communication, and to build engagement by members in their community. Each of these strategies was developed in direct response to the resolution passed at Convention 2023.

Below is a full plan complete with the tactics on how to accomplish the plan.

1. Building awareness through education and communication: drawing from the general resolution:
 - a) Providing better links and terminology around “Just Transition” and “Green Deal”
 - Updating Slide deck, narration
 - Finish the development of the foldup business card.
 - Regular DI Articles highlighting issues.
 - b) Myth busting
 - c) Cost of transitioning to sustainable resources
 - d) Road map articles
 - e) Developing webinars
 - f) Guest speakers
 - g) Subject matter topics
2. Building community engagement:
 - a) Getting the Facebook page up and pertinent
 - b) Using AUPE other digital platforms
 - c) Grassroots letter
 - d) Getting members out to community events

Each of these strategies has timelines attached and we will be able to show progress on regular intervals which would coincide with reporting to PE and to the members. At the time of writing this report:

- Articles for *Direct Impact*: Drafts have been written, but other issues have taken priority.
- Fold-out Business cards: These business cards are in the draft stage and we hope to have them available at or directly after Convention.
- Social media (Facebook & Instagram): Is under redevelopment, and we hope to have a bigger presence on Instagram

The goals of the committee have changed over the years and were essentially built from the bottom up. With the primary focus being on climate change and its impacts on members, the Environmental Committee rebranded itself through the creation of resolution, “Just Transition” and a “Green New Deal.” In recent years, the committee has become more committed to providing members with an overview of the importance of the environment as it relates to labour. The committee also wants to engage with members to encourage them to be more active on promoting environmental initiatives. We have also changed the narrative, “Navigating the Future” is now how we are approaching the education of the members. Discussions are directed toward what the future looks like if we do nothing, opposed to if we on the labour front take a lead role in protecting the world around us. The committee wants to provide members with information, resources, and initiatives they can take on to protect our environment in the future.

Respectfully submitted on behalf of the Environmental Committee,

Bonnie Gostola
Vice-President, Calgary Region
Environmental Committee Chair

HUMAN RIGHTS COMMITTEE

Committee Members

Bobby-Joe Borodey – Chair
Barbara Brolly, Local 043, Manning
Randy Butler, Local 071, Sylvan Lake
Florinda Canteras, Local 045, Calgary
Kelly Dumouchel, Local 006, Edmonton
Jessica Pope (Vice Chair), Local 012, Edmonton
Brad Salmon, Local 052, Calgary
Atul Verma, Local 095, Chestermere
Zoey Jones – Staff Advisor
Megan Arts – Administration

To the officers and delegates of the Alberta Union of Provincial Employees attending Convention, October 24 – 26, 2024,

Meeting Dates from December 2023 – June 2024:

- January 25, 2024
- March 19, 2024
- May 22, 2024
- June 21, 2024
- July 27, 2024
- August 24, 2024 – scheduled
- September 15, 2024 – scheduled

The Human Rights Committee (HRC) is honored to contribute to the advancement of human rights within the workplace and AUPE. As outlined in our mandate (AUPE Constitution, Article 15(k)), we are committed to educating, supporting, and raising awareness about human rights issues that affect AUPE members, the public, and impacted communities. We are excited to share the committee's accomplishments since the last Convention in 2023.

Committee Focus – Four Pillars

The committee acknowledges that human rights in Alberta encompass 15 protected grounds. Given the diversity of AUPE's membership, we have fellow workers represented across all these grounds. At our initial meeting, we reviewed these protected grounds, discussed their importance to our members, and considered how best to offer support and adhere to the AUPE Constitution. While it would be commendable to focus on all grounds, we found it impractical. Thus, we identified four key areas, or pillars: gender identity and sexual diversity, accessibility, Indigenous relationships, and people of colour (the committees' recent addition). These were selected based on current initiatives we could support or amplify, the likelihood of these grounds affecting a significant number of members, and AUPE's ongoing efforts to build stronger relationships in these areas.

Pillar 1 – Gender Identity and Sexual Diversity

Supporting sexual orientation and gender identity within a union is crucial to fostering an inclusive and respectful environment for all members. Our membership is diverse and beautiful, and AUPE is proud to be an ally to the LGBTQ2S+ community. This community brings immense value to our union and our worksites, enriching our collective experiences with diverse perspectives and talents. As a union, it is our responsibility to stand in solidarity with LGBTQ2S+ members, advocating for their rights and ensuring they feel safe, supported, and celebrated. By doing so, we strengthen our union and demonstrate our commitment to equality and justice for all.

As of this report's writing, the committee had the privilege of participating in the Lethbridge PRIDE parade on June 21, 2024, alongside AUPE members and their friends and families. Additionally, the committee hosted a successful PRIDE BBQ in Athabasca on July 27th. We are eagerly excited to host two more BBQs: one in Edmonton at AUPE HQ on August 24th and a final PRIDE BBQ in Calgary at the regional office on September 15th. PRIDE events celebrate the self-affirmation, dignity, equality, and visibility of LGBTQ2S+ individuals as a social group. Many AUPE members identify with the lesbian, gay, bisexual, transgender, queer, questioning, and two-spirited (LGBTQ2S+) community, while many others proudly stand as allies. We are grateful for this support and encourage all members to continue showing their allyship.

Pillar 2 - Accessibility

The HRC's second pillar focuses on accessibility, which is defined as "being within reach, attainable, comprehensible, or approachable, and having equal access to available resources." While most people are familiar with physical disabilities, emotional and mental ailments are often overlooked. Disabilities, like people, are diverse and affect how individuals experience the world around them. It has been said that most people encounter some form of disability at some point in their life. Therefore, the committee supports the idea that AUPE has a responsibility to create a union where everyone can interact with people and their environment, regardless of their needs.

The Human Rights Committee has made strides in promoting accessibility within our union and its membership. Recognizing the importance of inclusivity, we collaborated with the PUB store to introduce ASL (American Sign Language) t-shirts for resale, offering members a unique way to express their support for accessibility and their union. Additionally, we have utilized our Facebook page to share valuable information on accessibility aimed at raising awareness to our community. These efforts are part of our ongoing commitment to ensuring that all members, regardless of their abilities, feel included and supported within AUPE.

Pillar 3 - Indigenous Relationships

The third pillar focuses on improving Indigenous relations, specifically by walking the path toward truth and reconciliation. Alberta defines truth and reconciliation as "a journey of education and action to improve relations between Indigenous and non-Indigenous people. It is ongoing and active and starts with acknowledging the truth about Canada's residential school systems and colonial origins." While definitions may vary slightly, the core message remains consistent: the journey will be long and painful, but we must hold ourselves accountable and embark on it. Healing will only be possible if we commit to embracing inclusivity, seek to understand, engage in meaningful and safe conversations, and pursue further education. The Human Rights Committee is dedicated to this task, and we look forward to walking this path alongside AUPE members who wish to join us.

To honor the National Day for Truth and Reconciliation (September 30th), the Human Rights Committee will focus on sharing educational opportunities and events that are taking place in communities across the province for members to observe this important day and reflect on its significance to Canadians. It is crucial to remember that however members choose to reflect on the National Day for Truth and Reconciliation, they do so with an open mind and an open heart.

Pillar 4 – People of Colour (newest addition)

Recognizing the value that people of colour bring to the labor movement is essential for furthering a truly inclusive and equitable union. AUPE is fortunate to have a diverse membership, including many who identify as people of colour. Their unique perspectives, experiences, and contributions enrich our collective efforts and strengthen our solidarity. The Human Rights Committee is excited to add this pillar to our committee focus, underscoring our commitment to ensuring that all members, regardless of race or ethnicity, feel valued and included. We encourage the entire membership to join us in promoting a union where people of colour feel they have a genuine seat at the table, and their voices are heard and respected.

The committee's first initiative was to celebrate Black History Month in February by hosting a contest on our Facebook page. This contest sought to encourage thoughtful conversations about the significance of the month. We were thrilled with the high level of engagement it generated and want to thank everyone who participated. We are also exploring additional ways to recognize and celebrate all our members who identify as people of colour.

Closing

Let us always remember that labour rights are human rights, and regardless of nationality, place of residence, sex, national or ethnic origin, colour, religion, language, or any other status, we are all interconnected and responsible to one another. I am confident that by working together, AUPE can lead in both the labour and human rights movements, and the Human Rights Committee is eager to contribute to this progress.

Thank you to everyone who has provided feedback, support, and encouragement over the past year. Your contributions have made the committee stronger, and we truly appreciate you. Please continue to reach out so we can achieve great things together.

Respectfully submitted on behalf of the Human Rights Committee.

In solidarity,

Bobby-Joe Borodey
Vice-President, Edmonton Region
Human Rights Committee Chair

LEGISLATIVE COMMITTEE

Committee Members

Bobby-Joe Borodey – Chair
Mack Branch, Local 003, Lethbridge
Jacob Cameron, Local 053, Lethbridge
Patrick Holwell, Local 006, Lethbridge
Teusdae Johnston, Local 084, Didsbury
Danielle Kiesman, Local 060, St. Albert
Karen Mann, Local 002, Edmonton
Martin Roy, Local 046, Edmonton
Samantha Samborski, Local 009, Morinville
Gil Laflamme – Staff Advisor
Kaitlin Harrison – Administration

To the officers and delegates of the Alberta Union of Provincial Employees attending Convention, October 24 – 26, 2024,

The Legislative Committee met on the following dates:

- January 5, 2024
- March 18, 2024
- May 23, 2024
- June 27, 2024
- August 26, 2024 – scheduled
- October 7, 2024 – scheduled
- November 18, 2024 – scheduled

The Legislative Committee is tasked with creating, receiving, and processing Convention resolutions and referring them to the appropriate standing committee for presentation at Convention. For the 2024 Annual Convention, there are 15 constitutional resolutions and nine general resolutions on the order paper. The Legislative Committee will present the constitutional resolutions and has determined the order of presentation, subject to amendments to the agenda. Please take note of the resolution's submitter, identified at the top of the resolution. If delegates raise a point of information, the submitting component should be ready to respond.

In addition to the work associated with Convention responsibilities, the AUPE Legislative Committee is also tasked with updating and/or creating policies that are then recommended to the Provincial Executive. These policies are crucial for guiding the union's actions and ensuring that our governance structures are aligned with the needs of our members. The committee's mandate, as outlined in the AUPE Constitution, is to ensure that our policies are current, relevant, and reflective of the best practices in labor union governance. In fulfilling this mandate, the committee engages in a thorough review of existing policies and identifies areas where revisions and/or new policies may be needed.

Good governance is the bedrock of any effective organization, and it is especially crucial in a union setting where transparency, accountability, and member participation are paramount. Good governance helps build trust between the union leadership and its members. It ensures that the union operates in a way that is transparent and accountable, thereby fostering a culture of integrity and ethical conduct. In this way, good governance not only enhances the union's internal operations but also strengthens its advocacy and negotiating power.

One of the key initiatives of the Legislative Committee this year was to support Locals in preparing for the upcoming Convention. The committee made itself available to any Local seeking guidance, offering a presentation designed to enhance delegate's understanding of Convention processes and protocols. This presentation covers essential aspects of Convention governance, including rules of order, the roles and responsibilities of delegates, and the procedures for debating resolutions. The presentation is specifically designed to be customizable to account for a Local's unique needs and concerns. This flexibility helps to ensure that all members, regardless of their prior experience or familiarity with Convention procedures, can participate fully and effectively. The presentation also includes practical advice on preparing for debates, understanding the implications of various resolutions, and making informed voting decisions.

Throughout the year, the Legislative Committee has remained focused on achieving its mandate as outlined in the AUPE Constitution. This commitment has been reflected in the committee's rigorous approach to policy review and development. The focus of the committee is to ensure that our union remains responsive, dynamic, and member driven. The Legislative Committee aims to draft policies that serve all members and advance the collective interests of the union.

The success of the Legislative Committee's work this year would not have been possible without the dedication and expertise of its members. I want to extend my heartfelt thanks to all committee members for their invaluable insight and input. Your commitment to the principles of good governance and your willingness to engage in thoughtful discussion have been instrumental in our achievements. It has been an honour to chair this team.

Additionally, I would like to extend a special thank you to Gil, Tammy, and Kaitlin for their unwavering support, guidance, and assistance. Gil and Tammy have been steadfast allies, providing critical feedback and logistical support. Kaitlin, as the newest addition to our team, has quickly become an indispensable part of our efforts.

The AUPE Legislative Committee has had a productive and impactful year, focused on its core responsibilities, and advancing the union's governance framework. Thank you to all who have contributed to our success this past year. We look forward to another year of meaningful work and collective progress.

Respectfully submitted on behalf of the Legislative Committee.

In solidarity,

Bobby-Joe Borodey
Vice-President, Edmonton Region
Legislative Committee Chair

MEMBERSHIP SERVICES COMMITTEE

Committee Members

Darren Graham – Chair
Kelly Annesty, Local 046, Sherwood Park
Trevor Bidyk, Local 057, Red Deer
Michael Decker, Local 002, Calgary
Christopher Dives, Local 084, Coalhurst
Denise Johnston, Local 044, Stettler
Miste Moore, Local 042, Cardston
Pam Vona, Local 002, Edmonton
Farris Sobhani – Staff Advisor
Charlene Peterson – Administration

To the officers and delegates of the Alberta Union of Provincial Employees assembled in Edmonton, Alberta, October 24-26, 2024.

The committee met on the following dates: January 9, February 7, March 4, April 9, May 21, July 9, August 19 and October 7. Note: the committee members also take turns throughout the year to vet potential discounters.

The committee follows the mandate set out in policy and is responsible for considering and reviewing items relevant to the mandate provided. The committee has worked together this last year to ensure that the general welfare of the members is one of positive outcomes.

Education

Below is a breakdown of some of the training and education numbers from the last fiscal year. Members that have taken core course training have almost tripled going from 759 in 2022/23 to 2075 in 2023/24. Let's keep that trend going AUPE!!

Steward Training

Steward training was held in person this year: May 16 Edmonton, May 31 Calgary and June 20 Edmonton. There is also a course planned for Lethbridge on November 13. The attendance so far this year is 271 which is close to the total attendance we had last year. On behalf of the committee, I would like to thank all the stewards who were able to attend this year, and I look forward to increasing numbers next year.

Chapter Chair & Vice Chair Workshops

Chapter Chair and Vice Chair Workshops were offered this year via Zoom to train those individuals who were elected for the remainder of the current term. This one-day workshop is designed to assist in being an effective chair or vice chair and 37 individuals took advantage of this training in April and June.

Area Council Workshops

Area Council Workshops were organized by Justin Huseby, Executive Secretary-Treasurer, and offered to Area Council Executives at six different workshops that were held throughout the province in April.

Picket Captain Training

I am happy to report that there have been an additional 147 picket captains trained this past year. These members plus the hundreds that have taken the training before show that we are ready for job action if necessary.

Course Breakdown – Online and In-person

The number of members who have completed courses in 2023/24 is broken down below:

Course	Online	In Person	Total
Intro to Your Union	293	376	669
Intro to OHS	165	113	278
OHS for Union Activists	63		63
Contract Interpretation	237		237
Basic Conflict Management	217		217
Negotiations Basics	115		115
Democracy at Work		57	57
Intro to Worker's History		70	70
Rethinking Politics		48	48
Workplace Power		275	275
Foundations for Union Stewards		46	46
Total	1090	985	2075

Please, inform your respective Chapters and worksites that the information on AUPE courses is available for all members to take. Courses planned for 2024/25 will be offered either in person, and/or online, the fall courses being offered are as follows:

Core courses offered this term in-person:

- Introduction to Your Union
- Basic Conflict Management
- Introduction to OHS
- Foundations for Union Stewards
- Workplace Power
- Picket Captain Training
- Rethinking Politics

Core courses online:

- Introduction to Your Union
- Contract Interpretation
- Introduction to OHS
- OHS for Union Activists
- Introduction to Workers' History
- Effective Joint Health and Safety Committees
- Bargaining Basics

Other online courses:

- Component Officer
- Labour Management/EMAC
- PIPA
- PSPP/LAPP seminars

For more information on courses, including course descriptions and prerequisites, visit www.aupe.org/training.

Labour School

Labour School is being planned for March 9-13, 2025, and will have some new courses being offered. Courses that will be offered at Labour School 2025 will be Accelerated Steward, Advanced OH&S, Continuing Education for Stewards, Leadership Essentials, Talking Union, and Educating and Organizing Your Shop Floor.

AUPE Discounters

The discount program is continually being updated with new vendors and reaffirming those that are already part of the program. Each committee member is tasked with taking turns vetting and providing feedback when new vendors apply. The committee does not actively solicit new vendors, but we do encourage members to read the policy on how new vendors can be part of the program if they know businesses that would be interested. Please check out the website regularly to see the list of approved vendor discounts and visit some of them in the vendor area at Convention.

Life Membership

The following members have been approved for life membership to be presented at Convention 2024:

- Rosanna Badree - Local 001
- Kevin Barry - Local 052
- Vanessa Bauder - Local 046
- Debbie Caplette - Local 042
- Carleen Detbrenner-Jenkins - Local 001
- Debra Humeny - Local 047
- Laura Johnstone - Local 046
- John Lomas - Local 002
- Brenda Lussier - Local 043
- Dolline Osterlund - Local 046
- Faye Rever - Local 001
- Rachel Shepherd - Local 047
- Mary Watson - Local 046
- Rhonda Whitten - Local 046

The committee would like to extend congratulations and gratitude to all the above members for their dedication to AUPE.

TAB Challenge

The committee is helping promote the connections we as AUPE members can make in our journey of activism in AUPE and are looking to highlight and help members that are involved in efforts to make others' lives and communities better. As part of this we are helping host a challenge to the locals to collect aluminum (pop) tabs which will be recycled for Books for the Magic Room's at the Ronald McDonald Houses across Alberta. Please reach out to your chair or PE Rep for more information and bring those tabs to Convention for a chance for bragging rights and a cool trophy.

Ongoing Work

The committee is continuing to work on updating policies and other ways to improve members' access to resources. The committee is also working on finalizing the local small businesses changes that the previous committee brought in last year. Please take the time to check out some of the great small businesses in your area and ask them if they would like to be part of the program.

In Closing

I want to thank the members of the committee for your dedication and willingness to take on tasks and to actively participate in your committee. I would also like to thank Farris Sobhani our staff advisor and Charlene Peterson our fantastic and amazing administrative support who helps keep us on track.

The Membership Services Committee always welcomes any ideas or thoughts on how to provide the best possible service to the membership, so please reach out to any of the committee members.

Respectfully submitted on behalf of committee,

Darren Graham
Vice-President, Central Region
Membership Services Committee Chair

OCCUPATIONAL HEALTH & SAFETY COMMITTEE

Committee Members

Bonnie Gostola – Chair
Dorinda Ainscough, Local 012, Kananaskis
Karie Burchill, Local 006, Stony Plain
Juanita Cozicar, Local 056, Smoky Lake
Angeline Croker, Local 052, Calgary
Alicia Heit, Local 044, Bowden
Sandra Mill, Local 001, Innisfail
Rose Anne Pimentel, Local 047, Edmonton
Chantelle Tindall, Local 095, Calgary
Diana Kee – Staff Advisor
Ghanem AlAtasi – Administration

The committee met on January 16, March 7, April 25, June 18 (virtual), September 17. All meetings were held in a hybrid format except for the June 18 meeting. Once again, the Local OHS Liaisons were invited to attend the meetings. The committee has once again set a very aggressive agenda for the work they wish to accomplish over this term as well as continuing the work done by the previous committee. The committee set a strategic plan to ensure that timelines to complete many of the campaigns or projects get accomplished during the term. As the chair I am proud to say the work being done by this group of activists has been outstanding. They are dedicated to continuing to build awareness for occupational health and safety across every worksite in this province. In the following report, members will see the work being taken on by the committee and where we will see the impact and/or awareness for the members.

Local OHS Liaisons

Once again, the committee felt the value of asking the Local OHS Liaisons to attend and contribute to the ongoing work being done by the standing committee. At every meeting to date there have been at least half of the Locals attending, either in person or virtually. It cannot be stressed enough how important communicating with these Locals has been. The input they provide has given the committee more insight on what impact the messaging about OHS is having on the frontlines. The commitment of these members is starting to be seen in the reporting of issues, the effectiveness of the worksite the Health and Safety Committee members, and the Local sub-committees. The continued presence of the Local liaison at the standing committee meetings will hopefully expand the work being done at every level in AUPE. We are working with the liaisons to build their subcommittees into functioning groups to improve the work at the Local level. The committee extends its thanks to those liaisons who have embraced their role as OHS leaders in their Locals.

OHS Reporting Form/ Working Short Reporting Form

The committee, with the guidance of the AUPE OHS union representatives, has reviewed the online reporting forms. We anticipate the new (and improved) reporting forms will be online by September. Members will see a more streamlined process, with a focus on the most efficient information gathering we have done to date. The Working Short Form will be linked to the OHS Reporting Form, so members will only need to go to one location to fill out both forms. Both forms will require less need for writing, using dropdown menus to quickly input the information needed by the OHS Committee.

These forms are designed to educate members while they fill them. For example, members will know who will be seeing the form, and whether follow-up by an OHS representative is required. Also, as part of the committee strategic plan every document produced by the committee will have a QR Code that links to the OHS reporting form, which will eliminate the search requirement on the AUPE webpage.

“It’s Okay to say you’re not Okay”

Knowing your limits; Boundaries. It’s okay to say “No!”.

Members should be reminded that their first obligation is to themselves. If they aren’t healthy (holistically – mentally, physically, spiritually) then they can’t be anything to anyone else.

Members should be reminded that to perform at their best for their clients/patients then they need to say “no” sometimes. This reduces the liability issues, improves client care, provides a higher quality of work, and in general allows the member to enjoy their work.

Members need to be reminded that if saying “no” means that their colleagues are put in a position to be working short it is the employer’s issue. They should be reminded that they have recourse through “best practice,” policy, professional groups, OHS, labour law, and master agreement/workload articles.

Members need to be reminded that a large part of their mental health includes having autonomy, being empowered and being an active member of their work team who can push back against events that cause them moral injury, sanctuary injury, compassion fatigue, vicarious trauma, and burn out.

As the “It’s Okay to say I’m not Okay” campaign progressed into the second year of the term we did not find as much time to focus on it, and therefore were only able to present the second idea for a poster. This idea revolved around the concept of “Knowing your limits; Boundaries”.

This is best described as: moral injury or sanctuary injury can be the final straw in a series of events that leads to taking sick/stress time off. If a member feels burned out and leaves work they don’t have the satisfaction of being productive and helpful anymore. Being able to do their work gives them a sense of purpose that is lost because there is too much to do.

This part of the campaign should help to inform members that it is “Okay to say, I am not Okay” so they are able to say “no” to being asked things that are too much: Overtime shifts, working short, training/orienting and mentoring new staff while still being expected to complete all their own tasks.

Members should feel empowered and safe to tell the employer “no.” The ability to say no is good for their own well-being, the quality of care that they provide their clients and the liability to the organization where they work.

The committee intends to include all that we discussed above in a new poster during the second part of its term. This new poster will be the second one in the Mental Health Campaign series that was started in 2021.

Occupational Health and Safety Committee Education

Exciting news on this front. The AUPE Education Department has completed work on a new course for the OHS Committee. The new course is scheduled to roll out in time for members (who are elected or appointed to their worksite committees) to take in the new year. We have proposed that the committee and the OHS Liaisons do the first test-run of this new education course in the early fall (Sept-Oct). We will provide feedback so adjustments the course can be done prior to the 2025 AGM season. This course is directed at members who will be working on joint committees at their worksites, or in their programs for their employment. The committee has seen the draft and is looking forward to taking the course in the fall. Hopefully this course will add piece to the puzzle as we work to change the culture of OHS on our worksites. The committee’s goal is to empower, educate, and create activists who will champion OHS issues. This education course completes the vision of the previous committees’ work, and we thank the Education department for their hard work in making this a reality for the members.

Safety Guide/OHS Issue Reporting Chart

The committee has also been developing a one-page guide for members to outline the OHS resources available to them. The guide will feature a QR Code to help to navigate reporting issues, to find their worksite representatives, and to resolve OHS issues on their worksites. Thank you to Alicia Heit of Local 044 for allowing us permission to use the material she created for her Local and Chapter, prior to joining the OHS Committee, as the basis for our guide. In conjunction with this one-page guide there will be another new document, the brainchild of committee member Chantelle Tindall of Local 095, available to download on the AUPE webpage. This document will include an “algorithm” or “navigation” chart that provides directions on how to report OHS issues, who reports go to, and what the outcomes are likely to be.

Facebook OHS Page

It is our hope to have a new OHS Facebook page up and running for the members by Convention. On this page we will be focusing on brief bulletins on OHS issues, providing links and information on anything safety related, and to recognize our members who are going above and beyond to promote safety in and around their worksites. We also hope to use the page to bring awareness to the roles of OHS Committee members, the education available, and any other pertinent OHS information, building a platform of awareness for all AUPE members and workers at large.

Safety Heroes

We often get so obsessed about everything that is going wrong out there that we fail to see the people and workers who are getting it right. The committee has decided that that is something that must change at AUPE. After Convention the OHS Committee will be recognizing, on the AUPE Facebook page, everyday members who are doing it right. Everyday SAFETY HEROES who may not even realize what they are doing is right and the impact they have. Every month, the committee will present a certificate to all members put forward for recognition by their coworkers. We also plan to highlight some of these members on the AUPE Facebook page. It is our way of saying thank you for doing it right, doing something safely, and looking after yourself and your fellow workers. This is something that is long overdue. Watch for more information on this in the mid-to-late fall. It is hoped to have a QR code for this initiative, to make it easier for the members to celebrate good safety habits.

Day of Mourning/ Rolyn Sumlak Award

The Day of Mourning (DOM), held annually on April 28, is an event where AUPE recognizes those workers who have paid the ultimate price to their work, resulting in death, injury, and or illness. Unfortunately, AUPE loses members every year because of a failure in OHS; these members are needlessly pulled from the lives of their families, their friends, and their coworkers. We send our condolences to those who have lost someone this year. We remain hopeful that our message of “safety first” continues to reach more and more of our members, and that next year is the year we see the losses suffered due to OHS failures significantly decline. This year, AUPE held the ceremony at AUPE Headquarters on April 26, as April 28 fell on a weekend. All members were invited to attend, and Local OHS Liaisons were asked to represent their Locals. The program included President Guy Smith, the OHS Committee, the OHS Local Liaisons, the Local 012 Chair, three amazing guest speakers, an honour guard from Local 003, and a piper. Thank you to our guest speakers: Jared Matsanuga Turnbull, Executive Director of the Alberta Workers Health Centre; Alesia Hadija, Owner of Connections to Thrive; and Rosalie Devost, a proud member of AUPE Local 046/008. Each of these guests provided insight into why we need to value work done by all, why our mental well-being is vital to our work/life balance, and to how direct action can lead to a successful outcome when addressing OHS issues on the worksite. And thank you to our committee members and liaison for speaking about the importance of the Day of Mourning. These members and activists speak with the experience of witnessing the failure in OHS planning on the worksite first-hand, sometimes with tragic outcomes. We were honoured this year to have a live piper and an honour guard from Local 003 after so many years without them in attendance due to Covid protocols. These members add to the solemn nature of this ceremony, and their participation is very much appreciated.

During this ceremony, the OHS Committee was joined by Local 012 Chair Richard Hansen, who was presented the Rolyn Sumlak Award and read “Someone,” which was written by Local 012 member Dennis Mikalson. Congratulations go to the recipient of the Rolyn Sumlak Award, Dorinda Ainscough of Local 012. This award is given to a member(s) in recognition of those who go above and beyond to promote safety on their worksites, in their Local, and for this union. The recipients are nominated by their fellow AUPE members.

Conclusion

As you can see, the committee is continuing to work on the initiatives that will make OHS issues and the reporting of issues less cumbersome. As the OHS Committee chair, I am proud of the work this committee has taken on, and continuing the work started by previous committees. The committee is dedicated to building resources for all AUPE. Our focus continues to be changing the culture of occupational health and safety by reducing (or ideally eliminating) the barriers workers face when reporting OHS issues on their worksites, by improving working conditions, and by creating safe work environments where no one cuts corners. We need to recognize the good work being done by members who refuse to be put in harm's way, and by members who challenge employers on their poor OHS practices. I want to also recognize the hard, and sometimes thankless, job our AUPE OHS reps do. Their commitment to working with AUPE members to improve our reporting system and follow-up of issues must not be overlooked. Diana Kee, Erez Raz, and Jason Wright work tirelessly to be there for the members when issues arise. Finally, this committee has the backing of an amazing pair of staff who work to help us achieve all the goals we set. Our administration professional Ghanem AlAtasi is a priceless member of this team. He is just as dedicated to AUPE members as the rest of the OHS Committee, thank you Ghanem. Diana Kee, the staff advisor, is an amazing support for this committee. She does everything we ask, from working with the Education department to get critical information into the courses, to working with the Local liaisons to build OHS working committees at the Local level.

Submitted in solidarity on behalf of the OHS Committee,

Bonnie Gostola
Vice-President, Calgary Region
Occupational Health and Safety Committee Chair

PAY AND SOCIAL EQUITY COMMITTEE

Committee Members

Sandra Azocar, Chair
Josie Audet-Black, Local 057, Alder Flats
Cindy Bill, Local 054, Edmonton
Joyce Gow, Local 041, Vauxhall
Charity Hill, Local 054, Edmonton
Kristina Javorsky, Local 056, Clairmont
William MacAoud, Local 003, Edmonton
Tessa Quinn, Local 095, Calgary
Hitomi Suzuta, Staff Advisor
Susan Tomsics, Administration

To the officers and delegates of the Alberta Union of Provincial Employees Convention assembled in Edmonton, Alberta, October 2024.

The AUPE Pay and Social Equity Committee (PSE) met on the following days: January 24, April 9, May 24, June 12, and September 3, 2024.

Our ability to meet this year has been somewhat impacted by the fact that a significant number of our committee members are part of their respective bargaining committees and have been busy bargaining on behalf of their members.

Alberta holds the dubious distinction of being one of two provinces in Canada which lacks pay equity legislation (the other is British Columbia). Employers, such as the Government of Alberta, are reluctant to even get into the debate much less have the political will to bring forward legislation to deal with this issue. Such reluctance and lack of legislation means that inequity will continue to exist if we do not continue to push for this to change.

Wage equity extends beyond gender disparities to broader concerns about fair compensation for work of equal value. The practice of undervaluing jobs through manipulated titles, descriptions, and classifications not only perpetuates wage gaps but also undermines the fair recognition of employees' contributions.

Examples from the healthcare sector illustrate this problem vividly. Licensed Practical Nurses (LPNs) often perform duties comparable to those of Registered Nurses (RNs) without receiving equivalent compensation, reflecting a systemic undervaluation of their roles. Similarly, low starting wages that fail to reflect the responsibilities and duties of various positions contribute to inequitable pay structures.

Over the years that this committee has been in existence, addressing these issues has required a multifaceted and incremental approach:

1. **Clear Job Classifications and Descriptions:** Ensuring that job titles, descriptions, and classifications accurately reflect the responsibilities and skills required for each role can help prevent undervaluation. Regular reviews and updates to these classifications are necessary to align them with the evolving scope of work.
2. **Transparent Pay Structures:** Implementing transparent and equitable pay scales that account for the complexity and scope of work can help ensure fair compensation. This involves developing clear criteria for salary increases and recognizing the value of additional duties or responsibilities.
3. **Regular Wage Equity Audits:** Conducting audits to assess and rectify discrepancies in pay based on job classifications, responsibilities, and performance can help identify and address areas of inequity.
4. **Advocacy and Legislation:** Continuing efforts to advocate for wage equity legislation and policies is crucial. This includes pushing for laws that mandate fair pay practices and provide mechanisms for addressing pay inequities.
5. **Training and Awareness:** Educating employers and employees about wage equity and the importance of fair compensation can foster a culture of recognition and respect for all roles.

By addressing these aspects, we can work towards a more equitable pay system that acknowledges and compensates the full scope of work performed by all employees.

Through the work of the committee, we attempt to impact change in the systems that continue to oppress women, people of colour, disabled people, queer people, and other marginalized groups.

Pay Equity Law Petition

Given that Alberta is the only province that has neither passed pay equity legislation nor developed a pay equity negotiations framework, the PSE Committee launched a campaign to petition the Legislature of Alberta to get with the times and make pay equity the law in this province. Saskatchewan, Newfoundland, and British Columbia have not enacted pay equity laws but have developed policy frameworks for negotiating pay equity with some specific public sector employees.

Since launching this campaign, we continue to attempt to garner petition signatures at every meeting, gathering and event that our members hold. We also go to various community events to try to meet our goal of reaching 10,000 petition signatures so that we can ask the government to finally pass legislation that will address pay equity.

We have made postcards available online and in various public spaces. We are also creating a more robust social media campaign to spread awareness and encourage people to sign the petition.

To further support our goal, the committee has put together informational workshops and materials to educate people about the importance of pay equity and how they can get involved. We've partnered with local organizations and advocacy groups to amplify our message and build a coalition of supporters.

Alberta Living Wage Reality

The disparity between living wages and current wages for many workers underscores a fundamental challenge in ensuring fair compensation for all employees, particularly in a province with a notable economic surplus.

The living wage reflects the amount needed to maintain a modest standard of living based on local costs, including essentials like food, housing, and childcare. Whereas the minimum wage was initially intended for entry-level positions it often fails to meet the needs of long-term employees who remain at, or near, minimum wage levels.

Living wage estimates vary significantly by location, with higher amounts in Calgary and Edmonton and varying costs across northern, southern, and central Alberta.

The living wage calculation for a family of four in Alberta highlights that even with government benefits, a substantial hourly wage is required to cover basic expenses.

A troubling example of this reality is found within members of the General Support Services sector where 80% earn less than \$20/hour.

The Pay and Social Equity Committee's review of the 169 AUPE contracts revealed numerous instances where wages fell below the living wage and, in some cases, below minimum wage.

Many unionized employees are struggling to make ends meet, often requiring multiple jobs to cover basic living expenses. This situation is both unfair and unsustainable.

The situation is particularly stark in a province with a significant budget surplus, which raises questions about the commitment to fair worker compensation.

Our commitment to addressing these wage disparities is crucial for ensuring fair compensation and improving the quality of life for many workers. By focusing on these areas, we can continue to work towards achieving a more equitable wage system that reflects the true cost of living.

The AUPE Pay and Social Equity Committee will be strongly recommending that AUPE consider bargaining for wages that at the very minimum reflect a living wage.

While continuing to engage in this work we also took time to celebrate and recognize our small but significant contributions, and PSE Committee can safely assume that the great deal of work that has been done around the issue of a living wage has had impact on the various negotiation tables that the union is currently in the process of bargaining.

As we can see from the GSBC bargaining update #4, the PSE work has not gone unnoticed: *“Your negotiating team also proposes that no GOA worker be paid less than \$22.98 per hour. That’s known as a living wage. It’s what a worker needs to earn to meet the necessities, including food, clothing, and a place to live. There is no reason any government worker should be unable to afford food, clothes, and rent while working full time for the government of a very wealthy province.”*

Education on Pay and Social Equity

As a committee we have worked tirelessly to ensure that educational information is easily accessible and available for members to use. We have also made ourselves available for presentations at Local council meetings.

Outreach/Advocacy and Lobbying

As a committee we continue to reach out to legislators directly, arranging meetings to discuss the petition, and continuing to gather support from key stakeholders. We believe that with these combined efforts, we can make a strong case for the introduction and passage of pay equity legislation in Alberta.

Disposition of Resolutions Convention 2023

Resolution 2-7

THEREFORE BE IT RESOLVED that AUPE provides education in wage equity for bargaining teams.

Resolution was carried at Convention and the committee has moved forward in having information materials readily available for members and bargaining committees.

Resolution 2-8

THEREFORE BE IT RESOLVED that AUPE endorses the principle of a living wage for our members.

Resolution was carried at Convention and committee has been actively speaking to the need of ensuring that the bare minimum no members should be making less than a living wage.

In Summary

I would like to take this opportunity to extend my heartfelt thanks to the members of the Pay and Social Equity Committee. The work undertaken by this committee is truly noteworthy, and I am deeply fortunate that I can rely on the dedication and passion that each of you brings to our mission.

A special thank you goes to our staff advisor, Hitomi Suzuta. Her exceptional work ethic, unwavering dedication, and profound expertise have been instrumental in shaping the committee into the influential force it is today. Hitomi’s relentless energy and commitment are truly inspiring and have greatly contributed to our progress and success.

I also want to express our sincere gratitude to Susan Tomsics, our administrative professional. Susan’s diligent efforts and organizational skills have ensured that our committee operates smoothly and efficiently. Her behind-the-scenes work is invaluable and greatly appreciated.

Thank you all for your hard work and continued dedication. Together, we are making a meaningful impact, and I am proud to work alongside such a committed and talented team.

Respectfully submitted on behalf of the Pay and Social Equity Committee,

Sandra Azocar
Vice-President, Northwest Region
Pay and Social Equity Committee Chair

PENSION COMMITTEE

Committee Members

Darren Graham, Chair
Gayle Berntson, Local 060, Edmonton
Gayle Burkholder, Local 118, Edmonton
Katie Flynn, Local 052, Calgary
Raminder Gill, Local 040, Edmonton
Edna Hickey, Local 045, Calgary
Tammy Paskuski, Local 053, Lethbridge
Andrew Wilson, Local 057, Sundre
Liliana Cordeiro, Staff Advisor
Rocio Granados, Administration

LAPP and PSPP Board Members

LAPP Sponsor Board: Darren Graham, Vice-President
LAPP Corporate Board: Terry Agoto, Director of Labour Relations
PSPP Sponsor Board: Justin Huseby, Executive Secretary-Treasurer
Mike Dempsey
Jason Heistad
PSPP Corporate Board: Liliana Cordeiro, Union Representative – Pensions
Jan Goodwin, Research Officer
David Lardner, Union Representative – Disputes and Arbitrations

To the officers and delegates of the Alberta Union of Provincial Employees assembled in Edmonton, Alberta, October 24-26, 2024.

Greetings!

The Pension Committee continues to fulfill its mandate to promote pension issues to members and the public, lobby government when our pensions are under threat, coordinate work with labour organizations to protect retirement benefits, and ensure workers' voices are heard in decision-making about their pension plans.

This year, new members Katie Flynn, Gayle Berntson, Tammy Paskuski, Gayle Burkholder, and Raminder Gill, joined seasoned members Edna Hickey and Andrew Wilson to advocate and educate members about pensions. I would like to take this opportunity to thank current, and past, members for their dedication; and to encourage members to consider joining our committee to promote, and fight for, decent income in retirement.

The committee met on January 10, 2024 (hybrid/in person at HQ), February 13, 2024 (hybrid), April 3, 2024 (hybrid), June 7, 2024 (hybrid/in person at HQ, September 4, 2024 (hybrid/in person at HQ).

Organizing

One of the key areas of our mandate is to advocate for pensions that support our members in achieving a dignified retirement. To understand our members' pension coverage, the committee collaborated with the research department on two significant projects. First, following the 2023 Convention, AUPE members participated in the 2023 Demographic and Discrimination Survey, which included questions about their pension participation and coverage. Second, our researchers completed an environmental scan of pension coverage across the entire membership, a project initiated in 2022. The committee has received the results of these efforts and will be developing activities and support materials based on the findings. We extend our sincere thanks to researchers Dr. Zoey Jones and Paul Hayes for their invaluable contributions to this foundational work.

Last year, the Alberta government released a \$1.8 million report evaluating the costs, benefits, and considerations of Alberta potentially withdrawing from the Canada Pension Plan (CPP) and establishing the Alberta Pension Plan (APP). This was followed by a survey, an ad campaign, and public consultations through a panel, which many perceived as a marketing effort, costing Albertans \$7.5 million. Subsequently, the UCP passed the *Pension Protection Act* (Bill 2), which sets the stage for a potential referendum on this issue. Although this appears to give Albertans a choice between staying in the CPP or creating the APP, it also allows Premier Smith to proceed with the APP regardless of the referendum results. Pensions are designed to provide long-term security for workers and retirees. We did not request the APP and have concerns about the UCP's motivations and plans. In 2024, we continue to offer a form letter for members to voice their support for the CPP, encouraging them to inform Premier Smith that we deserve pensions that prioritize our retirement security over political maneuvering.

Investment Performance

PSPP and LAPP investment performance is healthy. Pension plan assets on March 31, 2024 were \$19.2B in PSPP and \$64.9 billion in LAPP with both plans having sufficient assets to pay benefits earned to date. Unlike a defined contribution (DC) pension plan or RRSPs, the amount of the pension one receives doesn't fluctuate when markets are down. Risks are spread out among all members, vs. in a DC plan or RRSP savings where the individual assumes all investment risk and retirement income is usually based on how much money is in the bank when it's time to retire. Further, contribution rates are stable because they are based on long-term funding requirements and are not directly affected by short-term market performance. The plans continue to be fully funded, financially healthy, and stable.

Alberta Management Investment Corporation (AIMCo) is the legislated investment manager for PSPP and LAPP. The benchmark (target) return represents what a plan could reasonably expect to earn without active management if it invested in the market indices in proportion to its policy asset mix approved by the board. AIMCo strives to earn more than market returns by over or underweighting specific investments in relation to the indices.

PSPP – AIMCo Investment Performance

Year Ending	2023		2022		2021		2020	
December 31	Actual	Target	Actual	Target	Actual	Target	Actual	Target
	9.18	10.31	(4.5%)	(5.9%)	15.8%	10.3%	1.6%	8.0%

LAPP – AIMCo Investment Performance

Year Ending	2023		2022		2021		2020	
December 31	Actual	Target	Actual	Target	Actual	Target	Actual	Target
	7.63%	8.38%	(4.95%)	(6.6%)	14.96%	7.58%	5.2%	9.46%

As of March 31, 2024, AIMCo's investment management of PSPP assets produced a four-year annualized return of 10.14%, adding 1.51% value over the 8.62% benchmark. On the same date, AIMCo's management of LAPP assets resulted in a four-year annualized return of 7.79%, exceeding the target of 6.77% by 1.02%.

PSPP Employee Contribution Rates*

Year Beginning January 1	2024		2023		2022		2021	
	Earnings up to YMPE** \$68,500	8.3%	Earnings up to \$66,600	8.3%	Earnings up to \$64,900	9.6%	Earnings up to \$61,600	10.47%
	Earnings over \$68,500	11.9%	Earnings over \$66,600	11.9%	Earnings over \$64,900	13.7%	Earnings over \$61,600	14.95%

*Employers match employee's contributions

**Year's Maximum Pension Earnings is announced by Government of Canada by year end.

On January 1, 2024 LAPP reduced employee and employer contributions, as approved by the Sponsor Boards and announced in 2023.

LAPP Employee Contribution Rates***

Year Beginning January 1	2024		20223		2022		2021	
	Earnings up to YMPE** \$68,500	7.45%	Earnings up to \$66,600	7.45%	Earnings up to \$64,900	7.45%	Earnings up to \$61,600	8.39%
	Earnings over \$68,500	10.65%	Earnings over \$66,600	11.23%	Earnings over \$64,900	11.8%	Earnings over \$61,600	12.84%

**Year's Maximum Pension Earnings is announced by Government of Canada by year end.

***Employers match employee's contributions and pay an extra 1%

Pension Education

The Pension Committee continues to support members' pension education through collaboration with PSPP, LAPP and Alberta Pension Services Corporation (APS), and facilitating in-person and online learning opportunities.

PSPP	Number of Webinars	Members attended
2022 Fall	13	624
2024 (Winter/Spring)	10	256
LAPP	Number of Webinars	Members attended
2023 Fall	9	280
2024 (Winter/Spring)	9	109

On April 17, 2024, following a notable Alberta spring blizzard, I attended an morning education session for LAPP members at Olds College. The presentation was conducted by Mohit Dasaur from APS and Liliana Cordeiro, staff advisor for the Pensions Committee. The session was well-received by over 40 LAPP members, who gained a thorough understanding of their pension benefits and how participating in LAPP impacts their lives and careers. We extend our gratitude to Leona Megli for organizing and setting up the venue for this educational session and thank all those who attended.

To support committee members in their pension work, they participated in educational sessions. In February/May 2024 they attended "An Alberta Pension Plan? Making Sense of an Old Idea" presented by University of Calgary professor Trevor Toombe. This course covered the history and facts surrounding the APP and the CPP, and provides members with the knowledge they need, especially in anticipation of the upcoming report from the Chief Actuary of Canada on the proposed separation of Alberta from the CPP. Additionally, they had the opportunity to enhance their understanding of pension trust management and related matters by attending "Foundations for Trust Management" presented by the International Foundation of Employee Benefit Plans. This two-day course deepens their knowledge of essential pension trusteeship concepts, including fiduciary responsibility, retirement security, and pension plan asset investments.

For Fall 2024 the following live webinars are available to members:

PSPP Preparing for Your Retirement

Monday, September 9, 2024

9:00 – 10:15 A.M.

Monday, October 7, 2024

9:00 - 10:15 A.M.

Monday, November 18, 2024

1:00 - 2:15 P.M.

PSPP Steps to Retirement

Monday, September 16, 2024

9:00 - 10:15 A.M.

Wednesday, October 16, 2024

1:00 - 2:15 P.M.

PSPP Overview

Monday, December 9, 2024

1:00 -2:15 P.M.

LAPP Retirement Options

Wednesday, September 18, 2024

9:00 - 10:30 A.M.

Wednesday, October 9, 2024

9:00 – 10:30 A.M.

Wednesday, November 13, 2024

1:30 – 3:00 P.M.

Wednesday, December 4, 2024

9:00 – 10:30 A.M.

LAPP Increasing Your Benefit - Buying Back Service

Thursday, October 31, 2024

9:00 – 10:00 A.M.

LAPP Terminations, Death, and Disability

Tuesday, November 26, 2024

1:30 – 2:15 P.M.

The Pension Committee will continue to advocate for members' access to timely, relevant, and accessible information about their pension benefits.

The Pension Committee wishes to thank all members employed with the Alberta Pensions Services Corporation for their service and assistance to our members. The success of APS is built on the strength of these exemplary members that provide services for our plans.

The committee would also like to thank employees of PSPP and LAPP who provide outstanding service to AUPE members.

The Pension Committee looks forward to continuing to fulfill its role in monitoring the management of the PSPP and LAPP, as well as facilitating the education of AUPE members on the importance of pensions as the vital benefit to secure post-employment lifestyles.

The committee wishes to thank those nominated by AUPE sitting on respective PSPP and LAPP boards: Justin Huseby, Jason Heistad, Mike Dempsey, Darren Graham, Terry Agoto, Liliana Cordeiro, David Lardner, and Jan Goodwin for their contributions to joint governance of the pension plans.

We would also like to give special thanks to Rocio Granados, our administrative support, for keeping us organized.

Respectfully submitted on behalf of the Pension Committee,

Darren Graham

Vice-President, Central Region

Pension Committee Chair

WOMEN'S COMMITTEE

Committee Members

Sandra Azocar – Chair
Crystal Broadbent, Local 045, Calgary
Jennifer Charrois, Local 006, Edmonton
Pamela Foyle, Local 095, Calgary
Ainsley Gray, Local 044, Blackfalds
Ruth MacDonald, Local 084, Redcliff
Carol Mammel, Local 095, Calgary
Jennifer Richardson, Local 043, Grande Prairie
Alicia Salon, Local 056, High Prairie
Hitomi Suzuta – Staff Advisor
Jami Payne – Administration

On behalf of the AUPE's Women's Committee I would like to welcome all the officers, delegates, life members, committee members, observers, and guests to Convention 2024. Greetings of solidarity from all the members of the Women's Committee.

Women's Committee met on the following dates for the latter part of 2023-2024:

- January 29, 2024
- March 8 – International Women's Day Evening Event
- May 27, 2024
- July 22 & July 23, 2024
- August 15, 2024
- September 4, 2024

The above dates reflect the formal meeting/events days; however, it does not capture the 'check-in meetings' that take place to ensure that our work and events run as smoothly as possible.

As AUPE Women's Committee, our main goals are to strengthen our union's capacity to organize and grow; to enable women to exercise in full their energy and intelligence, wisdom, and skill; to create spaces for women to share their experiences; to support each other in our activism; and mobilize on equality issues and act on union priorities to the benefit of all its members—sisterhood is a powerful thing! We often get asked as to why we need to create separate forms of outreach for women. And the simple answer is that the fact remains that genuine, systemic equality for women at the workplace, in their unions, and within the labour movement is still unrealized. This is the reason why we continue to move forward and organize around issues that impact our membership.

The following report will attempt to highlight a few of the areas that this committee has been working on during the past year.

Dove Award/International Woman's Day

Every year since March 2002, chosen to coincide with International Woman's Day, AUPE has presented the DOVE Award. The DOVE AWARD honours female members who have made major contributions to the betterment of women and all members of our union. The DOVE Award – Day of Validation and Equity – provides an opportunity for members to recognize the work of their co-workers as activists, stewards, worksite contacts and spokespeople for the union movement.

The DOVE Award was presented this year on March 8, in coordination with the celebration/commemoration of International Women's Day.

This year our committee was once again faced with a difficult decision – choosing from the many women that were nominated for this prestigious award. After much discussion and consideration, the 2024 DOVE award was presented to two sisters that earned this award through the years of activism and dedication to our union, Janice Drader, Local 057 and Sandy Kyle, Local 046.

Janice Drader, member of Local 057 Chapter 002, decided to get involved with AUPE back in 2015 when she was voted in as Chapter chair and an alternate delegate for Convention that year. Since then, Janice has been an ever-present and unstoppable force for progress, in both AUPE and within the Wetaskiwin community.

She is described by friends as an “absolute firecracker” and someone who “wants nothing more than to make a positive difference in the world.” In 2019, just minutes after it was announced that Jason Kenney’s government would directly interfere with the bargaining process for GSS workers, Janice acted. She immediately organized a walk-out at Wetaskiwin Hospital, showing her employer that the government’s position on Bill 9 was unacceptable. This quick and mighty show of solidarity was enough to galvanize many of her co-workers in the fight for fair bargaining.

Janice continues to lean into the activist role, helping to organize new members with phone banking and worksite mapping activities. She has also served as a representative for almost every Local 057 committee including: bargaining, member engagement, finance, and education. Janice was nominated by Coralynn van Someren, saying “Sister Janice is humble, passionate and has a heart of pure gold.”

Sandy Kyle has been with AUPE from the very beginning. As a life member, she’s seen it all. Although she retired in 2022, the work she did for Local 046 Chapter 002 will continue to influence and inspire direct action for many years to come. Sandy is known to be a unifying force for AUPE members within AHS, emphasizing the importance of NC and GSS workers standing together in solidarity. For over 20 years, she sat across from the employer and bargained for fair compensation and better working conditions. In addition, she was a vital component of her Local and an outspoken advocate for GSS workers.

The AUPE Women’s Committee would like to congratulate all those who were nominated. We extend our gratitude for all the work they do on behalf of fellow union members and the communities they live in.

During this year’s celebration we were joined by Karen Kuprys, AFL Secretary Treasurer; members from HSAA Women’s Committee; Nancy Arlinghaus; Judy Lederer, Congress of Union Retirees, Edmonton Chapter; and Shauna McDonald, President of NAIT Academic Staff Association (NASA).

We were also fortunate to have our own Juno award winner Maria Dunn sharing her beautiful voice and songs with all those who attended. We were also amazed by the talent and strength of Edmonton’s Poet Laureate, spoken word poet Shima Robinson. Attendees were also serenaded by the amazing Latin-American singer Marianela Adasme.

On behalf of the AUPE Women’s Committee we would like to extend our gratitude to all those members who joined our committee to celebrate with us.

Domestic Violence/Intimate Partner Abuse

Domestic/intimate partner abuse is part of the union agenda because it is a family issue, a public health issue, a workplace issue, an occupational and health issue, a community issue, and a social justice issue. Unions play an integral role in helping members to stay safe, healthy, and employed so they can retain their dignity and remain economically self-sufficient. The work that our committee continues to do around this issue has been incremental and ongoing with each term.

As we have done in the past, I want to start by sharing a poem that was written by a Local 009 member who lived this reality for many years and was able to eventually start a new beginning. Her words are some of the reasons that as trade unionists we much continue to be propelled into action.

New Beginnings

Together forever, I believed in fairy tales.
Behind closed doors, a single emotion unveiled.
Deafening silence; weeks, months, more often years
Shattered rapidly by
Accusations, insults, and profanity
The true catalysts beneath my fears
I try desperately not to hear.
Make the world go away, I cannot take part today.
No light -----no tunnel,
Every rule carved in stone.
No chance for compromise, I stand alone.
Isolation, denial, depression ---my sanity in question
Bruises no one will ever see, no one that is, but me.
The fault was his, the fault was mine
Change comes slowly and is rarely kind.
But as I fall asleep tonight

Under my pillow, no pocket knife
Certain now, the morning light
In time, the nightmares too will fade.
For new beginnings not yet made.

Last term our committee was successful in creating a resource website that continues to be updated, and members can go to access information regarding domestic violence. We then proceeded to work and expand the amazing work that AUPE researcher, Dr. Zoey Jones, did on our behalf. As a result of this work, the Women's Committee has identified three potential approaches to improve domestic violence leave for AUPE members: first, we want to educate members; secondly, push for legislative changes around domestic violence leave; and thirdly, push for domestic violence leave in negotiations.

1. Educate our members

Last term the committee had put forward an educational proposal that had as an end goal to educate staff and union stewards on recognizing situations that may be indicative of domestic violence. Proposals did not proceed as expected, and the committee was given the opportunity to explore educational courses that are currently being offered by other organizations.

Our committee had the opportunity to participate in training provided by the Canadian Labour Congress and United Way. Followed up by a presentation of a course offered by the Alberta Council of Women's Shelters – Leading Change. We hope we will have recommendations prepared as we move forward in trying to provide educational opportunities for all union members.

In November, to mark the National Domestic Violence month and help raise awareness and prevent family violence we will be organizing a webinar entitled – *“You are Not Alone: Workplace Safety in Domestic Abuse Situations,”* which will take place on November 20 at 6:00 pm. All members are invited to attend.

2. Push for Legislative changes around domestic leave

Apart from the proposed work around gaining paid domestic violence leave, the committee is looking at ensuring that the employers are also held accountable for their role under the OHS Act.

Domestic violence has been included in the definition of violence in the *Occupational Health and Safety (OHS) Act*. We must highlight that if an employer knows that a domestic violence incident might come into the workplace they must take steps to protect workers. Workers also must report to their employer or supervisor if they think domestic violence might be, or is, occurring at the work site.

Legislation requires every employer to have a violence prevention plan in place. As per Part 27 of the OHS Code, the plan must include a violence prevention policy and procedures.

When an employer is aware that a worker is or is likely to be exposed to domestic violence at a work site, the employer must take reasonable precautions to protect the worker and any other persons at the work site likely to be affected – OHS Code Part 27, s.390.3

3. Push for domestic violence leave in negotiations:

With the expertise of Zoey Jones, over 30 collective agreements have been explored. It is important to note that most of the collective bargaining agreements use the minimum guidelines set out by Alberta Employment Standards which states that: An employee must be employed for at least 90 days to access provisions, and is entitled to UNPAID leave of up to 10 days in a calendar year. Alberta and Nunavut are the only provinces/territories in Canada without some form of paid domestic violence leave mandated by the province/territory. This makes Alberta the ONLY province in Canada without any form of a paid leave to access for victims of domestic violence. Alberta currently offers a short-term leave (10-days), many other provinces allow domestic violence leave to be combined with other leaves to allow for a longer absence.

The GOA offers domestic violence leave among the special leave provisions, but such time can only be used once a year. Other CBAs' language currently forces victims to use personal days.

Leave that will undoubtedly be an improvement from the bare minimum that we currently see in CBAs. Moving forward, the Women's Committee would like to see specific language identifying the use of paid leave for domestic violence leave.

End Period Poverty Campaign

Menstrual products are a basic need and are essential to uphold Canadians' sexual and reproductive health and rights, as well as to ensure women's participation in school, work, and society.

It has been reported that one in three Canadians who need pads, tampons, or other menstrual products struggle to afford them. A small cost of tampons/pads/panty liners/menstrual cups adds up when combined with the systemic challenges many women, trans people, genderqueer people, and other menstruators face in terms of their income, housing, and economic stability, further adds to inequity. AUPE has members who access foodbank and hope that their basket includes period products.

It was this need that propelled AUPE Women's Committee to begin a campaign addressing this situation. We reached out to AUPE Locals and, as always, we were amazed by the solidarity displayed by our union family. The committee collected over \$12,000 for the purchase of menstrual products. Since the start of our campaign, committee members have been busy delivering period products across Alberta. So far, we have managed to deliver products at:

- Calgary Food Bank
- Peace River Women's Shelters
- Sucker Creek Women's Shelters
- MITAA – High Prairie
- Calgary Women's Emergency Shelter – Fear is not Love.
- ECSC – Our Lady of Grace/Cardinal Collins Single Mom's
- Edmonton Food Bank
- Safe Place Women's Shelter - Sherwood Park Women's Shelter
- Edmonton District Labour Council – Labour Day BBQ
- High Level Women's Shelter
- High Level Complex (Evacuees)
- Red Deer Food Bank
- Red Deer Women's Shelter
- Ponoka Food Bank
- High River Food Bank
- Rowan House – Women's Shelter – High River (Covers all southern Alberta)
- Okotoks Food Bank
- Vulcan Food Bank
- Edmonton Water Warriors
- Odyssey House – Grande Prairie
- Beyond Food Community Hub – Blackfalls
- Women's Shelter – Rocky Mountain House
- YWCA Lethbridge
- Street's Alive Mission – Lethbridge and area
- Food Bank – Pincher Creek
- Food Bank – Crowsnest Pass
- Women's Shelter – Pincher Creek
- Women's Shelter – Crowsnest Pass
- Big Hill Haven Women's Shelter – Cochrane
- Airdrie Power – Women's Shelter –
- Mountainview Emergency Shelter Society – Olds
- Medicine Hat Women's Shelters

The funds that were collected through donations from Locals have now been used up. However, after hearing stories from those organizations that received our donations, it has become clear that this campaign cannot end. We are exploring different avenues for how we can continue to collect period products, and how we move forward with the lobbying of policy makers to ensure that these products are available to all menstruators for free in all public venues.

Grandparents Day BBQ

This year's Grandparents Day BBQ was held on September 4, we would like to take this opportunity to thank all those members who volunteered and made this annual event a success. Without volunteers this event could not take place. Our most sincere gratitude.

The Women's Committee has been holding this event for decades now to bring attention to the situation facing workers and residents of our continuing care system, and to bring attention to the privatization and commodification of the care being provided to our seniors and disabled Albertans. While it is important to take time to celebrate and highlight the contributions made by our grandparents and seniors, we need to ensure this recognition is not just empty platitudes.

With the changes made in the *Continuing Care Act* and the regulations that were dropped in February 2024 we see a serious threat to the quality of care for Alberta's seniors and other vulnerable citizens receive. What we saw with these regulations is a deliberate move by the government to remove standards of care and the fees charged for care from legislation and regulations. This has been done so the government and private operators of our facilities can lower those standards and increase those fees. This is inevitable as corporations, by their nature, always look to maximize profits and non-profit operators look to cut costs.

The people who will pay for this are seniors and other residents of continuing care, and the already overworked frontline staff. They will be asked to do more with less, to take on more responsibility and to provide care with fewer staff.

If minimum hours of care standards were included in the *Continuing Care Act* regulations, like they used to be, the government could only change them by taking their amendments to the legislature, where they could be debated. Changes outside of legislation, or regulations, go largely unnoticed because there is no requirement for the government to make them public. The Act's regulations used to include 1.9 hours of care per resident per day, but rather than build on that, the government is moving in the opposite direction.

Even a 1.9 hour minimum was woefully inadequate. The *2021 Facility-Based Continuing Care Review Report* recommended a minimum of 4.5 hours for long term care, and between 3.5 and 4 hours for designated supportive living.

Our members working in private and public continuing care facilities understand that working conditions are care conditions. They just want to be able to provide great care to the residents they love.

Added to the above concerns is the reality that it is unknown what impact the creation of the Continuing Care sector will have on the members who work in this area.

In build up to the Grandparents' Day Picnic, the Women's Committee launched the 'Strike a Change for Alberta Seniors'. Working in collaboration with Friends of Medicare, and other stakeholders, we attempted to raise the alarm to the impacts that the legislative and regulatory changes will have on the care that our seniors receive in this province. If you have not had an opportunity to sign the letter, please do so by going to <https://aupe.org/news-and-publications/campaigns/strike-change-alberta-seniors>.

Prairie School for Women

This year's Prairie School for Women took place in person on June 9 - 13, 2023 in Regina, Saskatchewan. As per policy, AUPE supports up to 10 members to participate in the Saskatchewan's Federation of Labour – Prairie School for Women.

This year we were once again faced with an abundance of applicants for the 10 spots available. The selection task was made easier by having a policy in place that clearly outlines the process and the expectations of those that are fortunate enough to be picked to attend.

Once again thank you to the locals that sponsored their own members to participate in this educational experience. The Alberta representation was strong and there are talks of expanding the school to include many more participants and courses available to attendees.

Disposition of Resolutions Convention 2024

Resolution 2-3

THEREFORE BE IT RESOLVED that AUPE and the Women's Committee prioritize a comprehensive approach to address the needed legislative improvements, educational information and bargaining benefits related to domestic violence for our members.

Resolution was referred to the committee with the direction to work with the OHS committee regarding the role that OHS legislation has on domestic violence; work has been ongoing in this area as per direction by Convention.

Resolution 2-4

THEREFORE BE IT RESOLVED that AUPE work with stakeholders, seniors' groups, and allies to pressure the provincial government to reinstate the Office of the Seniors Advocate as an independent office.

Advocacy has continued in this area, and we have yet to see any positive move to achieve this goal.

Resolution 2-5

THEREFORE BE IT RESOLVED that AUPE work with stakeholders and allies to pressure the federal government, along with the provinces and territories, for a moratorium on private, for-profit care in the long-term care sector.

THEREFORE BE IT FURTHER RESOLVED that AUPE will continue to lobby for a minimum of 4.5 direct care hours per resident per day which the threshold below which poorer health, social and psychological outcomes.

Resolution was referred to committee for clarification on language and intent.

In Summary

My appreciation and gratitude go to all the members of our committee for their passion and commitment to the work that we have done in the past year. I am incredibly fortunate to have the opportunity to meet and work with women whose stories and life and work experiences serve to enrich the work that needs to be done. I would also like to thank our past and present staff advisors, Sharleen Patterson, Carrie-Lynn Rusznak, and Hitomi Suzuta. They all brought their own version of passion and experience to the work they did on behalf of the committee. We are forever grateful. Our gratitude also goes out to our amazing administration professional Jami Payne. Although her base is Lethbridge, Jami is always on top of all that we do. Her demeanour and patience are appreciated, she always carries out our requests with precise accuracy. Without her work and attention to detail this committee would not be the same. I look forward to the upcoming work that this committee will undoubtedly do on behalf of our members.

Respectfully submitted on behalf of the Women's Committee,

Sandra Azocar
Vice-President, Northwest Region
Women's Committee Chair

YOUNG ACTIVISTS COMMITTEE

Committee Members

Curtis Jackson, Chair
Madeline Cuncannon, Local 044, Red Deer
Charlie Giguere-Letourneau, Local 052, Calgary
Lyndsey Jankowski, Local 043, Westlock
Nanhun Kim, Local 001, Calgary
Kimoy Marston, Local 002, Red Deer
Kennedy McNiven, Local 002, Calgary
Allysa Mercer, Local 002, Red Deer
Katherine Spencer, Local 058, Lethbridge
Kathie Milne, Staff Advisor
Charlene Peterson, Administration

Meeting Dates December 2023 - October 2024

January 30, 2024 – Edmonton
May 7, 2024 - Virtual
April 27, 2024 - Calgary
June 8, 2024 – Grande Prairie
July 12, 2024 – Virtual
August 9, 2024 – Red Deer
October 5, 2024 - Lethbridge

Foreword (contribution by Curtis Jackson)

When I was asked if I would consider chairing the Young Activists Committee (YAC), I did not consider in that moment that it would become a learning experience for me. Liaising with the various young activists across the province has shown me that AUPE members under the age of 30 have a lot to contribute to the solidarity and engagement within our union. Succession planning is something we need to encourage to ensure our union remains vibrant and healthy for another 105 years. With the passion our young members have, I can assure you, AUPE's future is bright!

YAC travelling roadshow (contribution by Katherine Spencer)

The Young Activists Committee presents the "YAC travelling roadshow". The committee's goal is to travel to the rural parts of Alberta, plan fun activities, and get young members involved. At these fun events, the committee members distribute union information, as well as support and encourage any younger members they encounter. All AUPE members are invited and encouraged to attend these events. In an effort to engage young members, the committee has offered a plethora of door prizes including an iPad at each event, which only young members, 30 and under, are eligible to win.

Calgary Event (contribution by Charlie Letourneau)

Our first event was held in Calgary on April 26th, 2024, at GRETA Bar & Arcade, a vibrant venue perfect for hosting our young members and activists. It was a fantastic evening, with over 50 members and attendees joining us for a night of mingling, networking, and fun activities! We were delighted to see many Local members represented, and to welcome numerous new faces who mentioned it was their first time attending an AUPE event. The event featured a variety of door prizes, showcasing some of Alberta's small businesses and products. Additionally, we provided game cards for our guests to enjoy the arcade games at the venue. This not only added a fun element to the evening but also encouraged attendees to engage and connect in a relaxed, informal setting. The main goal of our first event was to raise awareness about the types of events we plan to organize during our term. We aimed to attract new members, facilitate meaningful connections among attendees, and inform members about our union's operations. We also focused on getting grey cards signed and providing valuable information about our union's activities, benefits and answering question about this year's historic bargaining process. The feedback we received was overwhelmingly positive, with many attendees expressing their enthusiasm for future events. This successful kickoff has set a strong foundation for our upcoming events, reinforcing our commitment to fostering a vibrant and engaged community.

We look forward to building on this momentum and continuing to support and connect our members through engaging and enjoyable events.

Grande Prairie Event (contribution by Kennedy McNiven)

On June 7, 2024, the Young Activists Committee Travelling Road Show trekked many miles up to Grande Prairie to host a social night for the area's members. The event took place at Hornbrooke Hollow's Funhouse, the perfect setting for an evening full of fun, food and good conversation. With over 1,200 members in the area, we prepared for a good turnout. Though only a few members attended, it was important as a committee to be present for our young members in the northern region in a show of solidarity. More importantly, it prompted a conversation amongst the Young Activists Committee - that the north faces unique challenges in engaging its members in such a widespread area. The number of young members in the Grande Prairie region is even smaller than others, making engaging them even more critical. Despite lower turnouts, we will continue to show our presence across the province to connect and network with other young members. The Young Activist Committee knows you're out there... come out and join us next time!

YAC Future Plans (contribution by Nanhun "David" Kim)

The Young Activists Committee has a few plans on which we are seeking to put into action in the next year, the most prominent being collector patches. These patches will most likely mimic the look and functionality of Boy Scout badges and will show seniority within the union and/or attendance at various events. This will assist our new members in locating senior members of the union at an event for engagement and information or to further engage with various functions of the union.

The Young Activists Committee has the following meetings and events outstanding for the upcoming year of 2025:

- Edmonton
- Red Deer
- Peace River
- Fort McMurray
- Medicine Hat

As of the time of this report, the plans for each respective location aren't set in stone, however, the Young Activists Committee will endeavour to provide any upcoming events within a timely manner such that the members are sufficiently notified of the event should they choose to attend.

RALY Award (contribution by Kimoy Marston)

Every year the Young Activists Committee honours an AUPE member aged 30 or younger who has inspired members to be active within the union with the RALY Award. The RALY Award is a recognition of activism leadership for youth; to honour a young AUPE member. The RALY Award is presented yearly on August 12, International Youth Day, and recognizes young members who are activists in the workplace, have demonstrated leadership and participation of other young activists within the union. YAC accepts nominations for this award from all members of AUPE, young or young at heart. YAC is proud to support young activists as they build momentum within AUPE and continue to strengthen the union by learning from activists who have come before them. We are honoured to share that Hazel Osegueda (Local 046) was the recipient of the 2024 RALY Award. She was nominated by fellow union activist, Rosalie Devost (Local 046). The committee wishes to thank Hazel for all she does for AUPE, and we are confident she will continue to do amazing activist work in the future.

Young Activist Liaisons (contribution by Allysa Mercer)

You cannot do everything yourself; we hear this often within AUPE. The YAC committee could not agree more and as such we want to send out a huge thank you to all our YAC Liaisons who have stepped up over the last year within their Local to be an extension of the YAC Committee. These liaisons have helped us to divide and conquer the communication bridge within AUPE from the YAC committee to Locals and individual members. Each liaison is invited to attend and observe YAC meetings and to bring information regarding upcoming events and the spirit of young workers back to their Local and worksite. We have had a few liaisons join our meetings and look forward to various more attending over the next year. Many of our events would not have been possible without the support of liaisons who inspire young workers to become involved and to continue their work with the union.

What YAC Means and Why It's Important (contribution by Madeline Cuncannon)

The Young Activist Committee creates a much-needed space to share common issues, interests, and concerns as young workers, and provides a forum to have their voices heard. Within YAC, committee members share and learn from each other, as well as seasoned mentors to address issues that are important to, or uniquely affect, the upcoming generations of AUPE members and advocate for their resolutions. YAC strives to educate young workers, especially those newly entering the workforce, on what their union is doing for them, retain young workers, and encourage their participation in union movements and activities. YAC, sometimes fondly referred to as the “fun committee,” creates this spark of pushing you to get involved in your union by constructing events such as our roadshow centered on social networking with fellow members, team building, educating members, and simply having some fun. Getting involved as a younger worker not only provides opportunities to learn how your union benefits you, but it also fosters an understanding of workers’ roles within the workplace. Encouraging our young members to get involved is crucial for the continuity of not only our union, but the labour movement at large. Unions are at their strongest when all members are engaged.

Recognitions

The Young Activists Committee would like to thank previous committee members and chairs, the observers who have attended meetings, and the members at large who have contributed to the committee’s work in past years. The committee would also like to recognize and thank the Executive Secretary-Treasurer Justin Huseby, for his support in engaging young workers over the past year.

In solidarity, I submit this report on behalf of the Young Activists Committee.

Curtis Jackson
Vice-President, South Region
Young Activists Standing Committee Chair

ADDITIONAL REPORTS

FORT MCMURRAY AREA COUNCIL

Find us on Facebook and join us at Local events!

September 2024

Private showing at Landmark Cinema for Beetlejuice 2

November 2024

Bowling at the Alley YMM

Council Executive

Jacqueline Jonasson – Chair
Brittany Baker – Vice Chair
Jackie Marshall – Secretary
Dhiraj Verma – Treasurer

REPORTS & RESOLUTIONS

REFERRED TO COMMITTEES

The following Reports and Resolutions are referred to the noted Convention committees:

ANTI-PRIVATIZATION COMMITTEE

Report of the Anti-Privatization Committee

COMMITTEE ON POLITICAL ACTION

Report of the Committee on Political Action

ENVIRONMENTAL COMMITTEE

Report of the Environmental Committee

FINANCE COMMITTEE

Report of the Finance Committee

Audited Financial Statements for the year ended June 30, 2024

Proposed Budget 2024-2025

General Resolutions: 2-1, 2-2

HUMAN RIGHTS COMMITTEE

Report of the Human Rights Committee

LEGISLATIVE COMMITTEE

Report of the Legislative Committee

Constitutional Resolutions: 1-1, 1-2, 1-3, 1-4, 1-5, 1-6, 1-7, 1-8, 1-9, 1-10, 1-11, 1-12, 1-13, 1-14, 1-15

General Resolution: 2-3

MEMBERS' BENEFITS COMMITTEE

Report of the Members' Benefits Committee

MEMBERSHIP SERVICES COMMITTEE

Report of the Membership Services Committee

OCCUPATIONAL HEALTH & SAFETY COMMITTEE

Report of the Occupational Health & Safety Committee

PAY & SOCIAL EQUITY COMMITTEE

Report of the Pay and Social Equity Committee

General Resolutions: 2-4, 2-5

PENSION COMMITTEE

Report of the Pension Committee

WOMEN'S COMMITTEE

Report of the Women's Committee

General Resolutions: 2-6, 2-7, 2-8, 2-9

YOUNG ACTIVISTS COMMITTEE

Report of the Young Activists Committee

Constitutional Resolutions Group 1 – Constitution

1-1 PROVINCIAL EXECUTIVE

WHEREAS AUPE needs to continue to build its strength, resilience capacity, and resources to fully meet the increasing and expanding needs of a more diverse and complex membership; and

WHEREAS AUPE's strategic plans focus on building our member's power and abilities to defend their rights to fight for stronger collective agreements; and

WHEREAS making significant cuts to operational expenditures and services will severely undermine AUPE's ability to continue to build members' collective strength and power; and

WHEREAS AUPE gained the legal right to strike in 2015 for all members, thereby requiring the creation of an Essential Services Agreement (ESA) department and additional resources in other key departments; and

WHEREAS the funding status of AUPE's Defence Fund is currently insufficient to meet the needs of our members when comprehensive strike action is necessary, or members are locked out by their employers; and

WHEREAS the Provincial Executive has established Policy 5-44 whereby operational surpluses must first be allocated toward Defence Fund, and a portion of member dues is budgeted to build up the Defence Fund; and

WHEREAS AUPE has identified it will be necessary to operate on future deficit budgets to offer the current level of services and meet our strategic plan objectives, and continued deficits will require using long-term assets (including the Defence Fund) for yearly operations; and

WHEREAS the current membership is comprised of approximately 100,000 members, resulting in the need to provide significantly more diverse and complex services in an increasingly more challenging environment; and

WHEREAS unlike most unions, AUPE members only pay dues on base salary, have some of the lowest dues and staff to member ratios than our counterpart unions within Canada; and

WHEREAS the Provincial Executive continues to review recommendations for efficiencies and cost containment strategies, while optimizing resources for our ambitious strategic plans; and

WHEREAS even if Convention approves proposed cost containment initiatives, and HQ implements increased efficiencies and process changes, the financial stability and strength of AUPE members cannot be adequately addressed without a dues increase; and

WHEREAS AUPE must continue to do the hard work necessary to grow stronger, to mobilize our membership, and to build confidence, capacity, and readiness to defend our rights and make significant gains in collective bargaining, as well as improve working conditions for today and well into the future;

THEREFORE BE IT RESOLVED that effective **July 1, 2025**; Article 5.01 be amended as follows:

5.01 Regular members shall pay dues of one point **five (1.5%) percent ~~twenty-five percent (1.25%)~~** of their **base** salary or as provided for under Article 13.09 (I).

Delegates voted: Carried **Defeated**

1-2 LOCAL 052

WHEREAS Officers promote and represent the Union and maintain communication between members; and

WHEREAS the current terms duration poses challenges for Officers to understand their roles, complete their mandates, and work cohesively as a group; and

WHEREAS past input from members has recognized the potential benefits of the establishment of three (3) year terms for all elected officers of the Union; and

WHEREAS there is a recognized need to facilitate consistency, stability, role and leadership skill development, succession planning and an increased ability to achieve mandates for all elected officers;

THEREFORE BE IT RESOLVED that Article 8.02 be amended to:

8.02 These Officers shall be elected at Convention for a term of ~~two (2)~~ **three (3)** years.

THEREFORE BE IT FURTHER RESOLVED that Article 13.12 be amended to:

13.12 Provincial Executive members shall be elected as specified in the Constitution. Their term of Office shall be ~~two (2)~~ **three (3)** years and such election shall take place in the same election year as the President. The elected Provincial Executive members shall assume the duties of their Office immediately following the annual general meeting at which they were elected.

THEREFORE BE IT FURTHER RESOLVED that Article 18.03 (a) (ii) be amended to:

18.03 (a) (ii) The Chief Steward shall be elected by and from the appointed Union Stewards of that component and shall serve a ~~two-year~~ **three-year** term. Elections shall be held in the same election year as that of the President of the Union.

THEREFORE BE IT FURTHER RESOLVED that Article 20.03 be amended to:

20.03 The term of Office of Officers of a component shall be ~~two (2)~~ **three (3)** years except in the case for the first Executive. The elected Officers shall assume the duties of their Office immediately following the meeting at which they are elected. Elections shall be held in the same election year as that of the President of the Union.

THEREFORE BE IT FURTHER RESOLVED that Article 24.07 be amended to:

24.07 The Officers shall be elected for a term of ~~two (2)~~ **three (3)** years and such election shall take place in the same election year as that of the President. The elected Officers shall assume the duties of their Office immediately following the Annual General Meeting of the Area Council.

THEREFORE BE IT FURTHER RESOLVED this takes effect in 2025.

Delegates voted: Carried **Defeated**

1-3 PROVINCIAL EXECUTIVE (on behalf of the Finance Committee)

WHEREAS the budget for an annual Convention continues to grow due to inflation and membership growth; and
WHEREAS in pursuing cost containment measures, having a biennial Convention was identified as cost savings; and
WHEREAS 6.07 still allows for a special Convention to be called; and

WHEREAS Article 8.09 clearly identifies the process for an Executive Office vacancy between Conventions; and
WHEREAS should delegates pass a constitutional resolution in 2024 to have a biennial Convention in odd numbered years, the next Convention would be in 2025; and

WHEREAS the Provincial Executive and Convention have until 2027 to make any consequential amendments to our constitution and policies to reflect this change;

THEREFORE BE IT RESOLVED that Article 6.02 be amended as follows:

6.02 There shall be a Convention each **odd numbered** year. Each Convention shall be held at such time and place as determined by the Provincial Executive.

Delegates voted: Carried **Defeated**

1-4 PROVINCIAL EXECUTIVE (on behalf of the Finance Committee)

WHEREAS the budget for a Convention is in excess of two million dollars; and

WHEREAS in pursuing cost containment measures, changes to Convention delegate ratios could be a potential cost savings to the budget; and

WHEREAS inflation and membership growth continues to effect Convention logistics, escalate costs, and make it more challenging to manage; and

WHEREAS a smaller size Convention may provide for more venue options for future Conventions; and

WHEREAS in addition to the ratio of 1:100, the Provincial Executive Representative and Local chair go by right; and

WHEREAS Locals receive an additional delegate for the remaining “portion thereof”; and

WHEREAS if “portion thereof” was removed, Convention would reduce by 34 delegates;

THEREFORE BE IT RESOLVED Article 6.05 be amended as follows:

6.05 Provincial Executive members and Local chairs shall be delegates as of right. In addition, Locals shall be entitled to elect one delegate for one hundred (100) or less members, and one additional delegate for each additional one hundred (100) members ~~or portion thereof~~, based on the twelve (12) month average Headquarters records as of October 31st, preceding the Convention. For the purpose of this Article, members shall mean regular members as defined in Article 4.05.

Delegates voted: Carried Defeated

1-5 PROVINCIAL EXECUTIVE (on behalf of the Finance Committee)

WHEREAS the budget for a Convention is in excess of two million dollars; and

WHEREAS in pursuing cost containment measures, changes to Convention delegate ratios could be a potential cost savings to the budget; and

WHEREAS inflation and membership growth continues to effect Convention logistics, escalate costs, and make it more challenging to manage; and

WHEREAS a smaller size Convention may provide for more venue options for future Conventions; and

WHEREAS in addition to the ratio of 1:100, the Local chair goes by right; and

WHEREAS should the Local chair remain a delegate as of right but count towards the Local delegate entitlement, and the “portion thereof” is removed, the Convention would reduce by 68 members;

THEREFORE BE IT RESOLVED Article 6.05 be amended as follows:

6.05 Provincial Executive members and Local chairs shall be delegates as of right. **The Local chair shall be counted as the first delegate in their Local’s delegate entitlements.** In addition, Locals shall be entitled to elect one delegate for one hundred (100) or less members, and one additional delegate for each additional one hundred (100) members ~~or portion thereof~~, based on the twelve (12) month average Headquarters records as of October 31st, preceding the Convention. For the purpose of this Article, members shall mean regular members as defined in Article 4.05.

Delegates voted: Carried Defeated

1-6 PROVINCIAL EXECUTIVE (on behalf of the Finance Committee)

WHEREAS the budget for a Convention is in excess of two million dollars; and

WHEREAS in pursuing cost containment measures, changes to Convention delegate ratios could be a potential cost savings to the budget; and

WHEREAS inflation and membership growth continues to effect Convention logistics, escalate costs, and make it more challenging to manage; and

WHEREAS a smaller size Convention may provide for more venue options for future Conventions; and

WHEREAS changing the delegate ratio to 1:125 and removing the “portion thereof”, the Convention would reduce by approximately 230 members;

THEREFORE BE IT RESOLVED Article 6.05 be amended as follows:

6.05 Provincial Executive members and Local chairs shall be delegates as of right. In addition, Locals shall be entitled to elect one delegate for one hundred **twenty-five (125)** ~~(100)~~ or less members, and one additional delegate for each additional one hundred **twenty-five (125)** ~~(100)~~ members ~~or portion thereof~~, based on the twelve (12) month average Headquarters records as of October 31st, preceding the Convention. For the purpose of this article, members shall mean regular members as defined in Article 4.05.

Delegates voted: Carried Defeated

1-7 PROVINCIAL EXECUTIVE (on behalf of the Finance Committee)

WHEREAS the budget for a Convention is in excess of two million dollars; and

WHEREAS in pursuing cost containment measures, changes to Convention delegate ratios could be a potential cost savings to the budget; and

WHEREAS inflation and membership growth continues to effect Convention logistics, escalate costs, and make it more challenging to manage; and

WHEREAS a smaller size Convention may provide for more venue options for future Conventions; and

WHEREAS if the delegate entitlement for the first 1000 members remained at 1:100 and remaining portion over 1000 changed to 1:125 or portion thereof, Convention would reduce by approximately 138 delegates;

THEREFORE BE IT RESOLVED Article 6.05 be amended as follows:

6.05 Provincial Executive members and Local chairs shall be delegates as of right. In addition, Locals shall be entitled to elect one delegate for one hundred (100) or less members, **one additional delegate for each additional one hundred (100) members up to the first one thousand**, and one additional delegate for each additional one hundred **twenty-five (100) (125) members over one thousand** or portion thereof, based on the twelve (12) month average Headquarters records as of October 31st, preceding the Convention. For the purpose of this Article, members shall mean regular members as defined in Article 4.05.

Delegates voted: Carried **Defeated**

1-8 LOCAL 005

WHEREAS AUPE strives to be inclusive; and

WHEREAS parental leave encompasses both maternity and paternity leaves of absence; and

WHEREAS regardless of which parent is on a parental leave they remain as a regular member;

THEREFORE BE IT RESOLVED that Article 4.05 (g) be amended as follows:

4.05 Regular members on military, ~~maternity~~, **parental** or educational leave shall be entitled to provisions of 4.05 (b) above, shall be included in membership counts, but shall not be required to pay union dues.

Delegates voted: Carried **Defeated**

1-9 PROVINCIAL EXECUTIVE

WHEREAS Standing Committee can only be amended at Convention; and

WHEREAS each Standing Committee requires significant organizational resources for support; and

WHEREAS the work of some Standing Committees may be done by other committees; and

WHEREAS the Committee on Political Action and Anti-Privatization mandates may be combined; and

WHEREAS the President may establish ad hoc committees including one to raise member awareness on provincial and federal elections;

THEREFORE BE IT RESOLVED that Committee on Political Action and the Anti-Privatization Committee be combined and renamed as the Anti-Privatization/Contracting Out Committee and Article 15.07 be amended as follows:

15.07 The Union shall have the following Standing Committees:

- (a) Membership Services Committee;
- ~~(b)~~—Committee on Political Action;
- ~~(c)~~ **(b)** Occupational Health and Safety;
- ~~(d)~~ **(c)** Anti-Privatization/**Contracting Out** Committee;
- ~~(e)~~ **(d)** Women's Committee;
- ~~(f)~~ **(e)** Pension Committee;
- ~~(g)~~ **(f)** Pay and Social Equity Committee;
- ~~(h)~~ **(g)** Young Activists Committee;
- ~~(i)~~ **(h)** Human Rights Committee; and
- ~~(j)~~ **(i)** Environmental Committee.

THEREFORE BE IT FURTHER RESOLVED that Provincial Executive draft amendments Policy 26 AUPE Standing Committees upon adoption of this resolution, to have it take effect in 2025 when committee selections are to take place next.

Delegates voted: Carried **Defeated**

1-10 PROVINCIAL EXECUTIVE

WHEREAS Standing Committee can only be amended at Convention; and

WHEREAS each Standing Committee requires significant organizational resources for support; and

WHEREAS the work of some Standing Committees may be better suited to be added to other committees; and

WHEREAS the Pay & Social Equity mandate may be incorporated under the Women's Committee mandate;

THEREFORE BE IT RESOLVED that Article 15.07 be amended as follows:

15.07 The Union shall have the following Standing Committees:

- (a) Membership Services Committee;
- (b) Committee on Political Action;
- (c) Occupational Health and Safety;
- (d) Anti-Privatization Committee;
- (e) Women's **and Pay Equity** Committee;
- (f) Pension Committee;
- (g) Pay **Human Rights** and Social Equity Committee;
- (h) Young Activists Committee; ~~and~~
- ~~(i) Human Rights Committee; and~~
- ~~(j)~~ **(i)** Environmental Committee.

THEREFORE BE IT FURTHER RESOLVED that Provincial Executive amend Policy 26 AUPE Standing Committees upon adoption of this resolution, to have it take effect in 2025 when committee selections are to take place next.

Delegates voted: Carried **Defeated**

1-11 PROVINCIAL EXECUTIVE

WHEREAS the creation of a Standing Committee can only be amended by Convention; and

WHEREAS each Standing Committee requires significant organizational resources for support; and

WHEREAS environmental consciousness is a responsibility of every component;

THEREFORE BE IT RESOLVED that Article 15.07 be amended as follows:

15.07 The Union shall have the following Standing Committees:

- (a) Membership Services Committee;
- (b) Committee on Political Action;
- (c) Occupational Health and Safety;
- (d) Anti-Privatization Committee;
- (e) Women's Committee;
- (f) Pension Committee;
- (g) Pay and Social Equity Committee;
- (h) Young Activists Committee; **and**
- ~~(i) Human Rights Committee; and~~
- ~~(j) Environmental Committee.~~

THEREFORE BE IT FURTHER RESOLVED that Provincial Executive amend Policy 26 AUPE Standing Committees upon adoption of this resolution, to have it take effect in 2025 when committee selections are to take place next.

Delegates voted: Carried **Defeated**

1-12 LOCAL 060

WHEREAS the current roster of committees, despite its limited member representation, provides valuable constitutional recommendations and amendments, and lacks an alternative avenue to bring crucial matters to the attention of the assembly, while also acknowledging that standing committees utilize a large portion of union dues; and

WHEREAS the streamlining of the motion-presenting process at the Convention floor serves to enhance the likelihood of delegates participating in pivotal votes concerning the governance of the union; and

WHEREAS while acknowledging the Convention's status as the primary governing body of the union, it's important to address the increasing worry that several resolutions are facing excessive scrutiny before being presented to the delegates;

THEREFORE BE IT RESOLVED that 6.13 (b) be amended as follows:

- 6.13 (a) Resolutions for presentation at a regular Convention shall be submitted to the President at least one hundred and twenty (120) days before the opening date of the Convention. A resolution shall not deal with more than one subject matter and shall specify the action proposed. A resolution shall not contain more than one hundred and fifty (150) words, inclusive of the preamble. Resolutions may be submitted by the Executive Committee, the Provincial Executive, Standing Committees of the Union, Members' Benefits Committee, Chapters, Locals or Area Councils.
- (b) Constitutional amendments for presentation at a regular Convention shall be presented to the President at least one hundred and twenty (120) days prior to the start of the Convention. Resolutions that involve changes or additions to the Constitution are not limited to one hundred and fifty (150) words. Constitutional amendments may be submitted by: the Executive Committee, the Provincial Executive, the Legislative Committee, **Standing Committees of the Union**, Chapters and Locals.
- (c) All resolutions for presentation to Convention must be accompanied by the meeting minutes where the resolution was approved.

Delegates voted: Carried **Defeated**

1-13 PROVINCIAL EXECUTIVE

WHEREAS clarity on Article 20.14 is needed; and

WHEREAS all AUPE policies apply to all AUPE components;

THEREFORE BE IT RESOLVED that 20.14 be amended as follows:

- 20.14 Components may formulate policies for the guidance of the members of the Component and for the governance and financial administration of the component. Component policies must conform to the ~~minimum standards established in~~ AUPE Policies and Procedures **Manual**.

Delegates voted: Carried **Defeated**

1-14 LOCAL 006

WHEREAS Local Occupational Health and Safety Liaison (LOHSL) is a valuable and highly trained individual on the Occupational Health and Safety Legislation and they Liaison between the AUPE Standing Committee of OH & S and their Local; and

WHEREAS the LOHSL is the chair of the Local Sub OH & S Committee for those Locals with a committee; and

WHEREAS they provide education, mentorship and support to their members and provide outreach to Local Chapters for those Locals that have Chapters; and

WHEREAS the LOHSL provides a report and update to Local Council; and
WHEREAS it may be beneficial to have extra component officers on the Local Executive Board to assist with union business;
THEREFORE BE IT RESOLVED that the LOHSL be moved from Article 18.03 (c) to Article 18.02 Executive Board for those
Locals that have an LOHSL on their Local Council and be given both voice and vote; and renumbered accordingly.

Delegates voted: Carried **Defeated**

1-15 LOCAL 006

WHEREAS Chief Steward is a valuable and highly trained individual of AUPE and can cover for an MSO or be seconded to AUPE; and
WHEREAS the Chief Steward is an elected member from the appointed Union Stewards and takes annual training; and
WHEREAS the Chief Steward provides a report and update to Local Council; and
WHEREAS the Chief Steward may represent any member of AUPE when dealing with conflict with the Employer; and
WHEREAS they provide education, mentorship and support to their members and outreach to Local Chapters for those
Locals that have Chapters; and
WHEREAS it may be beneficial to have extra component officers on the Local Executive Board to assist with Union Business;
THEREFORE BE IT RESOLVED that the Chief Steward be moved from 18.03 (a) to Article 18.02 Executive Board for those
Locals that have a Chief Steward on their Local Council and be given both voice and vote; and renumbered accordingly.

Delegates voted: Carried **Defeated**

General Resolutions Group 2 - General

2-1 FINANCE COMMITTEE

WHEREAS Locals have spent an average of \$4.5 million per year since 2014; and
WHEREAS of March 2024, Locals had \$24,699,398.14 in bank and investment accounts; and
WHEREAS of March 2024, Locals held an average of 4.38 years of reserves, ranging from 1.68 to 15.39 years; and
WHEREAS Locals will still be able to pursue their 2024/25 strategic plans and operations with a rebate reduction of
approximately 50%; and
THEREFORE BE IT RESOLVED Convention direct Provincial Executive to amend Policy 5-2 to the following effective July 1,
2024:

Multi-Site Local

First 500 (or portion thereof)	\$5.00 per member per month
Next 1500 (or portion thereof)	\$3.00 per member per month
Remaining members (2001+)	\$2.00 per member per month

One-site Local

First 500 (or portion thereof)	\$3.50 per member per month
Next 1500 (or portion thereof)	\$2.50 per member per month
Remaining members (2001+)	\$2.00 per member per month

Delegates voted: Carried **Defeated**

(148 words)

2-2 FINANCE COMMITTEE

WHEREAS Convention 2024 directed Provincial Executive to amend Policy 5-2 Rebates to Locals; and
WHEREAS the financial stability and strength of the Union depends on a number of factors including resolutions passed at Convention, cost containment initiatives, resource allocations, bargaining gains, and dues rates; and
WHEREAS direction to amend Policy 5-2 rebate amounts may only be granted by Convention;
THEREFORE BE IT RESOLVED the AUPE Finance Standing Committee shall provide recommendations to Convention 2025 on Policy 5-2 rebate amounts based on AUPE's financial position.

Delegates voted: Carried **Defeated**

(84 words)

2-3 PROVINCIAL EXECUTIVE (LEGISLATIVE COMMITTEE)

WHEREAS candidates are nominated from the floor during election proceedings, and it has been observed this process may lead to logistical challenges; and
WHEREAS running for an Executive Officer position should be thoroughly considered; and
WHEREAS all candidates should be given equal opportunity to participate in pre-election events; and
WHEREAS it is essential we ensure a structured and well-organized election system that promotes informed decision making is in place, and delegates are provided an opportunity to cast informed votes;
THEREFORE BE IT RESOLVED that Provincial Executive draft policy prior to the June 2025 Provincial Executive meeting that would require AUPE members who choose to run for an Executive Officer position to pre-declare their candidacy 60 days prior to Convention; and
THEREFORE BE IT FURTHER RESOLVED that this policy will include contingency plans in the event that not enough candidates pre-declare.

Delegates voted: Carried **Defeated**

(140 words)

2-4 PAY AND SOCIAL EQUITY COMMITTEE

WHEREAS the minimum wage is the legislated minimum set by the provincial government and living wage reflects what people need to earn to cover the actual costs of living in their community; and
WHEREAS Alberta's \$15.00 minimum wage became effective on October 1, 2018, and for students under 18, the minimum wage is \$13.00 for the first 28 hours they work in a week; and
WHEREAS the minimum wage has not increased since 2018 despite inflation; and
WHEREAS Alberta now has the second-lowest minimum wage in the country just above Saskatchewan at \$14 an hour;
THEREFORE BE IT RESOLVED that AUPE lobby the provincial government to increase the minimum wage to reflect a living wage for all Albertans.

Delegates voted: Carried **Defeated**

(118 words)

2-5 PAY AND SOCIAL EQUITY COMMITTEE

WHEREAS this round of bargaining has highlighted wage inequities and wage gaps; and
WHEREAS the current wage rates cannot sustain individuals or families; and
WHEREAS the Alberta Advantage no longer exists since Alberta now has some of the lowest average wages in Canada; and
WHEREAS provinces that have introduced a wage equity legislation have seen improvements in forcing employers to review Pay Equity within their organization, increased or at least leveled wages for comparable classifications, narrowed the pay gap, and created an office that handles pay equity complaints and reviews;
THEREFORE BE IT RESOLVED that AUPE continue to lobby the provincial government for the introduction of pay equity legislation.

Delegates voted: Carried **Defeated**

(109 words)

2-6 WOMEN'S COMMITTEE

WHEREAS AUPE values the lives of all members; and

WHEREAS Alberta has the highest rate of intimate partner abuse in the country; and

WHEREAS Alberta is the only province without paid intimate partner abuse leave; and

WHEREAS AUPE negotiated collective agreements are silent about paid intimate partner abuse leave;

THEREFORE BE IT RESOLVED that AUPE and the Women's Committee prioritize a comprehensive approach to address the needed legislative improvements, educational information and bargaining benefits related to intimate partner abuse for our members.

Delegates voted: Carried **Defeated**

(82 words)

2-7 WOMEN'S COMMITTEE

WHEREAS the demand for continuing care services will grow 62% by the year 2030; and

WHEREAS the provincial government is following recommendations made in the facility-based continuing care review, resulting in a 9% increase to the amount of in-community care; and

WHEREAS privatization of home care services compromises care and equity; and

WHEREAS home care workers are not being treated and paid fairly for the important work that they provide;

THEREFORE BE IT RESOLVED that AUPE lobby the provincial government to increase funding that will be directed towards Albertans who require home care services rather than for profit organizations; and

THEREFORE BE IT FURTHER RESOLVED that the federal government, in cooperation with the provinces, implement a National Home Care Program with standards and provisions of core services comparable from province to province. This program must be comprehensive, based on non-profit or public delivery and be accessible to seniors.

Delegates voted: Carried **Defeated**

(148 words)

2-8 WOMEN'S COMMITTEE

WHEREAS poor staffing levels, inhumane workloads, and high costs for care are realities that Albertans, especially seniors, face every day; and

WHEREAS Albertans, civil society and workers have lobbied for a minimum of 4.5 hours of direct care for seniors in health care facilities and this call to action has been ignored; and

WHEREAS the new funding model is based on the number of residents per facility; and

WHEREAS the new process removes all accountability or responsibility to the residents;

THEREFORE BE IT RESOLVED that the provincial government scrap the new funding process and return to a system that allows funding by hours of care; and

THEREFORE BE IT FURTHER RESOLVED that the return to the previous system create an increase to a minimum 4.5 hours of direct care for seniors in health care facilities.

Delegates voted: Carried **Defeated**

(135 words)

2-9 WOMEN'S COMMITTEE

WHEREAS the federal government passed Bill C58 known as the Anti-Scab Legislation, that prohibits the use of replacement workers in federal workplaces; and

WHEREAS the 2019 Alberta Bill 21; *Ensuring Fiscal Sustainability Act* overturned prior legislation to allow employers to opt in to a plan for replacement workers; and

WHEREAS Quebec and British Columbia are currently the only jurisdiction in Canada that have banned the practice of contracting out;

THEREFORE, BE IT RESOLVED that AUPE lobby the provincial government for legislation that will prohibit employers from using replacement workers for the duration of any legal strike or lockout and banning the use of any workers to perform the duties of a bargaining unit employee.

Delegates voted: Carried **Defeated**

(114 words)

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Financial Statements of

**ALBERTA UNION OF
PROVINCIAL EMPLOYEES**

Year ended June 30, 2024

ALBERTA UNION OF PROVINCIAL EMPLOYEES

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Year ended June 30, 2024

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INDEPENDENT AUDITOR'S REPORT

To the Members of Alberta Union of Provincial Employees

Opinion

We have audited the financial statements of Alberta Union of Provincial Employees (the Entity), which comprise:

- the statement of financial position as at June 30, 2024
- the statement of operations for the year then ended
- the statement of changes in net assets for the year then ended
- the statement of cash flows for the year then ended
- and notes to the financial statements, including a summary of significant accounting policies (Hereinafter referred to as the "financial statements").

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Entity as at June 30, 2024 and its results of operations and its cash flows for the year then ended in accordance with Canadian accounting standards for not-for-profit organizations.

Basis for Opinion

We conducted our audit in accordance with Canadian generally accepted auditing standards. Our responsibilities under those standards are further described in the "***Auditor's Responsibilities for the Audit of the Financial Statements***" section of our auditors' report.

We are independent of the Entity in accordance with the ethical requirements that are relevant to our audit of the financial statements in Canada and we have fulfilled our other ethical responsibilities in accordance with these requirements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Responsibilities of Management and Those Charged with Governance for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with Canadian accounting standards for not-for-profit organizations, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.



In preparing the financial statements, management is responsible for assessing the Entity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless management either intends to liquidate the Entity or to cease operations, or has no realistic alternative but to do so.

Those charged with Governance are responsible for overseeing the Entity's financial reporting process.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion.

Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with Canadian generally accepted auditing standards will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of the financial statements.

As part of an audit in accordance with Canadian generally accepted auditing standards, we exercise professional judgment and maintain professional skepticism throughout the audit.

We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion.
The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Entity's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Entity's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditors' report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditors' report. However, future events or conditions may cause the Entity to cease to continue as a going concern.



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- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation
- Communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

A handwritten signature in black ink that reads 'KPMG LLP'. The signature is written in a cursive, slightly slanted style. Below the signature is a single, long, horizontal stroke that tapers at both ends, serving as a decorative underline.

Chartered Professional Accountants

Edmonton, Canada

September 5, 2024

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Statement of Financial Position

June 30, 2024, with comparative information for 2023

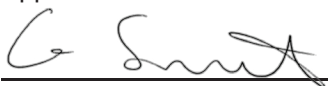
	2024	2023
Assets		
Current assets:		
Cash	\$ 9,557,566	\$ 13,644,219
Accounts receivable (note 2)	5,078,535	4,569,248
Inventory	35,306	36,429
Prepaid expenses and deposits	1,689,406	1,504,761
	<u>16,360,813</u>	<u>19,754,657</u>
Investments - Union operations (note 3)	91,236,595	84,513,989
Investments - Members' benefits (note 4)	15,231,800	14,084,826
Capital assets (note 6)	85,060,016	87,832,261
Interest rate swap (note 8)	1,301,923	1,847,798
	<u>\$ 209,191,147</u>	<u>\$ 208,033,531</u>

Liabilities and Net Assets

Current liabilities:		
Accounts payable and accrued liabilities (note 7)	\$ 12,867,005	\$ 13,275,275
Current portion of long term debt (note 8)	1,175,126	1,104,959
Current portion of obligation under capital lease (note 9)	14,823	14,385
Current portion of lease inducements (note 10)	2,372	14,238
	<u>14,059,326</u>	<u>14,408,857</u>
Long term debt (note 8)	41,283,088	42,345,186
Obligations under capital lease (note 9)	167,024	181,847
Lease inducements (note 10)	-	2,372
Employee future benefits (note 11)	1,959,207	1,801,235
	<u>57,468,645</u>	<u>58,739,497</u>
Net assets:		
Internally restricted - Union operations (note 12)	91,236,595	84,513,989
Internally restricted - Members' benefits (note 12)	15,231,800	14,084,826
Invested in capital assets	42,417,583	44,169,274
Unrestricted	2,836,524	6,525,945
	<u>151,722,502</u>	<u>149,294,034</u>
	<u>\$ 209,191,147</u>	<u>\$ 208,033,531</u>

See accompanying notes to financial statements.

Approved on behalf of Provincial Executive:


Guy Smith, President


Justin Huseby, Executive Secretary-Treasurer

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Statement of Operations

Year ended June 30, 2024, with comparative information for 2023

	2024	2023
Revenues:		
Membership dues	\$ 61,698,706	\$ 58,520,202
Less: Area Council rebates (note 13)	(365,093)	(464,575)
Less: Local rebates (note 13)	(6,770,277)	(6,639,521)
	54,563,336	51,416,106
Interest and other income	1,159,209	1,478,673
Rental income	358,335	342,832
	56,080,880	53,237,611
Expenditures:		
Salaries and benefits	39,453,534	36,808,645
Travel and time-off - members	5,350,952	5,005,282
Amortization	3,199,891	3,193,608
Maintenance and repairs	3,061,687	2,802,620
Administration	2,271,216	2,841,509
Bank charges and interest	1,889,805	2,068,182
Travel - staff	1,706,297	1,546,711
Professional fees / legal (note 16)	1,649,067	1,734,472
Utilities	1,117,946	1,459,840
Regional offices - rent	402,242	388,538
Labour Movement Allies	301,014	303,604
Advertising	188,483	168,651
Training	4,410	14,553
	60,596,544	58,336,215
Deficiency of revenues over expenditures before the undernoted	(4,515,664)	(5,098,604)
Other income (expenditures):		
Investment income (note 14)	8,527,814	6,110,780
Management fees	(205,619)	(178,577)
Unrealized (loss) gain on interest rate swap	(545,876)	485,787
Disbursements	(832,187)	(721,781)
Dues suspension recovery (note 16)	-	2,000,000
Gain on disposal of assets held for sale	-	478,393
	6,944,132	8,174,602
Excess of revenues over expenditures	\$ 2,428,468	\$ 3,075,998

See accompanying notes to financial statements.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Statement of Changes in Net Assets

Year ended June 30, 2024, with comparative information for 2023

	Internally restricted					
	Union operations	Members' benefits	Invested in capital assets	Unrestricted	2024	2023
Net assets, beginning of year	\$ 84,513,989	\$ 14,084,826	\$ 44,169,274	\$ 6,525,945	\$ 149,294,034	\$ 146,218,037
Revenues	-	370,089	-	55,710,791	56,080,880	53,237,611
Expenditures	-	(102)	(3,185,654)	(57,410,788)	(60,596,544)	(58,336,215)
Other income (expenditures):						
Unrealized (loss) gain on interest rate swap	-	-	-	(545,876)	(545,876)	485,787
Management fees	(174,755)	(30,864)	-	-	(205,619)	(178,578)
Disbursements	(420,384)	(411,803)	-	-	(832,187)	(721,781)
Investment income	7,312,773	1,215,041	-	-	8,527,814	6,110,780
Gain on disposal of assets held for sale	-	-	-	-	-	478,393
Dues suspension recovery	-	-	-	-	-	2,000,000
Investment in capital assets, net	-	-	1,433,963	(1,433,963)	-	-
Transfers	4,972	4,613	-	(9,585)	-	-
Net assets, end of year	\$ 91,236,595	\$ 15,231,800	\$ 42,417,583	\$ 2,836,524	\$ 151,722,502	\$ 149,294,034

See accompanying notes to financial statements.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Statement of Cash Flows

Year ended June 30, 2024, with comparative information for 2023

	2024	2023
Cash provided by (used in):		
Excess of revenues over expenses	\$ 2,428,468	\$ 3,075,998
Items not involving cash:		
Amortization	3,199,891	3,193,608
Amortization of lease inducement	(14,238)	(14,238)
Unrealized gain on investments	(3,765,416)	(4,016,855)
Unrealized loss (gain) on interest rate swap	545,876	(485,787)
Gain on disposal of assets held for sale	-	(478,393)
Non-operating cash flows included in excess revenues over expenses:		
Realized (gain) loss on investments	(1,414,617)	322,830
	979,964	1,597,163
Changes in non-cash operating working capital:		
Accounts receivable	(509,287)	(156,722)
Inventory	1,123	3,114
Prepaid expenses and deposits	(184,645)	339,510
Accounts payable and accrued liabilities	(408,270)	(137,830)
Employee future benefits	157,972	272,999
	36,857	1,918,234
Cash flows used in financing activities:		
Repayments of long term debt	(991,931)	(5,623,688)
Repayment of capital lease	(14,385)	(13,961)
	(1,006,316)	(5,637,649)
Cash flows (used in) from investing activities:		
Purchase of capital assets	(427,646)	(355,009)
Proceeds on disposal of assets held for sale	-	4,000,000
Purchase of investments	(31,387,876)	(11,790,692)
Proceeds on disposal of investments	28,698,328	899,616
	(3,117,194)	(7,246,085)
Decrease in cash	(4,086,653)	(10,965,500)
Cash, beginning of year	13,644,219	24,609,719
Cash, end of year	\$ 9,557,566	\$ 13,644,219

See accompanying notes to financial statements.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements

Year ended June 30, 2024

Nature of operations:

The Alberta Union of Provincial Employees (the "Union") was organized in 1976 as successor to the Civil Service Association of Alberta (founded in 1919). The Union gained statutory status in 1977. The Union is a not-for-profit organization and is exempt from income tax pursuant to Section 149(1)(k) of the Income Tax Act.

The financial records of the Union include the Alberta Union of Provincial Employees Members' Benefits Funds, which are administered by the Members' Benefits Committee in accordance with Article 27 of the Union's Constitution.

1. Significant accounting policies:

(a) Basis of accounting:

These financial statements have been prepared in accordance with Canadian accounting standards for not-for-profit organizations in Part III of the CPA Canada Handbook.

The Union has determined that the local chapters ("Locals") and area councils ("Area Councils") are separate entities for financial reporting purposes. These entities are not controlled and their results have not been included in these financial statements.

(b) Revenue recognition:

The Union follows the deferral method of accounting for contributions. Restricted contributions are deferred and recognized as revenue at the time the related expenditure is incurred. Membership dues and other income are recognized as revenue in the period to which they relate if the amount can be reasonably estimated and collection is reasonably assured. Rental income is recognized on a straight-line basis over the term of the lease agreement. Interest and other investment income is recognized when earned.

(c) Inventory:

Inventory is valued at the lower of cost and net realizable value, using a first-in, first-out inventory assumption.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

1. Significant accounting policies (continued):

(d) Capital assets:

Amortization is based on the estimated useful life of the asset, calculated on the straight-line basis, without residual values, as follows:

Asset	Useful lives
Building	25 - 50 years
Building improvements	5 - 15 years
Furniture and equipment	5 years
Computer hardware and software	5 years
Automotive	5 years
Leasehold improvements	5 - 10 years

(e) Lease inducements:

Lease inducements are amortized against rent expense on a straight-line basis over the terms of the leases.

(f) Employee future benefits:

(i) Termination benefits:

The Union provides termination benefits for certain employees. These long term benefits are specified in agreements and represent contractual future obligations. The Union accrues its liabilities for termination benefits based on the contractual length of the agreements or the expected term of employment. The Union uses a discount rate based on the average fixed income interest rate held in the internally restricted asset fund used to pay the obligation.

(ii) Defined contribution pension plan:

The Union sponsors a defined contribution plan providing pension benefits for its employees. The Union contributes a specified percentage of earnings as per the Collective Agreement. The cost of the defined contribution plan is recognized based on the contributions required to be made during each period. The Union has no obligation to fund pension shortfalls. These contributions are included as part of salaries and benefits.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

1. Significant accounting policies (continued):

(f) Employee future benefits (continued):

(iii) Other defined contribution pension plans:

The Union sponsors a Registered Retirement Savings Plans (RRSPs) for individuals commencing employment prior to January 1, 2018 and who have not joined the defined contribution pension plan as defined in part (ii) above. The cost of this defined contribution plan is recognized based on the contributions required to be made during each period. These contributions are included as part of salaries and benefits.

(g) Financial instruments:

Financial instruments are recorded at fair value on initial recognition. Freestanding derivative instruments that are not in a qualifying hedging relationship and equity instruments that are quoted in an active market are subsequently measured at fair value. Changes in fair value are recognized in net income in the period incurred. All other financial instruments are subsequently recorded at cost or amortized cost, unless management has elected to carry the instruments at fair value. The Union has elected to carry its investments at fair value.

Transaction costs incurred on the acquisition of financial instruments measured subsequently at fair value are expensed as incurred. All other financial instruments are adjusted by transaction costs incurred on acquisition and financing costs, which are amortized using the straight-line method.

Financial assets are assessed for impairment on an annual basis at the end of the fiscal year if there are indicators of impairment. If there is an indicator of impairment, the Union determines if there is a significant adverse change in the expected amount or timing of future cash flows from the financial asset. If there is a significant adverse change in the expected cash flows, the carrying value of the financial asset is reduced to the highest of the present value of expected cash flows, the amount that could be realized from selling the financial asset or the amount the Union expects to realize by exercising its right to any collateral. If events and circumstances reverse in a future period, an impairment loss will be reversed to the extent of the improvement, not exceeding the initial carrying value.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

1. Significant accounting policies (continued):

(g) Financial instruments (continued):

The Union enters into interest rate swaps in order to manage its exposure to market risks from fluctuations in interest rates in the normal course of operations. The Union has not designated its risk management contracts as effective hedges, and thus has not applied hedge accounting. As a result, all risk management contracts are measured at fair value through excess of revenues over expenditures. The fair value of these derivative financial instruments are based on an estimate of the amounts that would be paid or received to settle these instruments at the date of the statement of financial position.

(h) Use of estimates:

The preparation of financial statements requires management to make estimates and assumptions that affect the reported amount of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenue and expenditures during the reporting period. Actual results could differ from those estimates and may have an impact on future periods.

Significant areas requiring the use of estimates include the determination of the useful life of capital assets and the anticipated liability with respect to member time-off reimbursements and employee future benefits.

2. Accounts receivable:

	2024	2023
Membership dues	\$ 4,682,787	\$ 4,438,566
Locals (note 13)	202,760	46,506
Other	185,480	69,059
Employees and members	7,508	15,117
	<hr/> \$ 5,078,535	<hr/> \$ 4,569,248

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

3. Investments - Union operations:

	2024	2023
Cash accounts, bearing interest at prime minus 2.00% per annum (2023 - prime minus 2.00% per annum)	\$ 2,753,264	\$ 4,398,944
Guaranteed investment certificates, with maturity dates of ranging from November 2024 to April 2027, bearing interest ranging from 4.36% to 5.33% (2023 - March 2026, bearing interest at 4.53%)	11,184,375	4,363,732
Canadian mutual funds (bonds and short-term investments)	3,540,780	13,941,267
Bonds with maturity dates ranging from March 2024 to June 2035 (2023 - July 2024 to June 2035), with stated rates of return ranging from 2.05% to 6.00% per annum (2023 - 1.50% to 6.00%)	45,813,945	37,437,091
Equity investments	19,695,331	16,852,272
Exchange-traded fund investments	8,248,900	7,520,683
	<u>\$ 91,236,595</u>	<u>\$ 84,513,989</u>

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

4. Investments - Members' benefits:

	2024	2023
Cash accounts, bearing interest at prime minus 2.00% per annum (2023 - prime minus 2.00% per annum)	\$ 473,821	\$ 589,003
Guaranteed investment certificates, with maturity date ranging from October 2024 to April 2026 (2023 - October 2024 to April 2026), bearing interest from 4.49% to 5.33% (2023 - 4.49% to 4.79%)	2,148,914	1,900,897
Canadian mutual funds (bonds and short-term investments)	650,178	981,562
Bonds with maturity date ranging from July 2024 to June 2035 (2023 - March 2024 to June 2035) with stated rates of return ranging from 2.15% to 5.40% (2023 - 2.15% to 5.40%) per annum	7,291,270	6,096,285
Equity investments	3,328,516	3,161,646
Exchange-traded fund investments	1,339,101	1,355,433
	<u>\$ 15,231,800</u>	<u>\$ 14,084,826</u>

5. Assets held for sale:

In the prior year, the Entity disposed of all assets held for sale for proceeds of \$4,000,000.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

6. Capital assets:

			2024		2023	
	Cost	Accumulated amortization	Net book value		Net book value	
Land	\$ 12,105,788	\$ -	\$ 12,105,788	\$	12,105,788	
Buildings	77,234,698	7,844,861	69,389,837		71,226,133	
Building improvements	1,498,610	572,580	926,030		1,029,865	
Furniture and equipment	6,542,091	4,046,371	2,495,720		3,184,099	
Computer hardware and software	1,162,893	1,044,887	118,006		107,764	
Automotive	165,221	165,221	-		6,164	
Leasehold improvements	872,043	847,408	24,635		172,448	
	\$ 99,581,344	\$ 14,521,328	\$ 85,060,016	\$	87,832,261	

7. Accounts payable and accrued liabilities:

	2024		2023	
Trade payables and accrued liabilities	\$	3,224,902	\$	2,726,413
Vacation pay and time-off in lieu		4,964,743		4,970,025
Payables to Area Councils (note 13)		1,330,320		1,438,518
Time-off reimbursements		1,944,657		1,925,499
Wages and benefits payable		766,005		1,636,105
Government remittances		604,861		548,084
Tenant rental deposits		31,517		30,631
	\$	12,867,005	\$	13,275,275

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

8. Long term debt:

	2024	2023
ATB commercial term loan: non-revolving facility, authorized to a maximum of \$50,000,000, payable in monthly variable installments, bearing interest at prime + 0.25%, maturing July 21, 2046.	\$ 42,458,214	\$ 43,450,145
Less current portion	1,175,126	1,104,959
	<u>\$ 41,283,088</u>	<u>\$ 42,345,186</u>

Principal repayments are due as follows:

2025	\$ 1,175,126
2026	1,227,460
2027	1,277,304
2028	1,330,093
2029	1,394,487
Thereafter	36,053,744
	<u>\$ 42,458,214</u>

The Union has entered into an interest rate swap contract, relating to the commercial loan payable. Under the swap contract, the Union has agreed to exchange the difference between the Union's floating rate interest (Prime + 0.25%) and the counterparty's fixed rate interest (3.15%) (2023 - 3.15%) plus stamping fee (1.25%) (2023 - 1.25%) calculated based on agreed notional amounts. The notional value of the swap as at June 30, 2024, was \$42,458,214 (2023 - \$43,450,145) and unrealized losses of \$545,876 (2023 - gains of \$485,787) included in other income (expenditures) on the statement of operations.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

8. Long term debt (continued):

The Union's long-term debt is secured by a general security agreement, providing a security interest over all present and after acquired personal property and a floating charge on all lands and an assignment of leases and rents on the lands located at Plan South Airways Industrial Park Calgary 7810077 Block 6 Lot 6, Block 6 Lot 8 and Edmonton 1821668 Block 1 Lot 24A and 8020492 Block 2 Lot 25.

The Union has an available letter of credit facility up to \$744,500 (2023 - \$1,000,000), which is reduced by any outstanding letters of credits. At June 30, 2024, the Union had outstanding letters of credit, totaling \$nil (2023 - \$nil).

9. Obligations under capital lease:

The Union has a capital lease arrangement which matures January 31, 2035. Capital lease repayments are due as follows:

2025	\$	20,075
2025		20,075
2026		20,075
2027		20,075
2028		20,075
Thereafter		112,091
Total minimum lease payments		212,466
Less amount representing interest		30,619
Present value of net minimum capital lease payments		181,847
Current portion of obligations under capital lease		14,823
		<hr/>
		\$ 167,024

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

10. Lease inducements:

The Union has received lease inducements with respect to leased premises which are summarized as follows:

	2024	2023
Balance, beginning of year	\$ 16,610	\$ 30,848
Amortization of lease inducement	(14,238)	(14,238)
Balance, end of year	2,372	16,610
Current portion of lease inducements	2,372	14,238
	\$ -	\$ 2,372

11. Employee future benefits:

Employee future benefits include amounts for two termination benefit plans. Management employees are entitled to termination benefits as contractually negotiated. Specified union employees are entitled to negotiated benefits as agreed upon in the 2001 collective bargaining agreement.

Salaries and benefits expense includes an expense of \$231,619 (2023 - \$296,197) related to termination benefits and \$3,663,852 (2023 - \$3,431,637) related to the defined contribution pension plans during the year.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

12. Internally restricted net assets:

a) Union operations

	2024	2023
Defence fund	\$ 70,164,389	\$ 64,474,446
Contingency fund	1,690,040	1,453,826
Severance fund	8,216,165	7,555,315
Time-off fund	5,526,542	5,082,559
Digital strategy fund	196,588	351,972
Defending our services campaign	1,314,652	1,202,653
Mobilization campaign	629,114	629,114
Image campaign	269,989	269,989
Strategic planning campaign	181,700	181,699
Fight back operations campaign	3,038,059	3,178,059
Labour movement allies	9,357	134,357
	\$ 91,236,595	\$ 84,513,989

Defence Fund	This fund is designed to assist members, according to the Union's Strike Policy, during organized labour disruptions.
Contingency Fund	This fund is established to fund repairs and major renovations. It is also used to finance the purchase of new properties. A minimum of 1% of dues revenue is to be transferred into the fund.
Severance Fund	This fund is established to cover severance obligations to employees of the Union.
Time-off Fund	This fund is established to cover billings by employers with respect to member time-off reimbursements.
Digital Strategy Fund	This fund is established to purchase new and upgraded software, hardware, service and train the Digital Strategic Department.
Defending Our Services Campaign	This fund is established to defend the Union and the services that its members provide.
Mobilization Campaign	This fund is established to support mobilization efforts.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

12. Internally restricted net assets (continued):

a) Union operations (continued)

Image Campaign	This fund is established to promote the Union and the services that its members provide.
Strategic Planning Campaign	This fund is established to support ongoing efforts to enhance the planning initiatives of the Union in all areas, from Provincial Executive and Management/Staff to Locals and Area Councils. Creating opportunities by strengthening governance and mobilization strategies.
Fight Back Operations Campaign	This fund is established to fund current operations to fight back against anti-labour legislation.
Labour Movement Allies	This fund is established to fund monies spent supporting identified Allies in the Labour Movement and in reaching Target Audiences that would otherwise prove too costly or un-reachable.

b) Members' benefits:

	2024	2023
Benevolent fund	\$ 9,611,529	\$ 8,851,138
Education fund	5,620,271	5,233,688
	\$ 15,231,800	\$ 14,084,826

Benevolent Fund The Benevolent Fund makes available grants for financial assistance to members, retired members, their spouses and dependant children under the age of 25 years in circumstances of temporary or urgent need.

Education Fund The Education Fund makes available grants for financial assistance to enable members, retired members, their spouses and dependant children under the age of 25 years to attend post-secondary educational institutions.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

13. Related party transactions:

The Union enters into transactions with its Locals and Area Councils, which are considered to be related parties of the Union. Related party transactions are summarized as follows:

	2024	2023
Statement of Financial Position:		
Receivables from Locals (note 2)	\$ 202,760	\$ 46,506
Payables to Area Councils (note 7)	1,330,320	1,438,518
Statement of Operations:		
Local rebates	6,770,277	6,639,521
Area Council rebates	365,093	464,575

These transactions are in the normal course of operations and are measured at the exchange amount, which is the amount of consideration established and agreed to by the related parties.

The Union holds funds on behalf of employees and manages certain investments on behalf of the Locals and Area Councils. These figures are excluded from the statement of financial position, since they represent assets of the related parties. Total amounts held in trust are as follows:

	2024	2023
Investment portfolio - Locals and Area Councils	\$ 11,703,782	\$ 11,135,332
Staff fund	14,845	33,442
	\$ 11,718,627	\$ 11,168,774

14. Investment income (loss):

	2024	2023
Unrealized gains	\$ 3,765,416	\$ 4,016,855
Interest	2,387,726	1,595,477
Dividends	960,055	821,278
Realized gains (losses)	1,414,617	(322,830)
	\$ 8,527,814	\$ 6,110,780

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

15. Commitments:

The Union has entered into agreements to lease premises with future minimum annual lease payments, as follows:

2025	\$	262,849
2026		140,141
2027		99,976
2028		100,706
2029		100,706
Thereafter		8,392
	\$	712,770

Under the terms of certain lease agreements, the Union is also responsible for paying its proportionate share of operating costs to the lessor which vary in amount from year to year of the lease agreement. Where the operating costs are fixed and determinable, they have been included in the minimum lease payments above.

16. Contingencies:

In 2021, an application was made to the Alberta Labour Relations Board, against the Union, requesting the suspension of dues, in relation to a wildcat strike. On July 12, 2023, the Alberta Labour Relations Board issued a ruling, deciding on a one month suspension of dues, which is estimated by management to be approximately \$2,000,000. This ruling is being appealed by the Union and a reconsideration of the decision is also being sought. Management has accrued \$2,000,000 as an estimate of the most likely outcome.

In addition, there are certain lawsuits that have been filed against the Union for incidents which arose in the ordinary course of business. In the opinion of management, the outcome of these pending lawsuits is not determinable.

Should any reduction in revenue or loss result from the resolution of these matters, the amounts will be charged to operations in the year of resolution. Any cost recoveries from insurance will be credited to operations when the amount can reasonably be determined.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Notes to Financial Statements (continued)

Year ended June 30, 2024

17. Financial instrument risks:

(a) Credit risk:

Credit risk is the risk that one party to a financial instrument will cause a financial loss for the other party by failing to discharge an obligation. The Union is exposed to credit risk resulting from the possibility that employers of Union members or another counterparty to a financial instrument defaults on their financial obligations. The Union's financial instruments that are exposed to concentrations of credit risk relate primarily to the accounts receivable related to the membership dues which are remitted by the Alberta Government and agencies funded by the Government. Overall credit risk is considered to be low given the current credit rating of the Alberta Government.

(b) Interest rate risk:

Interest rate risk is the risk that the fair value or future cash flows of a financial instrument will fluctuate because of changes in market interest rates. The Union is exposed to this risk through its investment portfolios. The Union holds a number of bonds with fixed interest rate payments and the fair value of these investments is dependent on prevailing interest rates.

The Union's commercial term loan is at a floating rate of interest based on Canadian Prime rate, CORRA and Bankers' Acceptance rate ("rates"). Changes in these rates can cause fluctuations in interest amounts and cash flows required to service the debt. The Union has mitigated its interest rate risk relating to the variable rate of interest on the loan facility through the use of an interest rate swap contract (note 8).

Overall, the interest rate risk in the current year has not changed substantially compared to the prior year.

(c) Market risk:

The Union's investment portfolios include both equity and debt instruments and mutual funds that are subject to market volatility. The markets are affected by a number of factors including changes in interest rates, availability of financing, exchange rates and general economic conditions (local, regional, national and international). The market fluctuations have the potential to create both gains and losses within the investment portfolios.

18. Comparative information:

Certain comparative information has been reclassified to conform with the financial statement presentation adopted in the current year. The changes do not affect prior year excess of revenues over expenditures.

ALBERTA UNION OF PROVINCIAL EMPLOYEES

Schedule - Executive Salaries and Benefits

Year ended June 30, 2024

Name	Assigned region	Salary	Vacation	Benefits	Travel, subsistence and other	Allowances
President ^{a)} Guy Smith	Alberta	\$ 197,574	\$ 29,220	\$ 48,477	\$ 21,259	\$ 12,658
Executive Secretary - Treasurer ^{a)} Justin Huseby	Alberta	106,215	14,385	43,071	28,656	7,269
Vice Presidents ^{b)} Bonnie Gostola	Calgary	118,544	17,518	61,749	27,880	12,421
Bobby-Joe Borodey	Edmonton	118,544	15,247	55,552	48,391	13,484
Darren Graham	Central	118,544	14,477	56,007	50,940	16,864
Sandra Azocar	North West	118,544	6,854	38,526	21,898	13,008
James Gault	North East	80,155	7,711	41,172	18,122	10,017
Curtis Jackson	South	77,865	7,491	41,092	39,996	9,612

As requested by Convention Motion in 2013, the salaries and benefits of the Executive Committee members appear above.

- a) Disclosed in accordance with 2013 Convention Motion.
- b) Disclosed in accordance with 2016 Convention Motion. Effective November 1, 2016, Vice Presidents are no longer entitled to honoraria and time-off reimbursements but rather salary and benefits.
- c) Included in "benefits" are amounts related to WCB, RRSP and other payroll related benefits. Additionally, the Union subsidizes benefits with the home employer.
- d) Included in "travel, subsistence and other" are travel, accommodations, meals per diem and office supplies.
- e) Included in "allowances" are car allowances, cell phone allowances and internet allowances.

FINANCE COMMITTEE

Committee Members

Justin Huseby – Chair
Steve Eagles, Local 004, Red Deer
T Gavin, Local 020, St. Paul
Margaret Miller, Local 044, Red Deer
Percy Ogden, Local 056, Grande Prairie
Jessica Philp, Local 044, Red Deer
Ryan Rybchuk, Local 060, Vegreville
Kathleen Schwengler, Local 048, Rocky View
Michelle Wight, Local 057, Red Deer
Cecilia Murphy – Staff Advisor
Destiny Baines – Administration

Greetings Convention Delegates and fellow AUPE Members!

We trust you are having a great convention! Our report is just one of several agenda items that are finance related, but our goal is to provide you with supplemental information that is useful to help inform the many decisions you will make over the next three days.

The future power of working people is at a pivotal point in Alberta. We, the members of AUPE, are facing tough and unfair tactics at the bargaining tables. We, the members of AUPE, are preparing ourselves for the real possibility of serious job action to win the wages and security from our tone-deaf employers. And we, the members of AUPE, are working constantly to strengthen the power of all members by enhancing and expanding initiatives, programs and services. This is all required to force the bosses to respect our worker rights and show our solidarity to succeed at the bargaining table.

Many years from now, members can look back and know that we were all leaders during this historic shift for the working people of AUPE. There are 82,000 members in bargaining this year, with thousands more set to join. We are a membership led union that needs to continue to enhance mobilization and member engagement. In this struggle, your employers and our government are “preparing”, so we must “prepare”. We must not stop; we must continue to fight. Because when we fight, we will win!

A recurring theme in our report is that the status quo is not sustainable, meaning the status quo of both member wages and AUPE’s finances. Inflation has hurt both over a long period of time. The decisions of the AUPE delegates in 2024 will chart the course of our union for the next 10 years and beyond.

Our report is large and may be overwhelming in some areas. The information provided is presented in multiple ways (descriptive, table view, or visual graphic) and is our sincere attempt to improve accessibility for AUPE delegates on their finances.

Some delegates may have already made their decision on some of the motions and resolutions on the convention agenda this week. Please seek clarity and understanding on your finances in advance. We are asking every delegate to commit to reading the full report and additional Finance FAQs that will be posted on the website. You can email AUPE Executive Secretary-Treasurer (EST) Justin Huseby j.huseby@aupe.org with any questions on the AUPE financial statements or reports before convention. Beginning September 16, 2024, EST Huseby will post the answers to some of the common questions in a new AUPE Finance FAQ section on the convention website. Please visit <https://www.aupe.org/convention#15127> regularly. We hope this will help with the deluge of questions in the limited time we have on the convention floor.

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WHEN IS IT BEST TO ASK A FINANCE QUESTIONS?

It can be confusing to know when the most appropriate time to ask questions during the finance related items. Guidance on when to Ask Finance Questions

You may be confused on the agenda item to ask your finance related question (if it wasn't answered already). After all, there is an EST report, the audited financial statements, the Finance Committee report, the proposed budget, and resolutions.

Debate and Q&A should be done in a supportive environment, so ask if you are unsure. We do not want to discourage people from asking their questions, especially on the important matters we will discuss this year. But the answer to "when" generally depends on what type of question you have.

- Do you have a question on the consolidated audited financial statements & report by KPMG?
 - Your independent auditors will present their report first before the Finance Committee presents their report. They are your independent professional auditors and will answer questions about their statements, findings and methods. The key thing to remember is that they can only speak to their report. For example, they cannot give you an opinion on PE's proposed budget.
 - You are encouraged to email EST Huseby with questions on the consolidated audited financial statements before Convention.
 - Delegates do not need to "pass" the audited financial statements at convention. The auditors presented the statements to your Provincial Executive in September 2024.
 - Prior to September PE meeting, your Finance Committee met with your auditors and made their recommendation to your Provincial Executive.
- Do you have a question on this Finance Committee report?
 - Ask it when this report is put on the table for debate. There will be lots of questions from the floor, so we hope that all delegates will have taken the time to review the finance FAQs and even submitted their own questions in advance to EST Huseby.j.huseby@aupe.org
 - The one caveat is that this report contains some supplemental information on the proposed budget and resolutions. If possible, please try to refrain from debating the resolutions during the finance report.
- Do you have a question on the proposed budget?
 - This question should come during the agenda time allocated for the budget which happens after our report and the general resolutions 2-1 & 2-2.
- Do you have a question on one of the resolutions that had supplemental information in the finance committee report?
 - Please try to ask those when the agenda moves to those resolutions.
 - EST Huseby will happily reference to the supplemental information or provide additional information where feasible during that agenda item

Your Finance Committee is eager to see you at convention and look forward to the decisions and directions that you set!

2023/24 FINANCIAL YEAR IN REVIEW

Table A

**Statement of Operations
July 1, 2023 to June 30 2024**

A	B Budget	C Actual	D Variance Actual (-) Budget
1 REVENUE			
2 Membership Dues	\$58,100,000	\$61,698,706	\$3,598,706
3 Investment Income - Reserves	\$0	\$7,138,017	\$7,138,017
4 Rental Income	\$353,712	\$358,335	\$4,623
5 Interest and Other Income	\$600,000	\$789,120	\$189,120
6 Total Revenue	\$59,053,712	\$69,984,178	\$10,930,466
7 EXPENSES			
8 Wages	\$29,464,880	\$28,318,113	(\$1,146,767)
9 Overtime	\$2,348,560	\$2,096,867	(\$251,693)
10 Pensions	\$3,860,520	\$3,663,852	(\$196,668)
11 Benefits	\$6,435,334	\$5,758,526	(\$676,808)
12 Travel - Staff	\$1,307,004	\$1,679,042	\$372,038
13 Travel - Members	\$2,051,608	\$2,634,603	\$582,995
14 Travel - Members Time Off	\$2,387,340	\$2,716,279	\$328,939
15 Local Rebates	\$6,600,000	\$6,770,277	\$170,277
16 Area Council Rebates	\$468,000	\$365,093	(\$102,907)
17 Professional Fees / Legal	\$1,489,176	\$983,972	(\$505,204)
18 Professional Fees / Consulting	\$533,560	\$665,095	\$131,535
19 Advertising	\$270,636	\$328,250	\$57,614
20 Sponsorships / Donations	\$12,084	\$8,750	(\$3,334)
21 Members Benefits	\$300,000	\$299,764	(\$236)
22 Regional Offices	\$436,152	\$402,242	(\$33,910)
23 Administration - Supplies & Misc	\$281,308	\$298,299	\$16,991
24 Administration - Insurance	\$298,320	\$298,947	\$627
25 Administration - Interest On Long Term Debt	\$2,005,692	\$1,878,821	(\$126,871)
26 Administration - Property Taxes	\$846,516	\$783,123	(\$63,393)
27 Administration - Printing, Postage & Mailing	\$435,088	\$399,853	(\$35,235)
28 Utilities	\$1,185,900	\$1,117,946	(\$67,954)
29 Equipment	\$1,731,828	\$1,938,218	\$206,390
30 Depreciation	\$3,528,792	\$3,199,891	(\$328,901)
31 Maintenance and Repairs	\$1,085,556	\$1,125,989	\$40,433
32 Unrealized Gain/Loss on Interest Rate Swap	\$0	\$545,876	\$545,876
33 Total Expenses	\$69,363,854	\$68,277,686	(\$1,086,167)
34 Revenue In Excess of Expenditures	(10,310,142)	\$1,706,492	\$12,016,634

This section looks at our AUPE financial numbers used for our operations. This is different from the consolidated statement of operations that your auditors will present to you which is a consolidation of your operational finances and members' benefits. You will have the opportunity to ask your auditor questions about their report, but questions about the Finance Committee report should be directed to your EST.

This section is a discussion and analysis of some items that may be useful to help delegates understand their finances. Table A is a statement of operations for July 1-June 2024.

2023/24 Operational Revenue Discussion

In terms of Operational Revenue, we had a good year with continued growth in membership and some long-awaited contracts settlements that came to fruition for many bargaining tables. This increase in revenue is factored into the discussions on dues as well as the forecast and proposed budget that delegates will be reviewing at convention.

A budgeted deficit was partially offset by this increase in revenue from dues by ~ \$3.6M (line 2D). The next item that stands out is the very good investment year that we had. With \$7,138,017 in investment revenue (line 3D).

There are 3 important points when it comes to Line 3

- Investment revenue is the revenue that is reported for our reserve funds like our defence fund. This \$7.1M is a mix of both realized and unrealized revenue gains, but the value of those gains for the period is what is reported.
- Total revenue is NOT the same as cash in hand.
- We do not use investment revenue to fund regular operations. This revenue is comprised of 2 types of gains: 'realized' and 'unrealized' The part that is when it is 'realized' is put back directly into the investment. The part that is unrealized can't be used because we simply don't have it as usable cash until it is sold And when it is realized, we put it back into the investment.

Table A

**Statement of Operations
July 1, 2023 to June 30 2024**

A	B Budget	C Actual	D Variance Actual (-) Budget
1 REVENUE			
2 Membership Dues	\$58,100,000	\$61,698,706	\$3,598,706
3 Investment Income - Reserves	\$0	\$7,138,017	\$7,138,017
4 Rental Income	\$353,712	\$358,335	\$4,623
5 Interest and Other Income	\$600,000	\$789,120	\$189,120
6 Total Revenue	\$59,053,712	\$69,984,178	\$10,930,466

- “Unrealized” gains or losses are terms that are used to describe the change in value of an asset you own but haven’t sold (e.g. a stock). Even though you haven’t sold it, it still has \$ value. That \$ value can go up and down until it is sold. Those gains and losses in values before being sold are considered “unrealized”.
- Sometimes people call them ‘paper gains’ or ‘paper losses’, but the change in value during still needs to be included in our financial statements as part of proper accounting practices.

In other words, when your Defence Fund earns investment revenue, it is a mix of both ‘realized’ and (mostly) ‘unrealized’ gains. \$5M of the \$7.1M investment revenue on line 3D were gains to your Defence Fund. In this case, the ‘realized’ portions are put back into the Defence Fund to grow the fund. They are not used to supplement regular AUPE operations.

To be sustainable every year, the total revenue from dues, rentals, and interest (lines 2, 4, & 5) have to be large enough to cover all of our operational expenses AND transfers to the Defence Fund and Contingency Fund savings so we don’t have to use your long-term investments like the Defence Fund to pay the bills (there were \$0 in transfers from dues revenue this past year, but refer to line 39 & 40 on the prosed budget).

Finally, part 4 of the long-term financial strategy (detailed in a later section of our report) includes establishing a dedicated investment fund for regular AUPE operations. The purpose would be to use ‘realized gains’ from that fund to help offset operational costs during a budget year. This initiative will take several years until meaningful returns for operations can be established. But for now, when your Defence Fund (or any fund) earns revenue, remember that it is put back so it can continue to grow.

2023/24 Operational Expenses Discussion

Employer related expenses have been broken out into lines 8-11. Previously it was reported as one line. The amount of budget and expenses for wages, OT, pension, and benefits are interconnected depending on the employee type.

7 EXPENSES			
8 Wages	\$29,464,880	\$28,318,113	(\$1,146,767)
9 Overtime	\$2,348,560	\$2,096,867	(\$251,693)
10 Pensions	\$3,860,520	\$3,663,852	(\$196,668)
11 Benefits	\$6,435,334	\$5,758,526	(\$676,808)
12 Travel - Staff	\$1,307,004	\$1,679,042	\$372,038
13 Travel - Members	\$2,051,608	\$2,634,603	\$582,995
14 Travel - Members Time Off	\$2,387,340	\$2,716,279	\$328,939
15 Local Rebates	\$6,600,000	\$6,770,277	\$170,277

This past year, the amount spent on wages was lower than budgeted which helped keep the deficit lower. This year EST Huseby feels that the numbers closely align given the breakdown and build-up of the proposed budget.

Question: How many staff does AUPE

have? Answer: PE has authorized a compliment of 258 permanent positions across the province (not including your 8 Executive). This number doesn’t account for casual, temporary employees that may need to be brought in for cover off to help manage peak workload periods or special projects. Line 8 “Wages” represent all staff groups including your Executives.

11 Benefits	\$6,435,334	\$5,758,526	(\$676,808)
12 Travel - Staff	\$1,307,004	\$1,679,042	\$372,038
13 Travel - Members	\$2,051,608	\$2,634,603	\$582,995
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16 Area Council Rebates	\$468,000	\$365,093	(\$102,907)
17 Professional Fees / Legal	\$1,489,176	\$983,972	(\$505,204)

Lines 12-14 for staff travel and member travel were higher year than. This is not a surprise as bargaining meetings, training, and a whole host of other initiatives ramped up this past year. Line 13 on Local rebates are an outcome calculated from policy, so the overage is a feature of membership growth (also partly why our dues revenue increased). Area Council rebates are also formulated in policy.

13 Travel - Members	\$2,051,608	\$2,634,603	\$582,995
14 Travel - Members Time Off	\$2,387,340	\$2,716,279	\$328,939
15 Local Rebates	\$6,600,000	\$6,770,277	\$170,277
16 Area Council Rebates	\$468,000	\$365,093	(\$102,907)
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19 Advertising	\$270,636	\$328,250	\$57,614
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32 Unrealized Gain/Loss on Interest Rate Swap	\$0	\$545,876	\$545,876
33 Total Expenses	\$69,363,854	\$68,277,686	(\$1,086,167)
34 Revenue in Excess of Expenditures	(10,310,142)	\$1,706,492	\$12,016,634

Line 17 Legal Fees were lower than budgeted, though this will vary depending on the number of arbitrations and legal matters we find ourselves in. Line 19 Advertising was more than budgeted as AUPE increased ad spending in response to feedback from Locals and PE.

Line 30 Depreciation is a non-cash expense. It is the value of our capital assets were expensed during the year.

The last item to draw attention to is line 32. This is an unrealized expense that is reported in the statement of operations as part of proper accounting protocols. This is the difference between our floating rate of prime +1.25% and a fixed rate of 4.28% for our building.

In total, we incurred \$68.2M in expenses which includes (non-cash expense lines 30 and 32).

In summary, while the overall expenditures on your statement of operations were lower budgeted, and revenue was more than planned. The combination of a strike, more organizational costs, and a full staffing compliment would have depleted the remainder of cash reserves. There are three forecast models later in our report that will show the effect of our cash flow impacts without action.

AUPE INVESTMENTS DISCUSSION

You had a very good year for investments returns, with the overall return being 8.75% for our long-term investment savings funds (e.g. Defence Fund, Contingency Fund etc.). In terms of investment gains, your Defense Fund increased by \$5.7M, Severance Fund by \$660,000, your “Time-off Liability” Fund by \$444,000 and Contingency Fund increased by \$236,000.

Investment Disclosure

This year want to try something new to get the feedback from members. It is always important to ensure that as an organization, we balance our fiduciary duty with ensuring we’re not indirectly undermining our mission. Our investment policy has a section that forbids AUPE from making investments in 12 anti-labour organizations. Your finance committee will be conducting a thorough review of the policy and propose amendments to your Provincial Executive. This review will include the “dirty dozen” list as well as ensure that our investment risk profile is appropriately aligned with our organizational goals.

Here is the inaugural disclosure of the content of your investment fund instruments:

<p style="text-align: center;"><u>GICs</u></p> <p>ATB 2Y CIC NR ATB 3Y CIC NR ATB 3Y CIC NR</p> <p style="text-align: center;"><u>Fixed Income</u></p> <p>TD BK DEP NT CIBC SR DP NT BMO BNS DEP NT NBC SR UNSECURD TD BK MANULIFE BK QUE PROV MAN PROV SASK PROVINCE PROVINCE OF ONT BC PROV</p> <p style="text-align: center;"><u>Mutual Funds</u></p> <p>BNS CORP INV SAV ACT SR F –NL</p> <p style="text-align: center;"><u>Trust Units</u></p> <p>CHARTWELL RETIREMENT RES TR UT</p> <p style="text-align: center;"><u>ETFs</u></p> <p>ISHARES CORE IMI ETF CAD HEDGD</p> <p style="text-align: center;"><u>Equities</u></p> <p>ABBOTT LABS ALIMENTATION COUCHE–TARD ALPHABET INC CL C ALPHABET INC CL A ALTUS GROUP LIMITED CENCORA INC</p>	<p>AMETEK INC NEW AMPHENOL CORP CL A APTARGROUP INC BK OF MONTREAL BK OF NOVA SCOTIA BECTON DICKINSON & CO BOYD GROUP SVCS INC BROOKFIELD CORP VTG CL A BROOKFIELD ASSET MGMT LTD CL A CGI INC CME GRP INC CDN NTL RAILWAY CO CDN NTRL RES LTD CANADIAN PAC KANS CITY LTD COLLIERS INTL GRP INC SUB VTG CONSTELLATION SFTWR INC DANAHER CORP DESCARTES SYS GRP INC DOLLAR GENERAL CORP NEW DOLLARAMA INC ENBRIDGE INC FORTIS INC INTACT FINL CORP JPMORGAN CHASE & CO JOHNSON & JOHNSON LOBLAW COS LTD MARSH & MCLENNAN COS INC MARTIN MARIETTA MATERIALS INC MICROSOFT CORP NIKE INC CL B</p>	<p>NUVEI CORP SUB VTG IF AS OPEN TEXT CORP PARKLAND CORP PEPSICO INC PET VALU HOLDINGS LTD PROCTER & GAMBLE CO RB GLOBAL INC RESTAURANT BRANDS INTL INC SPIN MASTER CORP SUB VTG SHRS STANTEC INC TMX GROUP LIMITED THOMSON REUTERS CORP TOPICUS.COM INC SUB VTG SH TORONTO DOMINION BK UNITEDHEALTH GRP INC VERISK ANALYTICS INC VISA INC WATERS CORP WASTE CONNECTIONS INC</p> <p style="text-align: center;"><u>OTHER</u></p> <p>WT–CONSTELTN SFTWR INC 31MAR40</p>
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AUPE EXECUTIVE SALARY SUMMARY, DISCUSSION, & FAQs

The Executive expenses have been included in your audited financial statements, stemming from a general resolution from years ago. Given that resolution has long since expired, your PE formalized the requirement for Executive employment expenses reporting into a new policy such that it would be included as part of the Finance Committee report. The report by the auditors was still included in the scope for this year (before the policy took effect), however, we would like to break down the items a bit further for delegates as was the intent of the new policy. The structure of this section of our report is mostly in a Q&A form, and we hope to bring clarity to the expense categories and history. In 2024/25, your Finance Committee will continue this practice of including these summaries as part of its report.

AUPE Executive Salaries 2023/2024 & FAQ

Table B			
AUPE Executive Salaries 2023/24			
Position	Name	Salary	Primary Region
President	Smith, Guy	\$197,574	Alberta
EST	Huseby, Justin	\$106,215	Alberta
VP	Azocar, Sandra	\$118,544	Northwest Region
VP	Borodey, Bobby-Joe	\$118,544	Edmonton Region
VP	Gault, James	\$80,155	Northeast Region
VP	Gostola, Bonnie	\$118,544	Calgary Region
VP	Graham, Darren	\$118,544	Central Region
VP	Jackson, Curtis	\$77,865	South Region

Question: Are the Executive Positions all Full time?

Answer: Yes, though it is a little nuanced depending on the position. Your President and Executive Secretary-Treasurer are devoted 'full time' to the office (article 9.05 & 12.04). Your Vice-Presidents devote such time as required. Our current President has your VPs devoting full time to the office (article 11.02) .

Question: When did our AUPE Vice-President positions become "full-time"?

Answer: Delegates at Convention 2016 voted to set remuneration and benefits to be up to full-time. Prior to this, VPs were considered volunteers, and any time away from their employer was paid as "Time-Off for Union Business" to their home employer whenever they were away.

Question: Are our AUPE Executives also AUPE members?

Answer: Yes! AUPE Executives are members! Unpaid leaves of absence are sought with their home employers for the duration of their terms, subject to the terms of the constitution.

Question: Do AUPE Executives pay union dues?

Answer: Yes! Your AUPE Executives pay AUPE union dues on their base wages like all fellow members. In fact, your AUPE Executives are members of all Convention or PE Committees and all Components - Locals, Chapters, and Area Councils (article 8.06) .

Question: How are our AUPE Executives' salaries determined?

Answer: Convention. The compensation was set by Convention (Article 9.05, 11.02, 12.05, & 8.08) and is in Policy 4-3. Compensation was formulated by PE and presented to Convention for ratification (article 8.08). Convention set entitlements to be similar to those in contained in the AUPE staff collective agreements. However, executives are not entitled to things like weekend overtime or any wage adjustments in that agreement.

The last time Convention amended compensation terms for VP positions was at Convention 2016. Compensation terms for the President and EST positions were last amended at Convention 2006.

Question: How do our AUPE Executives' salaries change?

Answer: Both Convention 2006 (for President and EST) and Convention 2016 (for VPs) tied compensation adjustments to the salaries negotiated in the GOA collective agreement. This excludes special grade adjustments.

Question: Are our Executives paid overtime wages?

Answer: No. Executives are not entitled to earn OT wages, even if it is accordance with the terms of the staff collective agreement. This means that there is no OT pay (at 1.5x or 2x wages) for weekdays beyond the regular day or work that occurs anytime on the weekend. Executives are issued the equivalent of 35 hours of time off each quarter which is called Time Off in Lieu (TOIL). The intent of TOIL is to offset some of the unpaid overtime that occurs during the week. They are also not able to earn additional wages, OT pay or TOIL for work on weekends or designated holidays.

AUPE Executive Expense Summary and FAQs

Benefit & Pension Expense					
Position	Name	Home	Primary Region	Benefits	Pension/RRSP
VP	Azocar, Sandra	Edmonton	Northwest Region	16,084	16,631
VP	Borodey, Bobby-Joe	Red Deer	Edmonton Region	25,264	16,631
VP	Gault, James	Fort Saskatchewan	Northeast Region	16,074	11,222
VP	Gostola, Bonnie	High River	Calgary Region	31,409	16,631
VP	Graham, Darren	Red Deer	Central Region	29,561	16,631
EST	Huseby, Justin	Calgary	Alberta	13,284	14,962
VP	Jackson, Curtis	Medicine Hat	South Region	16,155	10,901
President	Smith, Guy	Edmonton	Alberta	19,527	27,718

Question: How are/were benefits and other entitlements determined?

Answer: Convention (Article 9.05, 11.02, 12.05, & 8.08) and is in Policy 4-3. Convention set other entitlements to those in the AUPE staff collective agreement. However, this excludes 'weekend overtime' or wage adjustments in that agreement.

The last time Convention amended this for VPs was at Convention 2016. The last time it was amended for the President and EST was at Convention 2006.

Question: Why are benefit expenses for some Executives different from others?

Answer: VP Gault, VP Jackson, and EST Huseby started part way through the 2023/24 year and on different dates. Additionally, your executive officers come from different home employers and sectors. The timeliness and processes for employer pension and benefit costs from is not consistent and in some cases will cross fiscal years.

Allowances						
Position	Name	Home	Primary Region	Cell	Internet	Vehicle Allowance
VP	Azocar, Sandra	Edmonton	Northwest Region	1,163	1,045	10,800
VP	Borodey, Bobby-Joe	Red Deer	Edmonton Region	1,061	799	11,624
VP	Gault, James	Fort Saskatchewan	Northeast Region	733	748	8,536
VP	Gostola, Bonnie	High River	Calgary Region	1,621	0	10,800
VP	Graham, Darren	Red Deer	Central Region	417	1,457	14,991
EST	Huseby, Justin	Calgary	Alberta	0	0	7,269
VP	Jackson, Curtis	Medicine Hat	South Region	1,594	957	7,061
President	Smith, Guy	Edmonton	Alberta	1,858	0	10,800

Question: Do our AUPE Executives receive mileage (\$0.52) in addition to the vehicle allowance?

Answer: No. The vehicle allowance is \$900/month plus business insurance, registration etc. Executive are required to use their own vehicle for employment transportation across the province to fulfil their constitutional obligations. They do not receive an additional \$0.52/km.

Employment Costs									
Position	Name	Home	Primary Region	CPP/EI/WCB	Accommodations	Travel	Meals	Supplies/Equip.	Misc.
VP	Azocar, Sandra	Edmonton	Northwest Region	5,357	9,561	7,043	4,219	121	952
VP	Borodey, Bobby-Joe	Red Deer	Edmonton Region	4,925	20,304	10,012	8,820	4,522	4,733
VP	Gault, James	Fort Saskatchewan	Northeast Region	7,233	5,028	6,926	3,907	1,783	478
VP	Gostola, Bonnie	High River	Calgary Region	10,293	12,450	8,528	2,156	-	4,745
VP	Graham, Darren	Red Deer	Central Region	8,509	26,816	7,362	6,379	203	10,180
EST	Huseby, Justin	Calgary	Alberta	7,928	17,161	5,779	1,956	17	3,743
VP	Jackson, Curtis	Medicine Hat	South Region	7,393	17,333	13,914	6,222	131	2,395
President	Smith, Guy	Edmonton	Alberta	5,383	10,747	6,792	3,430	-	290

Question: Why are the CPP EI and WCB totals different

Answer: The timing of the invoicing from the home employer varies. Additionally, the WCB cost incurred by employers for staff working in healthcare differs significantly from other sectors.

Question: What items make up the Travel category?

Answer: Items like fuel, airfare, parking, overnight etc. Most of the Travel category is fuel, which consists of both employment related and taxable portions.

Question: What makes up the Miscellaneous category and why is one value more than the others?

Answer: It is a collection of costs incurred that don't fit within the other categories. An example could be registration or training expenses, rally supplies, etc. This number stands out due to the fact that invoicing was received this past fiscal year, but it contains costs not previously accrued and reported in the previous year.

Table F						
Time Off						
Position	Name	Home	Primary Region	Vacation	TOIL	Float
VP	Azocar, Sandra	Edmonton	Northwest Region	6,854	9,132	458
VP	Borodey, Bobby-Joe	Red Deer	Edmonton Region	15,247	8,938	458
VP	Gault, James	Fort Saskatchewan	Northeast Region	7,711	6,184	458
VP	Gostola, Bonnie	High River	Calgary Region	17,518	8,938	458
VP	Graham, Darren	Red Deer	Central Region	14,477	8,938	458
EST	Huseby, Justin	Calgary	Alberta	14,385	8,245	611
VP	Jackson, Curtis	Medicine Hat	South Region	7,491	6,184	458
President	Smith, Guy	Edmonton	Alberta	29,220	14,896	763

Question: What is TOIL?

Answer: TOIL is Time Off In Lieu. As mentioned as part of an answer to a question on salaries earlier, AUPE Executives do not get paid OT wages. TOIL is time off granted every quarter to offset some of the unpaid overtime incurred during the week. TOIL is pre-set to 35 hours per quarter and does not increase when more hours are worked that would normally be considered OT at other jobs. TOIL is not earned or accrued for any work that occurs on weekends or designated holidays. The amount reported is not pay, rather the 'value' of the time accrued during the fiscal year.

Question: What is Float?

Answer: AUPE staff are entitled to a floater holiday as part of their contract. The amount reported is not pay, rather the 'value' of the time accrued during the fiscal year.

Question: Do the "expenses" shown in Table F for Vacation, TOIL, and float represent additional pay?

Answer: No. The numbers represent the "value" of the time off earned in 2023/24.

As with most salaried members, when you take a vacation day you are paid your regular salary. What many may not realize is that the cost of vacation time is tracked separately. Thus, the value of this liability of time owed (e.g. vacation) is tracked separately until the time off is used. It is a common practice to represent the value of time off that is earned by employees this way.

SUPPLEMENTARY FINANCIAL INFORMATION ON RESOLUTIONS

This section provides additional information to help provide further context for the proposed constitutional resolutions that your Provincial Executive has forwarded to Convention behalf of your Finance Committee.

Financial Information for Constitutional Resolution 1-3

Delegates will be debating a proposed amendment to Article 6.02 of our constitution:

<p>6.02 <i>There shall be a Convention each odd numbered year. Each Convention shall be held at such time and place as determined by the Provincial Executive.</i></p>

The purpose of amendment 1-3 is to change Convention from annual to biennial (every other year). Please note that additional resolutions for cost consideration (resolutions 1.4 – 1.7) can still be considered regardless of the outcome of the vote on 1-3. Table G compares the forecast Convention costs with the change to a biennial over 10 years. As with any forecast, it is only accurate on the day it is created as many factors will change, but forecasts help assist decision makers. Some of the assumptions in the 10 Year forecast are: annual 2% inflationary, 1% membership growth, no additional scheduled days.

Table G:					
Annual vs Biennial: 10 Year Convention Forecast					
Forecast			Annual Convention	Resolution 1-3 Biennial Convention	
Year		Delegates		Cost	Cost
Year 1	2025	1091	\$2,101,840	\$2,101,840	
Year 2	2026	1102	\$2,165,316		(\$2,165,316)
Year 3	2027	1113	\$2,230,708	\$2,230,708	
Year 4	2028	1124	\$2,298,075		(\$2,298,075)
Year 5	2029	1135	\$2,367,477	\$2,367,477	
Year 6	2030	1147	\$2,438,975		(\$2,438,975)
Year 7	2031	1158	\$2,512,632	\$2,512,632	
Year 8	2032	1170	\$2,590,546		(\$2,590,546)
Year 9	2033	1181	\$2,670,813	\$2,670,813	
Year 10	2034	1193	\$2,753,505		(\$2,753,505)
Total			\$24,129,888	\$11,883,471	(\$12,246,417)

Should resolution 1-3 pass, there will be a Convention in Oct 2025, then 2027. AUPE members could save \$12.2M over 10 years with this decision. The cost savings could then be applied to other initiatives and strategic outcomes. This means that over the next 10 years, our average operational costs could reduce by \$1.2M each year. See the summary in Table H. Resolution 1-3 is an important proposed change that delegates should not take lightly. However, as with any change, if implemented we will adapt as an organization.

Table H:		
Annual vs Biennial Summary		
10 Year Forecast Summary (Total)		
Annual Convention	Cost	\$24,129,888
Biennial Convention (Res. 1-3)	Cost	\$11,883,471
Biennial Convention (Res. 1-3)	(Savings)	(\$12,246,417)
10 Year Forecast Summary (Average)		
Cost Per Year	Annual	\$2,412,989
Cost Per Year (Res.1-3)	Biennial	\$1,188,347
(Savings) Per Year	Annual	n/a
(Savings) Per Year (Res.1-3)	Biennial	(\$1,224,642)

Financial Information for Constitutional Resolutions 1-4, 1-5, 1-6, & 1-7

Your Finance Committee has put forward four resolutions for Convention 2024 to consider which come from a list of 41 possibilities presented to your Provincial Executive. While we expect much of the debate to surround representation and Local considerations, the fact remains that our membership grows at an approximate rate of 1.3 - 1.9% per year. The size of our Convention under the current ratio limits us to 1 or 2 facilities in the province. Without adjustments to the ratio, the size of Convention will continue to grow in conjunction with the escalating costs.

Table "I" summarizes how each resolution (if passed) would change our Convention. This does not account for whether delegates pass resolution 1-3 for biennial Convention. Therefore, if one or more of the proposed resolutions on ratios were approved by Convention 2024, these savings would be on top of savings if 1-3 is also approved. Should delegates choose to reduce the size of Convention, the options for locations could increase (depending on the size of the change).

Not surprisingly, our finance report focuses on some of the financial and operational impacts of these changes, but there are other considerations that delegates need to factor. The representation ratio for Convention has been better than 1:100 for quite some time, so, even small changes including 1-4 and 1-5 will have a meaningful financial impact in the long term.

Please note that the delegate reduction for 1-6 & 1-7 differs from the preamble to the actual resolutions. At the time PE forwarded the resolutions to be included on the Convention agenda, the estimate in the model was based on the best available information at the time, whereas this finance report has an updated forecast.

Summary of Resolution Changes and Impacts								
Description				Forecast Impact to 2025 Convention				
A	B	C	D	E	F	G	H	I
Options	Local Delegate Ratio	Additional Local	PE Delegates by Right	Delegates	Change	%	Ratio	Cost (Savings)
Current	1:100 or portion thereof	Local Chair (by right)	34 PE Reps 8 Executive Committee	1091	0	0	1: 91.74	\$40,000
Resolution 1-4	1:100 or portion thereof	Local Chair (by right)	34 PE Reps 8 Executive Committee	1057	-34	-3.12%	1: 94.35	(\$47,600)
Resolution 1-5	1:100 or portion thereof Local Chair is "First Delegate by right"	Local Chair (by right)	34 PE Reps 8 Executive Committee	1023	-68	-6.23%	1: 97.48	(\$95,200)
Resolution 1-6	1:125 or portion thereof	Local Chair (by right)	34 PE Reps 8 Executive Committee	857	-234	-21.45%	1: 116.36	(\$327,600)
Resolution 1-7	1:100 or portion thereof For the first 1000 members or portion thereof. Over 1000 members 1:125 or the portion thereof	Local Chair (by right)	34 PE Reps 8 Executive Committee	943	-148	-13.57%	1: 105.75	(\$207,200)

Table J shows the cumulative forecast cost (savings) for each of the four resolutions as well as the additional cost of not changing anything over year 1 through 5 and after 10 years. The 'cost' of not changing the delegate ratios of our membership (thus number of Convention delegates) continues to rise annually. This forecast for the resolutions reflects the cumulative impact of these decisions with 2% inflation and does not factor in membership growth. The cost increase is based on 2% inflation so delegates can be mindful that the costs will continue to escalate each year if there is no significant action taken.

Cumulative Forecast Cost (Savings)						
A	I	J	K	L	M	N
Options	Year 1	Year 2	Year 3	Year 4	Year 5	Year 10
Current	\$40,000	\$80,800	\$122,416	\$164,864	\$208,162	\$437,989
Resolution 1-4	(\$47,600)	(\$96,152)	(\$145,675)	(\$196,189)	(\$247,712)	(\$521,207)
Resolution 1-5	(\$95,200)	(\$192,304)	(\$291,350)	(\$392,377)	(\$495,425)	(\$1,042,413)
Resolution 1-6	(\$327,600)	(\$661,752)	(\$1,002,587)	(\$1,350,239)	(\$1,704,844)	(\$3,587,129)
Resolution 1-7	(\$207,200)	(\$418,544)	(\$634,115)	(\$853,997)	(\$1,078,277)	(\$2,268,782)

Regardless of the final decision on dues, your Finance Committee is recommending delegates consider ratio changes as there would be other operational resources that can be allocated elsewhere by reducing the size of Convention. Table K provides information on the forecasted impact of each of the four resolutions on each Local for 2025, though we should remind everyone that the spirit of the proposed resolutions is for the impact of the union 'as a whole'.

O Local	P	Q	R	S	T	U	V	W
	2024 Convention		2025 Convention (Forecast)		2025 Convention If Resolution...			
	Average	Delegates	Average	Delegates	...1-4	...1-5	...1-6	...1-7
0001 GOA - Administrative & Support Services	5753	60	5802	61	60	59	48	51
0002 GOA - Administrative & Program Services	6497	67	6851	71	70	69	56	59
0003 GOA - Correctional & Regulatory Services	3010	33	3082	33	32	31	26	29
0004 GOA - Trades & Related Services	562	8	558	8	7	6	6	7
0005 GOA - Natural Resources Conservation	1051	13	1077	13	12	11	10	13
0006 GOA - Social Services	3130	34	3201	35	34	33	27	30
0009 GOA - Health and Support Services	601	9	602	9	8	7	6	8
0012 GOA - Technical & Field Services	1156	14	1178	14	13	12	11	14
0020 ATB	505	8	501	8	7	6	6	7
0038 NAIT	910	12	934	12	11	10	9	11
0039 SAIT	645	9	672	9	8	7	7	8
0040 Covenant Nursing Care & General Support Services	2338	26	2336	26	25	24	20	23
0041 AHS - South Zone - Nursing Care	1352	16	1388	16	15	14	13	16
0042 The Good Samaritan Society	1609	19	1648	19	18	17	15	18
0043 AHS - North Zone Nursing Care	3375	36	3402	37	36	35	29	32
0044 AHS - Central Zone Nursing Care	2255	25	2287	25	24	23	20	23
0045 AHS - Calgary Zone Nursing Care	4293	45	4301	46	45	44	36	39
0046 AHS - Edmonton Zone Nursing Care	5706	60	5711	60	59	58	47	50
0047 Continuing Care Separate Employers North	6487	67	6636	69	68	67	55	58
0048 Continuing Care Separate Employers Calgary/South	3320	36	3392	36	35	34	29	32
0049 Capital Care Group	1508	18	1495	17	16	15	13	16
0050 Alberta Gaming, Liquor, and Cannabis Commission	786	10	794	10	9	8	8	9
0052 University of Calgary	4974	52	5033	53	52	51	42	45
0053 University of Lethbridge	547	8	561	8	7	6	6	7
0054 AHS - Edmonton Zone General Support Services	8817	91	8697	89	88	87	71	74
0056 AHS - North Zone General Support Services	2944	32	2903	32	31	30	25	28
0057 AHS - Central Zone General Support Services	3308	36	3299	35	34	33	28	31
0058 AHS - South Zone General Support Services	2006	23	1990	22	21	20	17	20
0060 Alberta Innovates & InnoTech Alberta	199	4	201	5	4	3	3	4
0069 Athabasca University	249	5	245	5	4	3	3	4
0071 Colleges & School Divisions	2802	31	2910	32	31	30	25	28
0084 Continuing Care Separate Employers Central/South	4292	45	4370	46	45	44	36	39
0095 AHS - Calgary Zone General Support Services	10089	103	9934	102	101	100	81	84
0118 Local Government & Agencies	1736	20	1736	20	19	18	15	18
Executive Committee		8		8	8	8	8	8
Totals	98812	1083	99725	1091	1057	1023	857	943
Change vs 2025 Forecast Delegate Count [1091]					-34	-68	-234	-148
Forecast 2025 Savings					(\$47,600)	(\$95,200)	(\$327,600)	(\$207,200)
Change vs Total 2024 Delegate Count [1083]					-26	-60	-226	-140

Finally, though there are many variables to consider when combining the impacts of resolutions, Table L gives an idea about the potential cumulative savings if both a biennial convention (resolution 1-3) and one of the four resolutions on ratios is approved.

After:	Resolution 1-4	Resolution 1-5	Resolution 1-6	Resolution 1-7
Year 1	(47,600)	(\$95,200)	(\$327,600)	(\$207,200)
Year 2	(2,261,468)	(2,357,620)	(2,827,068)	(2,583,860)
Year 3	(2,310,991)	(2,456,666)	(3,167,903)	(2,799,431)
Year 4	(4,659,580)	(4,855,768)	(5,813,630)	(5,317,388)
Year 5	(4,711,103)	(4,958,816)	(6,168,235)	(5,541,668)
Year 10	(12,767,623)	(13,288,830)	(15,833,546)	(14,515,199)

Financial Information Generals Resolutions 2-1 & 2-2 (Local Rebate Formula)

Your Provincial Executive has forwarded their recommendation to Convention to direct an amendment to AUPE Policy 5-2 Rebate Formula.

One of the peculiarities of our constitution is that only Convention can approve amendments to the amounts contained in Policy 5-2. PE is not able to unilaterally change the policy without Convention. The requirement to amend rebates at Convention only applies to the rebate amount, not other details or current or future parts of the policy. This is found in your constitution under Article 7.02: *“Convention shall determine the amount of Union funds to be remitted to the Locals for their operations and the Union shall remit those sums every month.”*

The proposal is to direct a reduction of roughly 50% for the 2024/25 fiscal year. Given that general resolutions may only have a maximum of 150 words (including ‘WHEREAS’ portion/preambles), additional information is given below to help you assist in making your decision. Table M summarizes the current and proposed rates for information.

The purpose of 2-1 would be to change the rebates for the current fiscal year. The proposed budget proposed reflects this amount. Should 2-1 not pass in any form, EST Huseby can propose an amendment to the budget to increase the budget expense amount for rebates (see line 19 of the proposed budget) by an additional \$3M. The rationale would be due to the fact the original rebate amounts in Policy 5-2 would still apply if Convention doesn’t make changes which budgets a further increase to your operational deficit for 2023/24.

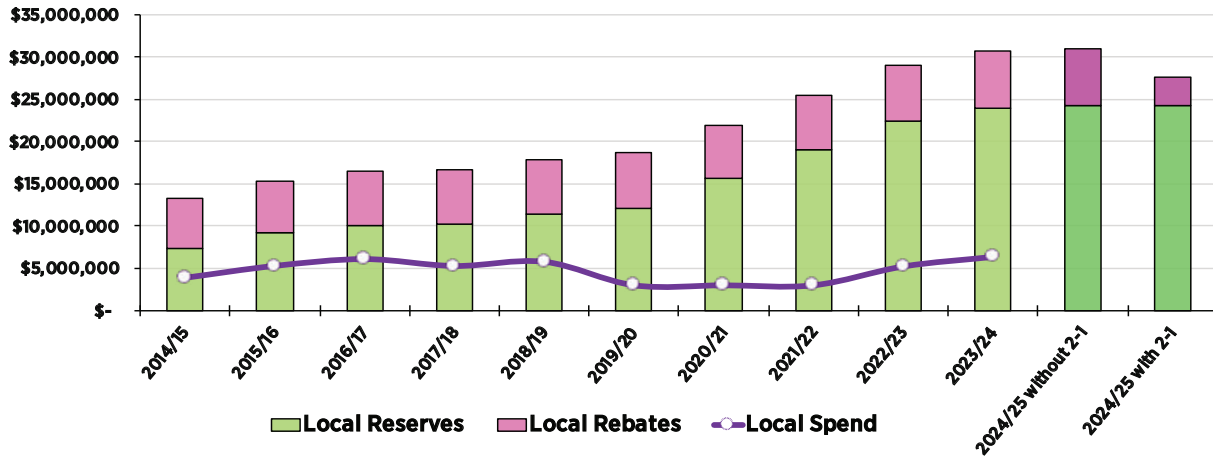
Should Convention 2024 direct PE to amend the Local rebates, a second General Resolution should also be debated. General Resolution 2-2 is in place for debate to ensure your Finance Committee comes back with a recommendation to amend 5-2 for Convention 2025 to decide. This ensures that a recommendation comes to Convention 2025, which will be based on the most up to date information on the financial status of AUPE Locals.

Supplemental Information for General Resolutions 2-1

Table M						
Resoluton 2-1 Proposed Changes to Policy 5-2 Local Rebates						
	A	B	C		D	E
1	Multi-Site Local	Current	Proposed		Change	
2	First 500 (or portion therof)	\$9.83	\$5.00	per member per month	-49.14%	(\$4.83)
3	Next 1500 (or portion therof)	\$5.88	\$3.00	per member per month	-48.98%	(\$2.88)
4	Remaining members (2001+)	\$4.13	\$2.00	per member per month	-51.57%	(\$2.13)
5	One-site Local	Current	Proposed		Change	
6	First 500 (or portion therof)	\$6.90	\$3.50	per member per month	-49.28%	(\$3.40)
7	Next 1500 (or portion therof)	\$4.92	\$2.50	per member per month	-49.19%	(\$2.42)
8	Remaining members (2001+)	\$4.13	\$2.00	per member per month	-51.57%	(\$2.13)

If 2-1 is passed in the proposed form there would be a reduction of rebates flowing to the Locals for the remainder of fiscal year. The goal would be to make the rebates received align with Convention by the end of the fiscal year, so there is no need to repay rebates issued in July, August, September and October under the former formula. Instead they can be gradually adjusted through the rest of the fiscal year to provide some measure of predictability. In other words, if Convention directs 2-1 to take effect July 1, 2024, EST will reduce the monthly rebates for December - June to reflect the new amount and correct overpayments by the end of the fiscal year. However, our Locals have traditionally had \$5-6M in rebates budgeted to be disbursed to them each year. Collectively speaking, our Locals have consistently underutilized rebates for mobilization, member engagement and their operations for several years. Figure N shows the history of Local reserves & rebate use in each year. The Local financial reserves (green) include chequing and investment accounts, stacked on top of the rebates received each year (pink). The purple line shows the spending incurred by Locals each year.

Figure N: Consolidated Local Annual Reserves, Rebates & Expenses 2014 - 2024



The last two columns show the impact of 2-1 (in the proposed form) vs current policy. In essence, Local finances will not collapse if this change is made. In fact, each Local has between 1.54 and 15.88 years of rebates before adding the 2024/25 forecast rebates.

- Locals collectively have approximately \$30,981,000 for their budget as of July 1, 2024
 - General Resolution 2-1 would reduce that to \$27,623,000 for this year
- Locals collectively spent approximately \$6,371,000 last year

Table O	
Summary Financial Status - All Locals - as of July 1, 2024	
Local Bank Accounts	\$12,453,873
Local Investments	\$11,811,099
Total Local Funds	\$24,264,973
Average Local Financial Reserve	\$713,676
Financial Reserve Range	\$97,157 - \$3,085,614
Average Years Worth of Financial Reserves	4.34 Years
Financial Reserve Range	1.54 - 15.88 Years
2023/24 Average Annual Rebate	\$199,126
2023/24 Annual Rebate Range	\$23,474 - \$575,451

- Table P summarizes Locals with more than \$1M in financial reserves and Table Q summarizes Locals with less than \$1M in financial reserves.
- Table R summarizes the status of Locals with less than \$100K annually in rebates
- Table S summarizes the status of Locals with less than two years of reserves.
- Table T categorizes the range of financial reserves and Table U categorizes the range of years for all Locals.

Table P		
Locals With \$1M+ in Financial Reserves		
As of July 1, 2024		
	A	B
1	# Locals	6
2	Financial Reserve - Total	32.63 Years
3	Financial Reserve - Average	5.44 Years
4	Range:	2.94 - 11.32 Years
5	Local Bank Accounts	\$4,498,971
6	Local Investments	\$5,335,919
7	Total Local Financial Reserves	\$9,834,890
8	Average Financial Reserve	\$1,639,148
9	Range of Financial Reserves	\$1,046,430 - \$3,085,614
10	Average Annual Rebate	\$372,724
11	Annual Rebate Range	\$106,731 - \$557,451

Table Q		
Locals With Less Than \$1M in Financial Reserves		
As of July 1, 2024		
	D	E
12	# Locals	28
13	Financial Reserve - Total	114.82 Years
14	Financial Reserve - Average	4.10 Years
15	Range:	1.54 - 15.88 Years
16	Local Bank Accounts	\$7,954,902
17	Local Investments	\$6,475,180
18	Total Local Financial Reserves	\$14,430,083
19	Average Financial Reserve	\$515,360
20	Range of Financial Reserves	\$97,158 - \$996,830
21	Average Annual Rebate	\$161,926
22	Annual Rebate Range	\$23,474- \$395,489

Table R		
Locals That Receive Less Than \$100K in Rebates Per Year		
As of July 1, 2024		
	E	F
23	# Locals	9
24	Financial Reserve - Total	53.72 Years
25	Financial Reserve - Average	5.97 Years
26	Range:	2.22 - 15.88 Years
27	Local Bank Accounts	\$1,669,328
28	Local Investments	\$1,193,695
29	Total Local Financial Reserves	\$2,863,023
30	Average Financial Reserve	\$318,114
31	Range of Financial Reserves	\$97,158 - \$996,830
32	Average Annual Rebate	\$56,252
33	Annual Rebate Range	\$23,474 - \$89,897

Table S		
Locals With Less Than 2 Years of Reserves		
As of July 1, 2024		
	G	H
34	# Locals	4
35	Financial Reserve - Total	6.5 Years
36	Financial Reserve - Average	1.62 Years
37	Range:	1.54 - 1.75 Years
38	Local Bank Accounts	\$1,150,122
39	Local Investments	\$641,948
40	Total Local Financial Reserves	\$1,792,070
41	Average Financial Reserve	\$448,017
42	Range of Financial Reserves	\$361,709 - \$605,387
43	Average Annual Rebate	\$273,938
44	Annual Rebate Range	\$233,919 - \$348,927

Table T		
Local Financial Reserves		
As of July 1, 2024		
	I	J
45	Range:	# of Locals
46	\$0 - \$100,000	1
47	\$100,001 - \$200,000	3
48	\$200,001 - \$300,000	1
49	\$300,001 - \$400,000	5
50	\$400,001 - \$500,000	4
51	\$500,001 - \$600,000	1
52	\$600,001 - \$700,000	6
53	\$700,001 - \$800,000	4
54	\$800,001 - \$900,000	2
55	\$900,001 - \$1,000,000	1
56	\$1,000,001 - \$1,500,000	4
57	\$1,500,001 - \$3,000,000	1
58	\$3,000,001+	1
59	Totals:	34 Locals \$24,264,973

Table U		
Local Financial Reserves		
As of July 1, 2024		
	K	L
60	Range:	# of Locals
61	0.0 to 1.0 Year	
62	1.0 to 1.49 Years	
63	1.5 to 1.99 Years	4
64	2.0 to 2.99 Years	7
65	3.0 to 3.99 Years	15
66	4.0 to 4.99 Years	1
67	5.0 to 5.99 Years	
68	6.0 to 6.99 Years	1
69	7.0 to 7.99 Years	2
70	8.0 to 8.99 Years	1
71	9.0 to 10.99 Years*	
72	11.0 to 11.99 Years	2
73	12.0 to 14.99 Years*	
74	15.0 to 15.99 Years	1
75	Totals:	34 Locals \$24,264,973

(*) Change in Range

Table U summarizes the impact to the funds available for Locals on July 1 (same as Table T), with the rebate forecast under current policy, and the forecast of available funds if general resolution 2-1 is passed.

Locals started July 2024 with \$24.2M in financial reserves. If Convention does not change the rebate policy, Locals have \$30.9M in funds for the year (see line 95).

If 2-1 is passed as presented by your Provincial Executive, Locals will still have \$27.6M in funds for this year. If Locals collectively spend \$6M this year, their financial reserves will drop to \$21.6M by June 30, 2025.

Table V				
Local Finance Impacts: Financial Reserves + Forecast Rebates				
As of July 1, 2024				
	M	N	O	P
76	Range:	July 1, 2024	2024/25 Local Budget	If 2-1 Passed
77	0.0 to 1.0 Year			
78	1.0 to 1.49 Years*			
79	1.5 to 1.99 Years*	4		
80	2.0 to 2.99 Years	7	4	8
81	3.0 to 3.99 Years	15	7	12
82	4.0 to 4.99 Years	1	15	7
83	5.0 to 5.99 Years		1	
84	6.0 to 6.99 Years	1		1
85	7.0 to 7.99 Years	2	1	1
86	8.0 to 8.99 Years	1	2	1
87	9.0 to 10.99 Years*		1	1
88	11.0 to 11.99 Years	2		2
89	12.0 to 14.99 Years*		2	
90	15.0 to 15.99 Years	1		
91	16.0 to 16.99 Years		1	1
92		34 Locals	34 Locals	34 Locals
93	Financial Reserves	\$24,264,973	\$24,264,973	\$24,264,973
94	Rebates (Forecast)		\$6,716,000	\$3,358,000
95	2024/25 Local Funds		\$30,980,973	\$27,622,973

(*) Change in Range

Figure W is another way to visualize the financial reserves of the Locals 34.

Figure W: The red area visually represents one year worth of rebates, the blue circle is the average Local financial reserve (4.34 years), and the black shows the number of years of financial reserves. If Convention 2024 defeated the resolution on rebates, Locals will have an average of 5.34 years for funding for this year. If the proposed version of general resolution 2-1 passes, Locals would still have an estimated average of 4.84 years of funding available to them.

Figure X is a close-up of Figure W, whereas Figure Y shows an adjusted average where the three highest and three lowest values are removed from the calculation. The adjusted average is 3.73 years of financial reserves, meaning Locals would have an average of 4.73 years of funding without 2-1. If the proposed version of general resolution 2-1 passes, Locals would have an estimated adjusted average of 4.23 years of funding available to them this year.

Given that 2-1 is formulated on the fact that every Local has at least two years of funding available to them. You may even be surprised to know that even if 2-1 is passed, every Local will still have at least two years of funding (see Table 'V', column 'P'). However there still needs to be rebates issued to the Locals for operational reasons. Keep in mind that a 50% reduction in rebates would theoretically take two full years to reduce reserves by one year.

Figure W: Local Reserves as of July 1, 2024 (Years)

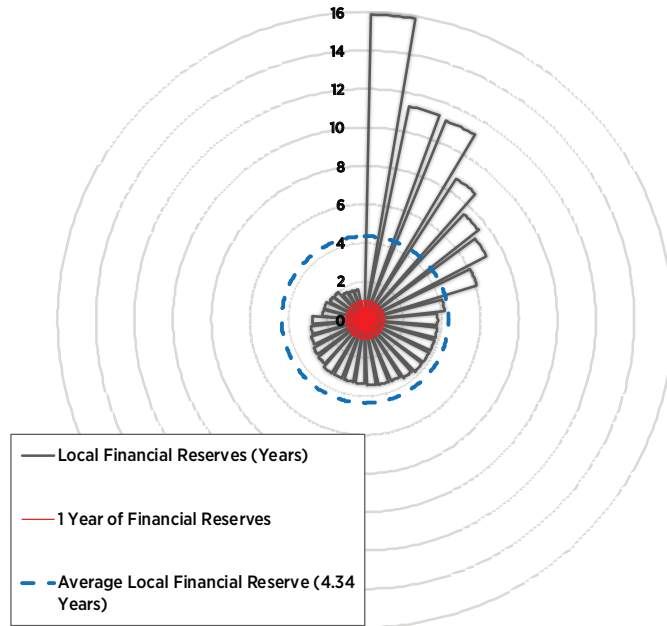


Figure X: Local Reserves as of July 1, 2024 (Years)

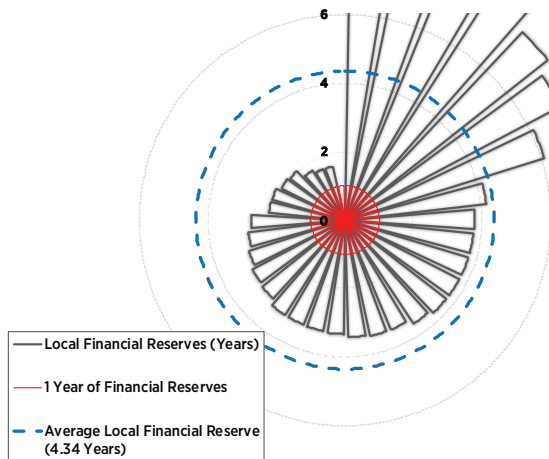
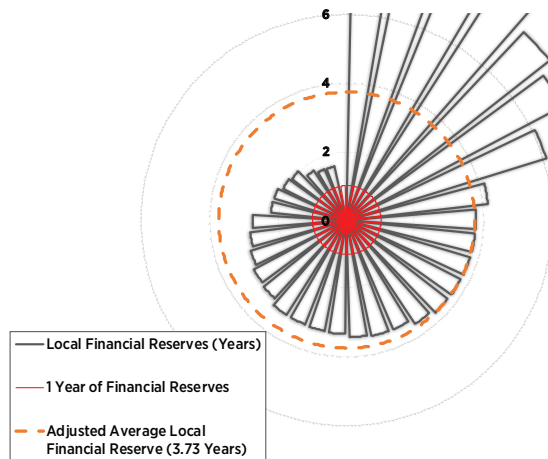


Figure Y: Local Reserves as of July 1, 2024 (Years)



Resolution 2-1 is not intended to slow down Local mobilization and engagement initiatives. It is a recognition that there is surplus to varying degrees and that all Locals will have between two and 16.88 years of combined reserves and forecasted rebates without the proposed change.

The purpose of the rebates is for Local Councils to use for administering Local and Chapter component meetings and initiatives under the pursuit of mobilization, engagement, and solidarity. So if Locals need to rely on their chequing account or unwind an investment for mobilization, engagement and building solidarity among their Local and Chapter members...that is a good thing. It is possible to both acknowledge that there is a surplus with the Locals and at the same time continue to increase mobilization and engagement of Locals and Chapters in our pursuit of our rightful gains at the bargaining table.

At the start of 2014/15 AUPE's 33 Locals had \$7.4 million in financial reserves which was approximately 1.27 years of rebates. At the end of 2023/24, AUPE's 34 Locals have \$24.2M in financial reserves, which represents a 228% increase over 10 years.

In other words, there was a yearly average of - \$1,685,000 more in revenue/rebates than expenditures in these past 10 years. Reducing the rebates to utilize financial reserves is productive, rather than adding an additional \$3M+ to the deficit.

AUPE DUES & FINANCIAL PLAN DISCUSSION:

AUPE has the lowest dues of any large union in the country at 1.25%. For constitutional resolution 1-1, PE has proposed a 20% increase to our dues; changing the rate from 1.25% to 1.5%. This would not take effect until July 1, 2025. While other unions include base wages, OT, shift differentials and premiums in their dues formula, AUPE dues only apply to base wages and resolution 1-1 does not change that.

In 2023 & 2024 we heard some delegates rightfully ask: “What is the plan”, and “how do we make sure we aren’t needing to come back here in a few years for more dues”? There is a 4-point plan to strengthen our members that require a combination of dues increase and bargaining gains. As members we still want to sustain and enhanced membership services, build up and achieve our strategic plan goals, broaden our mobilization and member engagement initiatives, and prepare to take on the bosses at the negotiation table and on the worksites.

We’ve been fortunate that there were some surpluses and expenses not incurred due to environmental impacts, such as the effect of COVID-19, on operations. We feel we have been lucky to not have had to use long-term assets. The next few sections of our report lay out information on the forecast of impacts to our operational cash flow given various choices, with the assumption we need to avoid having to dip into the long-term assets like the Defence Fund and reallocate them for yearly operations.

Our journey for financial strength needs to be a continuous process. In 2023, Delegates asked for 10-year forecasts and to see the impacts of the dues increase. You will see some of that work in the next section on resolution 1-1.

Today we focus on building a usable Defence Fund, stabilizing income to bring about better wages and benefits to members.

If AUPE Dues increase to 1.5% starting July 1, 2025...

... we would not have to increase dues for the foreseeable future. Other unions, including our closest comparator, have dues of 1.85% on all income. AUPE can make it with being 1.5% as long as we members commit to never settling for less than inflation. If 1.5% is approved and we make a commitment to invest in ourselves to ensure we never again take zero per cent at the table from our employers, we will be financially stabilized for the future. Let’s believe in ourselves! Let’s invest in ourselves! Let’s turn five cents in dues into \$5.00 in wages, not tomorrow... today!

We ask that delegates take the time to digest this information before they make their decision. It is October 2024 and we are at impasse at many tables, so today is the wrong time to reduce our momentum and remove resources.

If delegates approve their dues to increase to 1.5% services, our HQ and component processes and structure still need to be continually evaluated. In other words, even if delegates increase dues to 1.5%, they should still evaluate the effectiveness of the way we do things including some of the resolutions on Convention and Convention ratios. Every dollar we can put into your Defence Fund is an investment in higher wages and worker power at the table, so a future increase in dues is not needed.

If AUPE Dues remain 1.25% on July 1, 2025...

...Delegates will need to determine if they want to maintain, increase or reduce their services and each option comes with a myriad of possibilities. The first thing that must be amended is the Defence Policy and strike policy provisions, as they will not be sustainable without regular contributions for dues. We would not be able to plan to allocate dues revenue to the fund each year. Without dedicated funding every year it cannot maintain itself and will not be able to help members to take strike action or defend themselves in lockouts.

If members choose to reduce services but keep a defence fund, the defence fund is still not sustainable without a budgeted transfer each year. Therefore, provisions in policy like strike pay will still need to be amended to terms that are lower than before.

Four Point AUPE Financial Plan:

Here is the 4-point framework to see the stabilization and growth of our Defence Fund which help position to drive gains at the bargaining table and provide financial stability for AUPE members.

1. Stabilize Our Defence Fund Funding
Action: PE has approved a Defence Fund strategy which is in policy. We need to ensure we have a robust and effective defence fund that all sectors can see themselves in.

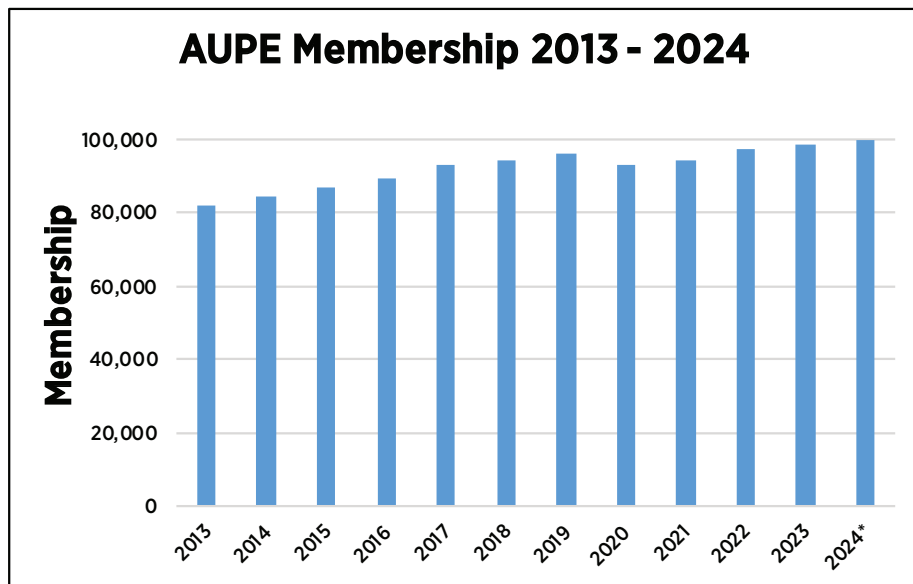
2. AUPE Dues at 1.5%
Action: Delegates have an opportunity to vote for this to start on July 1, 2025.
3. Success at the Bargaining Tables
Action: 84,000 members are in bargaining now with more set to join. If we, the members, commit to never settling for less than inflation, dues will not have to be increased as the wage increases will offset the inflation costs of the operations and services. Additionally, our Defence Fund can further grow to the target size with any additional surplus
4. Establish a Future Operational Fund
Action: Your Finance Committee will be studying how we can create and sustain a fund for the purpose of offsetting operational expenses in the future.
Planning for a 1% allocation of total dues to your contingency savings fund as part of the budget plan and 10-year forecast outcomes is a big first step. It may take several years to reach a fund size that is impactful, but the future of AUPE members can benefit by setting aside an opportunity for investment income to offset operational costs. Currently, AUPE investment funds like your Defence Fund are separated so they can be ready for use in the event of a strike to make gains at the table, and not used to fund regular operations.

Financial Information for Constitutional Resolution 1-1 – Dues Increase

The next few subsections provide additional information to assist delegates in their decision on the future of AUPE dues, which PE has proposed to increase in 2025 to 1.5%. While this is an increase in dues our dues are still among the lowest in the country and well below those similar public sector and general employee unions. Some of the information may be not surprising to some, while others may provide different context. The dues increase resolution is supported by your Finance Committee, and your Provincial Executive has put it forward this year. We ask that delegates read and debate the information.

Membership Counts

Table Z	
Year	AUPE Average Membership
2013	81,804
2014	84,593
2015	87,044
2016	89,323
2017	93,082
2018	94,276
2019	96,311
2020	93,300
2021	94,560
2022	97,283
2023	98,807
2024*	100,096



Our membership continues to grow annually. Since 2020, we have grown at an average of 1.77% each year. While this will bring in more dues revenue along with wage increases, there is also an increase of services needed to effectively support all membership.

Effect of Wage Increases on Dues

An often-heard point is that dues increase whenever members receive raises. This is true but isn't as simple as it may sound.

1. AUPE dues are only on base wages
 - This means members do not pay dues on any OT, weekend premiums, shift differentials etc. Most unions have it on all income.

- So, if we – the members ratify contracts with wins on non-wage gains, or, non-base wage increases including shift premiums, pensions or benefits, that does not translate into increased dues revenue.
2. Contracts that ratify for less than inflation (or \$0) can put us further behind over the long term due to inflation.

The fact that dues revenue increases when base wage increase is true, but those increases need to be at or above inflation every year. The organization will still experience inflation to the operations cost in the operations budget. The next section will examine the decline in purchasing power of your dues on a per member basis.

The Effect of Inflation on Dues 2013 - 2024

Table AA			
Average Dues per Member			
Year	Members	\$/Member	Adjusted for Inflation (2024 Dollars)
2013	81,804	\$534.92	\$695.53
2014	84,593	\$535.13	\$685.21
2015	87,044	\$555.89	\$703.34
2016	89,323	\$563.30	\$703.79
2017	93,082	\$581.39	\$715.21
2018	94,276	\$582.07	\$699.89
2019	96,311	\$591.16	\$697.69
2020	93,300	\$609.70	\$713.25
2021	94,560	\$590.55	\$676.00
2022	97,283	\$584.05	\$626.80
2023	98,807	\$592.26	\$609.42
2024	100,096	\$616.40	\$616.40

When you extrapolate the average dues per member that AUPE receives each year with the dues revenue of 1.25%, you can begin to see how much impact inflation has had over the years. Table AA shows the dollar/per member cost for that given year and the dollar/per member cost when adjusted for inflation to 2024 dollars.

When graphed (see figure AB), you can see the blue line is mostly in a positive trajectory from 2013 through 2024.

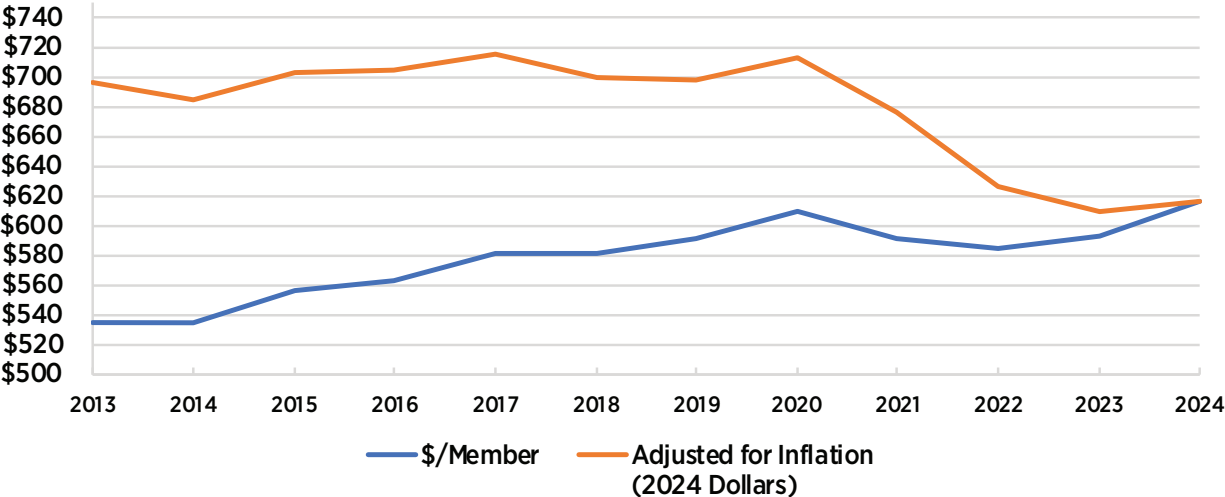
However, the orange line helps explain the inflationary effect and you see that both lines intersect in 2024.

\$534.92/member in 2013 had the economic power of what is \$695/member in 2024. As the years have gone by, your dues revenue has gone up. But when compared on an average per member basis, the contracts have not kept up to inflation.

What is exciting is that AUPE members are demanding their worth at the table. Wage gains

that are at or above inflation will offset future inflationary pressures. Inflation is estimated to be systemically higher than the traditional 2.0% Bank of Canada target for the foreseeable future.

Figure AB: AUPE Average Dues/Member 2013 - 2024



The Effect of a Dues Increase in 2025

The actual dollar impact of an increase in dues from 1.25% to 1.50% varies depending on the base income. Use the following examples to understand the change in contributions for a given wage.

A base wage of \$15 per hour contributes ~ \$0.19 in dues. If the increase takes effect July 2025, the same wage will contribute ~ \$0.04 more.

A base wage of \$20 per hour contributes \$0.25 in dues. If the increase takes effect July 2025, the same wage will contribute ~\$0.05 more.

A base wage of \$25 per hour contributes ~\$0.31 in dues. If the increase takes effect July 2025, the same wage will contribute ~ \$0.06 more.

A base wage of \$30 per hour contributes ~\$0.38 in dues. If the increase takes effect July 2025, the same wage will contribute ~ \$0.08 more.

A base wage of \$35 per hour contributes ~ \$0.44 in dues. If the increase takes effect July 2025, the same wage will contribute ~ \$0.09 more.

A base wage of \$40 per hour contributes \$0.50 in dues. If the increase takes effect July 2025, the same wage will contribute \$0.10 more.

A base wage of \$45 per hour contributes ~ \$0.56 in dues. If the increase takes effect July 2025, the same wage will contribute ~ \$0.11 more.

A base wage of \$50 per hour contributes ~ \$0.63 in dues. If the increase takes effect July 2025, the same wage will contribute \$0.13 more.

A base wage of \$55 per hour contributes ~ \$0.69 in dues. If the increase takes effect July 2025, the same wage will contribute ~ \$0.14 more.

A base wage of \$60 per hour contributes \$0.75 in dues. If the increase takes effect July 2025, the same wage will contribute \$0.15 more.

A base wage of \$65 per hour contributes ~ \$0.81 in dues. If the increase takes effect July 2025, the same wage will contribute ~ \$0.16 more.

A base wage of \$70 per hour contributes ~\$0.88 in dues. If the increase takes effect July 2025, the same wage will contribute ~ \$0.18 more.

A base wage of \$75 per hour contributes \$0.94 in dues. If the increase takes effect July 2025, the same wage will contribute ~ \$0.19 more.

A base wage of \$80 per hour contributes \$1.00 in dues. If the increase takes effect July 2025, the same wage will contribute \$0.20 more.

Dues Increase as an Investment in Member's Future

The number of hours worked will determine how much the overall impact of the change in contributions proposed. However, our dues should be seen as an investment in ourselves. For example, members that earn \$20/hour. We the members need to leverage our strength to turn that \$0.05 dues increase into \$5.00 in wages at the bargaining table and they are a tax credit.

Effect of Dues Increase on Paycheque

Based on the 2023/24 figures, with the increase of dues members would contribute an average of:

- \$4.74 more each paycheque if they are paid every 2 weeks. (26 pay periods in a year)...
- or
- \$5.14 more each paycheque if they are paid twice each month (24 pay periods in a year)...

Financial Forecasts

There are three tables in this section in the form of a statement of operations. It contains the proposed budget for this year and a 10-year forecast. Some of the assumptions are listed along with the outcomes. The three tables represent three outcomes of Convention related to the budget and several resolutions (1-1 on dues, 2-1 on rebates).

- Table AC: 10 Year Financial Forecast keeping dues at 1.25% along with a host of assumptions and our defence fund building strategy.
- Table AD: 10 Year Financial Forecast keeping dues at 1.25% stepping back from defence fund building strategy.
- Table AE: 10 Year Financial Forecast increasing dues to 1.5% starting next July 2025, maintain plan for building our Defence Fund.

Table AC: Forecast of the current state of 1.25% dues and keep the Defence Fund strategy.

CATEGORY		10 Year Forecast (rounded to nearest 1000)										
		Proposed 2024/2025 Budget	2025/26 Year 1	2026/27 Year 2	2027/28 Year 3	2028/29 Year 4	2029/30 Year 5	2030/31 Year 6	2031/32 Year 7	2032/33 Year 8	2033/34 Year 9	2034/35 Year 10
A	Revenue	1.25%	64,297,000	65,583,000	66,894,000	68,232,000	69,597,000	70,989,000	72,409,000	73,857,000	75,334,000	76,841,000
B	Forecast Membership Dues (@ 1.25% base)											
C	Investment Income - Reserves											
D	Rental Income	346,000	350,000	354,000	357,000	361,000	364,000	368,000	372,000	375,000	379,000	383,000
E	Interest and Other Income	750,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000
F	Forecast Operational Revenue	64,132,000	65,297,000	66,587,000	67,901,000	69,243,000	70,611,000	72,007,000	73,431,000	74,882,000	76,363,000	77,874,000
G	Expenses											
H	Forecast Operational Expenses	68,051,000	69,810,000	71,130,000	72,680,000	74,260,000	75,880,000	77,540,000	79,230,000	80,960,000	82,730,000	84,540,000
I	Fund Transfers											
J	Reserve - Contingency Fund	630,360	643,000	656,000	669,000	682,000	696,000	710,000	724,000	739,000	753,000	768,000
K	Reserve - Defence Fund	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000
L	Forecast Reserve Fund Transfers	3,630,360	3,643,000	3,656,000	3,669,000	3,682,000	3,696,000	3,710,000	3,724,000	3,739,000	3,753,000	3,768,000
M	Total Expenses & Reserve Fund Transfers	71,681,360	73,453,000	74,786,000	76,349,000	77,942,000	79,576,000	81,250,000	82,954,000	84,699,000	86,483,000	88,300,000
N	Revenue in Excess of Operational Expenses and Reserve Fund Transfers	(7,549,360)	(8,156,000)	(12,199,000)	(12,448,000)	(12,699,000)	(12,965,000)	(13,243,000)	(13,523,000)	(13,817,000)	(14,120,000)	(14,284,000)

Forecast Assumptions:

- Revenue: Average annual dues revenue increase 2% (total membership)
- Continue annual transfer to Defence Fund & Contingency savings (line J&K)
- Conservative Inflation: Forecast Year 1 @ 2%, Year 2-10 @ 2.25%
- Investment income from reserves returned to back to reserves (line C)
- Continue AUPE strategic plan focus on bargaining gains and membership mobilization
- Continued membership service enhancements
- Continue member activism in the worksite and bargaining
- 50% Local rebates for 2024/25 & Year 1; (100% Year 2 - 10)
- Available cash set aside for operations \$4M (June 30/24)

Forecast Outcomes:

- 2024/25 Statement of Operations: Deficit
- 10 Year Forecast Statements of Operation: Deficits
- Net effect to operational cash flow: 2024/25 (\$4.14M), Year 1: (\$4.7M)... Year 2: (\$8.79M)... etc.
- Time until negative operational cash flow: Approx. 1 year (Fall 2025)
- Investment returns & savings: By Year 8, the equivalent of the current value of your Defence Fund \$71M would be needed to pay for the services
- Time to have enough chequing cash equivalent of 4 months of expenses: Not Possible

Summary: This is not a sustainable approach if the goal is to maintain and enhance services, ramp up bargaining, build up our Defence Fund, and build a contingency safety net for long term. AUPE's annual operational costs cannot be covered by dues/rental revenue. Members would need to rely on their savings. (Investment reserves) along with consistent positive returns or reduce operations.

Table AD: Forecast with future dues at 1.25% starting next July 2025.

CATEGORY	Proposed 2024/2025 Budget	10 Year Forecast (rounded to nearest 1000)																		
		2025/26 Year 1	2026/27 Year 2	2027/28 Year 3	2028/29 Year 4	2029/30 Year 5	2030/31 Year 6	2031/32 Year 7	2032/33 Year 8	2033/34 Year 9	2034/35 Year 10									
Revenue																				
B Forecast Membership Dues (@ 1.25% base)	63,036,000	64,297,000	65,583,000	66,894,000	68,232,000	69,597,000	70,989,000	72,409,000	73,857,000	75,334,000	76,841,000									
C Investment Income - Reserves	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
D Rental Income	346,000	350,000	354,000	357,000	361,000	364,000	368,000	372,000	375,000	379,000	383,000									
E Interest and Other Income	750,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000									
F Forecast Operational Revenue	64,132,000	65,297,000	66,587,000	67,901,000	69,243,000	70,611,000	72,007,000	73,431,000	74,882,000	76,363,000	77,874,000									
Expenses																				
H Forecast Operational Expenses	68,051,000	69,810,000	71,530,000	73,260,000	75,000,000	76,780,000	78,600,000	80,460,000	82,360,000	84,300,000	86,290,000									
I Fund Transfers																				
J Reserve - Contingency Fund																				
K Reserve - Defence Fund																				
L Forecast Reserve Fund Transfers																				
M Total Expenses & Reserve Fund Transfers	68,051,000	69,810,000	71,530,000	73,260,000	75,000,000	76,780,000	78,600,000	80,460,000	82,360,000	84,300,000	86,290,000									
N Revenue In Excess of Operational Expenses and Reserve Fund Transfers	(3,919,000)	(4,513,000)	(8,543,000)	(8,779,000)	(9,017,000)	(9,269,000)	(9,533,000)	(9,799,000)	(10,078,000)	(10,367,000)	(10,516,000)									

Forecast Assumptions:

- Revenue: Average annual dues revenue increase 2% (total membership)
- ~~Continue annual transfer to Defence Fund & Contingency Savings~~ (line J & K)
- Conservative inflation: Forecast Year 1 @ 2%, Year 2-10 @ 2.25%
- Investment income from reserves returned to back to reserves (line C)
- Continue AUPE strategic plan focus on bargaining gains and membership mobilization
- Continued membership service enhancements
- Continue member activism in the worksite and bargaining
- 50% Local rebates for 2024/25 & Year 1; (100% Year 2 - 10)
- Available cash set aside for operations \$4M (June 30/24)

Forecast Outcomes:

- 2024/25 Statement of Operations: Deficit
- 10 Year Forecast Statements of Operation: Deficits
- Net effect to operational cash at year end: ~~2024/25 (\$4.14M), Year 1-10 (\$4.7M), Year 2-10 (\$8.79M), etc.~~ **Now: 2024/25 (\$0.5M), Year 1: (\$1.1M), Year 2: (\$5.1M), etc**
- Time until negative operational cash flow: ~~Approx. 1 year (fall 2025)~~ **Now: 2.5 Years (winter 2027)**
- Investment returns & savings = By year 8, ~~the equivalent roughly half of~~ the current value of your Defence Fund \$71M would be needed to sustain services
- Time to have enough chequing cash equivalent to 4 months of expenses: Not Possible

Summary: This is not a sustainable approach if the goal is to maintain and enhance services, ramp up bargaining, build up our Defence Fund, and build a contingency safety net for long term. AUPE's annual operational costs ~~still~~ cannot be covered by dues/rental revenue. Members would need to rely on their savings (investment reserves) along with consistent positive returns or reduce operations.

Table AE: Forecast with future dues at 1.5% starting next July 2025, build up the Defence Fund, enhance services

CATEGORY	Proposed 2024/2025 Budget	10 Year Forecast (rounded to nearest 1000)														
		2025/26 Year 1	2026/27 Year 2	2027/28 Year 3	2028/29 Year 4	2029/30 Year 5	2030/31 Year 6	2031/32 Year 7	2032/33 Year 8	2033/34 Year 9	2034/35 Year 10					
A	Revenue	1.25%	1.25%	1.50%	1.25%	1.50%	1.25%	1.50%	1.25%	1.50%	1.25%	1.50%	1.25%	1.50%	1.25%	1.50%
B	Forecast Membership Dues (@ 1.25% base)	63,036,000	64,297,000	65,583,000	66,894,000	68,232,000	69,597,000	70,989,000	72,409,000	73,857,000	75,334,000	76,841,000	78,378,000	79,945,000	81,543,000	83,172,000
B2	Forecast Impact of 1.5% Dues Increase	-	12,859,000	13,117,000	13,379,000	13,646,000	13,919,000	14,198,000	14,482,000	14,771,000	15,067,000	15,368,000	15,674,000	15,985,000	16,301,000	16,622,000
C	Investment Income - Reserves	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
D	Rental Income	346,000	350,000	354,000	357,000	361,000	364,000	368,000	372,000	375,000	379,000	383,000	387,000	391,000	395,000	399,000
E	Interest and Other Income	750,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000
F	Forecast Operational Revenue	64,132,000	78,156,000	79,704,000	81,280,000	82,889,000	84,530,000	86,205,000	87,913,000	89,653,000	91,430,000	93,242,000	95,089,000	96,971,000	98,888,000	100,831,000
G	Expenses															
H	Forecast Operational Expenses	68,051,000	69,810,000	75,130,000	76,680,000	78,260,000	79,880,000	81,540,000	83,230,000	84,960,000	86,730,000	88,540,000	90,385,000	92,265,000	94,180,000	96,130,000
I	Fund Transfers															
J	Reserve - Contingency Fund	630,360	643,000	656,000	669,000	682,000	696,000	710,000	724,000	739,000	753,000	768,000	783,000	798,000	813,000	828,000
K	Reserve - Defence Fund	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000
L	Forecast Reserve Fund Transfers	3,630,360	3,643,000	3,656,000	3,669,000	3,682,000	3,696,000	3,710,000	3,724,000	3,739,000	3,753,000	3,768,000	3,783,000	3,798,000	3,813,000	3,828,000
M	Total Expenses & Reserve Fund Transfers	71,681,360	73,453,000	78,786,000	80,349,000	81,942,000	83,576,000	85,250,000	86,954,000	88,699,000	90,483,000	92,306,000	94,168,000	96,070,000	98,013,000	100,000,000
N	Revenue In Excess of Operational Expenses and Reserve Fund Transfers	(7,549,360)	4,703,000	918,000	931,000	947,000	954,000	955,000	959,000	954,000	947,000	947,000	947,000	947,000	947,000	947,000

Forecast Assumptions:

- Revenue: Average annual dues revenue increase 2% (total membership)
- Continue annual transfer to Defence Fund & Contingency Savings (line J & K)
- Conservative Inflation: Forecast Year 1 @ 2%, Year 2-10 @ 2.25%
- Investment income from reserves returned to back to reserves (line C)
- Continue AUPE strategic plan focus on bargaining gains and membership mobilization
- Continued membership service enhancements
- Continue member activism in the worksite and bargaining
- 50% Local rebates for 2024/25 & Year 1; (100% Year 3 - 10)
- Available cash set aside for operations \$4M (June 30/24)
- **2024/25 Dues 1.25% (until June 30, 2025)**
- **July 2025 Dues 1.50%**

Forecast Outcomes:

- 2024/25 Statement of Operations: Deficit
- 10 Year Forecast Statements of Operation: **Surplus \$4.7 Year 1 (due to 50% local rebate assumption), \$90,000 surplus.**
- **Operational surplus at end of year would be put into Defence Fund as per policy**
- Effect on operational cash at year end: ~~2024/25: (\$0.5M), Year 1: (\$1.1M), Year 2: (\$1.4M), etc.~~ **NOW: 2024/25 (\$0.1M), Year 1: +\$8.1M, Year 2: +\$4.3M, ...**
- Time until negative operational cash flow: ~~2.5 Years (winter-2027)~~ **Now: Not Applicable**
- Investment Returns & Savings = **Not needed to support operations**
- Time to have enough chequing cash to handle the equivalent of 4 months of expenses: **Approximately 5 years, 11 months (71 months)**

Summary: AUPE Members would be unstoppable. Operational liquidity would recover to the 4 month level within 6 years. The Defence Fund would grow in addition to the long term savings contingency. Would set members up to begin to establish an operational investment fund to offset operational costs in the future. Defence fund would strengthen at a faster pace toward the fully funded status. (\$2.19M) with additional operational surpluses compounded with long term investment growth.

Forecast Summary

Table AF:			
Comparison of Forecast Revenue In Excess of Operational Expenses and Reserve Fund Transfers			
	TABLE AC	TABLE AD	TABLE AE
DUES	1.25%	1.25%	1.25% 2024/2025 1.50% Year 1 - 10
2024/2025	(7,549,360)	(3,919,000)	(7,549,360)
YEAR 1	(8,156,000)	(4,513,000)	4,703,000
YEAR 2	(12,199,000)	(8,543,000)	918,000
YEAR 3	(12,448,000)	(8,779,000)	931,000
YEAR 4	(12,699,000)	(9,017,000)	947,000
YEAR 5	(12,965,000)	(9,269,000)	954,000
YEAR 6	(13,243,000)	(9,533,000)	955,000
YEAR 7	(13,523,000)	(9,799,000)	959,000
YEAR 8	(13,817,000)	(10,078,000)	954,000
YEAR 9	(14,120,000)	(10,367,000)	947,000
YEAR 10	(14,284,000)	(10,516,000)	1,084,000

10 YEAR FORECAST

AUPE BUDGET SUPPLEMENTAL INFORMATION

In June, your Provincial Executive approved a budget that was proposed by your Finance Committee. As per our Constitution, this approved budget will be presented to Convention 2024, who may adopt the budget or amend. After the finance report is passed, Convention will debate the budget. This report contains some additional information to help delegates make their decision. This supplemental information compares the outcomes of their budget from Convention 2023. Table AG compares the 2024/25 budget adopted by PE with the results of the most recent fiscal year.

Table AG: 2023/24 Budget & Actual vs. 2024/25 Proposed Budget					
	A	B	C	D	
1	CATEGORY	Last Year		This Year	1
2		2023/2024	2023/2024	2024/2025	2
3		Budget	Actuals	Proposed Budget	3
4			Jul.1/23 - Jun.30/24	Jul. 1/24 - Jun.30/25	4
5	REVENUE				5
6	Membership Dues	58,100,000	61,698,706	63,036,000	6
7	Investment Income - Reserves	0	7,138,017	0	7
8	Rental Income	353,712	358,335	346,000	8
9	Interest and Other Income	600,000	789,120	750,000	9
10	TOTAL REVENUE	59,053,712	69,984,178	64,132,000	10
11	EXPENSES				11
12	Wages	29,464,880	28,318,113	31,057,000	12
13	Overtime	2,348,560	2,096,867	2,313,000	13
14	Pension	3,860,520	3,663,852	3,996,000	14
15	Benefits	6,435,334	5,758,526	6,053,000	15
16	Travel - Staff	1,307,004	1,679,042	1,426,000	16
17	Travel - Members	2,051,608	2,634,603	2,347,000	17
18	Travel - Members - Time Off	2,387,340	2,716,279	2,400,000	18
19	Local Rebates	6,600,000	6,770,277	3,358,000	19
20	Area Council Rebates	468,000	365,093	394,000	20
21	Professional Fees / Legal	1,489,176	983,972	1,100,000	21
22	Professional Fees / Consulting	533,560	665,095	821,000	22
23	Advertising	270,636	328,250	548,000	23
24	Sponsorships / Donations	12,084	8,750	15,000	24
25	Members Benefits	300,000	299,764	300,000	25
26	Strike Pay	0	0	0	26
27	Regional Offices	436,152	402,242	440,000	27
28	Administration - Supplies & Misc.	281,308	298,299	292,000	28
29	Administration - Insurance	298,320	298,947	305,000	29
30	Administration - Interest On Long Term Debt	2,005,692	1,878,821	1,845,000	30
31	Administration - Property Taxes	846,516	783,123	744,000	31
32	Administration - Printing, Postage & Mailing	435,088	399,853	466,000	32
33	Utilities	1,185,900	1,117,946	1,189,000	33
34	Equipment	1,731,828	1,938,218	2,130,000	34
35	Depreciation	3,528,792	3,199,891	3,400,000	35
36	Maintenance and Repairs	1,085,556	1,125,989	1,112,000	36
37	Unrealized Gain/Loss on Interest Rate Swap	0	545,876	0	37
38	TOTAL OPERATIONAL EXPENSES	69,363,854	68,277,686	68,051,000	38
39	Reserve - Contingency Fund			630,360	39
40	Reserve - Defense Fund			3,000,000	40
42	TOTAL FUND TRANSFERS			3,630,360	42
43	TOTAL EXPENSES & RESERVE FUND TRANSFERS	69,363,854	68,277,686	71,681,360	43
44	REVENUE IN EXCESS OF EXPENDITURES & RESERVE FUND TRANSFERS	(10,310,142)	1,706,492	(7,549,360)	44

Tables AH compares the budget approved last year by Convention with the actual operational revenue and expenses incurred up to June 1, 2024. The proposed budget is shown for information.

Table AH: 2023/24 Budget Variance						
	A	B	C	E	D	
1	CATEGORY	Last Year			This Year	1
2		2023/2024	2023/2024	Variance	2024/2025	2
3		Budget	Actuals	BUDGET VS ACTUAL	Proposed Budget	3
4			Jul.1/23 - Jun.30/24	[E] = [C] - [B]	Jul. 1/24 - Jun.30/25	4
5	REVENUE					5
6	Membership Dues	58,100,000	61,698,706	3,598,706	63,036,000	6
7	Investment Income - Reserves	0	7,138,017	7,138,017	0	7
8	Rental Income	353,712	358,335	4,623	346,000	8
9	Interest and Other Income	600,000	789,120	189,120	750,000	9
10	TOTAL REVENUE	59,053,712	69,984,178	10,930,466	64,132,000	10
11	EXPENSES					11
12	Wages	29,464,880	28,318,113	(1,146,767)	31,057,000	12
13	Overtime	2,348,560	2,096,867	(251,693)	2,313,000	13
14	Pension	3,860,520	3,663,852	(196,668)	3,996,000	14
15	Benefits	6,435,334	5,758,526	(676,808)	6,053,000	15
16	Travel - Staff	1,307,004	1,679,042	372,038	1,426,000	16
17	Travel - Members	2,051,608	2,634,603	582,995	2,347,000	17
18	Travel - Members - Time Off	2,387,340	2,716,279	328,939	2,400,000	18
19	Local Rebates	6,600,000	6,770,277	170,277	3,358,000	19
20	Area Council Rebates	468,000	365,093	(102,907)	394,000	20
21	Professional Fees / Legal	1,489,176	983,972	(505,204)	1,100,000	21
22	Professional Fees / Consulting	533,560	665,095	131,535	821,000	22
23	Advertising	270,636	328,250	57,614	548,000	23
24	Sponsorships / Donations	12,084	8,750	(3,334)	15,000	24
25	Members Benefits	300,000	299,764	(236)	300,000	25
26	Strike Pay	0	0	0	0	26
27	Regional Offices	436,152	402,242	(33,910)	440,000	27
28	Administration - Supplies & Misc.	281,308	298,299	16,991	292,000	28
29	Administration - Insurance	298,320	298,947	627	305,000	29
30	Administration - Interest On Long Term Debt	2,005,692	1,878,821	(126,871)	1,845,000	30
31	Administration - Property Taxes	846,516	783,123	(63,393)	744,000	31
32	Administration - Printing, Postage & Mailing	435,088	399,853	(35,235)	466,000	32
33	Utilities	1,185,900	1,117,946	(67,954)	1,189,000	33
34	Equipment	1,731,828	1,938,218	206,390	2,130,000	34
35	Depreciation	3,528,792	3,199,891	(328,901)	3,400,000	35
36	Maintenance and Repairs	1,085,556	1,125,989	40,433	1,112,000	36
37	Unrealized Gain/Loss on Interest Rate Swap	0	545,876	545,876	0	37
38	TOTAL OPERATIONAL EXPENSES	69,363,854	68,277,686	(1,086,168)	68,051,000	38
39	Reserve - Contingency Fund	-	-	-	630,360	39
40	Reserve - Defense Fund	-	-	-	3,000,000	40
42	TOTAL FUND TRANSFERS				3,630,360	42
43	TOTAL EXPENSES & RESERVE FUND TRANSFERS	69,363,854	68,277,686	(1,086,168)	71,681,360	43
44	REVENUE IN EXCESS OF EXPENDITURES & RESERVE FUND TRANSFERS	(10,310,142)	1,706,492	12,016,634	(7,549,360)	44

Table AI (below) shows the variance between the budget Convention passed last year and the proposed budget this year. The most notable change is the dedication of dues to the defence fund as part of the defence fund strategy in policies approved by PE earlier this year. In essence, \$3M of dues are dedicated to the defence fund each year, along with 1% for contingency savings.

While the tables show a budget surplus last year of \$1.7M, recognize that is not the same as cash. Income statements (or statements of operations) are not cash statements. There are non-cash expenses in addition to unrealized gains and losses in the statement of operations. An example of a non-cash expense is depreciation. Just as investment income (line C17) contains unrealized gains in your funds like the defence fund. An unrealized gain or loss is the change in value of an asset you own (e.g. stock) but haven't sold. Even though you haven't sold it, the value can go up and down, so those gains or losses are not realized (unrealized) until they are sold. Sometimes people call them 'paper gains' or 'a paper loss', but the change in value during a period of time still needs to be included in our financial statements... even though you have not received cash as you are still holding the investment. The gain or loss is only "realized" when you sell the asset.

Table AH demonstrates that proposed budget expense was less than the actual expenses incurred last year. While some expenses like interest rate swap are unrealized expenses, the transfer to the defence fund is offset by the 50% reduction in rebates to Locals collectively hold a reserve of \$24.2M as of June 30, 2024.

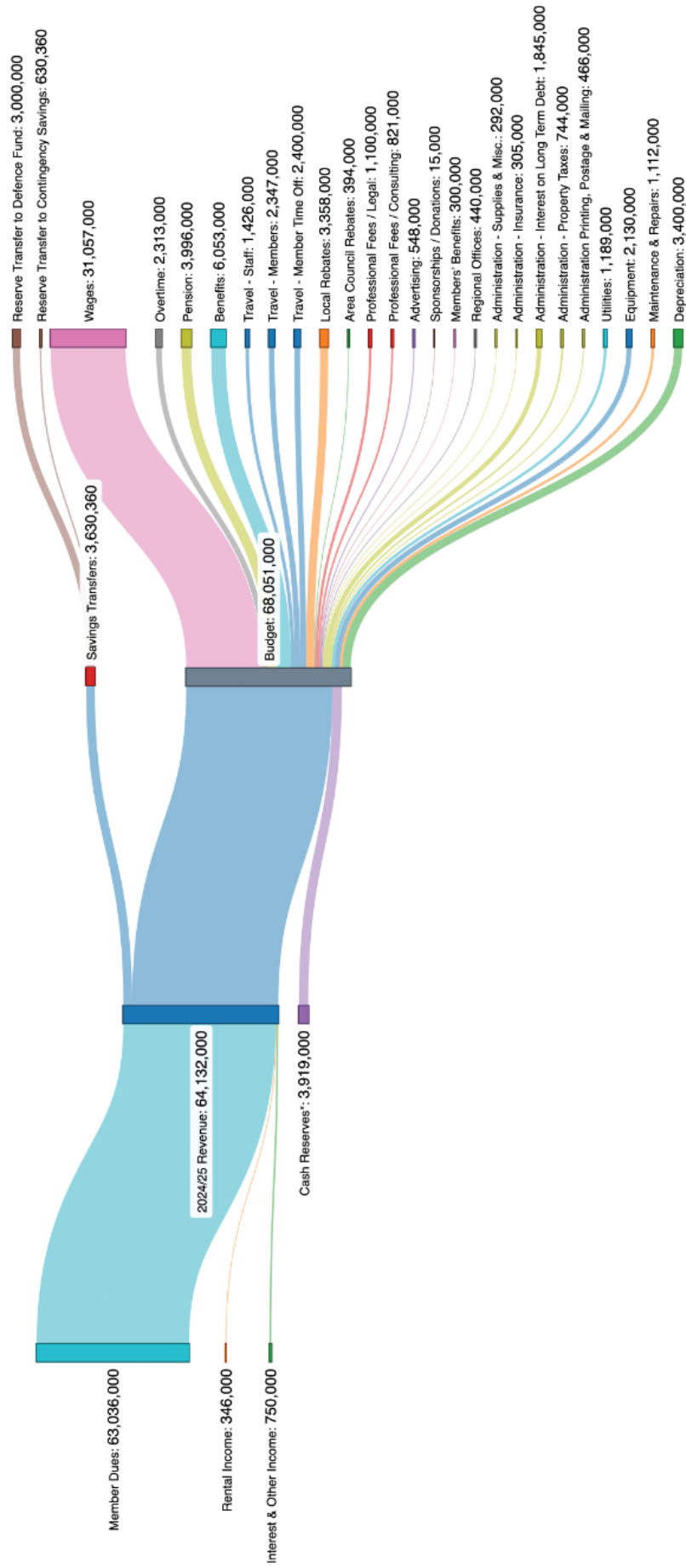
Table AI: Variance: 2023/24 Budget vs Proposed Budget					
	A	B	D	F	
1		Last Year	This Year		1
2	CATEGORY	2023/2024	2024/2025	Variance	2
3		Budget	Proposed Budget	BUDGET VS BUDGET	3
4		Jul. 1/23 - Jun.30/24	Jul. 1/24 - Jun.30/25	[F] = [D] - [B]	4
5	REVENUE				5
6	Membership Dues	58,100,000	63,036,000	4,936,000	6
7	Investment Income - Reserves	0	0	0	7
8	Rental Income	353,712	346,000	(7,712)	8
9	Interest and Other Income	600,000	750,000	150,000	9
10	TOTAL REVENUE	59,053,712	64,132,000	5,078,288	10
11	EXPENSES				11
12	Wages	29,464,880	31,057,000	1,592,120	12
13	Overtime	2,348,560	2,313,000	(35,560)	13
14	Pension	3,860,520	3,996,000	135,480	14
15	Benefits	6,435,334	6,053,000	(382,334)	15
16	Travel - Staff	1,307,004	1,426,000	118,996	16
17	Travel - Members	2,051,608	2,347,000	295,392	17
18	Travel - Members - Time Off	2,387,340	2,400,000	12,660	18
19	Local Rebates	6,600,000	3,358,000	(3,242,000)	19
20	Area Council Rebates	468,000	394,000	(74,000)	20
21	Professional Fees / Legal	1,489,176	1,100,000	(389,176)	21
22	Professional Fees / Consulting	533,560	821,000	287,440	22
23	Advertising	270,636	548,000	277,364	23
24	Sponsorships / Donations	12,084	15,000	2,916	24
25	Members Benefits	300,000	300,000	-	25
26	Strike Pay	0	0	-	26
27	Regional Offices	436,152	440,000	3,848	27
28	Administration - Supplies & Misc.	281,308	292,000	10,692	28
29	Administration - Insurance	298,320	305,000	6,680	29
30	Administration - Interest On Long Term Debt	2,005,692	1,845,000	(160,692)	30
31	Administration - Property Taxes	846,516	744,000	(102,516)	31
32	Administration - Printing, Postage & Mailing	435,088	466,000	30,912	32
33	Utilities	1,185,900	1,189,000	3,100	33
34	Equipment	1,731,828	2,130,000	398,172	34
35	Depreciation	3,528,792	3,400,000	(128,792)	35
36	Maintenance and Repairs	1,085,556	1,112,000	26,444	36
37	Unrealized Gain/Loss on Interest Rate Swap	0	0	0	37
38	TOTAL OPERATIONAL EXPENSES	69,363,854	68,051,000	(1,312,854)	38
39	Reserve - Contingency Fund	-	630,360	630,360	39
40	Reserve - Defense Fund	-	3,000,000	3,000,000	40
42	TOTAL FUND TRANSFERS	-	3,630,360	3,630,360	42
43	TOTAL EXPENSES & RESERVE FUND TRANSFERS	69,363,854	71,681,360	2,317,506	43
44	REVENUE IN EXCESS OF EXPENDITURES & RESERVE FUND TRANSFERS	(10,310,142)	(7,549,360)	2,760,782	44

This budget plans for \$1.3M fewer expenses than planned the previous year and has \$5M more in planned income. So, there is a planned statement of operations deficit of (\$4.1M), but given the proposed plan is to transfer \$3.6M as part of the defence funding strategy and contingency savings policy, it looks like a planned (\$7.5M). There are two caveats; the Local rebates is proposed at 50% of the current rebate amount. Should the rebate reductions or dues increases not pass, the ability for PE to make the transfers from dues to the Defence Fund will not be able to occur as planned.

Earlier, Table AH showed that last year our proposed budget expense was less than the actual expenses. For Table AI, although some expenses like 'interest rate swap' are unrealized expenses, the transfer to your Defence Fund is offset by the 50% reduction in rebates to Locals (if directed by convention).

Figure AJ: Sankey Diagram AUPE Operational Budget Inflows & Outflows

A Sankey diagram can help visualize inflows and outflows. Figure AB has been created to help visualize the proposed 2024/25 budget that was passed by your Provincial Executive and will be before Convention.



ACKNOWLEDGEMENTS

We want to acknowledge the hard work and determination of the AUPE staff assigned to assist your Finance Committee. There are plenty of folks that go into helping us keep member finances transparent and consistent and work to improve training, processes and procedure. Thank you to AUPE staff in the Finance/Accounting, Member Records, and Research departments. Your Committee wishes to give a gracious thank you to Cecilia and Destiny who provide sage advice and coordination to secure outcomes.

In the short time we have been together as a standing committee there have been dozens of recommendations that your Provincial Executive have debated and enacted, with the goal of strengthening the positions of members to secure gains at the bargaining table.

EST Huseby wants to acknowledge your hard working, dedicated, engaged Finance Committee. Margaret, Steve, Michelle, Kathleen S., Ryan, Jesse, Percy, and T: Thank you!

Additional Information for Convention Preparation & Question Submission

This is an important Convention with some very important decisions to be made but it is impossible to anticipate everything you may need unless you tell us. For the questions you would like to have answered, or any information you suggest being generated to help delegates make decisions, please email EST Huseby.j.huseby@aupe.org as soon as possible to help timely responses before convention.

EST Huseby will post information asked for by the members to a new 'Finance FAQ' section that will be available starting September 16. This will be updated regularly right up to the start of Convention. The section will not be up on the Convention website before September 16 but will be found at <https://www.aupe.org/convention#15127> but please send in your questions as soon as possible to give time to answer.

Stay safe out there, and we'll see you on the Line.

On behalf of your Finance Standing Committee and in solidarity!

Justin Huseby
Chair AUPE Standing Committee on Finance
AUPE Executive-Secretary-Treasurer

2024 - 2025 Proposed AUPE Budget		
1	CATEGORY	BUDGET
5	REVENUE	
6	Membership Dues	63,036,000
7	Investment Income - Reserves	0
8	Rental Income	346,000
9	Interest and Other Income	<u>750,000</u>
10	TOTAL REVENUE	64,132,000
11	EXPENSES	
12	Wages	31,057,000
13	Overtime	2,313,000
14	Pension	3,996,000
15	Benefits	6,053,000
16	Travel - Staff	1,426,000
17	Travel - Members	2,347,000
18	Travel - Members - Time Off	2,400,000
19	Local Rebates	3,358,000
20	Area Council Rebates	394,000
21	Professional Fees / Legal	1,100,000
22	Professional Fees / Consulting	821,000
23	Advertising	548,000
24	Sponsorships / Donations	15,000
25	Members Benefits	300,000
26	Strike Pay	0
27	Regional Offices	440,000
28	Administration - Supplies & Misc.	292,000
29	Administration - Insurance	305,000
30	Administration - Interest On Long Term Debt	1,845,000
31	Administration - Property Taxes	744,000
32	Administration - Printing, Postage, & Mailing	466,000
33	Utilities	1,189,000
34	Equipment	2,130,000
35	Depreciation	3,400,000
36	Maintenance and Repairs	1,112,000
37	Unrealized Gain/Loss on Interest Rate Swap	<u>0</u>
38	TOTAL OPERATIONAL EXPENSES	68,051,000
39	Reserve - Contingency Fund	630,360
40	Reserve - Defence Fund	<u>3,000,000</u>
42	TOTAL FUND TRANSFERS	3,630,360
43	TOTAL EXPENSES & RESERVE FUND TRANSFERS	71,681,360
44	REVENUE IN EXCESS OF EXPENDITURES RESERVE FUND TRANSFERS	(7,549,360)

AUPE Account Explanation 2024-2025 Proposed Budget

REVENUE

Line 6 Membership Dues

Dues withheld and remitted (by employers) on behalf of AUPE Members

Line 7 Investment Income

Returns from long term investments

Line 8 Rental Income

Income earned from the partial rental of the Calgary Regional Office

Line 9 Interest and Other Income

Realized interest from our short-term investments. (chequing accounts) and any other income not included in the above categories

EXPENSES

Line 12 Wages

Wages for all AUPE staff (full-time, part-time, casual, temporary, & executive)

Line 13 Overtime

Overtime budgeted for AUPE support staff (excluding management & executive)

Line 14 Pension

Employer paid portion of AUPE Staff pension/RRSP plans

Line 15 Benefits

Employer paid portion of AUPE staff group benefits plans

Line 16 Travel – Staff

Costs for AUPE staff to travel to conduct AUPE business

Line 17 Travel – Members

AUPE HQ Costs for Members to attend courses, meetings, and events

Line 18 Travel – Members – Time Off

AUPE HQ cost of 'Time Off for Union Business'

Line 19 Rebates

Disbursements issued to Locals based on policy

Line 20 Area Council Rebates

Disbursements issued to Area Councils based on policy

Line 21 Professional Fees – Legal

Support from external service providers for legal and arbitration

Line 22 Professional Fees – Consulting

Fees paid to external service providers for example: software support, auditing, negotiations, organizing, training

Line 23 Advertising

AUPE advertising costs

Line 24 Sponsorships/Donation

Funds to sponsor events promoting AUPE

Line 25 Strike Pay

Costs incurred for strike and lockout actions

Line 26 Members Benefits

Monies transferred to Member Benefits (\$0.25 per member per month)

Line 27 Regional Offices

Rental costs for regional offices

Line 28 Administration - Supplies & Miscellaneous

Supplies and miscellaneous administrative costs

Line 29 Administration - Insurance

AUPE insurance costs

Line 30 Administration - Interest on Long term Debt

Interest on AUPE building loan

Line 31 Administration - Property Taxes:

For AUPE offices in Calgary, Edmonton, and Peace River

Line 32 Administration - Printing, Postage & Mailing

Expenses from listed activities

Line 33 Utilities

Cost of water, electricity, natural gas, and phones

Line 34 Equipment

Costs associated with purchasing equipment for our offices and programs. Equip. purchased for less than \$5,000 is expensed, Equipment costing over \$5,000 is capitalized

Line 35 Depreciation

Assets purchased for more than \$5,000 are "capitalized" and subsequently expensed over a period of years

Line 36 Maintenance & Repairs

Costs associated with maintaining equipment offices (e.g. leasehold improvements, equipment, grounds, security, garbage removal, and caretaking)

Line 37 Unrealized Gain/Loss on Interest Rate Swap

The difference between "floating rate" (prime plus 1.25%) vs a fixed rate of 4.28% on our long-term debt

RESERVE FUND TRANSFERS

Line 38 Reserve - Contingency Fund

Transfer of 1% of dues into your Contingency Fund savings

Line 39 Reserve - Defence Fund

Transfer \$3M of dues into your Defence Fund

MEMBERS' BENEFITS COMMITTEE

Committee Members

Justin Huseby – Chair
Katherine Alexander, Local 002, Lacombe
Debora Coombes, Local 057, Bowden
Susan Cowtan, Local 002, Edmonton
Beverly McQuiston, Local 006, Red Deer
Rashim Sharma, Local 006, Edmonton
Gautam (Gary) Verma, Local 095, Chestermere
Kim Lockert – Staff Advisor / Administration

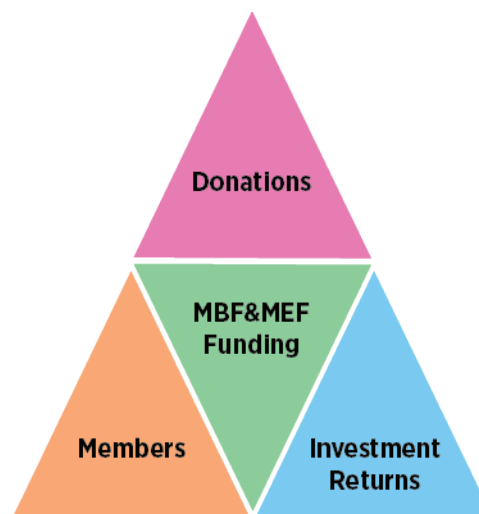
Greetings Convention Delegates! We hope you are having a fantastic and safe Convention!

Your Members' Benefits Committee administers the Members' Benevolent Fund (MBF) and the Members' Education Fund (MEF) on your behalf. Your MBF was established to assist members who are dealing with an emergent need requiring financial assistance, and funds other related programs and services. Your MEF was established to help provide scholarships and bursaries to assist members and their families in pursuing educational opportunities.

MBF & MEF Funding

Your MBF and MEF programs are sustained through three sources of funding:

1. AUPE Members
 - Convention 2012 passed a resolution that \$0.25 per member is contributed to the Members' Benefit Committee each month to support the programs and sustain the funds
2. Direct Donations
 - Donations have come from: AUPE vendors, AUPE partners, individual AUPE members, committee initiatives and locals
3. Investment Returns
 - Realized and unrealized investment gains
 - Earned interest and other income



MBF and MEF Investment Policy

The \$0.25 is split according to the terms contained in Policy 8-4 Members' Benefits Fund Investment Policy (IP). The split is currently 77%/23% which works out to: MEF: \$0.1925 and MBF: \$0.0575 (19.25¢/5.75¢).

The Investment Policy (IP) sets parameters for your investments including the risk level to ensure prudent and efficient management of the MBF and MEF. The risk level in the Member's Benefits IP is aligned with AUPE's IP, meaning the funds operate with the same level of risk as AUPE's other investment savings including your Defence Fund.

This is done as part of the committee's approach to ensure that the MBF and MEF are 'sustainable in perpetuity' so they will serve AUPE members today and tomorrow.

MBF & MEF Sustainability

As reported in previous *Reports and Resolutions*, your Members' Benevolent Fund (MBF) and Members' Education Fund (MEF) are sustainable today at maximum target spends for a year. Your MEF can sustain an annual target spend of \$300K for scholarships, bursaries, and other educational initiatives. Your MBF can sustain \$240K in annual support for emergent needs and other programs. Your committee will review the sustainability of both funds after the conclusion of the 2024 fall education bursary and scholarship program.

For 2023/24, your committee continued to work to ensure that your funds are sustainable when factoring specific spend projections, market swings and capital. Thus, we've continued progress on the strategic goals outlined in our 2020, 2021, 2022, and 2023 Convention reports. In essence, our goal is to ensure your MBF & MEF are 'sustainable in perpetuity' for the members. We need to meet the needs of today without compromising the needs of tomorrow.

In other words, we work to see that your MBF and MEF will exist for members forever and we don't compromise a future committees' ability to respond to future environmental considerations. Like any fund, ongoing monitoring and evaluation need to occur to protect the interests of our members.

Building on this strategy, along with comprehensive management of fund investments and investment policy updates from our advisors, your committee continues to balance the desire for a well-funded MBF & MEF and member program needs for today. A maximum spending figure is established each fiscal year in the investment policy to keep both funds sustainable despite fluctuations in the markets. Those targets remain unchanged for the start of the 2024/25 fiscal year, though your MBF will be going through stress testing in late 2024 as part of regular checks on fund sustainability. Your committee will follow up with any necessary amendments to current policy and practices, but the principle of a sustainable level of annual spend being available for the MBF needs to be protected before potential strategies for sustainable changes (increases) can be explored for the MEF. As of June 30, 2024, the MBF was \$9,462,582; the MEF was \$5,350,118 and the return on investments for the previous 12 months was 8.69%. As a whole, 2023/24 was a positive period for your investments, offsetting much of the market hit the portfolio took back in the first quarter of 2022.

Members' Benevolent Fund (MBF)

I am proud to report that the MBF will sustain funding for the AUPE member crisis counselling services line available to all members starting July 2024. Even though this service should be provided by all employers in Alberta, we still have members who do not have access to an 'Employee Family Assistance Program' (EFAP) which are gateways to counselling and other services. I will encourage the component leaders to push their employer to correct this and make this an EMAC issue, or reluctantly a bargaining table matter.

Information on accessing crisis counselling services for AUPE Members and their immediate families, can be found at <https://aupe.org/member-resources/crisis-counselling-service-aupe-members>

Additionally, the committee is currently working on stabilizing financial support for the services provided by Legacy Place Society for AUPE members who are first responders. This includes including those working in corrections, as sheriffs, and other peace officers. Details have not been finalized as of report submission time, but an update is anticipated for the 2024 September PE meeting. For more information on Legacy Place Society programs and resources, visit <https://legacyplacesociety.com>.

2023-2024 MBF Applications

As we forecasted in our 2023 Convention report, your MBF saw an increasing number of applications for emergent needs and given the applications received in July 2024 (the time of the writing of this report), we forecast this increase to continue throughout 2024/25.

Table A: Total (MBF) Applications	
Period	Amount
July 2023 - June 2024: 238 applications	\$118,191
July 2022 - June 2023: 224 applications	\$108,164
July 2021 - June 2022: 202 applications	\$130,297
July 2020 - June 2021: 143 applications	\$81,059
July 2019 - June 2020: 244 applications	\$152,488

MBF Q&A

There are some misconceptions about the Members' Benevolent Fund and confusion on where to find information on it. We've put together a quick Q&A:

- Q: Who can apply for the MBF?
A: Any current AUPE Member who is facing an emergency need. They will have to demonstrate that there is an emergency need and provide all the necessary information and documentation with their application submission.
- Q: What is the process for applying to the MBF?
A: Please check out the link below or visit the AUPE Member Resources' section of the AUPE.org website where you will find additional information on what may be eligible for consideration, required documentation and the deadlines for application submissions. <https://www.aupe.org/member-resources/financial-support/members-benefits-benevolent-fund>

2023/2024 Donations to the Members' Benevolent Fund (MBF)

We would like to acknowledge the donations received for the MBF during the 2023/24 fiscal year. All donations towards the MBF directly help members in need!

- Thank you Local 001 for your generous donation of \$ 25,000 to the MBF!
- Thank you Local 038 for your generous donation of \$ 10,000 to the MBF!
- Thank you Local 004 for your generous donation of \$ 2,000 to the MBF!

The Members' Education Fund (MEF)

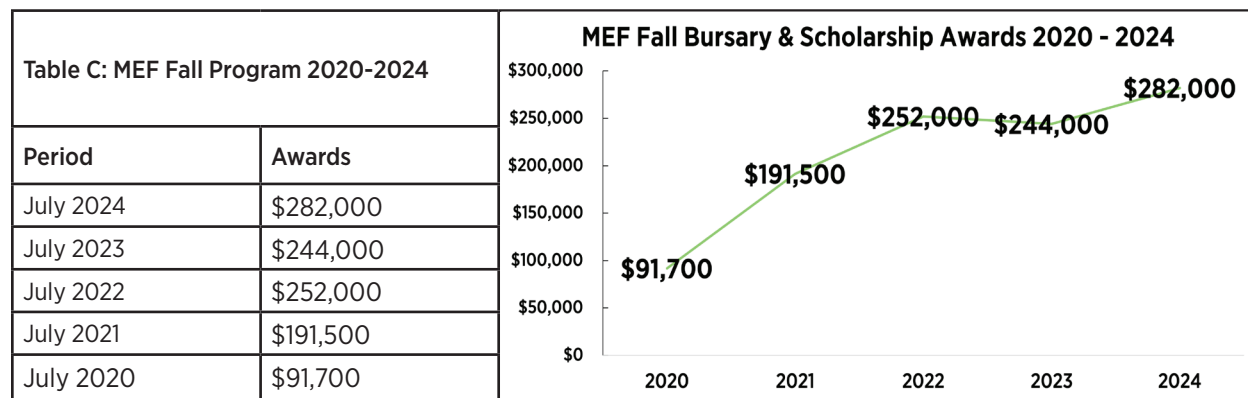
From 2020 - 2023, your MEF could sustain up to \$200,000 in awards before donations. The committee tasked ATB Wealth with optimizing the maximum amount that the MEF could sustainably run, seeking to achieve a goal of \$300,000 per year before donations. The details of this exercise were summarized for Convention 2023, but the takeaway for this report is that the most your MEF is up to \$300,000 annually without taking on riskier investments profile (thus compromising sustainability) or increases in source funding.

Fall 2024 Scholarship & Bursary (Full-time & Part-time Studies)

In July 2024, your committee awarded \$282,000 in scholarships and bursaries to AUPE members and their families as part of the fall 2024 application period. This is an increase of \$46,000 over the fall 2023 program! The outcome of the round is summarized in *Table B* below.

Table B: MEF July 2024 (Fall) Application Period	Amount
July 2024 Applications: 337 Approved: 238 Full Time @ \$1,000; 72 Part-Time @ \$500	\$274,000
Brent Gawne Scholarships Essay Applications: 36 2 Awards @ \$2,000 each	\$4,000
Mary Kehoe Scholarships Essay Applications: 3 2 Awards @ \$2,000 each	\$4,000
Total Awards	\$282,000

The fall 2024 program was the largest fall application period ever, surpassing the previous record from 2022.

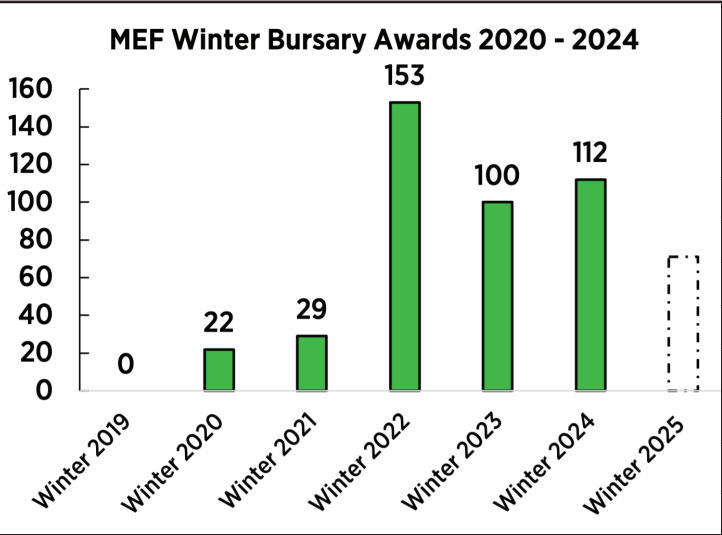


Winter 2024 Bursary Program (Part-Time Studies)

The 2024 winter part-time bursary program successfully awarded 112 education bursaries issued to AUPE members totaling \$56,000. The winter application period was open from October to November 2023 with awards issued in January 2024. *Table D* tracks the history of the winter awards since the inception of the part-time bursary program in 2019.

Table D: MEF Winter Program 2020-2024

Period	Awards	Amount
January 2025	TBD	TBD
January 2024	112	\$56,000
January 2023	106	\$53,000
January 2022	152	\$76,000
January 2021	28	\$8,400
January 2020	22	\$16,500
January 2019	-	-

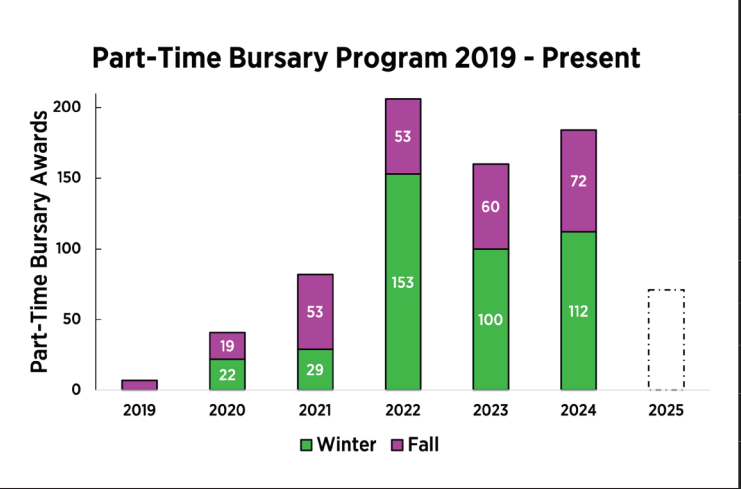


History of Part-Time Bursary Program

The part-time studies bursary program was created in 2019/2020 by the committee in response to the needs identified at the 2018 Convention. While the full-time studies program is open to AUPE members and eligible family members, the part-time program is only open to AUPE members. The fall part-time studies program runs concurrently with the full-time and scholarship awards. There is an opportunity to run a second program for the winter session, though the number of awards is dependent on remaining funds after the fall program. To show the growth and impact of the program for members who cannot take full-time studies is shown in *Table E* which combines both the fall and winter part-time programs since its launch in 2019.

Table E: MEF Part-Time Bursary Program History: Fall and Winter Programs Combined

Year	Winter	Fall	Total
2019	0	7	7
2020	22	19	41
2021	29	53	82
2022	153	53	206
2023	100	60	160
2024	112	72	184
2025	TBD		



2025 Winter Part-Time Bursary Program for AUPE Members

There is ~\$18,000 remaining that can be allocated to run a 2025 winter bursary round for AUPE members now that the fall program has concluded.

A big thank you to Randy Pearson and the belairdirect insurance company for their donation of \$17,500 to your MEF. Be sure to visit Randy in the Convention exhibitor hall. This will be used for bursaries for the winter 2025 program. This generous donation ensures that a minimum of \$35,500 in bursary awards will be available for members for the Winter 2025 program (71x \$500 awards).

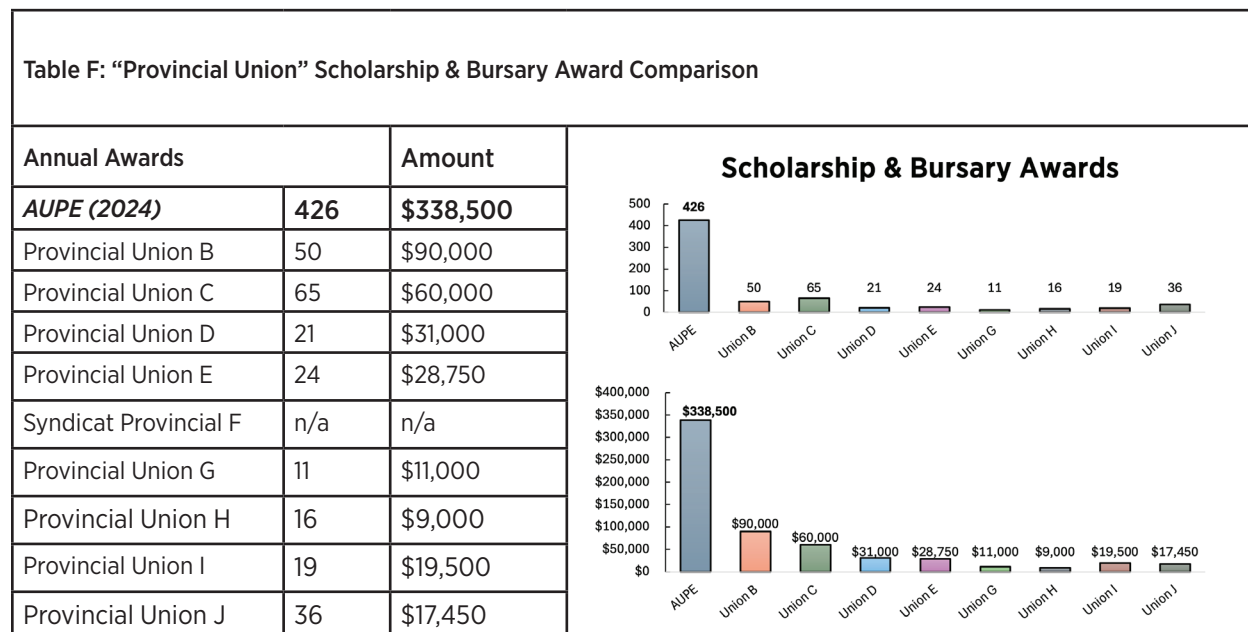
However, 71 bursaries would be well short of the previous winter programs (112, 100, 153) as we are forecasting to receive 120-140 eligible applications for winter 2025. Therefore, we need to raise an additional \$25,000-\$30,000 just to meet the forecasted need or the program will have to scale back at award time.

If your Local is in a financial position to donate and would like more information or a presentation to your council, please have your Local chair reach out to Justin Huseby. For every \$500 donated, one additional bursary will be awarded to an AUPE member in January 2025! The 2025 Winter Bursary application period will run **October 15 – November 29, 2024**.



AUPE Scholarship & Bursary Impact and Comparisons

The total outcome of the 2024 winter and fall programs was \$338,500 in bursaries and scholarships through 426 awards. Though it is not a competition, when compared to similar Canadian “provincial/general employee” unions, you... AUPE issues a lot of scholarships and bursaries for their members. This comparison excludes programs administered by labour federations, in-house education, labour schools, or awards managed by educational institutions. *Table G* contains a consolidation of publicly available information put out by comparable provincial public sector unions compared to AUPE’s 2024 results.



While *Table F* provides a reference nationally, *Table G* provides context to other Alberta based public sector unions. It is important to note this is a consolidation of publicly available information put out by the unions and excludes any programs administered by labour federations, in-house education, labour schools, or awards managed by educational institutions.

In summary, these tables and graphs impress the substantial impact and benefits for AUPE members and their families in their educational pursuits. However, the future of the programs relies on getting information on getting to members and stabilization of our operational finances.

Table G: Alberta Public Sector Union Scholarship & Bursary Award Comparison		
Annual Awards		Amount
AUPE (2024)	449	\$338,000
Alberta Union K	6	\$3,000
Alberta Union L	n/a	n/a
Alberta Union M	2	\$2,000

2023/2024 Donations to the Members’ Education Fund (MEF)

We would like to acknowledge the donations received for the MEF during the 2023/24 fiscal year. All donations towards the MEF directly to help AUPE members through education bursaries

- Thank you Local 038 for your generous donation of \$10,000 to the MEF!
- Thank you Local 052 for your generous donation of \$5,000 to the MEF!
- Thank you Local 057 for your generous donation of \$7,000 to the MEF!
- Thank you Local 046 for your generous donation of \$250 to the MEF!
- Thank you Local 095 for your generous donation of \$1,500 to the MEF!

Mary Kehoe Scholarship

In 2024, the committee established the Mary Kehoe education scholarship. It is an essay scholarship on OHS where applicants can earn one of two scholarship awards each valued at \$2,000. The funding for this award comes from the MEF annually and is established in policy. The adjudication of submitted essays is not complete at report time, so the inaugural scholarship recipients are not known at this time.

Local 049 Mary Kehoe Bursary for OH&S

Your committee worked with AUPE Local 049 to establish a bursary award with the University of Alberta for the OHS diploma program. Details on the award and applications will be handled by the University of Alberta. The award is expected to be ready in the Fall 2024 for eligible AUPE members. Local 049 raised funds to establish this impactful endowment in Mary’s honour that will live in perpetuity.

Future of the MEF

In 2024-2025, your committee will review how to sustain the awards in the future, given that the fund can only currently sustain \$300,000 in total per year before fundraising from Locals and partners. The more the program becomes known, the more demand for it as a benefit to being a member of AUPE. It is a good problem to have as the scholarships and bursaries have the outcome of helping AUPE members on their educational journey as a benefit of membership. I look forward to tackling the challenges that come with the increased successful utilization and awareness of this benefit.

Acknowledgements

We are sending a gigantic “thank you!” to Winston Gereluk from the Alberta Labour History Institute for volunteering to adjudicate scholarship essay submissions. Visit Winston at the ALHI table in the exhibitor hall. For more info on ALHI, visit <https://albertalabourhistory.org>.

A heartfelt and gracious “thank you” to past MB committee members, Bill Piggot (Life Member Local 003 Medicine Hat), Vanessa Bauder (NEW Life Member Local 046 Edmonton), Wendy Kicia (Local 057 Red Deer), Leah Schmidt (Local 002 Spruce Grove), Chrissie Mather (Local 071 Medicine Hat), and Kathleen Schwengler, (Local 048 Airdrie). Please know that the legacy and outcomes of amazing groundwork continues today. Thank you.

As committee chair, I want to thank your current committee members: Katherine, Deb, Rashim, Gary, Beverley, and Susan. You are all amazing and I am humbled that you have given your time and expertise each month for AUPE members. Each of you bring something special to our team, keeping us on course to deliver outcomes for AUPE members and their families. Thank you.

Thank you to all AUPE support staff for the work you do in supporting members. The committee wishes to acknowledge the Member Resource Centre staff, Finance/Accounting department staff and our Membership Services Officers across our province. Your help with inquiries and directly administering our programs enables successful outcomes. Thank you.

Finally, your committee would like to give an extra special THANK YOU to the amazing Kim Lockert, our AUPE staff committee advisor superhero! Kim: You are exceptional! While it is unfortunate that you root for the wrong ice hockey team, we see and experience your hard work, determination, and dedication. Your impact on making our team (and AUPE members) successful cannot be overstated. We could not accomplish these levels of program outcomes without you. It is our honour and privilege to have you working on our team. Thank you.

Delegates, please enjoy Convention 2024 and let's stick together.

On behalf of the Members' Benefits Committee and in solidarity,

Justin Huseby

Executive Secretary Treasurer

Members' Benefits Committee Chair

AUPE Locals/Chapters by Employer (July 2024)

New units* (bold with asterisk)

Name change (bold)

Government of Alberta Master/Subsidiary

Local 001 – Administrative & Support Services

- 001 Fort McMurray
- 002 Lac La Biche
- 003 St Paul
- 004 Vegreville, Vermilion
- 006 Barrhead
- 008 Slave Lake, High Prairie
- 009 Peace River, McLennan
- 010 High Level
- 011 Grande Prairie
- 014 Whitecourt
- 015 Edson
- 017 Camrose, Wetaskiwin
- 021 Calgary
- 025 Red Deer, Olds, Hanna, Drumheller
- 026 Rocky Mountain House, Drayton Valley
- 031 Edmonton - West (Including 107 St and on)
- 034 Edmonton - East (106 St and on)
- 056 Brooks, Lethbridge, Fort McLeod, Medicine Hat

Local 002 – Administrative & Program Services

- 001 Calgary
- 002 Edmonton
- 003 Red Deer
- 004 Peace Region
- 005 Lethbridge
- 006 Northeast Region

Local 003 – Correctional & Regulatory Services

- 001 Calgary - Correctional Institute
- 002 Calgary - Remand Centre
- 003 Peace River Correctional Institute
- 004 Edmonton - Sheriffs/PPO
- 005 Fort Saskatchewan Correctional Centre
- 006 Lethbridge Correctional Centre
- 007 General - North
- 008 Edmonton Remand Centre
- 009 General - South
- 010 EYOC - Community Corrections
- 011 CYOC - Community Corrections
- 012 Red Deer - General
- 014 Medicine Hat Remand Centre
- 015 Calgary/Drumheller - Sheriffs/PPO

Local 004 – Trades & Related Services

- 002 Calgary - General
- 005 Edmonton - Inspectorate
- 010 Grande Prairie
- 015 Red Deer & Hanna
- 018 Lethbridge
- 019 Edmonton

Local 005 – Natural Resources Conservation

- 001 Calgary
- 002 Edmonton
- 003 Fort McMurray
- 004 High Level
- 005 Peace River
- 006 Slave Lake
- 007 Grande Prairie
- 008 Lac La Biche, Smoky Lake
- 010 Whitecourt
- 011 Edson
- 012 Rocky Mountain House , Red Deer
- 015 Blairmore, Lethbridge

Local 006 – Social Services

- 001 Calgary Social Service & Community Health
- 003 Red Deer, Drumheller
- 004 Edson
- 005 Edmonton - Child Care Counsellors
- 006 Lethbridge
- 007 Camrose, Wetaskiwin, Killam
- 008 Medicine Hat, Brooks
- 009 Fort McMurray
- 010 Vermilion
- 011 Lac La Biche, Bonnyville
- 012 High Prairie, Slave Lake
- 013 Grande Prairie
- 014 Edmonton - General
- 017 Peace River
- 018 Westlock, Barrhead, Alexis Nation
- 019 Drayton Valley
- 024 Medical and Rehab

Local 009 – Health & Support Services

- 001 Calgary – General
- 002 Edmonton - General
- 005 Red Deer

Local 012 – Technical & Field Services

- 002 Brooks, Medicine Hat
- 003 Calgary
- 004 Camrose, Viking, St. Paul, Vermillion, Vegreville
- 005 Drumheller, Hanna
- 006 Edson, Evansburg, Hinton
- 007 Fort Mcleod, Lethbridge, Claresholm
- 008 Grande Prairie
- 009 Peace River, High Level
- 010 Red Deer, Rocky Mountain House
- 014 Edmonton, Athabasca, Lac La Biche, Fort McMurray

Health Care Sector**Local 040 - Covenant Health NC & GSS**

- 001 Mineral Springs Hospital
- 002 Bonnyville Health Centre
- 003 Covenant Care - Villa Marie
- 004 Mary Immaculate Hospital (Mundare)
- 005 Our Lady of the Rosary Hospital (Castor)
- 006 St. Mary's Health Centre (Trochu)
- 007 St. Mary's Hospital (Camrose), Killam GH & Killam HC

- 008 St. Josephs Auxiliary Hospital Edmonton
- 009 St. Michael's Health Centre (Lethbridge)
- 010 Youville Home (Grey Nuns) St. Albert
- 011 St. Therese Villa
- 012 Covenant Care - Holy Cross Manor Calgary
- 013 Covenant Care - Chateau Vitaline - All
- 014 Covenant Care - St. Marguerite Manor including Dulcina Hospice - All
- 015 Covenant Care - Foyer Lacombe NC & GSS
- 016 Covenant Care - St. Teresa Place - All
- 017 Covenant Care - Centre de Sante Saint-Thomas - All***
- 018 Covenant Care - Buffalo Grace Manor - All***
- 019 St. Joseph's General Hospital (Vegreville)**

Local 041 - Alberta Health Services NC - South Zone

- 001 Cardston, Coaldale, Lethbridge, Magrath, Milk River, Raymond, Taber
- 002 Blairmore, Fort MacLeod, Pincher Creek
- 003 Bassano, Bow Island, Brooks, Medicine Hat, Oyen
- 005 Claresholm, Carmangay, Vulcan, Willow Creek

Local 042 - The Good Samaritan Society

- 001 Choice / Zetter
- 002 Pembina Village - Evansburg
- 003 Lethbridge
- 004 Spruce Grove / George Hennig
- 006 Millwoods / Wedman
- 007 Group Homes (PPDD)
- 008 Rocky Mountain House
- 009 Southgate
- 010 Stony Plain Care Centre
- 011 Raymond & Magrath
- 012 Good Shepherd Home - Wetaskiwin
- 013 Cardston

Local 043 - Alberta Health Services NC - North Zone

- 001 Polar Bears - Fort Vermilion, High Level, LaCrete
- 002 Northern Lights - Fort McMurray
- 003 Peace Region - Fairview, Gift Lake, Grimshaw/Berwyn, High Prairie, Manning, McLennan, Peace River, Peerless, Worsley
- 004 Trumpeter Swans - Beaverlodge, Grande Prairie, Grande Cache, Hythe, Spirit River, Valleyview
- 005 Mountain View - Hinton, Jasper
- 006 Black Swan - Athabasca, Barrhead, Boyle, Keir, Onoway, Radway, Slave Lake, Thorhild, Wabasca, Westlock
- 007 Rolling Hills - Bonnyville, Cold Lake, Elizabeth Métis Settlement, Elk Point, Glendon, Lac La Biche, Smoky Lake, St. Paul
- 008 Militants - Camrose, Lamont, Tofield, Two Hills, Vegreville, Viking
- 010 Easteners - Bashaw, Daysland, Galahad, Hardisty, Islay, Kitscoty, Lloydminster, Manville, Provost, Sedgewick, Vermillion, Wainwright
- 011 Foothills - Edson
- 012 Mayerthorpe, Whitecourt, Swan Hills, Fox Creek

Local 044 - Alberta Health Services NC - Central Zone

- 001 Lacombe, Bentley, Ponoka (excluding Centennial Centre)
- 002 Red Deer, Sylvan Lake
- 004 Castor, Consort, Coronation, Hanna
- 005 Wetaskiwin
- 006 Centennial Centre
- 007 Breton, Drayton Valley, Winfield
- 008 Elnora & Stettler
- 009 Drumheller

- 010 Innisfail, Olds, Sundre, Three Hills
- 011 Rimbey, Rocky Mountain House

Local 045 - Alberta Health Services NC - Calgary Zone

- 001 Peter Lougheed Centre
- 002 Rockyview Hospital
- 003 Canmore
- 004 Diamond Valley, High River, Okotoks - Except Home Care
- 005 Black Diamond, High River, Nanton, Okotoks - Home Care Only
- 006 Foothills Nursing Care & Tom Baker
- 007 Strathmore District Health Services
- 008 Calgary Community Health & SCHC
- 009 Didsbury
- 010 South Health Campus
- 011 Alberta Children's Hospital - NC

Local 046 - Alberta Health Services / Covenant Health NC - Edmonton Zone

- 001 Cross Cancer & U of A Hospital
- 002 Glenrose Hospital
- 003 Devon & Leduc Hospital
- 004 Morinville & Sturgeon Hospital
- 005 Edmonton General
- 006 Grey Nuns Hospital
- 007 Misericordia Hospital
- 008 Royal Alex Hospital
- 009 Ft. Saskatchewan, Redwater, ERC
- 012 Alberta Hospital Edmonton, ARC, AYS & HTC
- 014 Evansburg, Spruce Grove, Stony Plain
- 015 The Gray House Guild (Allen Gray CCC)
- 016 Community NC

Local 047 - Continuing Care Separate Employers - North Zone

- 001 Brazeau Senior's Foundation
- 002 Bethany Nursing Home – Rosehaven LTCC / Tri-Lodges / Deer Meadows / **West Pine Lodge**
- 003 **Bloom Limited Partnership** - Jasper Place
- 004 **Bloom Limited Partnership** - South Terrace
- 005 Extencicare - Athabasca
- 006 Extencicare - Mayerthorpe
- 007 Revera - Churchill Retirement Community
- 008 CBI Edmonton
- 009 Seasons Retirement Communities (Camrose) LP
- 010 Points West Living Cold Lake
- 011 Shepherd's Care - Vanguard Care Centre & **Greenfield**
- 012 Points West Living - Stettler
- 013 The Canterbury Foundation
- 014 Shepherd's Care - Millwoods Care Centre
- 015 Park Place Community Living – Copper Sky
- 016 St. Michael's Long Term Care Centre Edmonton & Grove Manor
- 018 Shepherd's Care - Millwoods Manor & Southside Manor
- 020 Grace Manor
- 021 Extencicare - Michener Hill
- 022 Venta Care Centre Ltd.
- 023 Extencicare - Holyrood
- 024 The Salem Manor Society NC
- 025 St. Michael's Health Group - VegrManor & Optima Living - Century Park - Vegreville
- 026 Lamont County Housing Foundation
- 027 Shepherd's Care - Kensington Village
- 028 Seasons Retirement Communities (Wetaskiwin) LP
- 029 Chinatown Multi-Level Care Foundation

- 033 Shepherd's Care - Barrhead
- 034 Touchmark at Wedgewood
- 036 Rivercrest Lodge Nursing Home Ltd.
- 038 Park Place Seniors Living - Sprucewood Place & Villa Marguerite Housing Community Partnership
- 039 Park Place Seniors Living - Hardisty Care Centre NC & GSS
- 040 Heritage House
- 041 **Optima - Symphony** Aspen Ridge
- 042 Revera - Riverbend Retirement Residence
- 043 Park Place Seniors Living - Devonshire Care Centre Partnership NC & GSS
- 045 Extencicare - Eaux Claires
- 046 Points West Living - Slave Lake
- 048 **Bloom Limited Partnership** - Miller Crossing Care Centre
- 049 St Thomas Health Centre
- 050 Seasons Retirement Communities (Ponoka) LP
- 051 Seasons Retirement Communities (Drayton Valley) LP
- 052 Revera - River Ridge
- 053 Park Place Seniors Living - Benevolence Care Centre
- 054 Chartwell Master Care - Griesbach & Heritage Valley Retirement Residence
- 055 Rosedale Partnership
- 056 **Optima Living** - Sagebrush
- 057 Points West Living Lac La Biche Inc.
- 058 Revera - McConachie Gardens
- 059 Chartwell Master Care - Emerald Hills Retirement Residence
- 060 Yarrow Ltd Partnership - Wildrose Retirement Residence
- 061 Revera - Our Parents' Home
- 062 Chartwell Wescott Retirement Residence
- 063 St. Paul Abilities Network (Society)
- 064 Points West Living Drayton Valley Ltd.

Local 048 - Continuing Care Separate Employers - Calgary/South Zone

- 006 Well Being Services - Monterey Place
- 007 Carewest - Fanning Centre
- 008 Carewest - Glenmore Park
- 009 Carewest - George Boyak
- 010 Carewest - Maintenance
- 014 Park Place Seniors Living - Newport Harbour Care Centre
- 015 Revera - Edgemont
- 016 Carewest - Colonel Belcher
- 020 Choices in Community Living - Legacy Lodge
- 028 Revera - Scenic Acres
- 033 Golden Life Management Corp.
- 034 Saint Elizabeth Health Services - Millrise
- 035 Carewest - Signal Pointe NC & GSS
- 037 Carewest - Rouleau Manor
- 038 Carewest - Garrison Green NC
- 039 Carewest - Sarcee NC
- 040 Carewest - Nickle House NC
- 041 Carewest - C3 Beddington
- 046 Signature Ridge - Rocky Ridge Retirement Community
- 047 Chartwell Master Care LP - Eau Claire NC
- 050 Masterpiece Southland Meadows Ltd. NC
- 051 Whitehorn Village Retirement Community
- 053 Swan Evergreen Village by Origin
- 054 Silverado Seniors Village Partnership - NC
- 055 Saint Elizabeth Health Care - Hawthorne

Local 049 - Capital Care Group Inc.

- 001 Dickensfield - NC
- 002 Grandview - NC & GSS
- 003 Lynnwood - NC & GSS
- 004 Kipnes Centre for Veterans (old Mewburn) - NC & GSS
- 005 Norwood - NC
- 006 Strathcona - NC & GSS

Local 054 - Alberta Health Services GSS - Edmonton Zone

- 001 U of A Hospital and surrounding buildings, Edmonton General Hospital
- 002 Glenrose Hospital
- 003 Ft. Saskatchewan, Sherwood Park, Strathcona, Redwater
- 004 St. Albert, Morinville, Gibbons, Sturgeon, Edmonton Remand Centre
- 005 Stony Plain, Spruce Grove, Evansburg
- 006 Royal Alex & HYS
- 007 Urban Comm Health/Home Care/Mental Health/AADAC/Coronation Plaza/MDC
- 008 Alberta Hospital & Henwood
- 009 Food Production Centre
- 010 Leduc County, Devon
- 011 Seventh Street Plaza, Addictions & Mental Health, Downtown, IBM Building
- 012 Cross Cancer & Cancer Care Clinics

Local 056 - Alberta Health Services GSS - North Zone

- 001 Swan Hills, Whitecourt, Mayerthorpe
- 002 Edson, Hinton, Jasper, Seton
- 004 Barrhead, Westlock, Onoway
- 005 Athabasca, Boyle, Lac La Biche, Peerless Lake, Radway, Smoky Lake, Thorhild, Trout Lake, Vilna, Wasbasca
- 006 Cold Lake, Glendon, St. Paul, Elk Point, Bonnyville
- 007 Peace River, Fairview, Grimshaw, Manning
- 008 Fox Creek, High Prairie, Kinuso, McLennan, Slave Lake, Valleyview
- 009 Beaverlodge/Hythe, Grande Cache, Grande Prairie, Spirit River
- 012 Northern Lights - Fort Vermilion, LaCrete, High Level, Rainbow Lake
- 013 Northern Lights - Fort McMurray

Local 057 - Alberta Health Services GSS - Central Zone

- 001 Rocky Mountain House, Eckville, Rimbey, Sylvan Lake
- 002 Wetaskawin & Winfield
- 003 Centennial Centre & Ponoka
- 004 Red Deer - no Clerical - Michner, Johnstone, Valley Park, RDrNH, RDrHC
- 005 Red Deer - Clerical & Mental Health Clerical, 49th & Bremner
- 006 Drumheller, Hanna, Three Hills, Elnora, CHS, Three Hills Mental Health
- 007 DTRHA CHS & Drayton Valley Hospital, Mental Health Drayton
- 008 DTRHA - Castor, Consort, Stettler
- 009 East Central - Camrose & Daysland Area
- 010 Islay, Kiscoty, Lamont, Lloydminster, Manville, Myrnam, Two Hills, Vegreville, Vermillion, Willingdon
- 011 Didsbury, Innisfail, Olds, Sundre
- 013 DTRHA - Lacombe
- 016 East Central - Provost Area

Local 058 - Alberta Health Services GSS - South Zone

- 008 Claresholm, Willow Creek, Vulcan, Carmangay, Nanton
- 015 Medicine Hat Area
- 016 Lethbridge Area

Local 084 - Continuing Care Separate Employers - Central/South Zone

- 001 Age Care Investments Ltd. - Beverly Centre Glenmore - NC
- 002 Age Care Ltd. - Valleyview - Medicine Hat
- 003 Age Care Ltd. - Columbia Assisted Living & Season's Retirement Living (Lethbridge)
- 004 Aster Joint Venture - Sunrise Gardens

- 005 Aster Joint Venture - Sagewood
- 006 Aster Joint Venture - Walden Heights Seniors Community - NC & GSS
- 007 Aster Joint Venture - Skypointe Seniors Community
- 008 Aster Joint Venture - Seton - NC
- 009 Bethany Care Society - Airdrie
- 010 Bethany Care Society - Calgary
- 011 Bethany Care Society - Harvest Hills
- 012 Bethany Care Society - Sylvan Lake - NC
- 013 Mountain View Seniors' GSS & Bethany Care Society NC - Sundre and Olds
- 014 Bethany Care Society - Didsbury
- 015 Bethany Care Society - College Side - NC
- 016 Bethany Care Society - Riverview - NC
- 017 Bethany Care Society - Cochrane
- 018 Extencicare - Hillcrest
- 019 Extencicare - Cedars Villa
- 020 Extencicare - Fairmont Park
- 021 Brenda Strafford Foundation - Clifton House
- 022 Brenda Strafford Foundation - Wentworth Manor NC
- 023 Chantelle Mgmt. - Sunset Manor & Innisfail Country Manor
- 024 Chantelle Mgmt. - Edith Cavell (Lethbridge)
- 025 Seasons Retirement Communities (Encore) LP
- 026 Green Acres - Alberta Rose
- 027 Green Acres - Piyami Lodge
- 028 Green Acres - Sunny South Lodge
- 029 Brenda Strafford Foundation - Cambridge Manor NC***

Local 095 - Alberta Health Services GSS - Calgary Zone

- 001 Foothills
- 004 Alberta Children's Hospital
- 005 South Health Campus
- 006 Calgary RHA - Community
- 007 Strathmore, High River, Canmore, Diamond Valley, Okotoks etc.
- 008 Calgary Zone IT
- 009 Calgary - Southport, Southland Crossing & SCHC
- 010 Rockyview
- 011 Peter Lougheed Centre

Education Sector

Local 038 Northern Alberta Institute of Technology

Local 039 Southern Alberta Institute of Technology

Local 052 - University of Calgary

- 001 Operational/Administrative
- 002 Trades/General
- 003 Specialist/Advisor
- 004 Technical

Local 053 - University of Lethbridge

Local 069 - Athabasca University

Local 071 - Colleges and School Divisions

- 001 Lethbridge Community College
- 002 Olds College
- 003 Evergreen Catholic Separate Regional Division No. 2
- 004 Lakeland College
- 005 Medicine Hat College
- 006 Alberta University of the Arts
- 007 Northwestern Polytechnic
- 008 Portage College
- 009 Northern Lakes College
- 010 NorQuest College
- 011 Bow Valley College
- 012 Living Waters Catholic Regional Division No. 42
- 013 Edmonton Catholic Separate School District No. 7
- 014 Red Deer Polytechnic

Boards, Agencies & Local Government**Local 020 - ATB Financial**

- 001 North Region
- 006 Central Region
- 008 South Region

Local 050 - Alberta Gaming Liquor and Cannabis Commission

- 001 St. Albert
- 002 Stettler
- 003 Calgary

Local 060 - Alberta Innovates and InnoTech Alberta

- 001 Alberta Innovates - Except Vegreville
- 002 Alberta Innovates - Vegreville

Local 118 - Local Government and Agencies

- 001 Town of Coaldale
- 002 Town of Bonnyville
- 004 Town of Ponoka
- 008 Mackenzie County
- 009 Strathcona County
- 010 County of Northern Lights
- 011 Civida
- 013 Alberta Pensions
- 015 Travel Alberta
- 016 City of Cold Lake
- 019 Legal Aid Alberta – Edmonton & Calgary
- 020 Special Areas Board
- 021 Edmonton Immigrant Services Association
- 024 Emcon Services Inc. Fort McMurray **& West**
- 025 Emcon Services Inc. East
- 027 Emcon Services Inc. South
- 109 Cargill Ltd. - Alberta Terminals

List of Terms

AGM – Acronym for Annual General Meeting.

AHS – Acronym for Alberta Health Services.

Bargaining Committee – A committee made up of members of a certified bargaining unit who bargain with their employer on behalf of all employees for a collective agreement. Bargaining committees are assisted by union representatives who specialize in negotiations.

Bargaining Unit – The Locals and/or Chapters that are covered by one Labour Relations Board Certificate.

Chapter – A smaller group of members in a large local. Locals can be divided into chapters by worksite, by geographic area, by department, or by any other means that makes sense within the Local. Chapters are designated in writing as either Local XXX Chapter **YYY** or Local XXX/**YYY**.

Collective Agreement – A legally binding contract between a union (bargaining on behalf of a group of workers) and an employer. Collective agreements generally set out things such as wages, benefits, job security, sick leave, vacation, layoff and recall rights, and hours of work, as well as many other work-related items.

COPA – Acronym for Committee on Political Action.

D&A – Acronym for Disputes and Arbitration, a specialization area for Union Representatives. This specialization specifically deals with grievances that have proceeded to a formal resolution process.

DI – Acronym for *Direct Impact*.

Direct Impact – AUPE's quarterly member magazine.

EMAC – Acronym for Employee Management Advisory Committee. Not all worksites have an EMAC.

FOM – Acronym for Friends of Medicare

General Service – AUPE members who work directly for the Government of Alberta.

General Support Service – Individuals working for Alberta Health Services and other health care providers in administrative and non-direct patient involvement roles. Includes administrators, maintenance workers, cleaners, food service workers, etc.

GOA – Acronym for Government of Alberta, referring to the sector of workers who work directly for the government services.

GRB – Acronym for Grievance Review Board.

GSBC – Acronym for General Service Bargaining Committee.

GSS – Acronym for General Support Services.

Labour School – An annual advanced union education school.

LAPP – Acronym for Local Authorities Pension Plan.

Local – An administrative component of the union. Locals are created on one of three criteria: community of interest (i.e. clerical workers with the Government of Alberta), bargaining unit (i.e. all members at SAIT), or similar work at different job sites (i.e. all GSS workers with Alberta Health Services). Locals are designated in writing as Local **XXX**.

LTC – Acronym for Long Term Care.

LTD – Acronym for Long Term Disability.

MSO – Acronym for Membership Services Officer.

Membership Services Officer – A staff position with AUPE. The duties of a membership services officer include (but are not limited to) providing labour relations services to existing members, external organizing, presenting AUPE sponsored education courses to the membership, and assisting in collective bargaining as assigned.

NC – Acronym for Nursing Care.

Nursing Care – Individuals working for Alberta Health Services and other health care providers in nursing roles. Includes licensed practical nurses, nursing attendants, physical therapists, and other paramedical professionals. Does not include registered nurses or medical doctors.

PE – Acronym for Provincial Executive.

PIA – Acronym for Public Interest Alberta.

Provincial Executive – The governing body of AUPE between Conventions. The group is made up of one representative from each Local and meets six times yearly.

PSP – Acronym for Public Service Pension Plan.

PSEC – Acronym for Pay and Social Equity Committee.

RO - Regional (office) – A satellite office of AUPE. Regional offices are generally staffed by membership services officers and support staff.

Sector – In the AUPE context, one of four work sectors where AUPE represents employees:

Government Services, Health Care, Education, Boards and Agencies

Steward – A worksite union activist responsible for ensuring that the terms of the collective agreement are enforced at the workplace, and for assisting members with workplace problems related to the collective agreement. Stewards receive specialized training through AUPE on how to deal with worksite issues where the union needs to have a representative present.

Time Off for Union Business – Time off requested by a member from their employer to take part in union activities. These can include committee meetings, Convention, conferences, courses, and Labour School. Time off requests must be cosigned by an AUPE staff-person to confirm that the member attended the event or activity.

Union Representative – A staff position with AUPE. Union Representatives specialize in one of several areas, including rights and interest arbitrations, Labour Relations Board hearings, negotiating collective agreements, WCB/LTD appeals, health and safety, pensions, and union education.

RULES OF ORDER AND PARLIAMENTARY PROCEDURE

MAIN MOTION

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	YES
Is it debatable?	YES
Can it be amended?	YES
Can it be reconsidered?	YES
Is it subject to closure or limiting motions?	YES
Can it be tabled?	YES
Can it be referred?	YES
What majority does it require?	SIMPLE MAJORITY

Every motion should be worded so as to propose an affirmative action.

AMEND

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	YES
Is it debatable?*	YES
Can it be amended?	YES
Can it be reconsidered?	YES
Is it subject to closure or limiting motions?	YES
Can it be tabled?	YES
Can it be referred?	YES
What majority does it require?	SIMPLE MAJORITY

***Debate is limited to the amendment itself and not the Main Motion.**

Note: The Amendment shall not alter the intent of the Main Motion.

RESCIND

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	YES
Is it debatable?	YES
Can it be amended?	NO
Can it be reconsidered?	YES
Is it subject to closure or limiting motions?	YES
Can it be tabled?	YES
Can it be referred?	YES
What majority does it require?	2/3

RECONSIDERATION

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized? *	YES
Does the motion require a seconder?	YES
Is it debatable?	YES
Can it be amended?	NO
Can it be reconsidered?	N/A
Is it subject to closure or limiting motions?	YES
Can it be tabled?	YES
Can it be referred?	NO
What majority does it require?	2/3

***Note: A motion to reconsider must be moved and seconded by members who originally voted with the majority.**

REFER/DEFER

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	YES
Is it debatable? *	YES
Can it be amended? *	YES
Can it be reconsidered?	YES
Is it subject to closure or limiting motions?	YES
Can it be tabled?	YES
What majority does it require?	SIMPLE MAJORITY

***Is debatable and amendable, as to advisability.**

POINT OF INFORMATION

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	NO
Is it debatable?	NO
Can it be amended?	NO
Can it be reconsidered?	NO
Is it subject to closure or limiting motions?	NO
Can it be tabled?	NO
Can it be referred?	NO
No vote taken	DECIDED BY THE CHAIR

POINT OF ORDER

Can a Member who has the floor be interrupted?	YES
Must the mover first be recognized?	YES
Does the motion require a seconder?	NO
Is it debatable?	NO
Can it be amended?	NO
Can it be reconsidered?	NO
Is it subject to closure or limiting motions?	NO
Can it be tabled?	NO
Can it be referred?	NO
No vote taken	DECIDED BY THE CHAIR

POINT OF PRIVILEGE

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	NO
Is it debatable? *	NO
Can it be amended?	NO
Can it be reconsidered?	NO
Is it subject to closure or limiting motions?	NO
Can it be tabled?	NO
Can it be referred?	NO
No vote taken	DECIDED BY THE CHAIR

***Debate is permitted on a point of privilege but the member raising the point may explain his reasons and in turn the chair may give reasons for its ruling.**

TABLE

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	YES
Is it debatable?	NO
Can it be amended?	NO
Can it be reconsidered?	NO
Is it subject to closure or limiting motions?	NO
Can it be tabled?	N/A
Can it be referred?	NO
What majority does it require?	SIMPLE MAJORITY

STOP DEBATE (PREVIOUS QUESTION)

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	YES
Is it debatable?	NO
Can it be amended?	NO
Can it be reconsidered?	YES
Can it be tabled?	NO
Can it be referred?	NO
What majority does it require?	SIMPLE MAJORITY

“I move the motion be put.”

LIMIT DEBATE

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	YES
Is it debatable?	YES
Can it be amended?	YES
Can it be reconsidered?	YES
Can it be tabled?	NO
Can it be referred?	NO
What majority does it require?	SIMPLE MAJORITY

CHALLENGE THE CHAIR

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	YES
Is it debatable?	NO
Can it be amended?	NO
Can it be reconsidered?	NO
Is it subject to closure or limiting motions?	NO
Can it be tabled?	NO
Can it be referred?	NO
What majority does it require?	SIMPLE MAJORITY

ADJOURN

Can a Member who has the floor be interrupted?	NO
Must the mover first be recognized?	YES
Does the motion require a seconder?	YES
Is it debatable?	NO
Can it be amended?	NO
Can it be reconsidered?	NO
Is it subject to closure or limiting motions?	NO
Can it be tabled?	NO
Can it be referred?	NO
What majority does it require?	SIMPLE MAJORITY

List of Regional Offices

Headquarters

10025 - 182 Street NW
Edmonton, AB T5S 0P7
P: 780-930-3300
TF: 1-800-232-7284
F: 780-930-3392
F: 780-930-3397 (Labour Relations)
TF Fax: 1-888-388-AUPE (2873)

Athabasca Regional Office

Street: 4920 - 49 Street
Mail: Box 2227
Athabasca, AB T9S 2B7
P: 1-800-232-7284
F: 780-675-3727

Calgary Regional Office

200, 2116 - 27 Avenue NE
Calgary, AB T2E 7A6
P: 1-800-232-7284
F: 403-283-7328

Camrose Regional Office

Unit 25A, 6601 - 48 Avenue
Camrose, AB T4V 3G8
P: 1-800-232-7284
F: 780-672-2296

Grande Prairie Regional Office

102, 9815 - 101 Avenue
Grande Prairie, AB T8V 0X6
P: 1-800-232-7284
F: 780-532-0580

Lethbridge Regional Office

203, 1921 Mayor Magrath Drive S.
Lethbridge, AB T1K 2R8
P: 1-800-232-7284
F: 403-327-5827

Medicine Hat Regional Office (Future)

102, 12 Gehring Road SW
Medicine Hat, AB T1B 4W1
(Opening early 2025)

Peace River Regional Office

9910 - 99 Avenue, Box 6895
Peace River, AB T8S 1S6
P: 1-800-232-7284
F: 780-624-4859

Red Deer Regional Office

101, 4719 - 48 Avenue
Red Deer, AB T4N 3T1
P: 1-800-232-7284
F: 403-340-1210



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