

## **Workplan Progress Report President - Richard Wellen**

During the past year I have worked in a number of areas to fulfil my 2015-16 workplan and the responsibilities of the office of YUFA President. These included:

1. **YUFA Governance and Administration.** I coordinated the work and organization of the association and its employees, working with an extremely energetic, active and committed team of Executive members, committee members, Stewards' Council and Staff. I worked closely with the Treasurer to analyze the finances of our association and began the process of preparing to negotiate a new collective agreement with YUFA staff.
2. **Collective Bargaining.** I played a significant role in the round of negotiations which led to progress of equity issues as well as a new arrangement for bringing in more competitive and academically beneficial teaching loads for York faculty members. This was a very long round of bargaining which ended in conciliation and mediation. Communication and close consultation with members through newsletters, bargaining updates and department visits were crucial to the process. This involved successful teamwork between the bargaining team, executive, our communications officer and staff.
3. **Academic Planning at York and participation on Collegial bodies:** As President I have a designated seat on Senate and also sit as an observer on APPRC. I participated in numerous discussions and debates on these bodies, many of which involved discussions of the preparation of the University Academic Plan, plans for the new Markham campus and York's finances.
4. **Pension issues.** Continued to work with other York employee groups on issues related to changes with the York University Pension Plan. Played a significant role in policy discussions within OCUFA on the prospects and potential limits associated with the project of forming a province-wide "joint-sponsored" pension plan.
5. **Socially Responsible Investment for York's Endowment Fund.** Worked with our Financial Information Subcommittee (FISC) to develop a more transparent and revealing look at York's financial situation. Brought YUFA's analysis of York's financial statements into discussions at Senate and other collegial bodies.
6. **Reports and Communications.** I drafted a number of updates and reports to the membership on collective bargaining in consultation with the Executive, Chief Negotiator and the Communications Officer. I also attended numerous department meetings which allowed us to develop a richer and more participatory communications approach during a long and difficult round of bargaining.

7. **National and Provincial Associations (CAUT and OCUFA).** I attended a number of meetings of Faculty Association presidents organized by CAUT in Ottawa. Was similarly active in OCUFA, including that organization's Queen's Park lobbying program..

**YUFA Vice President Internal Workplan Progress Report**  
**2015-16**  
**Heather Campbell**

Executive and Stewards Council

I substituted for the President as Acting President as necessary, and assisted the President in the overall management of the Association. I attended YUFA Executive and Stewards' Council meetings and participated in the work of these bodies. I attended YUFA General and Special Membership meetings.

Personnel Committee

I handled Personnel issues as they arose and called meetings of the Labour Management Committee as necessary. I reported to the YUFA Executive Committee under the Personnel Committee Report as required. I chaired the Labour Management Committee in rotation with the staff caucus chair.

Membership

I contacted each new hire in the Fall term to welcome them to the Association, and invited them to meet me to discuss the ways in which YUFA may support them, as well as the possibilities for future involvement.

Nominations

I worked with YUFA staff and other members of Executive to recruit members to fill vacancies on the committees and subcommittees of YUFA. It continues to be challenging to recruit members for YUFA committees and subcommittees despite numerous calls for volunteers via YUFA-M.

Returning Officer

I served as interim Returning Officer for YUFA elections and votes until the appointment of Kym Bird. I am currently engaged in the development of election policies and procedures, including a clear set of parameters for the task of Returning Officer, which will be brought before Executive and Stewards Council.

Collegial Governance

As a senator, I participated in the activities of the Faculty Caucus as it exercised vigilance over the procedures followed in the creation of the new campus in Vaughan, and the introduction of the IIRP.

## **Vice-President External Progress Report 2015-16**

Craig Heron

The responsibilities of the VP External span a great diversity of issues and relationships. I attend meetings of YUFA Executive, Stewards' Council, Labour-Management Committee, Community Projects Committee, and General Membership meetings. I also represent YUFA at many meetings of groups and organizations on campus and off, including the Cross Campus Alliance, Community Safety Council, OCUFA, CAUT, NUCAUT, Toronto and York District Labour Council, the Ontario Federation of Labour, and the Canadian Labour Congress.

### **1. University Strategic Planning**

- Monitored the process of discussion and implementation of the IIRP and the new campus.
- Worked with Senators on articulating these issues.
- Helped to strategize about a YUFA response.

### **2. Collegiality**

- Worked to strengthen the institutions and processes of collegial decision-making at York, particularly Senate and Faculty Councils.
- In particular, helped to nurture the Faculty Caucus in Senate.
- Helped to raise issues of governance in relation to the new Markham campus.

### **3. Solidarity**

- Coordinated the monthly meetings of the Cross Campus Alliance of unions and student groups.
- Attended meetings of the broader labour movement.
- Met with campus-based \$15 and Fairness campaign to promote a better minimum wage and improved employment conditions for precarious workers.

### **4. Campus Safety and Security**

- Provided leadership to the new working group on faculty safety issues within the Community Safety Council.
- Worked with that group to develop an action agenda.

### **5. Faculty Club**

- Worked with the YUFA working group on a new faculty club to help bring it into fruition.

## **6. Community Project Support**

- Continued to work with the YUFA Community Projects Committee to support local community-building projects.

## **7. Assisting Refugees**

- Helped to develop a YUFA response to the Syrian refugee crisis, which, after a referendum of YUFA members, resulted in a new bursary program for all refugees.

## **8. Defending Science**

- Continued to participate in the organizational and educational work of Our Right to Know (formerly Scientists for the Right to Know) and the Right to Know Network to promote better federal policies towards science, public knowledge, and evidence-based decision-making.
- Developed a campus-based campaign on these issues during the 2015 federal election.

## **9. Divestment**

- Liaised with student groups leading a campaign to urge York's Board of Governors to divest from all weapons production.
- Liaised with the campus Fossil Fuel Divestment campaign.

## **10. Helping to Build a Knowledge Base in our Association**

- Helped to keep our stewards and executive members aware of new reports, articles, and other pertinent documents on current issues in post-secondary education, as well as new developments at other institutions.
- Reported back from meetings and conferences on important new developments.

**Communication Officer  
Progress Report, June 1, 2015 – May 30, 2016**

The majority of my work this year has focused on internal communication, with a particular focus on bargaining communication, ensuring that the membership was regularly and well-informed about the issues and the process. As this round of bargaining ran unusually long, other elements in the Communications Officer Workplan were deferred. In support of bargaining, and in collaboration with other members of the YUFA executive and staff, I wrote and published:

- three **Bargaining Backgrounders**, focused respectively on York's finances, collegiality issues, and workload balance;
- eleven Bargaining Updates (between May 2015 and February 2016);
- a series of seven posters that highlighted key elements in our bargaining agenda;
- a Strikes and Lockouts FAQ;
- materials surrounding the Tentative Agreement (including the Executive Statement);
- **10 e-newsletters** (between July 2015 and January 2016, each of which contained a minimum of four items) that provided members with regular information about workplace issues, collective bargaining, developments in the higher education sector, labour movement politics and initiatives, and social justice activities engaged in by our members and those in the wider community.
- In addition, I was involved in all discussions about bargaining strategy and bargaining mobilization efforts that took place at Executive and Stewards' Council, and in particular those which had communications implications. In October 2015, I proposed a bargaining mobilization plan to both Executive and Stewards' Council, and I worked with the YUFA president, chief negotiator and staff to organize the more than 20 unit-level meetings about bargaining that subsequently took place in Fall 2015.

Other communications work carried out this year included:

- Refresh of the website pages for YUFA's Benefits Trust and Foundation, Community Projects Committee, Library Chapter and Association of Retired Faculty and Librarians;
- Regular maintenance of the website content, including the posting of materials about York's Markham Campus proposal;
- Support for public communications around YUFA's endorsement of the #YUDivest campaign and President Shoukri's comments about YUFA / faculty engagement in collegial discussions.

Submitted by Stephanie Ross, Communications Officer, March 21, 2016

**Maura Matesic**  
**YUFA Treasurer**  
**Work progress report for the 2015-2016 year**

YUFA's Treasurer plays a leading role in administering the finances of our union. Working with members of the YUFA Executive and staff, I monitor YUFA's financial position, ensure that funds are invested wisely, and provide regular spending updates. More specifically, I have:

- provided quarterly financial reports and monthly updates for the YUFA Executive;
- prepared YUFA's annual budget in consultation with members of the Executive and YUFA staff for presentation to the membership on April 11, 2016;
- reviewed the annual audit of our Association's accounts and worked with YUFA's auditors and financial advisor to maintain our financial position;
- continued to explore, with members of the YUFA Executive, YUFA Trust, and YUFA Foundation, the possibility of retaining a new financial advisor capable of identifying strategies and developing an investment policy statement that would place greater emphasis on socially responsible investment strategies;
- worked with YUFA staff to develop an ongoing monthly budget reporting structure in order to facilitate greater financial transparency for Executive decisions.

**Equity Officer's Progress Report 2015-16**  
**Submitted by YUFA Equity Officer Frances Latchford**

Currently, there is one elected Equity Officer (EO), while normally there are two. Numerous calls for nominations to fill the interim period of the second EO position have gone out in both the YUFA e-newsletter and YUFA-M over the course of this year. To date no interim EO has been nominated, nor therefore elected. The current EO has actively participated in member outreach one on one and in conjunction with the YUFA Executive and Communications Officer to encourage new nominations.

In 2015-2016 the EO has pursued the on-going work of strengthening equity-related YUFA committees and equity related joint YUFA-Employer committees to enhance organizational democracy, transparency and accountability and to reinforce and enhance equity at York and within YUFA. The EO also has actively supported and consulted on equity-related concerns in bargaining, which is now complete. Although formally her work as a bargaining team member, the current EO has worked actively at the bargaining table to ensure YUFA's equity related proposals were realized to the fullest possible extent in what is the new YUFA collective agreement. These gains are discussed in the bargaining section below.

**Regular Work and Meetings**

The EO has attended the regular meetings of YUFA's Executive Committee, Stewards' Council and General Membership meetings and special YUFA meetings to conduct a watching brief on emerging and on-going issues related to equity and the Collective Agreement. The EO is also a member of JCOAA. The EO has responded to issues and concerns surrounding equity as they have arisen in relation in the context of day-to-day YUFA business, regular committee work, and has consulted within YUFA (e.g., JCOAA Co-Chair, Chief Stewards, YUFA Staff, Equity Caucuses, Executive, etc.) and externally with CAUT and OCUFA as necessary.

**Equity Sub-Committee (ESC)**

The EO has organized and chaired the regular ESC meetings. The EO has worked in cooperation with ESC members and Equity Caucus Representatives to support, engage, raise awareness and enlist YUFA members in the interests and service of equity at York. The EO and ESC have worked together to do so during 2015-2016 in the following ways:

- 1) The ESC has already had 3 of 4 regular meetings this year. The EO and ESC members have developed various equity initiatives and identified equity related concerns which the EO has acted on, for instance, via and/or in conjunction with the appropriate committees on which she sits (e.g., Executive, JCOAA, Stewards, Bargaining Team, YUFA Implementation Committee, etc).
- 2) The EO's involvement with the Equity Caucuses has been appropriate to that desired by each Caucus; where Caucuses have no, or next to no, current members, the EO has actively worked to engage and draw in new caucus members.
- 3) In conjunction with the ESC, the EO has organized two important events this year:
  - a. The "All Equity Caucus Social" to encourage participation and new membership within the caucuses, as well as networking across them and within YUFA as it concerns equity. It took place on December 5<sup>th</sup>, 2015 and has now taken place two years in row to great success.
  - b. A YUFA hosted CAUT workshop on "Mental Health and Workplace Stress" on November 16, 2015, which was also well attended.

### **Communicating Equity**

The EO has engaged in outreach to the membership either through the sorts of events described above or through periodic reporting on equity news and equity bargaining (e.g., equity backgrounder), issues and events via the Communications Officer and, thus, YUFA newsletter and/or the YUFA Equity Bulletin listserv.

### **Equity related Gains in Bargaining and the New Agreement**

During collective bargaining, the EO monitored and consulted on equity bargaining, and did so closely as a member of the YUFA Bargaining Team. The list of equity related gains during bargaining are:

- Aboriginal (Indigenous) faculty hiring incentive program: minimum of 4 appointments (and potentially up to 6).
- Affirmative Action: 20% threshold for Visible Minorities (members of racialized groups) established within Affirmative Action hiring procedures (Art. 12.21)
- LGBTQ2 inclusion as employment equity group (Art. 7.08)
- LGBTQ2 and disaggregated categories of visible minorities (racialized groups) included within self-identification data collection (Art. 8.01 and 12.22)
- Amendments to Art. 7.08 (Joint Subcommittee on Employment Equity) and Art. 12.22 (Affirmative Action Officer)
- Transgender Health Fund - \$30,000 per year (Art. 26.11)

The EO is now a member of the YUFA Implementation Committee and has continued to closely monitor the implementation of YUFA's latest gains on equity in the Collective Agreement.

### **Equity within JCOAA**

The EO has and continues to sit on JCOAA to monitor on-going issues related to equity, such as the AAPR/IIRP/PIER, New Campus, Accommodations and/or the administration of the Collective Agreement, and has regularly raised YUFA members' equity concerns with the Employer on the part of YUFA.

### **Reports and Recommendations**

The Equity Officer compiled and drafted the "YUFA response the York Mental Health Steering Committee's Recommendations," consulting widely with Executive, Chief Stewards, JCOAA Co-Chair, ESC and Caucuses, and YUFA Staff to do so.

Finally, to advance and promote equity at York, the EO has liaised, as necessary with: the Equity Caucuses, various equity-seeking constituencies, groups and/or organizations, and/or members with expertise in equity-related fields on campus, as well as with organizations off-campus, such as CAUT and OCUFA.

The EO would especially like to thank members of the ESC (Caucus Representatives and Members at Large) for their generous service to YUFA in support of equity!

## Chief Stewards – Sheila Embleton and Penni Stewart

In 2015-16, we have, between us:

1. Consulted with, assisted, and represented YUFA members in contract-related matters: consulted with a large number of members with a variety of different concerns in areas such as tenure and promotion processes (including failure to advance to candidacy, tenure denials and delays, difficulties in full professor cases including inability to assemble the requisite committees; consultation on establishing departmental standards in engineering), dismissal, workload, teaching assignments, use of banked courses, sabbatical scheduling and pay, maternity and parental leave scheduling, requests for LOAWOP (leave of absence without pay), compassionate leave, disciplinary matters, Appendix P stipend and release issues, Appendix O (graduate supervision credit), problems with research accounting and Concur, member-to-member disputes, faculty transfers, cross-appointments, chilly climate and harassment issues and complaints falling under Appendix Q, various infrastructural support/working conditions issues, copyright, workplace accommodation, irrevocable reduced load, retirement benefits, sick-leave/long-term disability benefits, chair and master selection process, decanal intervention in hiring processes (particularly in shortlisting and determination of conflict of interest), etc. Typically these are handled confidentially, without grievance (while protecting that option if needed); in many cases the advice provided has enabled the YUFA member to reach a satisfactory solution without further intervention from us, often without even a complaint stage meeting. Sometimes the matter goes to grievance, but may be resolved (with minutes of settlement) without any need for arbitration. In addition, we worked on a number of policy grievances, bringing these to the attention of the YUFA Executive, who then voted to grieve on behalf of YUFA. Listing new as well as ongoing/unresolved grievances that began earlier, these included: employee engagement survey, YUFA-E holding Appendix P positions, denial of Appendix P position to CLA and pre-tenure members, copyright/document preservation, CV exercise and performance evaluation, use of briefing notes in tenure and promotion cases, workload for the alternate stream in units that don't currently have alternate stream (now largely settled at bargaining), etc. This year, a YUFA member filed a complaint with the Labour Board that alleges that YUFA has failed in its duty to fairly represent the member. YUFA firmly denies this claim and with legal counsel have prepared a robust defence.
2. Between grievance and arbitration is the Dispute Resolution Process. This year we participated in no Dispute Resolution Committee Hearings.
3. Worked on several arbitrations resulting from grievances:
  - a) there are two arbitrations underway (although we maintain a watching brief until our negotiated memorandum of settlements are implemented), all resulting from denial of tenure. One further case resulted in a negotiated settlement.
  - b) there are several further grievances, relating to appointments processes, to the AAPR (Academic and Administrative Program Review), to pension portability, to alternate stream workload, which will proceed to arbitration in the coming months, or be withdrawn as a result of a negotiated Memorandum of Settlement or the new Collective Agreement.
  - c) three policy grievances related to tenure and promotion are in process. One policy grievance (F.3.4.8, dean's letter of transmittal) was settled. We have filed one additional

T&P policy grievance regarding briefing notes that may move to arbitration pending outcome of two individual files.

In our work described in (1), (2), and (3) we have worked closely with YUFA staff and lawyers (Goldblatt Partners), and truly appreciate their knowledge, wisdom, and support. In particular we work most closely on the largest number of cases with Kristin Skinner. We do work on an increasing number of cases with other staff, Sue Levesque, Andrea Harrington, and Jeff Braun-Jackson. We want to acknowledge the huge support, wise counsel, and tremendous hard work, sometimes in quite difficult circumstances, from all the staff over this past year.

4. Assisted with the work of Stewards Council
  - a) during discussions of members' concerns
  - b) providing reports and updates on grievances and areas of special concern or interest (e.g. Concur)
  - c) ratifying the election/appointments of members to various positions and subcommittees throughout YUFA
  - d) discussion of collective bargaining progress.
5. Participated actively in regular meetings (every two weeks) and special meetings of the YUFA Executive, including discussions related to collective bargaining.
6. Participated in meetings, caucuses and deliberations of the JCOAA, including its subcommittees such as on Long Range Planning.
7. Attended regular monthly meetings and occasional extra meetings with YUFA staff and Barry Miller (Faculty Relations), at which we review concerns and grievances in an attempt to find quicker and less formal resolutions than full grievances. Our ongoing list continues to grow and is the longest it has been in at least the last 5 years.
8. Attended monthly meetings on Accommodations. These meetings were a new initiative last year to try to deal expeditiously with members needing accommodations or having issues with medical leaves. Although the situation may be better than it would have been without these meetings, it is still shocking how much time routine matters take to move forward on the part of the employer and in particular the Employee Well Being (EWB) office. In one particularly egregious case of delay we have recently filed a grievance.
9. Attended meetings and workshops of OCUFA's Grievance Committee (twice per term); attended annual meeting of CAUT Grievance Officers; attended CAUT Grievance Handling Workshop (facilitator training workshop, with a view to helping train grievance officers at other institutions).

Concerns:

- a) Rising number of files at all stages (inquiries, consultations, complaints, grievances, arbitrations). Length of time that files remain unresolved, leading to increased stress on members and compounding of the original issue (this was also a concern in at least the last three AGM reports)
- b) Number of members being called in for discipline or what is reasonably interpreted as discipline, often when the meeting agenda was something else or not announced; other aspects of the process also improper, such as not providing copies of written complaints

or extreme delay in doing so (this was also a concern in at least the last three AGM reports)

- c) Rising number of problems with coming on/off sick-leave or LTD, receiving “bridging” salary while waiting for Sun Life to make its decisions about LTD, appeals of LTD denial, getting correct workplace accommodations, filling out EWO’s forms. This is complicated by the ever-changing staff in EWO (Employee Wellbeing Office).
- d) Apparent lack of concern on the part of senior academic administrators for smoothly functioning labour relations. One indicator of this is the increasing desire (or even need) for faculty members to have a YUFA representative advise them first and then accompany them to any meeting with any senior administrator or EWO, even for what used to be considered routine matters (this was also a concern last year and the year before in AGM reports). Often YUFA members contact YUFA first, rather than the Employer, even for routine questions or matters where formerly no problems would have been anticipated – and this adds considerably to the workload of the YUFA staff and the chief stewards, and gives rise to a feeling that we are doing the Employer’s work for them.
- e) Length of time that promotion or tenure-and-promotion files take, and in some cases failure to initiate the process in a timely manner.
- f) There is a rising number of cases under harassment, with an ensuing formal (quasi-) disciplinary process (itself a problem) when such matters would have formerly been solved in less formal more collegial ways.

## **Progress Report, YUFA Recording Secretary, March, 2016**

As Recording Secretary I have fulfilled my role by taking and submitting the minutes for YUFA's Executive meetings, Stewards' Council, General Membership Meetings, and Annual General Meeting. The Minutes records motions and major points in the discussion as well as summaries of reports of the officers and committees including the action taken on them.

Merle Jacobs. 2015-2016

**PROGRESS REPORT**  
**March 17, 2016**

**PAST PRESIDENT - ARTHUR HILLKER**

The duties of the Past President are as follow. "Mentors and advises the incumbent President; member of Executive and Stewards' Council." I fulfilled these duties during the year under review.

Arthur Hilliker