

TRUMPETER

ATA Local 26

Policy Handbook



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This policy addresses members of and financial dealings of Trumpeter Local #26. Policies may be updated as motions are made during the year by Local Council. The financial policies will also be reviewed every three years, or as deemed necessary, by the Policy Handbook Committee. Any possible changes made to this document by the Local Executive will be brought to the Local Council for approval.

Table of Contents

Acronyms	4
Duties of a Local Council School Representative	5
Duties of the Executive Committee	6
Policy 1 - Expenses	8
Policy 2 - Conferences	10
Policy 3 - Recognition	11
Policy 4 - Induction and Retirement	13
Policy 5 - Technology	14
Policy 6 - Donations	15
Policy 7 - Bank Account	16
Policy 8 - Committees	17
Policy 9 - Social Events	19

Acronyms

AGM	Annual General Meeting
ARA	Annual Representative Assembly
ATA	Alberta Teachers' Association
BUGM	Bargaining Unit General Meeting
CBC	Collective Bargaining Conference
CSR	Council of School Representatives (Trumpeter calls this Local Council)
DEHR	Diversity, Equity and Human Rights
DR	District Representative
EFEC	Edmonton Field Experience Committee
LCO	Local Communications Officer
LPEO	Local Political Engagement Officer
LPM	Local Presidents' Meeting
MIM	Membership Information Meeting
MPTCA	Mighty Peace Teachers' Convention Association
NSC	Negotiating Sub Committee
PDC	Professional Development Conference
PEC	Provincial Executive Council
TES	Teacher Employment Services
TWC	Teacher Welfare Committee

Duties of a Local Council School Representative

1. Serve as a two-way communications facilitator between the school and the local:
 - Attend monthly meetings - report back to your staff, remembering that local council is a closed meeting;
 - Speak at staff meetings - there should be an ATA section on the agenda;
 - Maintain a school email list with personal emails of each teacher;
 - Report concerns to the local - you are the voice of your school staff;
 - Encourage attendance at ATA sponsored events, such as:
 - Induction and Retirement
 - Beginning Teachers' Conference
 - AGM (Annual General Meeting)
 - BUGM (Bargaining Unit General Meeting)
 - MIM (Membership Information Meeting)
 - MOM (Member Organization Meetings)
 - Encourage teachers to become involved with their professional organization.
2. Distribute ATA News.
3. Maintain the ATA bulletin board in the staffroom.
4. Distribute election material and encourage online voting in ATA elections.
5. Carry out activities decided on by the local council, e.g. World Teachers' Day activities, Substitute Appreciation week, collection of information, etc.
6. Direct and support teachers to Barnett House for available services for advice - maternity issues, contracts, transfers, evaluation, discipline, termination, etc.:
 - Barnett House/Teacher Employment Services 1-800-232-7208

Duties of the Executive Committee

The executive committee of this local shall consist of the president, vice-president, past-president, secretary, treasurer, professional development chair, teacher welfare committee chair, political engagement officer, communications officer, and diversity, equity and human rights chair. Duties are defined in the Constitution and/or Frame of References, and below:

Duties of Officers

President

- Serves as chief executive officer of the local
- Calls and presides at all general, special, local council and executive committee meetings
- Serves in ex-officio capacity on all committees of the local
- Attends local board meetings or appoints a designate subject to availability
- Attends Local Presidents' Meetings called by the Association

Vice-President

- Takes charge of the affairs of this local association in the absence of the president
- Assists the president in the discharge of duties
- Oversees the Induction/Retirement Ceremony

Secretary

- Keeps accurate records of all proceedings of this local association
- Sends to the ATA such statements and reports as may be required
- Reports on communications received by the local
- Sends notice calling all meetings

Treasurer

- Keeps accurate record of all monies received and collected
- Prepares an annual financial statement for audit purposes
- Makes the necessary disbursements of the funds of this local association as authorized
- Prepares, at the direction of the executive committee, an annual budget for the local

Past-President

- Acts as a resource person for members of the executive

- Prepares a slate of nominations for executive positions to be presented at the local's AGM

Communications Officer

- Carries out a communication program with the teachers in the local and between the local and its various partners
- Maintains social media platforms: Facebook, Local website
- Develops ideas for publicity and promotional events

Political Engagement Officer

- Establishes, participates in, sustains and expands active networks of politically involved and engaged teachers
- Works in conjunction with locals and the Association, responds to emergent political situations
- Encourages ongoing political engagement and assists with locally-based capacity building and training

Teacher Welfare Committee Chair

- Oversees TWC school reps
- Liaises between TWC, Local Council, Executive, and PD Fund Committee
- Organizes seminars as required/requested

Professional Development Chair

- Oversees PD Committee (PD school reps)
- Liaises between PD, Local Council, and Executive
- Works with the board to organize a mentorship program

Policy 1 - Expenses

All expenses must be claimed within 60 days or by May 31st of the financial year, whichever is sooner, unless otherwise stated. Expenses can be submitted by mail or submitted in person to the treasurer. Original receipts are required for reimbursement. Maximum claim amount of \$3500 per attendee. Overages must be approved by the local executive.

The following allowances are approved for expense claims from members who incur expenses while fulfilling duties for Trumpeter Local 26:

Travel Expenses

1. Accommodations

- 1.1. Local members are encouraged to stay at a hotel designated by the Association or one of equal or lower cost. Members will be reimbursed for the full amount of the invoice. Receipts are required and must show a zero folio balance. Expense claim forms must be submitted to the treasurer within two months of the date of expenses.
- 1.2. For conferences/meetings that are more than 400 km away, members will be reimbursed for a one-night hotel stay before and/or on the last evening of their association business. Meals during these days will also be covered.

2. Meals

- 2.1. Meals provided at the meeting/conference cannot be expensed.
- 2.2. Meals required during travel can be expensed. Restaurant, grocery, and miscellaneous items totalling up to \$65.00 per day are acceptable without receipts when meals aren't provided, otherwise: \$15 for breakfast, \$20 for lunch, and \$30 for dinner.

3. Travel

- 3.1. No receipts are required for vehicle travel; kilometrage will match current ATA standards.
- 3.2. Airfare will be reimbursed with receipts. Airfare receipt must include locations where travel originates and ends, airfare receipt must include total including taxes.

- 3.3. In the event of air travel, ground transportation expenses at the destination location, such as taxi, rental car, and/or shuttle, will be reimbursed with detailed receipts. KM cannot be claimed instead of airfare.

Additional Costs

4. Childcare/Pet Care Expenses
 - 4.1. Members of ATA Local 26 who are attending a meeting for local business may submit a claim for reasonable child care or pet care expenses to be paid. The provider may not be a parent or guardian.
 - 4.2. The rate per hour for one child is \$10.00, the rate per hour for two or more children is \$13.00, to a maximum of \$50 a day, on an honour system.
 - 4.3. A form will be required to be submitted to the treasurer. If additional costs are incurred, receipts will be required.

5. Guidelines for Release Time

When the local is paying for substitute teacher costs, approval needs to be submitted at least 5 days PRIOR to the absence.

- 5.1. Full day sub for each day while attending a meeting/conference during a work day.
- 5.2. Half day sub for travel to a meeting/conference that is more than 400 km away, where a member would need to leave during the school day. A full day sub for travel to a meeting/conference that is more than 700 km away where a member would need to leave during the school day.

Policy 2 - Conferences

1. Expenses will be covered as per Policy 1 Travel Expenses.
2. Beginning Teachers' Conference
 - 2.1. Qualifications - must be new, or prior to the third year into the teacher profession
 - 2.2. Attendee may only attend once
 - 2.3. Mandatory attendance at the Edmonton conference
3. Annual Representatives Assembly (ARA)
 - 3.1. Qualifications - Local President, plus members elected as per allotment at the Annual General Meeting
4. Summer Conference
 - 4.1. Qualifications to attend will be determined as per provincial guidelines issued by Barnett House
 - 4.2. All expenses will be covered, including Park Pass
5. Other ATA Conferences
 - 5.1. Expenses for members attending conferences or seminars tied to their positions will be covered

Policy 3 - Recognition

The Trumpeter Local budgets annually for the recognition of committee chairpersons, executive members, and representations in regular service of the Local.

1. Honoraria will be paid for the following positions and listed amounts:

Position	Honoraria Amount
President	4000.00
Vice-President	1000.00
Secretary	1500.00
Treasurer	2000.00
Local Communications	1000.00
Professional Development	1250.00
TWC Chair	2500.00
TWC Vice-Chair/Secretary	500.00
NSC Chair	1000.00
NSC Member	250.00
Local Political Engagement	1000.00
DEHR Chair	1000.00
Past President*	500.00
ARA Representatives	1000.00

* Past-President is the only unelected executive position, as such, it should be limited to 2 years maximum time on executive

- 1.1 Honoraria will NOT be paid unless a SIN is received by the treasurer for CRA reporting purposes.
- 1.2 ARA Representative Honoraria will be paid after the member has attended ARA. If the ARA Representative resigns prior to ARA, or does not attend ARA, they will forfeit all honoraria.
- 1.3 An honorarium will be provided to the president every time that sub planning is required, in cases where release time is not being honored by the Division. Honorarium will be calculated at 35% of the cost of sub, charged to the local.
- 1.4 An honorarium will be provided to each of the non-executive NSC members every time that sub planning is required. Honorarium will be calculated at 35% of the cost of sub, charged to the local.
- 1.5 Executive Member Honoraria will be paid before the end of May. Should an executive member vacate their position before the end of their term, they shall be

paid any honorarium or allowance to which the member is entitled, prorated based on the number of days served in the current year's term up to and including the date of their resignation.

- 1.6 Should the duties of a vacant executive position be undertaken by someone else on the executive, the honorarium of that position will be divided up amongst the individuals who fulfilled those responsibilities. The amount will be prorated based on the number of days served.
2. Compassion/Bereavement
 - 2.1. Upon informing the Local of the death of an active member of the Local, the President will arrange an expression of condolence and a \$500 donation to a charity of the member family's choice.
 - 2.2. When the Local is notified of the death of a member's significant other or child, the president will send a condolence card and expression of condolence worth \$50 on behalf of all the members.
3. Gifts
 - 3.1. Gifts for representatives attending meetings for Local Council, Teacher Welfare Committee, Professional Development, and Substitute committees will come from each committee's budget line.
 - 3.2. Local council will spend \$1250 on gifts for members attending the Annual General Meeting.
4. Substitute Teacher Appreciation
 - 4.1. Trumpeter Local will contribute up to \$1000 toward a Tri-local Appreciation evening for subs during Substitute appreciation week.

Policy 4 - Induction and Retirement

Every year, the Local will organize an Induction and Retirement evening. This event will be at the cost to the Local up to \$5000.

For retirees:

1. The Local will provide:
 - 1.1. \$100 for a gift or gift card of choice.
 - 1.2. an ATA Retirement Certificate.

For inductees:

2. The Local will provide:
 - 2.1. Induction Certificates.
 - 2.2. an ATA information package and pin.

Policy 5 - Technology

Trumpeter Local #26 will provide a computer and applicable software to Executive Members and Committee Chairs: including President, Vice-president, Secretary, Treasurer, Teacher Welfare Committee Chair, Negotiating Sub-Committee Chair, Local Communication Officer, Professional Development Chair, and Diversity, Equity, and Human Rights Chair.

1. The local will provide up-to-date versions of accounting software as needed.
2. Maintenance as required for Local Executive assigned computers is covered by the Local. Detailed receipts must be provided.
3. The limit amount for the purchase will be approved by the Local Council.
4. Upon departure:
 - 4.1. Technology purchased by the local must be returned to the local if the executive position is vacated. Alternatively, the member may purchase the equipment according to the depreciation formula.
 - 4.2. Devices no longer being used must be sent to Barnett House for disposal. Devices being purchased by a member must be sent to Barnett House to be wiped before they purchase it.
 - 4.3. The depreciation value of computers will be at a rate of 25% a year.

Policy 6 - Donations

1. At ARA, the Local will donate \$500 (approximately \$1 a member) to the ATA Trust.
2. Requests for donations will be brought to the local council for approval. Local council will consider donations for approval at the October and February meetings.
3. Donations will be considered for approval until the maximum budget for the year has been exhausted.

Policy 7 - Bank Account

1. The Trumpeter Local #26 Treasurer will maintain custody of blank cheques.

2. Signing authority will be that of the Trumpeter Local #26's President, Treasurer, and two other designated executive members. Two signatures will be required on each cheque.

3. Process for Claimant Dispute

In the event that there is a dispute between a claimant and the Local Treasurer, a review of this dispute will be brought forward to the Local Executive (without the presence of either the claimant or the Treasurer). If there is such a time that the dispute cannot be resolved at the local level, an appeal can be brought forward to the Provincial ATA for review.

Policy 8 - Committees

The operation of Trumpeter Local 26 depends substantially on the operation of many different committees of volunteers.

1. Guidelines
 - 1.1. All committees shall be responsible to Local Council
 - 1.2. Duties of committees shall be as described in the Local's Constitution or this handbook
 - 1.3. Committee members are expected to attend scheduled meeting of the committee or to provide a reasonable rationale for their absence
 - 1.4. Committees will present reports when applicable at the local meetings
 - 1.5. Committee composition should recognize all schools where possible
2. Committees
 - 2.1. Substitution Teachers Committee
 - 2.1.1. At the request of three (3) or more substitute teacher members, this local shall organize a substitute teacher group.
 - 2.1.2. The chair of the committee will be entitled to attend the Substitute Teachers' Conference, with a per diem of \$250 for potentially lost wages, at the expense of Trumpeter Local 26.
 - 2.1.3. Those eligible for participation in the group shall be members who were substitutes in the employing jurisdiction for at least one day during the previous twelve-month period.
 - 2.1.4. An appropriate budget for the group shall be established at the Annual General Meeting.
 - 2.1.5. The frame of reference for the group shall be as follows:
 - 2.1.5.1. Its objectives shall be to advance the professional skills and knowledge unique to substitute teaching and to advance the special interests of substitute teachers within the local.
 - 2.1.5.2. It shall have at least one general meeting per year.
 - 2.1.5.3. It shall elect a chair from the members-at-large for the committee, which shall be responsible for organizing activities to promote the objects of the group.
 - 2.1.5.4. The chair shall present to the Local Council a report of its activities and of the disbursement of its funds, including an annual report at the AGM.
 - 2.2. Diversity, Equity and Human Rights (DEHR) Committee
 - 2.2.1. The local shall organize a DEHR teacher group
 - 2.2.2. An honorarium shall be paid to the chair of the committee
 - 2.2.3. Those eligible for participation in the group shall be members or invited guests of the local

- 2.2.4. An appropriate budget for the group shall be established at the AGM.
- 2.2.5. The frame of reference for the group shall be as follows:
 - 2.2.5.1. The purpose of the committee shall be to promote the aspects of diversity, equity and human rights within the local.
 - 2.2.5.2. It shall have at least one general meeting per year.
 - 2.2.5.3. It shall elect a chair from the members-at-large for the committee, which shall be responsible for organizing activities to promote the objects of the group.
 - 2.2.5.4. The chair shall present to the Local Council a report of its activities and of the disbursement of its funds, including an annual report at the AGM.
- 2.3. Policy Handbook Committee
 - 2.3.1. The local recognizes the need to meet, review and revise the policies within the handbook every three years, or sooner as needed.
 - 2.3.2. The Policy Handbook Committee shall consist of two Executive members, two Local council members, and two members at large, when possible.
 - 2.3.3. Circumstances for policy revisions could be, but are not restricted to:
 - 2.3.3.1. Addition of new schools to Grande Prairie Public School Division
 - 2.3.3.2. Changes to the budget
 - 2.3.3.3. Addition or deletion of social events
 - 2.3.3.4. Changes to expenses
 - 2.3.3.5. Changes to honorarium

Policy 9 - Social Events

It is the responsibility of the Executive Council to follow the current year's budget and prepare a budget for the following social events:

1. Events
 - 1.1. Retirement Ceremony
 - 1.2. Induction Ceremony
 - 1.3. Substitute Teachers' Appreciation Week
 - 1.4. World Teachers' Day