

**Officer Report
Richard Wellen
VP Internal**

The position of VP Internal carries with it responsibilities for assisting the President in overseeing the administration of YUFA as an organization and also working in the general area of member engagement including organizing committee participation. This year I worked in all of these areas and also served as a communications liaison between the bargaining team and the Executive. I participated in the mobilization and communications groups that became active throughout the bargaining process.

In addition, I served as Acting President (including periods of rotation with our VP External) for approximately four months due to an extended period of medical leave taken by our elected President. I also initiated the formation of the YUFA Subcommittee on Governance which was based on models with which I became familiar from my work on the OCUFA governance committee. I also served as one of the two the Executive reps on the governance subcommittee and played an important role in the formation of the Senate caucus which has been very active in promoting new initiatives for strengthening collegial governance at York.

Finally, I worked as the Executive member responsible for overseeing the settlement of the pension indexation grievance (arising out of the 2018 round of collective bargaining) which led to increased funding for retiree benefits. This work is ongoing as YUFA attempts to translate these gains into improved retiree benefits provisions.

Chief Stewards – Sheila Embleton (full term) and Tricia Wood (until September 18, 2021)

Report written by Sheila Embleton

(Marcia Macaulay is submitting a separate report for her activities after September 18, 2021.)

In 2021-22, Tricia (2021) and I (2021-22) have, between us:

1. Consulted with, assisted, and represented YUFA members in contract-related matters:

We have consulted with a large number of members with a wide variety of different concerns in areas such as tenure and promotion processes (difficulties in advancing to candidacy, tenure denials and delays, difficulties in full professor cases, files which wait a long time for the decanal letter of transmittal or suffer other lengthy delays along the way), workload, teaching assignments, use of banked courses, how to make up courses owed or allegedly owed, sabbatical scheduling, disputes over sabbatical credit, maternity and parental leave scheduling, requests for LOAWOP (leave of absence without pay), compassionate leave, inquiries about the salary anomalies exercise, disciplinary matters, research misconduct investigation, dismissal, Appendix P stipend and release issues, problems with research accounting, problems with grant administration, member-to-member disputes, transfers between units, 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, graduated returns to work following LTD, life insurance continuation for those working post-71, decanal intervention in hiring processes (particularly in shortlisting and determination of conflict of interest), AA issues in hiring processes, etc.

Typically these issues are handled confidentially, without grievance (while protecting that option if needed); in many cases the advice provided has enabled the member to reach a satisfactory solution without further intervention from us, often without even a complaint stage meeting. There are however many complaint stage meetings. Sometimes the matter goes on to grievance, but may be resolved (with minutes of settlement) without need of further steps, or maybe resolved at the DRC (Dispute Resolution Committee), or may be resolved as a formal mediation before 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.

We also worked with prospective members as they negotiated their letters of offer, and with continuing members as they moved from CLA to tenure-stream status, or attempted to switch streams. We also worked with the CUPE conversion appointees, a process fraught with an erosion of previously granted practices, such as sabbatical before tenure and sabbatical credits at the point of hire.

This year, we have worked with an unprecedented number of members seeking retirement, often earlier than might normally have been expected. For the first time ever, together with staff and others on Executive, we ran a very well-attended workshop on retirement, not limited

to the new collective agreement provision for a voluntary early retirement but also including many general issues.

Obviously covid-related issues remained at the forefront this year, and the differential impacts only worsened. The partial return to in-person teaching in Fall 2021 and the larger return for Winter 2022 produced a sharp increase in inquiries, pleas for advice and help, and request for assistance with accommodations for medical reasons and family status. YUFA filed grievances on various aspects of this, which resulted in a mediated settlement in December, and the mediator being seized with future cases related to the grievance, which he expeditiously resolved throughout the winter term.

2. Been involved in the Dispute Resolution Process, a formal step that can occur between grievance and going to external mediation and/or arbitration. In the past few years, the Employer has not wanted to engage with this option much, but recently we have laid some groundwork to use this process more frequently and have participated in several Dispute Resolution Committee Hearings. The Employer attempted to remove the DRC stage in recent contract negotiations, but it remains in our contract.

3. Worked on several mediations and arbitrations resulting from grievances; there are currently ten grievances at arbitration:

a) There are several grievances, both individual and policy, underway, and some were resolved in the past year. The most significant resolution involved GA support, which was resolved in a separate Memorandum of Settlement as part of the recent contract negotiations. This resulted in two funds of \$1m each, as base funding. We need to remain vigilant as to how these roll out. A significant win was that YUFA won at arbitration the right for members past the age of 71 (who have not yet retired) to access life insurance. YUFA still needs to determine how to move forward on the reduction of life insurance at age 65 from 3X to 1X base salary, and how life insurance after 71 should be handled. YUFA's view is that 65 is an arbitrary age for reduction and is exploring at the Executive Committee alternate models and their costing. In total there are 10 policy grievances active.

b) We have intervenor status in a complex case involving member-on-member complaints, currently at HRTO (Human Rights Tribunal of Ontario).

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 (such as covid19)

c) ratifying the election/appointments of members to various positions and subcommittees throughout YUFA

d) in discussions related to collective bargaining e.g. preparation of negotiating positions, being available on an ongoing basis to advise the negotiating team.

5. Participated actively in regular meetings (every two weeks) and special meetings of the YUFA Executive.

6. Participated in caucuses and meetings of the JCOAA, including its subcommittee on Long Range Planning (LRP). In March 2020, an ad hoc sub-group (“the covid table”) was added and continues to meet, with the President, two VPs, and the AVP Labour Relations to discuss the many questions, details, and general principles as we deal with covid19. In all these venues, there are some successes and some failures, but what is important is that our voice is heard, and sometimes (positive) changes do result. The Employer wants to reduce the length and/or frequency of all such meetings and to eliminate formal minutes, obviously problematic.

7. Attended meetings with YUFA staff and personnel from Faculty Relations, at which we review concerns and grievances in an attempt to find quicker and less formal resolutions than full grievances. These regular meetings however abruptly ended during this past year, at Faculty Relations’ request, removing one channel for promptly and reasonably amicably resolving issues soon after they arise. There are now many fewer ad hoc meetings for this same purpose.

8. Attended meetings and workshops of OCUFA’s Grievance Committee (twice per term; all virtual this year); attended the annual meeting of CAUT Grievance Officers (virtually this year). Normally I would give CAUT Grievance Handling Workshops (helping train grievance officers at other institutions) or Equity Workshops, and participate in other CAUT events such as their Equity Conference, but very little of this happened this year because of the pandemic (two virtual workshops only).

Concerns:

a) Large and rising number of files at all stages (inquiries, consultations, complaints, grievances, arbitrations). There are currently well over 100 open files, and this doesn’t include simpler questions/consultations. Also concerning is the length of time that many 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 eight 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, or declared to be just an informal chat. Often other aspects of the process are also improper, such as not providing copies (or at least important details of written complaints) in advance or extreme delay in doing so (this was also a concern in at least the last seven AGM reports). Members are also being disciplined based on the employer’s arbitrary and in our view erroneous assertion of procedure or process. The turn-over and restructuring in Faculty Relations has resulted in the employer asserting, reinterpreting or ignoring past practice.

c) Number of problems with getting appropriate and correct workplace accommodations (this was especially acute this year with covid19, and continues into summer 2022), filling out EWB's forms, the extremely intrusive nature of the questions EWB (Employee Wellbeing Office) asks, the latter including in covid19-related matters. There have been fewer problems this year for members going on/off sick-leave or LTD (long term disability), receiving "bridging" salary while waiting for Sun Life to make its decisions about LTD, and appeals of LTD denial. The Employer is also now asserting that members on LTD may not receive PER, which YUFA is contesting (this has just been referred to arbitration).

d) Apparent lack of concern on the part of senior administrators (both academic and non-academic) 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 EWB, even for what used to be considered routine matters. 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. Another indicator is the removal of our regular biweekly meetings with Faculty Relations to run through our list of cases, especially those freshly arising, and the Employer's (ultimately unsuccessful) attempt to remove the DRC during bargaining. More communication rather than less would be beneficial in our view.

e) Length of time that promotion or tenure-and-promotion files can take, often because of the time waiting for the Dean's letter of transmission, and in some cases failure to initiate the process in a timely manner. Typically we have at least managed to get some of the promotions back-dated (salary increment!), but that has become increasingly difficult.

f) There is a rising number of cases of harassment, with an ensuing formal (quasi-) disciplinary process (itself a problem) when such matters formerly would have been solved in less formal more collegial ways or not have become so serious so quickly. Procedures are often not clear, and often the dean/associate dean involved has had little to no training in these kinds of investigation. Some changes in Appendix Q (Procedure for Dealing with Complaints of Workplace Violence, Harassment or Discrimination), resulting from bargaining, may help a bit here.

In all our activities described above, we have worked closely with YUFA staff members and multiple lawyers (Goldblatt Partners), and truly appreciate their knowledge, wise counsel, hard work, and support, sometimes in quite difficult circumstances and under stringent deadlines. In particular we sincerely thank current staff members Erin Black, Baolinh Dang, Alison Fisher, Manuel Marques, and Kristin Skinner, and former staff members Sonja Killoran-McKibbin and the late Jeff Braun-Jackson. I look forward to welcoming two new staff members shortly. We also thank staff member Paula Perez-Smith for making sure that the legal and arbitration bills are paid efficiently.

Chief Steward Report (2021-2022) Marcia Macaulay

Over the past eight months (September to the present), I have been engaged in numerous complaints brought by faculty to YUFA. Some of these have required a meeting with a Dean/Principal to bring a concern or complaint to their attention. In certain instances, there have been meetings concerning disciplinary matters invoking Article 16 of the Collective Agreement. In many cases a complaint has progressed to being heard through either mediation/arbitration. With the support of our excellent staff (Jeff Braun-Jackson, Kristin Skinner, Erin Black, Baolinh Dang, Alison Fraser, Manuel Marques, and Sonja Killoran-McKibbin), I have met with faculty individually to assess a case or problem to determine the nature of its application to the Collective Agreement and what further steps need to be taken. If further steps are needed and the issue cannot be resolved by providing advice, then a strategy is developed to respond to the issue or complaint. If a problem cannot be resolved at a complaint stage meeting with a Dean or Principal, then with the help of the excellent lawyers at Goldblatt Partners a case is made ready for either mediation, and failing that, to arbitration.

A number of the cases that have been brought to the staff and myself have involved discipline, where concerns have been raised about a member's actions with respect to other members or to students. With cases of alleged harassment, these have resulted in either mediation between the parties or a formal investigation. There have been cases involving the need for accommodation resulting from Covid or from other concerns. Response at the decanal level has been variable with some deans showing a willingness to address a problem or work out compromises and others showing a degree of intransigence. Where there is intransigence, a formal grievance process usually follows. We have faced situations of faculty being denied the right to participate on committees while on sabbatical, being denied course releases, or being denied access to their PER accounts or even an updated pay equity exercise. All these issues have taken us to either formal grievance or to the Dispute Resolution Committee.

Over the past eight months, I have provided support for faculty in whatever way possible to ensure some degree of resolution to a complaint or grievance. I supported faculty in retirement negotiations, and in exploring both sick leave and long-term disability leave. One principal area of concern was that at my own faculty, Glendon College, where I organized a meeting of YUFA faculty to address the bringing in of NOUS, an Australian consultation firm, to analyse the College's performance. I also brought this matter to Stewards' Council and the matter was then taken up at JCOAA. Within this latter committee, I was able to advocate specifically for Glendon's own collegial responses to problems of enrolment and retention. One specific initiative concerning enrolment was ultimately approved by the Principal and went on to get approval at Faculty Council. To date there have been no formal proposals coming out of the NOUS consultation in combination with the Principal's Advisory Committee. Formal proposals may be developed in the next year, but little has materialised apart from a PowerPoint Presentation from the Principal that suggests in very general terms a form of restructuring.

Over the past eight months I have become deeply concerned about decanal incursion into collegial affairs (this would include the NOUS consultation). I see governance issues as foremost for YUFA in the next two years needing ongoing and careful oversight. Such incursion has realised itself through disciplinary matters, workload, hiring and other processes. In instances where a simple and straightforward solution is available that would serve the member, our students AND the institution, there has been failure on the part of upper administration to explore common sense solutions.

I remain deeply concerned about the application of Appendix Q. Changes have most recently been made to Appendix Q, but what is needed is a major overhaul of the procedures relating to harassment and discrimination. Other universities (Queens and UBC) have undergone such a major overhaul. As it is, Appendix Q relies too much on internal processes controlled by the administration that can be impaired where investigators without the necessary expertise are employed and where there can also be failure to meet appropriate deadlines. Both can result in flawed investigations which in turn necessitate further grievance procedures. Within the University of British Columbia procedures, investigation and adjudication are strictly distinguished and a panel of three provides adjudication. The failure of this process has led some faculty members to bring their complaints to the HRTO rather than have these resolved within the context of the university itself. This is a major failure and one that needs addressing before the next set of negotiations.

Overall, the last eight months have been both demanding and rewarding. I have been able to work with an exceptional staff and the lawyers of Goldblatt Partners. I have gained insight into the systemic problems of this university with a fly on the wall perspective. I hope that my comments provide useful advice for future chief stewards.

Communications Officer Report 2021-22, Jody Berland

My report is necessarily truncated by the fact that I had to take a medical leave from September 15 2021 to January 5 2022 due to a head injury leading to a concussion.

Together with VPE Terry Maley, I attended a number of 2021 meetings on Covid readiness with representatives of the Faculty Associations of the four Toronto Universities.

In conjunction with these meetings, we sent a number of communiques to YUFA members about COVID preparedness on the York campus, and advertised and posted the public panel on our website. This was an important coalition between the Faculty Associations of the 4 Toronto universities in the interest of the health and safety of our members. In line with the advice from public health professionals we placed pressure on York to develop better safety measures and greater transparency around the health and safety measures, especially ventilation of classrooms and offices.

During this year, we continued to develop the website capabilities of our new website, and to post more news, statements and documents so that members can readily access them. I developed the policy of clearly explaining acronyms, clauses, committee mandates and other YUFA references that might not be known to members.

We distributed by YUFA-M a number of OCUFA advisories including OCUFA's opposition to the IHRA policy on anti-Semitism (opposition to the IHRA was also unanimously supported by CAUT Annual Conference), the Laurentian bankruptcy and its relevance to York, the action tool for writing to MPPS about higher education in advance of the June 2022 provincial election, and other matters from OCUFA relevant to YUFA members.

A policy of sharing OCUFA reports and articles with members is crucial to keeping our members informed about issues in higher education in Ontario and beyond.

We also shared our governance committee's report on violations of governance structures and accountability at York and kept members updated on JCOAA deliberations on covid teaching protocols and debates.

As bargaining for the new contract ramped up, I formed a communications committee which developed a rapid-response strategy for addressing issues that arose in bargaining. These turned into a series of "Bargaining Bulletins." A total of eleven Bargaining Bulletins were issued. YUFA Exec voted in April 2022 to accept the proposal to form a permanent communications committee of 6-7 members following the procedures for establishing YUFA committees.

As Communication Officer I attended meetings of the Cross Campus Alliance and the York University Staff Association representatives, the YUFA Climate Emergency Committee (for which I was YUFA Exec liaison), and Fossil Free York.

Unfinished projects:

- Create member-only accessible site on the YUFA website.
- Bulletin on Surveillance by Evan Light
- Process for vetting, editing and approving messages to members from YUFA committees

26 April 2022

Re: 2020-2022 Activity Report of Equity Officers Lykke De La Cour and Minoo Derayeh

May 2020-July 2021:

YUFA Equity Officers (Lykke De La Cour and Minoo Derayeh) continued to reinforce equity-related YUFA and joint YUFA-Employer committees.

The EOs prepared the YUFA Justice, Equity, Diversity, and Inclusion (JEDI) Action Plan.

The EOs arranged ESC meetings for JEDI Action Plan consultation.

The EOs built a standing equity item into the Executive agenda for equity discussions.

The EO's held numerous meetings for ESC bargaining preparations.

The EOs looked after equity related issues raised by the members and those raised and discussed in the Equity Subcommittee Committee meetings.

The EOs attended the Executive Committee meetings and raised equity related issues raised by members.

The EOs attended Stewards meetings, General Membership meetings and they addressed equity related concerns in these meetings.

The EOs organize ESC meetings and discussed equity bargaining priorities proposals such as indigenous and black hires,

EO Lykke De La Cour attended and helped prepare the agenda for the Executive and the General Membership meetings.

EO Lykke De La Cour attended the JCOAA (Joint Committee on the Administration of the Agreement) and LRP (Long-Rang Planning) and raised equity concerns with the ER (Employer Relation).

EO Lykke de la Cour participated in meetings associated with the Staff Relations and Labour Management Committees, the Executive Agenda Planning Committee, and the JCOAA, as well as meetings with JCAA representatives.

EO Minoo Derayeh attended CAUT, OCUFA, and OCUFA Status of Women and Equity Committee (SEWAC) and discussed and coordinated equity matters with equity officers in other universities.

EO Minoo Derayeh was the member of selection committee for SWAED (Status of Women and Equity Award of Distinction)

July 2021-Present:

EO Minoo Derayeh held numerous meetings for ESC bargaining preparations, discussed equity bargaining priorities proposals such as indigenous and black hires, and addressed equity related concerns.

EO Minoo Derayeh looked after equity related issues raised by the members and those raised and discussed in the Equity Subcommittee Committee meetings.

EO Minoo Derayeh attended Bargaining Table meetings and the Collective Agreement mediation meetings.

EO Minoo Derayeh attended the Executive Committee meetings and addressed equity related concerns

EO Minoo Derayeh attended Stewards meetings, General Membership meetings and she addressed equity related concerns in these meetings.

EO Minoo Derayeh attended and helped prepare the agenda for the Executive and the General Membership meetings

EO Minoo Derayeh attended the JCOAA (Joint Committee on the Administration of the Agreement), JCAA and LRP (Long-Rang Planning) meetings.

EO Minoo Derayeh participated in meetings associated with the Staff Relations, Labour Management Committees, and the Executive Agenda Planning Committee.

EO Minoo Derayeh attended OCUFA, and OCUFA Status of Women and Equity Committee (SEWAC) and discussed and coordinated equity matters with equity officers in other universities.

YUFA

Annual JCOAA/LRP Work Progress Report

2021-2022

The Joint Committee on the Administration of the Agreement (JCOAA) and the Long-Range Planning Committee (LRP) function in an advisory capacity to the Association and/or the Employer with the general aim of ensuring that our Collective Agreement is administered in a spirit of co-operation and mutual respect. The Joint Committee shall, further, direct itself to the fulfilment of any tasks explicitly assigned by this Agreement to the Joint Committee, or to joint Employer-Association committees, required to bring into effect and implement the provisions of our Collective Agreement (YUFA Collective Agreement, 2018 – 2021, A7.02, p. 20). Additionally, within the JCOAA, the Joint Subcommittee on Long Range Planning, undertakes joint consideration of factors bearing upon the future well-being of the University and the members of the YUFA bargaining unit (YUFA Collective Agreement, 2018 – 2021, A7.05, p. 21).

Acknowledgements

Thanks are extended to existing JCOAA members Arthur Hilliker, YUFA President, Sheila Embleton, Chief Steward, Minoo Derayah, Equity Officer, and Harjeet Badwall, representative of Members at Large.

Special thanks are extended to the YUFA staff. The incredible support provided by Alison Fisher with occasional coverage by Sonja Killoran-McKibbin.

JCOAA/LRP

JCOAA along with its sub-agenda item of LRP meets on a monthly basis. Despite the Employer's (ER) attempt to suspend JCOAA/LRP Meetings during bargaining this past year, we managed to continue to hold them as per our Collective Agreement (CA). Nevertheless, the ER chose not to carry on with Co-Chairs' Meetings, which normally meets monthly, during the bargaining period. Our attempt to resume Co-Chairs' Meetings post bargaining met with some resistance from the ER. We have since compromised to continue them as one (1)-hour meetings monthly with the length of the meeting being extended or shortened based on agenda items to be discussed. We continue to prioritize LRP items, placing this section at the top of the agenda, which appears to be working in getting the ER to place more emphasis on these issues and prioritizing the sharing of information regarding them. We will continue this sequential positioning of LRP ahead of JCOAA items on the agenda, as York is currently engaged in several LRP initiatives (i.e., Markham Campus, Vaughan Healthcare Centre Precinct, School of Medicine) that affect our members. The ER is continuing to take issue with having JCOAA/LRP Meetings minutes, seeing them as labour intensive, complicated and not useful to the process. YUFA has been and will continue

indicating their importance. We are currently in the process of working out a compromise to ensure proper documentation of our meetings.

COVID Table

As the coronavirus pandemic continues, so has the COVID Table, which meets monthly with the Employer. The YUFA side is represented by JCOAA Co-Chair Nick Mulé, the President Arthur Hilliker, Chief Steward Sheila Embleton and supported by YUFA staff person, Alison Fisher, and we continue to meet with senior administration of the university, including President and Vice-Chancellor Rhonda Lenton, Provost and Vice President, Academic Lisa Philipps, Vice President, Equity, People and Culture Sheila Cote-Meek and Assistant Vice-President, Labour Relations Dan Bradshaw and Adam Bereza to discuss and work together on addressing COVID-19 issues. At this point in the process, we are dealing with a shifting circumstance in which the province and Toronto Public Health are both easing their directives and York University administration, in collaboration with other Ontario universities increasingly make their own decisions. The COVID Table is expected to meet less often over the summer months but expects to return to a monthly basis in the fall, until such a time as matters return to some level of normalcy.

Additionally, JCOAA Co-Chair Nick Mulé has begun leading an open discussion on the future of York University with and during an endemic, as a means of YUFA being proactive about how our members can be best accommodated in the areas of teaching, service, and research. Professor Mulé initiated the process with YUFA Executive, which then branched out to Stewards' Council and may possibly be taken up with the membership from there.

JCAA

The YUFA side of JCOAA is continuing to work closely with keen interest in the work of the Joint Committee on Affirmative Action (JCAA). This is both to prioritize equity, diversity, and inclusion (EDI) issues and to help empower the JCAA to strengthen the university's approach regarding EDI. Guided by the Annual JCAA Report, the YUFA side of JCOAA meet with the YUFA side of JCAA to review their report, discuss matters and come up with strategies to strengthen their work in advance of a full JCOAA Meeting with JCAA that includes all members on both sides. This will continue with a focus on JCAA in their process of shifting from an affirmative action (AA) to an EDI model and being empowered to come up with recommendations and be supported to implement them.

JSCEEI

Recently the Joint Sub-Committee on Employment Equity and Inclusion (JSCEEI) sent us their 2nd draft report that we are in discussions on at JCOAA. With a number of dedicated Black and Indigenous hires over the past few years and the intent to hire more in the coming years, JCOAA has placed an increased focus on retention. Backed by both JSCEEI and our recently negotiated Collective Agreement we will be urging the ER to put in place retention mechanisms so that these faculty members feel supported, have the resources they need and are given equitable opportunities throughout their career trajectory.

Governance Sub-Committee

JCOAA Co-Chair Nick Mulé also serves as a member of the YUFA Sub-Committee on Governance to both gain insights on governance issues affecting the membership and to share information learned from LRP. Such issues stem primarily from Senate, but also include the Board of Governors, and senior administration. With York currently involved in several LRP initiatives involving governance concerns, JCOAA/LRP and the Sub-Committee on Governance will share information to mutual benefits.

Respectfully submitted on April 23, 2022 by:

Nick Mulé
Co-Chair,
JCOAA-LRP
YUFA

Executive Officers' Workplan 2021-22: Progress Report

Respectfully submitted by (Interim) Recording Secretary - Ida Ferrara

I joined the YUFA Executive as the Interim Recording Secretary on September 18th, 2021. Since then, I have regularly attended the meetings of the Executive, Stewards' Council, and General Membership, ensuring to be accurate in capturing the essence of discussions and recording decisions. During the last few weeks of bargaining, before YUFA reached a settlement in March and in preparation for possible job action, the number of meetings intensified, and I ensured to be accommodating to attend to my minute-taking responsibility. Additionally, since joining the Executive, I have been attentive to the discussions and regularly participated in decision making.

Treasurer – Paul Evans

As Treasurer of YUFA, I will continue to perform the regular responsibilities of the Treasurer which include preparing YUFA's annual budget and financial reports to Executive and members on the state of Association's finances; participating in or monitoring all financial transactions, monitoring YUFA's financial situation and reporting periodically to Executive; providing guidance on financial policies, financial implications of proposed and anticipated events, and investment matters; and ensuring that our members' money is invested appropriately.

We have recently arranged for management of \$750,000 of our funds to be undertaken by Genus Capital Management which specializes in ESG (Environmental, Social and Governance) investments. Our newly formed financial committee will work with a group of interested members to provide advice on investment matters. We will formulate an investment policy.

We will continue to focus on transparency which involves twice yearly reporting to members. At the YUFA Fall General Membership Meeting in October or November we will present our complete audited financial statements and a forecast of our operating results for the fiscal year which will end on April 30. This forecast will be updated in March for YUFA Executive and we will then present an updated forecast and our annual budget for approval by the membership at the YUFA Annual General Meeting in May.

In collaboration with the financial committee and Executive we will review our financial reports, budgets, reporting and systems; review membership fees; advise on financial risk, investments and selection of auditor; and review and advise on auditor's recommendations.

Association of Retired Faculty & Librarians Representative to Executive Fred Weizmann

As the representative of the Association for Retired Faculty and Librarians (ARFL) at York, my role on the YUFA Executive is to represent the interests and concerns of YUFA retirees to the Association. Conversely, I also keep the ARFL membership apprised of developments happening at YUFA, and within the University as a whole, that have implications for retirees. This was also a bargaining year, so I spent much of my time surveying the ARFL membership about issues (like retiree benefits, facility resources and research supports available to retirees engaged in scholarly and research activities and then conveying the priority concerns and needs to the YUFA Executive as they drew up their negotiating package.

Apart from these efforts, I often acted to bring individual retiree complaints to YUFA staff members, who were often quite helpful in solving many of these complaints. In some cases, these complaints also turned out to mask more systemic problems (e.g., PER policies for Senior Scholars, availability of facilities to retirees) which needed to be addressed by the Executive and other Committees (e.g. the JCOAA). Many of these issues are still ongoing. Finally, working through YUFA, we tried this year to address YUFA members who are of retirement age but have not yet retired. We recently had a very successful meeting with those contemplating retirement in the next few years, covering basic information about retirement at York. The meeting was highly successful and I hope we continue to hold and expand such efforts in subsequent years.

Fred Weizmann