

1375, boul. St. Laurent Blvd., Ottawa, ON K1G 0Z7
Tel./Tél. : (613) 237-1590 Fax/Télec. : (613) 237-5508 Toll free/Sans frais : (844) 237-1590
cupemail@cupe.ca/courriel@scfp.ca – cupe.ca/scfp.ca

January 2019

**IMPORTANT
PLEASE GIVE THIS PACKAGE
TO THE TRUSTEES**

Dear Sisters and Brothers:

CUPE Trustees play a vital role in the union. Their annual audit ensures that the finances of the local union or chartered organization are being administered properly and effectively. Recommendations made by the Trustees help guide the membership in making the best financial decisions possible.

To that end, I am pleased to enclose the 2019 **TRUSTEES' REPORT PACKAGE**, to be used for all Trustees' audits in accordance with Article B.3.12 of the CUPE Constitution.

Please complete **and return to my attention** the following:

<ul style="list-style-type: none"> Trustees' Audit Report (using the paper version of the attached document OR generated from the electronic ledger) 	<ul style="list-style-type: none"> <i>completed, signed, and <u>balanced</u> with the amounts indicated on the Secretary-Treasurer's Financial Report to the Trustees</i>
<ul style="list-style-type: none"> Secretary-Treasurer's Financial Report to the Trustees (using the paper version of the attached document OR generated from the electronic ledger) 	<ul style="list-style-type: none"> <i>completed by the local Secretary-Treasurer and given to the Trustees prior to the audit</i>
<ul style="list-style-type: none"> Trustees' Checklist and Suggested Recommendations (attached) 	<ul style="list-style-type: none"> <i>completed by the Trustees</i>
<ul style="list-style-type: none"> Trustees' written report to the membership 	<ul style="list-style-type: none"> <i>Reporting on findings of the audit (If none, please specify)</i>
<ul style="list-style-type: none"> Trustees' written report made to the President and Secretary-Treasurer 	<ul style="list-style-type: none"> <i>Reporting on findings of the audit (If none, please specify)</i>
<ul style="list-style-type: none"> Written response of the Secretary-Treasurer to the Trustees 	<ul style="list-style-type: none"> <i>Providing explanation to Trustees' findings</i>

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MARK HANCOCK
National President/Président national

CHARLES FLEURY
National Secretary-Treasurer/Secrétaire-trésorier national

DENIS BOLDOC, FRED HAHN, JUDY HENLEY, DANIEL LÉGÈRE, MARLE ROBERTS
General Vice-Presidents/Vice-présidences générales


We review all Trustees' Reports that are received at CUPE National. We will send your local a letter acknowledging receipt of your reports and confirm whether the reports have been accepted. A copy will also be sent to your CUPE National servicing representative, so they can assist you should there be any concerns with your submission.

We encourage locals to use the CUPE electronic ledger. There is a six-month ledger, as well as a twelve-month ledger that can be used for all other fiscal periods besides the January-December year. Download the ledger of your choice from the CUPE website at cupe.ca/ledger-local-union-financial-officers.

You may also wish to download the Financial Officers' Handbook which provides a wide range of financial information. The link can be found at cupe.ca/financial-officers-handbook.

If you have any questions or need additional assistance, please do not hesitate to contact us at 1-800-363-2873, option #5 or at trustees@cupe.ca. If you require extra copies of these documents, select option #6. You may also download them from the CUPE website at cupe.ca/trustees-report-package.

In solidarity,



CHARLES FLEURY
National Secretary-Treasurer

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Enclosures

c.c.: M. Hancock; National Executive Board; National Trustees; Regional Directors; Assistant Regional Directors; Organizing and Regional Services; CUPE Servicing Representatives