

## Appendix K

### Financial Assistance Committee Terms of Reference

#### Name

The Financial Assistance Committee

#### Term of the Committee

Applications for financial assistance will be accepted throughout the year to be adjudicated by the committee during regular (monthly) meetings starting in June and ending in May. The applications are accepted throughout the year; however, application periods are divided by each calendar month (1st to 31st), and members can only apply once per term. The committee will adjudicate applications on the second full week of each month.

#### Budgetary Details

The terms of the Collective Agreement provide for the social welfare programming of the Local; these monies are known as "The Financial Aid Fund." The employer provides this funding. The total amount available for the Financial Assistance Committee to distribute per year is as follows: \$45,000 for medical/personal and \$16,000 for academic/childcare.

The Financial Assistance Committee is encouraged to review disbursement criteria to compare demand upon the fund to the available funds within the account. The committee may increase benefit amounts and/or create new programming to meet the needs of the members, if and only if funds are available. The purpose of the Financial Aid Fund is to provide the greatest benefit to members in the greatest amount of need.

#### Members

8. Chairperson: the Administration and Internal Communications Chair, or a designate elected by the Committee.
9. Maximum of 8 members, but the committee can vote to increase the membership cap.
10. Members will be selected and elected by the Executive Committee after a call-out has been sent to the membership.
11. Committee members shall meet several times and coordinate efforts to choose the recipients of financial aid.
12. Meetings will be held at the PSAC Local 610 Union Office, Somerville House Room 1313.
13. Members will receive an honorarium for their contribution.

#### How to Apply

Members should contact the Administration and Internal Communications Chair at [administration@psac610.ca](mailto:administration@psac610.ca) and cc [psac610@psac610.ca](mailto:psac610@psac610.ca) to express interest in joining the Committee. The Executive Committee will consider all members who express interest.

#### Meetings

### *Meeting Duration and Location*

Meetings will be held at the PSAC Local 610 Union Office, Somerville House Room 1313. Meetings shall be held monthly and scheduled for two (2) hours, although they may take less time.

### *Attendance*

Physical attendance at meetings is required, with the exception of remote participation where the Chair deems it appropriate. To maintain membership on the Committee, members shall be physically absent for no more than two meetings per academic year, except under extenuating circumstances (e.g., illness, research travel, bereavement).

### **Non-disclosure Policy**

Members of the committee shall hold confidential all the information related to applications, circulating at the meetings of the committee. This information related to the applications is not to be disclosed or shared with a third party without the written permission of the applicants.

### **Deliverables**

The Committee shall communicate its decisions to the PSAC Local 610 Office Manager.

### **Disbursement Policy for the Financial Assistance Committee**

The Financial Assistance Fund exists to provide assistance to members who experience unexpected financial need. TAs who have held a teaching assistantship for at least one term in an academic year are eligible. This fund is structured as a series of streams to meet the unexpected needs of members who have exceptional demands upon their finances. This policy exists to define such needs, and how the Committee is authorized to respond to and assist applicants.

The Committee recognizes the issues of student poverty within PSAC Local 610. Unfortunately, the Committee must also fund applications according to preferential criteria and cannot offer funding to all applicants. The Committee gives priority to unexpected and unavoidable expenses; therefore, expenses cannot arise from a chronic need. While the Financial Assistance Committee cannot offer funding for general expenses, such as food or groceries, the Local does offer assistance through the Food Support and Resources program. Members are encouraged to apply to this program, should they feel the need to.

Although we offer limited funding for some academic expenses, the Committee cannot act as a substitute for departmental or external funding, nor can we fund tuition or any other academic fee.

To apply, fill out the application form. You will need to attach ALL receipts for expenses already incurred. You will also need to have signed your union card (the blue card). Applicants must be members of the Local at the time of the expense.

Applications are considered throughout the year. Please allow time for a response from the Committee. The committee aims to respond to all applications within one month. Applicants will be notified of decisions by email, and if your application has been successful, you can pick up your cheque at the Local's office.

The Financial Aid Fund is limited and, unfortunately, not all applications can be approved. You may receive a bursary that was not the full amount of your request. These circumstances are based on several factors: need, available funds, and number of applicants. If your application was declined and you want to know why, please contact the Administration and Internal Communications Chair (administration@psac610.ca). Be advised that in contacting the Committee about your application, you will have self-identified, that is to say, your application is no longer anonymous.

The application process assures your confidentiality:

1. Each applicant is assigned an ID number.
2. Applications are reviewed without any identifying information.
3. Committee members must sign a Non-Disclosure Agreement before adjudicating applications.
4. Applications are kept on file for future use in characterizing members' needs for future rounds of negotiations.

Applications must be filled out in full to receive consideration. The Committee will verify the receipts appended to the application. Only documented expenses for which receipts are included shall be considered. Please include original receipts, or photocopies of original receipts, not bank statements.

While the Committee has the authority to fund or deny any application, the following criteria express the Committee's preferences.

Unlikely to be funded:

- Pet care expenses
- Passport fees, Visa applications or permanent residency fees
- Vehicle maintenance expenses (repairs, tires, etc.)
- UHIP expenses
- Textbook purchases, tuition fees
- Technology purchases, unless these can be explicitly justified
- Conference fees or membership fees
- And any other expense that does not qualify as "unexpected need"

Exceptions in the above cases, while extremely unlikely, are possible, at the Financial Assistance Committee's discretion based upon the applicant's justification.

Support for personal and medical emergencies can only be received once per term, up to a cumulative amount of \$500, regardless of when the expense was incurred. The terms divide into Summer (May–August), Fall (September–December) and Winter (January–April), and here refer to the time the committee adjudicates the application, not the date of the expense itself. Support for childcare expenses can only be received up to a cumulative amount of \$500 per academic year (September–August). Support for academic expenses can only be received up to a cumulative amount of \$300 per academic year (September–August).

Should an applicant's claim exceed the allotted \$500 within a single term, the applicant may reapply in the next term for the remainder of the same expense. However, new claims from previously unfunded applicants take precedence. Please note as well that applicants may not receive funding for the same expense more than three times. In addition, the committee cannot consider expenses for which the receipts are more than 12 months old. **Applicants who have received the maximum disbursement in a term are not eligible to apply again to the FAC within the same term.**

The following types of expenses can be funded, with appropriate justification:

**- 1) Medical Emergencies (maximum \$500 per term)**

- These include emergency medical or dental bills, including bills incurred outside Canada
- Please ensure you have applied for and exhausted your eligible SOGS health plan and EHP benefits
- You may claim for a dependent, such as a child, spouse or parent

**- 2) Personal Emergencies (maximum \$500 per term)**

- Examples include but are not limited to:
  - Bereavement travel expenses
  - Financial difficulties related to separating from a spouse or partner
  - Extra expenses incurred during or as a result of an unforeseen, catastrophic home emergency: house fire, flood, sudden unexpected homelessness, etc.
- Note that we can only fund expenses for which a receipt is provided. Please ensure you include receipts and an adequate description of the nature of the emergency.
- The Committee keeps all such private and personal information confidential

**- 3) Academic/Conference Travel (maximum \$300 per academic year)**

- Please demonstrate proof that you have applied to your department and SOGS for travel funding prior to applying to the FAC
- Please enclose records of your participation at the conference (e.g. approved abstract, photocopy of conference program, etc.) and receipts
- The Committee will only consider applications in which the applicant was an approved participant in the academic conference (e.g. as a presenter of a paper or poster, a responder, a panel chair or organizer, etc.)
- The Committee will not fund conference or membership fees
- The Committee will not fund food expenses

**- 4) Child Care Subsidy (maximum \$500 per academic year)**

The Financial Assistance Committee is pleased to offer a subsidy to help members of PSAC Local 610 offset the considerable cost burden of accessing quality child care while they complete their work as teaching assistants. We recognize that as well as balancing their duties as workers, researchers, and students, members who are parents must manage additional financial and personal responsibilities. This subsidy is offered as part of a pilot program that seeks to address child care as a serious member need, and also to gather vital data on how our membership is affected by the cost of child care in Ontario.

- The Committee and PSAC Local 610 may use non-identifying information from applications, such as the financial cost of child care, etc., in order to gather data about how our membership is affected by this issue.
- Please enclose the appropriate documentation and receipts with your application.
- Members are also encouraged to apply to SOGS Child Care Subsidy.
- Only receipts from licensed childcare providers and programs will be considered for the subsidy. For a list of licensed child care providers, go to <http://www.iaccess.gov.on.ca/LCCWeb/childcare/search.xhtml>

Members are encouraged to contact the Administration and Internal Communications Chair ([administration@psac610.ca](mailto:administration@psac610.ca)) should they have questions about the Financial Assistance funding process.

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