



# **2018 BCRTA AGM**

73<sup>RD</sup> ANNUAL BCRTA ANNUAL GENERAL MEETING

## **BCRTA Annual Conference:**

September 20<sup>th</sup> - 21<sup>st</sup>, 2018

## **RR Smith Memorial Fund Foundation AGM:**

Saturday, September 22<sup>nd</sup>, 2018, 9:00am

## **BC Retired Teachers' Association AGM:**

Saturday, September 22<sup>nd</sup>, 2018, 9:30am

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**Please bring this report with you to the meetings**

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# INFORMATION FOR DELEGATES

## **This booklet**

Don't forget to bring this Summary of Reports booklet with you to the Conference and AGM. Help us to save a few trees!

## **Delegates' expenses**

Delegates may claim travel and en route meal expenses on the BCRTA expense claim form. Hotel accommodation and parking are covered by the BCRTA. Lower Mainland delegates not staying in the hotel need to register their vehicles at the hotel's front desk, in order to have their parking covered. Friday and Saturday breakfasts and lunches are provided, as is the Friday evening banquet. Meal passes for non-delegates will be available for purchase at the BCRTA registration desk.

## **Registration and Meet-and-Greet**

Registration occurs in the ballroom foyer (at the back of the hotel's ground floor) on the Thursday evening, starting at 7:00 p.m. There will be snacks, a no-host bar, and the opportunity to check out our Advantage partners.

## **The Annual Conference (formerly known as "Delegates' Day")**

The Conference begins on Friday with breakfast in the ballroom at 8:00 a.m. Conference proceedings get under way at 8:45 and continue until approximately 3:40 p.m.

At 5:00 p.m. there is a no-host bar in the ballroom foyer, and the banquet begins at 6:00 p.m.

The banquet will be a served dinner with a band and dancing to follow.

## **The Annual General Meeting(s)**

Saturday's proceedings begin with breakfast at 8:00 a.m.

At 9:00 a.m. the RR Smith Memorial Fund Foundation holds their Annual General Meeting, electing

its officers for 2018-2019. Almost all of us are Foundation members, and should attend.

At 9:30 a.m. the BCRTA AGM begins, and usually lasts until about lunchtime.

The Annual General Meeting elects the Board of Directors, as well as BCRTA delegates to the pensions debates at the BC Teachers' Federation AGM (held each spring); and makes other major decisions for the organization.

## **The Board of Directors and BCRTA Committees**

The Directors will be meeting at 3:30 p.m. Thursday, then again immediately following the AGM. There is a Directors' Dinner on the Saturday evening where new directors are welcomed and departing directors are thanked.

The Board, consisting of 14 or 15 members from around the province, holds its regular meetings six times a year.

The Directors are advised by a number of standing committees that meet on the two days immediately preceding each Board meeting.

## **BCRTA Committee information**

If you are interested in joining a committee, there is a Committee Application Form elsewhere in this booklet. Appointments are made at the Board meeting immediately following the AGM.

## **Election procedures**

Please read the "Selected Election Rules" document included in this booklet. (See also the BCRTA Rules of Order in the Handbook, viewable on the BCRTA website, at [www.bcrta.ca](http://www.bcrta.ca).)

**BCRTA ANNUAL CONFERENCE AND AGM 2018**  
**VANCOUVER AIRPORT HILTON HOTEL**  
5911 MINORU BLVD, RICHMOND, BC  
SEPTEMBER 20, 21, 22, 2018

**SCHEDULE OF EVENTS**

**THURSDAY, Sept 20, 2018**

9:00 am Northern Zone Meeting – Hilton Ballroom  
3:30 pm Board of Directors Meeting – Hilton Ballroom  
7-9:00 pm Registration, Meet and Greet, No-host bar  
Entertainment: Earl Marriot High School – Jazz Trio

**FRIDAY, Sept. 21, 2018 BCRTA ANNUAL CONFERENCE – Hilton Ballroom**

8:00 am Delegates' Breakfast  
8:45 am Welcome, First Nations greeting, Marissa Nahanee  
9:00 am Travel Tips – Clare Newell  
10:10 am Activity Break – Kathleen Thompson  
10:25 am Refreshment Break  
10:40 am Moving Forward – Brad Baker  
11:40 am Golden Star awards - Charan Gill  
11:50 am Membership awards - Steve Bailey  
12:00 pm Delegates' Lunch  
1:00 pm Video Clip  
1:10 pm Executive Director – Tim Anderson  
1:20 pm Bill C-27 update – JoAnn Lauber  
1:30 pm Keeping Branch Presidents Out of Jail – Bob Taverner  
2:00 pm Strategic Plan/Pensions Update – Gerry Tiede  
2:40 pm Announcements, Evaluation, Nominations deadline  
2:50 pm Refreshment Break  
3:10 pm Zone Group Discussion  
3:45 pm Closing  
5:00 pm No-Host Bar – Ballroom Foyer  
6:00 pm BCRTA Annual Dinner – Ballroom

**SATURDAY, Sept. 22, 2018 ANNUAL GENERAL MEETING**

8:00 am Delegates' Breakfast – Ballroom Foyer  
9:00 am RR Smith Memorial Fund Foundation AGM – Ballroom  
9:30 am BCRTA Annual General Meeting – Ballroom  
12:00 pm Delegates' Lunch – Ballroom Foyer

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**NOTE:** Friday & Saturday meals indicated above are provided for Delegates and Official Guests. Tickets may be purchased for other guests at the BCRTA Registration Desk. Please ensure you bring your meal tickets to each meal where they will be collected.



# PRESIDENTS REPORT

I enjoyed all my visits to branches this year. I think the President is lucky to have these opportunities to listen to members.

Two ideas that have worked out well were our strategic planning sessions (on how to improve service to members) and the one year free membership (thanks to Steve Bailey and the membership committee). We will continue these initiatives during the next year. Please welcome all new members in the fall.

Think about serving on your Branch Executive this year -- maybe as a member at large to start with! Also I hope you have applied to our committees.

Thanks to our Directors and Committees for their hard work for members this year.

Thanks for being members!

Respectfully submitted,  
Patricia Clough,  
BCRTA President

# R.R. SMITH YEAR END REPORT 2018

The 2017-2018 year has been rewarding and productive. 19 grants totaling \$31,000 were made to educational projects in B.C. and around the world. The amount available for grants has increased since the \$2 membership fee was approved. As well, the interest rate earned on the Endowment Fund has increased since moving the Fund to Van City Community Foundation.

The grant recipient list was posted in the Postscript and in the R.R. Smith Newsletter. Many grant recipients have sent articles about the work they are doing. These articles have also been shared with members in the Postscript and in the R.R. Smith Newsletters published this year.

This past year the R.R. Smith Board of Directors has worked with member groups to establish a process to allow members to support educational projects through R.R. Smith and receive a tax receipt.

Two members have come forward with an interest in becoming R.R. Smith Board Members. The R.R. Smith Board has decided to increase the number of elected members to 8 from 5. There will still be 2 B.C.R.T.A. appointed Board Members for a total of 9 directors. Karen Kilbride has been appointed the R.R. Smith Representative South of the Fraser and Sarah Joyce the R.R. Smith Representative North of the Fraser.

The R.R. Smith Affinity Plan with Enjoy Tour and Travel is benefitting members, Enjoy Tours and R.R. Smith. Members can choose from a wide variety of escorted day trips, multi-day trips and vacations. Many of these trips are in B.C. and so a passport is not needed, there are no extra medical costs and flying is not involved. Enjoy Tours donates 10% for day trips, 5% for multi-day trips and \$100 for a vacation booked. This year every time a member takes a trip, their name will be put in a hat for a \$100 prize that will be drawn in December. R.R. Smith has organized 3 trips and some branches organize trips

for their members. Through the R.R. Smith "Let's Go Group" members can receive information about upcoming trips. To join the "Let's Go Group" contact Judy de Vries at devriesj@telus.net.

R.R. Smith has partnered with Linda Fawcus, the CEO of Gluu Technology, to achieve a goal of giving older adults the tools and knowledge needed to use technology to enhance their life. The Langley Retired Teachers' Association scheduled fall and spring workshop sessions for beginner and advanced users of iPads and iPhones. These workshops were fully subscribed with a waiting list. Linda Fawcus is willing to set up similar workshops in other branches as well. Linda makes learning fun. Contact her at linda@gluuconnects.org.

On behalf of the R.R. Smith Board of Directors, I would like to thank Office Administrator, Kristi Josephson and Office Staff Member, Laurie Boyd for all the work they do for R.R. Smith. I would also like to thank Anders I. Ourom for his legal advice and the work he does for our organization each year. Another "Thank you" must be extended to Dan Carter who is a retired CGA and who prepares the R.R. Smith financial report. Working with Troy Oppen of Enjoy Tours, Lisa Hansen of Johnsons and Linda Fawcus of Gluu Technology expands opportunities for our members and supports our goal to provide funding for educational projects in B.C. and around the world.

Lastly and most importantly, I wish to thank the R.R. Smith Board of Directors for their help to make R.R. Smith a success. Bev Anderson, Vice-President; Andy Hattrick, Secretary; Dave Carter, Treasurer; Sheila Pither, Member-at-large; Steve Bailey, Member-at-large; and Sterling Campbell, Member-at-large are dedicated to the work that R.R. Smith does.

Respectfully Submitted by  
Judy de Vries, President,  
R.R. Smith Memorial Fund Foundation

# ELECTION CANDIDATES

The following candidates have been endorsed by the R.R. Smith Board of Directors:

Eight to be elected  
Bev Anderson (Langley)  
Steve Bailey (Gibsons)  
Dave Carter (Coquitlam)  
Judy de Vries (Langley)  
Andy Hattrick (Vancouver)  
Sarah Joyce (Burnaby)  
Karen Kilbride (Surrey)  
Sheila Pither (Vancouver)

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## R.R. SMITH PROPOSED BUDGET JULY 1, 2018 - JUNE 30, 2019

### ANTICIPATED REVENUE

BCRTA Fees	\$29,000.00
Interest on Capital Balance	\$2,304.00
AGM Donations	\$1,000.00
Johnsons	\$800.00
Enjoy Tours	\$1,800.00
Miscellaneous Donations and Honoraria	\$1,500.00
Plus 4% of December 31, 2018 balance	\$7,562.17
<b>Total Revenue</b>	<b>\$43,966.17</b>

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### ANTICIPATED EXPENSES

Audit	\$200.00
President's Expenses	\$700.00
AGM	\$1,000.00
Updating Website	\$350.00
Grants	\$35,000.00
<b>Total Expenses</b>	<b>\$37,250.00</b>
<b>Transfer to Capital Fund</b>	<b>\$6,716.17</b>

# AGENDA

## BRITISH COLUMBIA RETIRED TEACHERS' ASSOCIATION 73<sup>RD</sup> ANNUAL GENERAL MEETING SATURDAY, SEPTEMBER 22<sup>ND</sup>, 2018 AT 9:30AM

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1. Call to Order and Welcome
2. One minute's silence for deceased members
3. Adoption of the agenda
4. Adoption of the 2017 AGM Minutes
5. Business Arising from the 2017 Minutes
6. Elections (to proceed throughout the meeting)
  - a) Explanation of Voting Procedures  
– See "Selected Election Rules" in Summary of Reports p. 24
  - b) Appointment of election scrutineers  
MOTION: That the following be appointed election scrutineers: .....
  - c) Elections – Candidates' statements  
– Summary of Reports pp. 25-33
    - President
    - 1st Vice President
    - 2nd Vice President
    - Directors for inside the Lower Mainland
    - Directors for outside the Lower Mainland
    - ACER-CART Representative
    - BCRTA delegates to the BCTF AGM
7. President's Report (questions and comments)  
– Summary of Reports p. 5
8. Branch Reports (questions and comments)  
– See Branch Reports booklet
9. BCRTA Finances – Summary of Reports pp. 11-14
  - a) Finance Committee Report – p. 11
  - b) Financial Statements  
MOTION: THAT the 2018 audited financial statements be adopted.
- c) Auditor appointment  
MOTION: THAT the BCRTA retain KPMG as its auditor for the 2018-2019 year.
- d) 2019/20 fees  
MOTION: THAT the BCRTA membership fee for 2019-2020 be \$40.00.
- e) Draft budget – pp. 12-13  
MOTION: THAT the draft 2018-19 budget be adopted as proposed/ amended.
10. Service Recognition
11. Branch Resolutions – Summary of Reports p. 9
12. Committee Reports  
(questions and comments) – pp. 16-23

ACER-CART	Steve Bailey
Communications	Bob Taverner
Excellence in Public Education	Charan Gill
Heritage	Barb Mikulec
Member Well-being	Terry Green
Membership	Steve Bailey
Pensions & Benefits	Gerry Tiede
Personnel	Bob Taverner
13. Introduction of new Officers and Directors
14. Presidents' Remarks
15. New Business
16. Adjournment

# BRANCH RESOLUTION

## LOWER VANCOUVER ISLAND RTA

### Moved Paul Hutcheson Seconded Pat Pawlett

That the Pensions Committee examine the way in which the COLA is calculated with a view to having the calculation reflect accurately the actual increase in the cost of living to those in receipt of a pension from the BC Teacher's Pension Plan.

**CARRIED**

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#### **Rationale:**

A cost of living adjustment, calculated in September of each year, is an increase to a retired member's Monthly pension payment. Cost of living adjustment are not a guaranteed benefit of the plan. Adjustments are currently made in January each year and are based on changes in the cost of living, as measured by the Canadian Consumer Price Index (CPI) and the financial health of the plan's inflation adjustment account. Once a cost of living adjustment is granted, it becomes part of a member's guaranteed basic lifetime pension. If there is deflation (i.e., the CPI declines from one year to the next), the pension amount remains the same - it does not decrease.

You will see that there was a 1.6% cost of living adjustment (COLA) to your pension effective January 2018.

The National Consumer Price Index (CPI) was unchanged at 1.5% in the 12 months to September 2017. The British Columbia Consumer Price Index at September 2017 was 2.0%, for Vancouver 2.0%, and for Victoria 2.0%.

Those in receipt of a BC Teacher's pension received 80% of what is necessary to maintain their standard of living.

# EXECUTIVE DIRECTOR'S REPORT

My first week as BCRTA Executive Director was eventful – I was with other BCRTA representatives at the national meetings of ACER-CART. It was an instructive time, confirming my impressions that our association is widely respected, and giving insights into the opportunities and challenges faced by parallel organizations across Canada.

The meetings also affirmed that the strategic goals adopted by the board were well-founded.

There are several themes that will continue to define my work over the coming year:

**Building Capacity** – BCRTA has an incredible legacy of volunteer leadership over the past 70+ years. It is uncommon to see levels of commitment such as those given by branch leadership and elected directors. It is remarkable that the association was able to reach 15,000 members with only two paid staff. But now to meet our growing responsibilities we need to adopt best practices in partnerships, administration and member service functions.

We are instituting improvement to our systems and this process will continue over the coming months and years.

**Alignment** – In years past, the main vehicles of communication were led by individuals with their own preferences and standards. When the time came for new leadership, the board made a good choice to move to alignment of all communications under one shared purpose. There are no more silos of information. For example, BCRTA Advantage programs can now be publicized on all platforms.

PostScript Magazine is growing as a source of important health information, with an emphasis on stories from members about personal experience, re-invention, adventurous travel and history. I'm so very impressed by the thoughtful, engaging stories that are provided by BCRTA members. We have topic experts contributing: Mike Berton, an expert in the financial needs of seniors; Dr. Roger Wong, an eminent geriatrician and speaker; and Marie-Helene Pelletier, a psychologist with expertise in personal resiliency. We now run some ads from approved partners and advertisers, connecting our members to services they enjoy. The ads are also a form of cost recovery – it takes serious money to produce and mail a colour magazine to 16,000+ members four times a year. Each fullpage ad pays for three pages of content by members for members.

BCRTA Connections is a very effective tool. Our email broadcast partner keeps statistics, and Connections has a response rate much higher than other membership newsletters. Insurance options, travel offers, pension facts and stories about BCRTA branch events get the most clicks. If you don't receive Connections, sign up now – [www.bcrt.ca/connections](http://www.bcrt.ca/connections)

Our FaceBook page is back up and sharing great info – [facebook.com/BCRTA](https://facebook.com/BCRTA)

Our website [www.bcrt.ca](http://www.bcrt.ca) is central to our communication efforts. Many improvements have been made over the past few months. We are working to assist branches in their need for a web presence by offering that service as part of our system. We hope to free up local branch leadership to spend more time connecting with people instead of their keyboard.

**Clarity** - The BCRTA Member Advantage program and our insurance partnerships offer incredible value to members.

I am working with these partners and I'm impressed by their responsiveness to our requests for improvement or clarification. I encourage members to explore these offers – chances are you will experience benefits many times the cost of your annual membership fee.

Finally, our internal technical and administrative systems need to match the pace of change. Chief among our considerations are the security of member information, our ability to respond to the needs of members, and building partnerships with the organizations our members depend upon.

Over the past months I have seen the immense range of BCRTA's effectiveness. In a national context, your leaders provide a clear voice for the needs of retired educators and seniors in general. On a more humble level, I see our staff respond to the needs of members in times of crisis and uncertainty. Their patient, caring demeanor and depth of knowledge are of great help to many people each week. That is why we are here.

I count it a privilege to join with you all in this important work.

Respectfully submitted,  
Tim Anderson, Executive Director



# FINANCE COMMITTEE

The Finance Committee has worked diligently to monitor the financial aspects of the BC Retired Teachers' Association.

1. An area that continues to raise questions for branches is permissible fundraising and charitable donations. We have provided information directly to some branches and Bob Taverner will review what is permissible for non-profit organizations at the BCRTA Conference Day.
2. Our financial reporting procedures continue to be refined. We are grateful for all the financial work that our Office Administrator, Kristi Josephson undertakes.
3. A Board authorized sub-committee recommended and the Finance and Board agreed that all investments be retained in GICs.
4. All insurance coverage provided for BCRTA including travel insurance for members and officers' liability as per procedure 3.7.1 of the Members Handbook is in place until November 8, 2019. Review of all insurance coverage for the organization will be a high priority for the Finance Committee in the fall.
5. We are recommending to the AGM that KPMG continue as our auditor for the next fiscal year.
6. In an effort to encourage more members to join it was imperative that we develop a unified communications strategy. To this end \$50,000 was allocated in the 2017-18 budget for

consulting. \$4,410 from the contingency fund was needed to help us modernize our website and enhance our security. The clarification of contingency fund procedures as they relate to a possible growth plan continues.

7. The Finance Committee is closely monitoring the free membership growth initiative that was recommended by the Membership Committee . The "financial reveal" will come this fall. We are excited and confident that the results will be positive. The Board is offering one year of free membership to new members again next year.
8. Procedures for the payment of expenses have been revised with some additions. You will find these changes on the back of the newly revised expense voucher.

Many thanks to the finance committee members for their thoughtful insight and attention to detail of financial matters of the BCRTA. The support of our Office Administrator, Kristi Josephson, made our work possible.

Respectfully submitted,  
Stefan Cieslik, Patricia Clough, Charan Gill,  
Arnie Lambert, Barb Mikulec, Bob Taverner, Grace Wilson (Chair)

# BCRTA DRAFT BUDGET 2018/19

ITEM	BUDGET 2017/18		CURRENT	PROPOSED 2018/19 BUDGET
<b>1 REVENUES</b>				
<b>2 INCOME</b>				
3 Provincial Fees	\$570,000.00		\$555,427.00	\$617,600.00
4 Prov. Fees Prepaid				
5 Johnson Insurance ASA	\$131,350.00		\$149,777.00	\$180,000.00
6 Advertising Revenue			\$8,271.00	\$15,000.00
7 Advantage Partner fees			\$22,300.00	\$20,000.00
8 Miscellaneous Revenue	\$100.00			\$100.00
<b>9 TOTAL OPERATING REVENUE</b>	<b>\$701,450.00</b>		<b>\$735,775.00</b>	<b>\$832,700.00</b>
<b>10 INVESTMENT REVENUE</b>				
11 Interest Earned - Operating Account	\$95.00		\$79.49	\$95.00
12 Income Earned National Bank	\$8,000.00		\$8,324.22	\$6,000.00
13 Income Earned Coast Capital			\$1,245.47	\$5,400.00
<b>14 TOTAL INVESTMENT REVENUE</b>	<b>\$8,095.00</b>		<b>\$9,649.18</b>	<b>\$11,495.00</b>
<b>15 TOTAL REVENUE</b>	<b>\$709,545.00</b>		<b>\$745,424.18</b>	<b>\$844,195.00</b>
<b>16 EXPENSES</b>				
<b>17 MEETING and PROJECT EXPENSES</b>				
18 AGM/Conference Accommodation	\$42,000.00		\$38,950.74	\$41,000.00
19 AGM/Conference-Meals	\$47,500.00		\$45,840.40	\$47,500.00
20 AGM/Conference Meeting Travel	\$32,000.00		\$25,461.60	\$28,825.00
21 AGM/Conference Other Expenses	\$35,000.00		\$32,014.48	\$35,000.00
<b>22 AGM/CONFERENCE TOTAL EXPENSE</b>	<b>\$156,500.00</b>		<b>\$142,267.22</b>	<b>\$152,325.00</b>
23 Directors/Accommodation/Meals	\$54,000.00		\$56,910.12	\$55,000.00
24 Directors' Branch Travel	\$3,000.00		\$1,737.02	\$3,000.00
25 Directors' Travel	\$27,000.00		\$25,042.63	\$27,000.00
26 Director' Other Expenses	\$2,000.00		\$1,827.30	\$2,000.00
27 President's Travel	\$5,000.00		\$5,897.18	\$5,000.00
<b>28 DIRECTORS EXPENSES TOTAL</b>	<b>\$91,000.00</b>		<b>\$91,414.25</b>	<b>\$92,000.00</b>
29 Ad Hoc Committee - ISPC	\$2,000.00		\$2,000.00	\$2,000.00
30 Advocacy Projects	\$7,000.00		\$0.00	\$7,500.00
31 Issue Action Grants	\$0.00		\$0.00	\$10,000.00
32 Communications Committee	\$15,000.00		\$9,269.75	\$10,000.00
33 Excellence In Education	\$9,000.00		\$3,122.71	\$7,000.00
34 Golden Star Awards	\$15,000.00		\$11,699.54	\$15,000.00
35 Finance Committee	\$4,000.00		\$3,748.90	\$4,000.00
36 Heritage Committee	\$6,000.00	\$1,000 from reserve	\$6,081.86	\$7,000.00
37 Heritage Branch Projects	\$5,000.00		\$3,750.00	\$5,000.00
38 Member Wellbeing Committee	\$12,250.00		\$10,032.83	\$9,000.00
39 Membership Committee	\$10,700.00	\$2,500 from reserve	\$12,499.64	\$10,000.00
40 Branch Startup and Revitalization	\$0.00		\$0.00	\$1,000.00
41 Pensions/Benefits Committee	\$15,850.00		\$12,083.26	\$16,000.00
42 Personnel Committee	\$1,000.00	\$1,000 from reserve	\$2,195.05	\$2,000.00
<b>43 COMMITTEE EXPENSES TOTAL</b>	<b>\$102,800.00</b>		<b>\$76,483.54</b>	<b>\$105,500.00</b>
44 BCTF AGM	\$2,500.00		\$2,230.88	\$5,000.00
45 Zone Meetings	\$7,500.00		\$9,178.04	\$10,000.00
46 BCRTA Representation	\$3,500.00		\$4,292.84	\$3,500.00
47 TPPAC / BCTF Pension Advisory Committee	\$3,000.00		\$4,183.06	\$5,000.00
<b>48 TOTAL MEETING EXPENSES</b>	<b>\$366,800.00</b>		<b>\$330,049.83</b>	<b>\$368,325.00</b>



# BCRTA DRAFT BUDGET 2018/19

ITEM	BUDGET 2017/18	CURRENT	PROPOSED 2018/19 BUDGET
<b>49 AFFILIATE FEES</b>			
50 ACER-CART - Fee	\$5,600.00	\$5,682.00	\$5,845.00
51 ACER-CART Translation	\$500.00	\$265.00	\$500.00
52 ACER-CART - Travel	\$4,000.00	\$3,901.82	\$4,000.00
<b>53 ACER-CART - TOTAL</b>	<b>\$10,100.00</b>	<b>\$9,848.82</b>	<b>\$10,345.00</b>
54 CCPA - Fee	\$500.00	\$500.00	\$500.00
55 First Call - Fee	\$500.00	\$500.00	\$500.00
56 COSCO	\$500.00	\$500.00	\$500.00
57 NPF - Fee	\$350.00	\$350.00	\$350.00
58 NPF Delegates' expenses	\$6,000.00	\$4,587.59	\$4,000.00
<b>59 NPF - TOTAL</b>	<b>\$6,350.00</b>	<b>\$4,937.59</b>	<b>\$4,350.00</b>
60 BC Health Coalition - Fee	\$200.00	\$200.00	\$200.00
61 Canadian Health Coalition - Fee	\$500.00	\$500.00	\$500.00
<b>62 TOTAL AFFILIATE FEES</b>	<b>\$18,650.00</b>	<b>\$16,986.41</b>	<b>\$16,895.00</b>
<b>63 EMPLOYEE EXPENSES</b>			
64 Wages & Salaries	\$132,000.00	\$141,791.28	\$245,050.00
65 CPP Expense	\$5,500.00	\$5,615.22	\$7,785.00
66 EI Expense	\$2,850.00	\$2,619.47	\$3,605.00
67 EHB & Dental Benefit	\$9,960.00	\$9,899.08	\$16,560.00
68 MSP Benefit	\$1,800.00	\$980.00	\$900.00
69 Municipal Pension Benefit	\$12,900.00	\$15,840.76	\$23,715.00
70 Life Insurance Benefit	\$2,000.00	\$1,350.80	\$2,000.00
71 WorksafeBC	\$150.00	\$71.00	\$225.00
<b>72 Total Employee Expenses</b>	<b>\$167,160.00</b>	<b>\$178,167.61</b>	<b>\$299,840.00</b>
<b>73 GENERAL &amp; ADMIN EXPENSES</b>			
74 Accounting & Audit	\$12,000.00	\$13,265.96	\$13,400.00
75 Legal	\$6,000.00	\$9,548.84	\$3,000.00
76 Bank Charges	\$250.00	\$315.96	\$250.00
77 Office Supplies	\$18,000.00	\$17,886.11	\$18,000.00
78 Postage & Courier	\$4,000.00	\$3,966.32	\$4,000.00
79 Telephone & Internet	\$3,000.00	\$3,570.89	\$4,500.00
80 Computer Software & Services	\$4,000.00	\$3,109.09	\$8,000.00
81 Equipment Maintenance & Upgrades	\$500.00	\$350.30	\$500.00
82 Staff Professional Development	\$5,000.00	\$2,396.48	\$7,000.00
83 Staff Travel	\$200.00	\$1,784.79	\$5,000.00
84 Service Recognition	\$1,500.00	\$271.12	\$1,000.00
85 President's Discretionary Fund	\$1,500.00	\$1,107.83	\$1,500.00
86 Directors/Staff liability insurance	\$4,900.00	\$4,900.00	\$4,900.00
87 Dir/Staff/Com travel insurance	\$0.00	\$0.00	\$0.00
88 Membership Recruitment Grants	\$3,000.00	\$2,740.00	\$3,000.00
89 Branch Formation	\$500.00	\$0.00	\$500.00
90 Exec. Dir Tech support allowance	\$0.00	\$0.00	\$6,000.00
91 Postscript Production	\$64,000.00	\$68,472.39	\$67,000.00
92 Postscript Mailing	\$40,000.00	\$38,666.64	\$40,000.00
93 Consultant	\$50,000.00	\$52,485.36	\$0.00
<b>94 GENERAL &amp; ADMIN TOTAL EXPENSES</b>	<b>\$218,350.00</b>	<b>\$224,838.08</b>	<b>\$187,550.00</b>
<b>95 TOTAL EXPENSE</b>	<b>\$770,960.00</b>	<b>\$750,041.93</b>	<b>\$872,610.00</b>
<b>96 NET INCOME</b>	<b>-\$61,415.00</b>	<b>-\$4,617.75</b>	<b>-\$28,415.00</b>

# DRAFT BUDGET & NOTES

3. Based on current paid member fees of 15,440 members @ 40\$ = 617,600
5. Estimates based on previous year payments.

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## ASA payments in 2017/18

Travel Insurance Medoc	\$92,226	Life Insurance	\$722	Long Term Care	\$1,435
EHC/Prestige	\$44,586	Home Insurance	\$10,758	Thrive	\$51

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6. Advertising revenue includes Postscript, Connections and the Website
  7. Advantage partner fees - Hearing Life ASA
  30. Advocacy projects – to cover expenses related to advocacy efforts - for eg. Election materials, Bill C-27, National Pharmacare program
  31. Issue Action Grants – there will be a Federal election in 2018; funds will be available to branches to apply for assistance in pre-election events
  45. Zone meeting total previously excluded the Northern Zone as it was absorbed in AGM costs. It is being redirected to Zone meetings to get a more accurate cost of these meetings. The travel portion will remain an AGM cost.
  46. Covers any affiliate group BCRTA directors attend as a rep of BCRTA. RR Smith in particular has been a higher cost as the reps are out of Lower Mainland and in previous years were both Lower Mainland.
  72. Based on current contracts
  74. KPMG fees as scheduled for 2018 is \$11,000. Bookkeeper is up to \$2400 for the year.
  75. 2017/18 required legal advice for the required transition to the New Societies Act. No large legal bills anticipated for 2018/19.
  80. Increased by \$4000 to update database
  83. Executive Director Travel
  83. The branch receives a one-time \$5 per new member added to the branch in the fiscal year.
  93. Alphabet Communications consultant contracts. There are no anticipated consultant needs for 2018/19
- 

## BCRTA Contingency Fund

The following amounts were charged against the Contingency Fund during the 2017-2018 fiscal year, either to cover unexpected increases in budgeted item costs, or to fund expenditure items not foreseen at budget preparation time in 2017.

Alphabet Communications	\$3,465	Communications Consultant
Alphabet Communications	\$945	Website
COSCO	\$5,000	Workshop Sponsorship
ZLC Financial	\$7,875	Insurance Consultant
BC Health Coalition	\$5,000	Legal Defense Funding
Membership Committee	\$2,500	Budget increase
Personnel Committee	\$1,000	Budget increase
Heritage Committee	\$1,000	Budget increase
<b>TOTAL:</b>	<b>\$26,785</b>	

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## Capital Fund Expenditures

Equipment	\$675	Eco Tank Ink Jet Printer
<b>TOTAL:</b>	<b>\$675</b>	

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# ACER-CART REPORT

The ACER-CART Annual General Meeting was held in Ottawa May 31-June 2 at the Canadian teachers' Federation offices. Attending from the BCRTA were Patricia Clough, JoAnn Lauber, Gerry Tiede, BCRTA Executive Director Tim Anderson and Steve Bailey. JoAnn completed her term on the ACER-CART executive and was recognized for her significant contributions to the organization over the past several years. Gerry was elected vice-president and will serve with newly elected president, Bill Berryman, from Nova Scotia. Replacing Gerry as ACER-CART Western Region Representative will be Gordon Cumming from the Alberta Retired Teachers' Association.

It was of great benefit to have Tim attend this gathering. He made positive connections with other ACER-CART executive directors - Daniel Mulloy from ARTA and Jim Grieve from RTO/ERO (Ontario) - as well as with other ACER-CART constituent representatives. Tim was able to contribute positively to the gathering and worked with RTO to form a motion dealing with the relationships among ACER-CART member bodies. Tim now has perspective on the BCRTA as a member of a Canadian coalition of retired educators.

The motions that we presented at the meeting all passed: continuing a campaign against Bill C-27, national pharmacare implementation, "Demand a Plan", privatization of Canadian medical care, establishment of a federal seniors' ministry, and reviewing and monitoring the emerging 10-year federal/provincial bilateral funding and accountability agreement related to home and community health care services. As newly elected vice-president of ACER-CART, Gerry reminded people that resolutions

to the ACER-CART AGM should be coming from other places in addition to the 'wacky-west' of British Columbia.

These passed resolutions from BCRTA are very much reflected in the established priorities for ACER-CART for 2018-2019. In terms of those priorities, JoAnn presented our BCRTA "Petition Campaign Package" for Bill-C27, and invited other ACER-CART members to adapt the material to their province/territory as an effective lobbying tool.

The meeting included excellent presentations. These included Nova Scotia's Advance Care Planning provisions, Barbara Farrell's presentation on "deprescribing" medications, Johnson Inc. presentation on the impact of medical marijuana on the insurance world and update of world travel products, and Geoff Norquay's "Lobbying 101".

In his Annual Report, ACER-CART president, Brian Kenny, remarked that ACER-CART continues to strive to be "a significant voice, at the national level, for retired teachers and other seniors, while maintaining co-operation and partnerships with other groups on issues of common concern." Examples include producing resources to counter elder abuse, defence of our defined benefit pension plans, establishing a Ministry of Seniors, pharmacare, enhanced support for home care, palliative care and mental health, and participation in the Lobby on the Hill. "We can best do that by working as a team of 13 associations, not necessarily owning the outcomes, but doing our best to achieve them together", he concluded.

Steve Bailey,  
BCRTA Director for ACER-CART

# COMMUNICATIONS COMMITTEE

## General

Members express general satisfaction with the new Communications Committee structure. The role and function of the three subcommittees continue to evolve toward:

- setting themes
- soliciting and reviewing submissions
- overseeing advertising policy
- coordinating with other committees re submissions/themes
- collecting feedback to guide operation

## I.T./Website

Review of 2017-2018:

- the BCRTA website is now vastly improved – excellent number of member visits
- emailed BCRTA Connections links have greatly increased our website traffic
- more and more branches are linking their websites with bcrta.ca
- the Board adopted the committee's recommendations re Ecotank printer and MS Office

Objectives for 2018-2019:

- continue website improvement and branch links
- develop a member login area
- work on better ways to recruit soon-to-retire prospective members
- make BCRTA's office wi-fi more workable/reliable
- work on an updated BCRTA promo/recruitment video

## PostScript

Review of 2017-2018:

- received and published quality material in changing format
- began including paid advertising—helping to defray costs
- have been receiving rave reviews from members, and from across Canada
- very high quality of the latest PostScript – great articles, good ads

For 2018-2019:

- solicit new advertising
- work with Membership to develop generic copy of PostScript for recruitment purposes
- use PostScript to help build the BCRTA's email list

## BCRTA Connections

Review of 2017-2018:

- rebranded from Liaison Priorities to BCRTA Connections
- adopted subcommittee guidelines
- excellent number of hits on BCRTA Connections

For 2018-2019:

- build the BCRTA's email list
- ensure that articles are of reader interest
- develop guidelines for committee chairs to help them keep reports interesting

Thanks to all our hardworking committee members: IT/Website: Sterling Campbell, Floyd Smith and George Main; PostScript: JoAnn Lauber, Leckie Reynolds and Libby Thornton; BCRTA Connections: Terry Green, Marion Hartley and Gerry Tiede; and especially our new Executive Director, Tim Anderson.

Bob Taverner, Communications Committee Chair

# EXCELLENCE IN EDUCATION COMMITTEE

The Committee objectives for the 2017-2018 were to:

1. Coordinate the administration and adjudication of the (intergeneration) Golden Star Award Program on behalf of the BCRTA. The Golden Star Awards are made to public school programs that feature the interaction between students and seniors, in the belief that such programs connect the generations and add to the learning, understanding and appreciation of the skills and experiences of both groups.

The Committee met and is pleased to announce the 5 Golden Star Awards for 2017 are:

## **BCRTA Golden Star Awards:**

**Adam Robertson Elementary School, Creston, BC**  
Lorraine Doeleman, Teacher, Grades 3 and 4  
Program Name: Adam Robertson Elementary School and Crest View Care Village Friends

**D.P. Todd Secondary School, Prince George, BC**  
Glen Thielmann Teacher, Social Studies 9 and 10.  
Program Name: Heritage inquiry Program

**Maquinna Elementary School, Port Alberni, BC**  
Lori Souther Teacher, Grade One.  
Program Name: Big Buddy Programme

**Ray Shepherd Elementary School, Surrey, BC**  
Ellen Petersen, Colleen Siple, Lisa Tome Teachers, Grades K, 1, 3 and 4.  
Program Name: "G" is for Grandfriend Program

**South Rutland Elementary School, Kelowna, BC**  
Suzan Miles, Teacher, Grade 5. Program Name: Sun Pointe Senior Buddies

Presentations of the trophies and the cheques have been made to all five recipients. Pictures and articles for all 5 winners will be published throughout the coming year in "Postscript". A summary of each program will be posted on the BCRTA website. A power point presentation celebrating the winners will be shown at the 2018 BCRTA AGM.

Branch presidents are thanked for their participation in the presentations. BCRTA Golden Star 2019 Application forms have been revised and will be on the website in September. Branch presidents are

asked to again promote the Golden Star Awards with the active teachers in their areas.

The Committee was successful in having the provincial government issue a proclamation declaring "June 1st Intergenerational Day in BC"

2. Continue to attend monthly meetings of First Call and to support their initiatives as appropriate. Charan Gill as our representative to First Call has kept us informed of issues and has been the author of motions/letters of support. First Call is very happy to have the BCRTA as an active partner. Resources from First Call partners such as "Grandparents Raising Grandchildren" have been well received by BCRTA members. At each of the meetings, it became clear that the issues affecting children and seniors are the same: affordable housing, accessible health care, healthy diet, safe communities, wanting to be treated with respect and compassion.
3. Continue to write articles that celebrate the excellence of the contributions made to the BCRTA and/or ACER-CART by living past presidents. Articles for both Bob Taverner (BCRTA) and JoAnn Lauber (ACER-CART) will be published in the fall Postscript as their terms of office as past president have been completed.
4. Explore ways to identify and recognize the activities of teachers, administrators and others who promote excellence in public education. Work is on -going with the Communications Postscript Subcommittee on ways to accomplish this goal.
5. Encourage retired teachers to exercise their franchise in the best interest of public education. School Board elections will be held in November, 2018; the Excellence in Public Education Committee will contribute to BCRTA initiatives.
6. Continue monitoring the funding of public education in BC.

Respectfully submitted: Steve Bailey, Val Dyer, Doug Edgar, Lynne Farquharson, Charan Gill (chair), Caroline Malm, and Margaret Sutton.



# HERITAGE COMMITTEE

## **The 2017/18 goals for the Heritage Committee were approved by the BCRTA Board:**

1. To update and promote the availability of BCRTA Heritage Project Funding Grant Criteria and Application forms
2. To continue to administer and adjudicate heritage grants on behalf of the BCRTA
3. To encourage recipients of heritage grant monies to write an article for PostScript
4. To visit a heritage site
5. To promote the availability of the Education Heritage Resource Collection and begin to digitize portions for the website

## **Actions this year:**

The BCRTA Heritage committee awarded grants to projects involving retired teachers;

- Abbotsford RTA to continue their project of transferring materials to the local museum for public use and archival storage.
- Cariboo Chilcotin RTA for 150 Mile 'Little Red School House' Historical Research Project
- Kimberley RTA for upgrading the Marysville School House heritage building used for demonstration classes in a 100 year old building.
- Kootenay Columbia RTA for digitizing and accessioning the registers of Cook Avenue Elementary
- Parksville Qualicum RTA to interview their life members, then to feature their interviews in the monthly newsletter
- Prince Rupert RTA to enrich students' heritage awareness of local historical events throughout the Northwest community.
- Reports from Abbotsford, Cowichan and Vernon RTA were received, detailing how they had used their heritage grant funds, and articles are prepared for inclusion in the PostScript.
- The Prince George RTA completed their Historical book, which won an award and press coverage for their achievements.

These projects were supported by the Heritage grants.

Committee members updated the Library resources which are situated in the BCRTA office. They also updated the Heritage Grant application and Criteria forms, which are available on the BCRTA website under 'Heritage'.

Heritage articles were submitted to Postscript magazine about the BC Labour Heritage plaques, which were funded by the BCRTA. The plaques unveiled in Victoria, Langley, Surrey, New Westminster, Terrace and Vancouver, commemorate events which highlight the struggle towards full collective bargaining rights of teachers in BC.

Ken Novakowski gave an informative talk about the work of the BC Labour Heritage Centre's Projects and Partnerships.

The Heritage committee successfully requested the Board of the BCRTA to fund an Oral History Project which creates videos of the historical events and interviews key people who were leaders bargaining for teachers' rights. Committee members held a virtual Heritage Walking Tour of important historical sites in Vancouver.

Representatives attended the provincial BC Heritage Fairs events. A member shared the 'Early 1900 Schoolhouse Journey into the Past' with photos and original materials in a class which is set up for students to imagine attending a class one hundred years ago.

Heritage Members are urging districts to develop a Heritage Policy for their district. A number of policies have already been collected. The 75th anniversary of BCRTA will be held in 2020.

Many thanks to the committee members in 2017-18 for all their efforts this year!

Heritage committee members: Janice Androsoff, Lynne Farquharson, Cheryl Halsted, Diane McNay, Louisa Sanchez, Barb Mikulec (chair)

# MEMBER WELL-BEING

The Well-Being Committee for the British Columbia Retired Teachers' Association was a newly formed committee that was initiated in 2017. The Committee was an amalgamation of the Health and Housing and the Social Concerns Committee. As a result for 2017-2018 year there were eight members to adjust for those that had a remaining year for their term with either of these committees. The members consisted of Committee Chair and BCRTA Board Member Terry Green, Caroline Malm, Cheryl Halsted, Annette O'Connor, Margaret Sutton, Elaine Thompson, and Tom Hastie. Board members and 2nd Vice President Grace Wilson, and JoAnn Lauber attended meetings to give support to activities when it was possible for them to do so.

The Well-Being Committee developed the following encompassing definition:

Well-Being is defined as the interconnected dimensions of the physical, mental, financial, emotional, social and spiritual health of members of the BCRTA that includes the awareness of developments and issues relating to the well-being of retired members and seniors in general.

We set out a new set of responsibilities for the former Health and Housing and Social Concerns Committees as follows:

- Research issues impacting or potentially impacting the well-being of BCRTA members and seniors in general;
- Provide information and advice to the Board and other Committees related to these issues for dissemination to members;
- Encourage members at the Branch Level to become involved in collecting information on issues affecting their members well-being and to appoint Contacts from local membership for back and forth communication with the BCRTA Well-Being Committee;
- Upon request of the Board, assist in the development of joint actions with organizations that have similar goals to the BCRTA; and

- Attempt to identify at least one issue per year to be investigated in depth and upon approval of the Board, to be pursued as an advocacy project, with assistance if required, from table officers.

The goals the Committee set for this year were to:

- provide at least four articles to the subcommittee of the Communications Committee on well-being topics to the POSTSCRIPT Magazine; and
- provide an article on the restructuring of the former committees for the winter edition of the POSTSCRIPT Magazine; and to
- hi-light the commitment to advocate for a National Pharmacare Program for Canada.

To this end the committee met six times during the year and were able to meet objectives set for 2017-2018. The Board and members of the committee have had positive feedback regarding improvements to both the BCRTA CONNECTION Report, to which this committee has made contributions and to the POSTSCRIPT Magazine.

The Committee has worked on reviewing BCRTA Policies regarding Health and Housing and Social Policy and has submitted a new Section 4 for the POLICY HANDBOOK with the title Social Policy that includes the broad beliefs and intents of BCRTA Advocacy on these issues on the behalf of our members.

I would like to express my sincere appreciation to the dedicated hard work of this Committee this past year. Our Committee will revert to a Chair from the Board of Directors of the BCRTA and six additional members. For those leaving the Committee, I wish them well. For those that have remaining terms and those wishing to apply, I look forward to the opportunity to work with you during the coming year (2018-2019).

Terry Green, Chair, Well-Being Committee

# MEMBERSHIP COMMITTEE

In accordance with its Committee Objectives and Action Plan for 2017-2018, the Membership Committee has been engaged in a number of initiatives to extend and enhance membership in the BCRTA:

- A revised “Branch Membership and Enhancement Guide” is being placed on the BCRTA website. This document will replace the previous printed version and includes valuable updates to support branch executives in carrying out their work. Thanks to George Main for his dedicated work on this project.
- The “One Year Complimentary Membership” for new members joining the association resulted in a significant gain of new members over the past year. This initiative will be extended into the next membership year. The BCRTA is seeing a significant membership increase.
- The BCRTA again acknowledges the support of the BCTF in our membership growth initiatives. The BCTF is actively publicizing the advantages of BCRTA membership.
- Working with Executive Director, Tim Anderson, and with the Communications Committee, the Membership Committee is developing mechanisms for transitioning active teachers into BCRTA membership before retirement. Active teachers will be made more aware of our insurance and benefits programs as an incentive to join.
- The Membership Committee is developing a line of BCRTA promotional and informational merchandise. A budgeted pilot project for the development of such material has been successful with the production of new pens and tote bags with the BCRTA website address, logo and motto “It’s Your Time”.
- We have had significant additions to our Members’ Advantage Program this year, including HearingLife Canada, Merit Travel and Travel Agency Tribes. We are working on an enhanced agreement with Collette Travel and currently exploring relationships with other Advantage Partners, including Iris Optical and the Edvantage Program. Need has been expressed for partnership with a service station brand (ie. ESSO) and veterinary services. Thanks to Committee member Sterling Campbell for spearheading our work in this important area. Very popular among our Members’ Advantage offerings are the Endless Savings and More BCRTA App and Park ‘N Fly. Complete listings of our Partners will now be published regularly in PostScript. Enjoy Tour and Travel, a partner associated with the R.R. Smith Charitable Foundation is proving to be a popular way for branches to arrange day trips as well as over night trips to various locations.
- The Membership Committee is celebrating the revitalization of the Comox Valley Retired Teachers’ Association. The branch has an executive in place and has been guided in its reestablishment by BCRTA Board members Stefan Cieslik and Sterling Campbell and Parksville-Qualicum president, Cathy Van Herwaarden.
- A big thanks again to branches to have been able to attend local Pension Corporation seminars and BCTF local events to promote BCRTA membership. These efforts pay off - along with the most valuable recruitment technique - word of mouth to retiring colleagues. The Parksville-Qualicum Branch produces executive member business cards with the BCRTA logo and the message “Join BCRTA and PQRTA - 1st year FREE = \$50 value.... [www.bcrt.ca](http://www.bcrt.ca) 1-877-683-2243” on the back. Here is



an inexpensive and effective way to spread the word. Our Membership Committee also had a good presence at the BCTF AGM this year.

- The Committee reaffirmed the right of each BCRTA branch to set its own branch fees according to branch needs and activities. Branches are reminded that branch fees must be used for the sole benefit of the membership and may not be used for charitable purposes. Branches are encouraged to use their branch funds to bring in event speakers and to subsidize branch activities and luncheons.
- Branches are reminded that they can request branch membership list updates in various formats from the BCRTA office. In the context of efficient use of office staff time, please make an arrangement with staff that works best for all involved.
- The Committee reviewed and amended BCRTA Procedures 8.3.3 guidelines around the Members' Advantage Program in order to update and clarify.
- The Committee continues to work with the Innovative Strategic Planning Committee (ISPC) to enhance the services of the BCRTA to its members.
- The Committee received a report by Annette O'Connor that Surrey, Langley and Delta branches are planning joint events of common interest to the branches. This kind of branch cooperation is recommended for local exploration.
- The Delta Branch has proposed BCRTA adoption of the "Green Sleeve" initiative. This project involves working with community resources to produce plasticized folders containing medical and personal information that is helpful in a time of emergency. This folder can be placed on a fridge for easy location. The Membership and Member Well Being Committees are working on the development of a BCRTA version of "Green Sleeve". Thanks to Pat Thiesen and Kay Dennison for their excellent presentation.

Respectfully submitted,  
Sterling Campbell, Val Dyer, Doug Edgar, Charan Gill, Annette O'Connor, Elaine Thompson, Steve Bailey (Chair)

# PENSION & BENEFITS

The preliminary 2017 report from the Teachers' Pension Plan is full of good news for all members of the plan. Our plan needs to earn a 5-year annualized return on investments of 6.5% but since that return is 10.6% we know there will be a significant surplus. The Joint-Trust Agreement specified some plan improvements when there was sufficient surplus, and these will come into effect, but these will only affect future pensions. Of interest is the fact that contribution rates will now be essentially equal – one of the goals of Joint Trusteeship.

One improvement will affect retired members. There will be a small increase in the amount of money flowing into the Inflation Adjustment Account (IAA). This is the account that provides cost-of-living increases and this account is now extremely well funded, so we can be confident that full increases will be coming in the foreseeable future.

The committee has continued to oppose the attacks on defined benefit pension plans. We began the year with a campaign to contact MPs and voice our opposition to Bill C-27. We recorded 145 separate contacts by our members who have written, phoned or visited an MP to voice our opposition to this bill. We have also started a petition campaign under the leadership of JoAnn and Dale Lauber. The petition language has been pre-approved by the Clerk of the House of Commons. Petitions with 25 signatures by constituents may be read out in the House of Commons and our goal is to have each petition read separately by every constituency MP in BC. Our two campaigns have been widely shared across Canada through our connections with ACER-CART, COSCO and the National Association of Federal Retirees. The first petitions have been read in the House of Commons.

Our Retirement Workshop sub-committee has developed and provided workshops for active

teachers preparing for retirement. The workshops are: There's More to it than the Money and Making Sense of Pensions and Benefits. The workshops are very popular with over 1000 participants this past year being introduced to the BCRTA. Al Cornes and Arnie Lambert have done the lion's share of the presentations with others helping as they are able.

Monitoring the group insurance plans available to our membership is a major time commitment of the committee.

We are very excited by:

- The improvements we have negotiated with improved benefits of our Travel plans.
- Vacations in BC covered
- The trip days don't start counting until you leave Canada
- The introduction of a top-up Trip cancellation plan which adds \$12,000 of trip cancellation benefits to current plans.
- The introduction of a stand-alone Extended Health Care Plan for members who don't travel but want an alternative to Green Shield.
- The growth in enrollment in our Johnson's EHC with Prestige Travel. This is a yearly plan that provides any number of 62 day trips with no 90 day stability clause.

The committee members are: Janice Androsoff, Stefan Cieslik, Al Cornes Arnie Lambert, Dale Lauber, Floyd Smith, Howard Spence, Gerry Tiede (Chair)

# PERSONNEL COMMITTEE

The committee negotiated two term contracts with Alphabet Communications, retaining the company to continue the work begun under previous contracts:

- to improve the BCRTA website
- to assist in the production and editing of the BCRTA's magazine and newsletter
- to advise and assist in the drawing up of contracts with Member Advantage partners
- to advise on upgrades and improvements to data management and sharing systems

The term contracts were for the periods November 1st 2017 to January 31st, 2018; and February 1st, 2018 to May 31st, 2018.

Under direction from the Board, the committee researched and developed a proposed continuing contract for the position of BCRTA Executive Director. The committee studied ED contracts in place in

the BCTF, in RTAs across Canada, and in several Vancouver-area organizations. The committee also sought and received advice from working HR professionals. The contract would be for 4/5-time employment.

In view of the outstanding work done under the Alphabet Communications contracts by Tim Anderson, the Board determined that the position of Executive Director should be offered to him. The ED's job description included, in large part, a continuation of the work done by Alphabet Communications.

The committee successfully concluded contract negotiations with Tim Anderson, the Board ratified the agreement, and he began work in his new position on June 1st, 2018.

My thanks for the work done by my committee colleagues: Patricia Clough (President), Gerry Tiede (1st VP), Grace Wilson (2nd VP).

Bob Taverner, Chair, Personnel Committee

# SELECTED BCRTA ELECTION RULES

## PROCEDURES: 4.6.2 For Director

### 4.6.2 For Director

(a) A call for nominations for Director positions, along with the appropriate forms, shall be published in the Summer issue of PostScript, in an issue of BCRTA Connections, and on the BCRTA website by April 30th.

(b) Nominees wishing their curriculum vitae to be published in the Summary of Reports booklet shall submit their nomination forms and curriculum vitae to the BCRTA office by July 15th. Dir., May 2014

(c) Persons nominated after the July 15th deadline may prepare curriculum vitae for distribution at the AGM, prior to the elections. Dir., May 2014

(d) Nominees submitting their forms after July 15th shall have their names added to the printed ballots if they are in the hands of BCRTA Staff by 5:00 pm on the day before the AGM.

(e) A nomination from the floor requires a mover and seconder. Dir., Mar 2015

(f) There shall be no candidate speeches except that, if there are nominations from the floor, all candidates for that particular position shall be granted two minutes in which to introduce themselves. Dir., Mar 2015

### 4.5.2 Composition of the Delegation to the BCTF AGM

#### BCTF AGM

AGMs 2008, 2011, 2017

The BCRTA delegation shall have up to 21 members, including the following: (a) the BCRTA Directors;

(b) BCRTA voting members elected by the AGM from a slate of candidates comprising:

i. members who have submitted nomination forms prior to the AGM; and

ii. members nominated from the floor of the AGM.

## RULES OF ORDER:

### 8.5.5 Balloting rules

(a) The printed ballots will include the names of those candidates whose valid nomination forms were in the hands of Office Staff by 5:00 pm on the day before the General Meeting.

(b) The names of candidates nominated from the floor shall, at the direction of the Nominations Chair, be added to the printed ballots by the voters.

(c) A ballot shall be valid if it is marked for at least one candidate but not if it is marked for more than the number of vacancies to be filled. The final determination of a ballot's validity lies with the Nominations Chair.

(d) To be declared elected a candidate must receive more than 50 percent of the valid ballots cast; except in the election for BCRTA Delegates to the BCTF AGM, where candidates are elected in order of the number of votes received, up to the number required to make up the delegation.

Dir., May 2015

(e) Following an indecisive ballot, where there are more than two candidates remaining over and above the number of remaining positions to be filled, the candidate with the fewest votes shall be dropped from the next ballot.

(f) Candidates defeated in an election for a position shall be deemed to have been nominated for the position next to be filled.

(g) At any time prior to the conduct of a ballot a candidate may, by giving notice to the meeting, withdraw from that election.

(h) Following completion of the election process, and unless there is a resolution to the contrary, the ballots shall be destroyed.

# NOMINEES FOR ELECTION AT THE 2018 BCRTA AGM

## FOR PRESIDENT - 1 YEAR TERM

### GERRY TIEDE SURREY

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Serving as First Vice President this past year has been an exciting and rewarding time as the Board has moved forward in improving our structures and services to members. Our efforts to grow and revitalize our Association are showing great results. I look forward to this next year as we continue to develop and implement our strategic plan. I know that this will be hard work; we will need to be careful, wise, disciplined, cooperative and courageous if we are to be successful in achieving our ambitious goals.

#### **Some career activities**

- Chairing the Pension and Benefits Committee of our Association.
- Representing our group on the Teachers' Pension Plan Advisory Committee and the BCTF Pension Committee.
- Introducing future members to our Association by delivering our pre-retirement workshops.
- I am currently the Vice President of the Canadian Association of Retired Teachers following one year as the Western Representative and 4 years as the BC Director.
- Serving as a Trustee of the B.C. Teachers' Pension Plan for 11 years including three years as Chair. Participating on many committees including the Benefits and Communication, the Inter-plan Education and the Inter-plan Investment Committee which I chaired for four years.
- Serving seven years on the Board of the Shareholder Association for Research and Education.
- Starting as an elementary music teacher, teaching throughout the elementary school program and retiring as a school principal.
- Providing leadership to the Surrey Principals' and Vice Principals' Association and the B.C. Principals' and Vice Principals' Association.

#### **The most rewarding highlights include:**

- Opening two new elementary schools as the Principal.
- Serving on the team that negotiated the joint trusteeship of our BC Teachers' Pension Plan.
- Serving as the first non-professional Chair of the Board of Trustees for our teachers' pension plan.
- Chairing the BCRTA's Innovation and Strategic Planning Committee with a goal to grow and revitalize our Association.
- Three trips to Zambia, in retirement, to work with students and teachers in an orphanage for students with AIDS.

Gerry holds a Bachelor's degree in Psychology (SFU) and a Master's degree in Education Administration (WWU).

# NOMINEES FOR ELECTION AT THE 2018 BCRTA AGM

## FOR 1<sup>ST</sup> VICE PRESIDENT – 1 YEAR TERM

### GRACE WILSON KOOTENAY LAKE WEST

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The BCRTA strategic plan has focused our energies on increasing membership. Each committee's objectives is driven by the desire to deliver better service to members. As second vice president and treasurer it has been a year of personal growth, dedication and excitement. I'm part of a team committed to seeing the BCRTA move towards its potential.

There is more work to do. I would appreciate your support for the position of first vice president. I would commit my experience and enthusiasm to see that the BCRTA continues to move forward in a thoughtful, practical, and transparent manner.

#### **Experience:**

##### **Provincial**

- BCTF Executive
- First Vice President - 3 years
- Negotiating Team for Joint Trustee Pension Plan

##### **BCRTA Committees and Positions**

- Health and Housing - 3 years – (chair for 2 years)
- Well-Being – 1 year
- Pensions and Benefits - 5 years
- Advocacy - 5 years
- Treasurer and Chair of the Finance – 1 year
- Innovation Strategic Planning Committee
- Personnel – 1 year
- Second Vice President – 1 year

#### **Local Association**

- Teacher, Kamloops and Nelson School Districts – 33 years
- President, Nelson District Teachers' Association – 9 years
- Bargaining Committee – local and provincial bargaining
- President during regional district amalgamations

#### **Local BCRTA Branch**

- Kootenay Lake West RTA member

# **NOMINEES FOR ELECTION AT THE 2018 BCRTA AGM**

## **FOR 2<sup>ND</sup> VICE PRESIDENT - 1 YEAR TERM**

### **CHARAN GILL**

### **RICHMOND**

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I am honoured to have been nominated to run for second vice president of the BCRTA. I have been a Director for six years, serving on most committees (Heritage, Social Concerns, Communications, Retirement Workshop, Membership, Finance and Excellence in Public Education). I also chaired the Retirement Workshop Committee in my first year as a Director and have been the chair of the Excellence Committee for the past four years.

I have been a BCRTA representative to COSCO, and in that position, worked with the task force to update and revise the COSCO workshops. I have also been the BCRTA representative to First Call.

I previously served on the Richmond Retired Teachers Board and was the treasurer of the Richmond Retired Teachers' Scholarship Trust Fund Foundation.

In the community I am currently a member of the Richmond Sister City Committee and have in the past served on the Richmond Intercultural Advisory Committee, the Steveston July 1st committee, and the Steveston Ships to Shore committee. I also volunteer with the "Heart and Stroke Foundation".

I believe I bring a breadth of knowledge and experience to the Board. My abilities to "see the big picture", establish and follow procedures and ask probing questions will be especially important as the BCRTA continues to grow as an organization. My experience and skills gained as a member of the BCTF Internal Mediation Service will be an asset as change brings new challenges.

I look forward to serving the membership in a new role, and ask for your support for second vice president.



# NOMINEES FOR ELECTION AT THE 2018 BCRTA AGM

## FOR 2<sup>ND</sup> VICE PRESIDENT - 1 YEAR TERM

### ARNIE LAMBERT VANCOUVER

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It has been a privilege to serve as a BCRTA Director for two years. I ask for your support for the position of 2nd Vice President.

#### **The adoption of our Strategic Plan is revitalizing the BCRTA:**

- Membership numbers and revenues are up,
- More members are serving on committees,
- Advantage partnerships are expanding,
- Communications and Member Well-being remain major priorities,
- Benefits options have improved and expanded,
- We hired an Executive Director.

#### **Work still remains:**

- Defending public healthcare,
- Defending defined benefit pensions,
- Lobbying for a national Pharmacare plan,
- Improving member services.

#### **Experience:**

##### **Local**

- Elementary teacher, Summerland - 25 years
- Summerland Teachers' President - 7 years
- Okanagan Skaha Teachers' President - 1 year

##### **Provincial**

- Pensions/Benefits staff - 10 1/2 years
- Income Security Ctte. - 6 years
- Pensions Ctte. - 8 years

##### **BCRTA**

- Director – 2 years
- Pensions and Benefits Ctte. - 7 years,
- Pension Workshops Ctte. and presenter - 6 years,
- Vancouver Branch RTA EC Member-at-Large

I will work to protect the goals of our organization, and I would be honoured to serve as the 2nd Vice President.



# NOMINEES FOR ELECTION AT THE 2018 BCRTA AGM FOR ACER CART REPRESENTATIVE - 2 YEAR TERM

## DALE LAUBER NEW WESTMINSTER

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Both the BCRTA and ACER-CART strive to protect the interests of retired teachers and Canadian seniors in general. This includes protecting and advancing defined benefit pension plans. To be effective both organizations must support each other's initiatives. I offer my effort, energy and experience to continue the good work of BCRTA's ACER-CART representatives of the past.

### Education:

- B.Ed. University of Alberta,
- M.Ed. University of Western Washington

- Director, BC Pension Corporation, 14 years
- Trustee, New Westminster Public Library, 6 years
- Director, InterLINK as representative from New Westminister Public Library, 5 years

### Teaching Experience:

- 19 years, Port Alberni, Prince George, Surrey, and Langley.
- 6 years, County of Beaver, AB

### BCRTA Experience:

- BCRTA Pensions and Benefits Committee, 13 years
- Vice President New Westminister Branch, 2 years
- President New Westminister Branch, 3 years
- BCRTA AGM Delegate, 5 years

### Other Experience:

- BCTF Staff, Director of Income Security, 15 years
- Trustee of BC Teachers' Pension Plan, 18 years
- Teachers' Pension Plan Advisory Committee, 22 years

# **NOMINEES FOR ELECTION AT THE 2018 BCRTA AGM**

## **FOR DIRECTOR**

### **(INSIDE THE LOWER MAINLAND AND FRASER VALLEY REGIONS)**

## **TWO - 2 YEAR TERMS**

## **CAROLINE MALM COQUITLAM**

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Having served four years on BCRTA committees, I would like to put knowledge, energy and commitment to work on behalf of members as a Director. When working on projects and resolving issues, I value a collaborative approach. Thank you for considering my candidacy - I respectfully ask for your support.

### **BCRTA Committee Experience:**

- Excellence in Public Education Committee (four years);
- Health and Housing Committee (three years);
- Member Well-Being Committee (one year);
- CRTA delegate to BCRTA AGM meetings; BCRTA delegate to BCTF AGM meetings.

### **Executive Committee Experience:**

- Coquitlam Retired Teachers' Association (CRTA): President (current); Vice President; Director responsible for Policies and Procedures; Newsletter editor; Social Concerns Contact to the BCRTA
- Coquitlam Local 43 (CTA): Acting President; First Vice-President; Grievance Officer; Member at Large

### **Other Committee Experience:**

- CTA and BCTF: As a local officer, dealt with pension issues and served on many district and local committees; BCTF Provincial Health and Safety Trainer; Local Representative to the BCTF; CTA delegate to BCTF AGM meetings; Staff representative.

### **School based committees:**

- Professional Development
- Health and Safety

### **Educator positions held:**

- Teacher of secondary English, French, German, Latin, Sewing and Social Studies in Burnaby, Ontario and Coquitlam
- Department Head of languages, Coquitlam

# **NOMINEES FOR ELECTION AT THE 2018 BCRTA AGM**

## **FOR DIRECTOR**

### **(INSIDE THE LOWER MAINLAND AND FRASER VALLEY REGIONS)**

## **TWO - 2 YEAR TERMS**

### **DAVE SCOTT**

### **NEW WESTMINSTER**

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Staying in the know and reacting to changes that directly affect teacher-retirees is a service we appreciate greatly. The BCRTA Directors and Committees provide important monitoring, oversight, input, and proactive/reactive advocacy in the face of ongoing changes in politics, social issues, and the economy - to ensure our retirement experience is comfortable, safe, and consistent. I offer my expertise, experience and problem-solving skills to continue improvement and expansion of services, to encourage new retirees to join, and to protect the retiree benefits we enjoy in retirement.

#### **Education**

- Kamloops Secondary 1966
- Bachelor of Education (SFU) 1974
- Masters in Special Education (UBC) 1984

#### **BCRTA**

- New West RTA Member for 10 years 2008
- Canada Health Care Accord Round Table/Local Lobbying 2014
- BC Seniors Advocate Residential Care Survey Volunteer 2016
- New West RTA Executive - currently serve as Secretary 2018

#### **Provincial**

- BCTF Pension and Retirement Workshop Presenter 4 years
- BCTF Staff - Income Security Assistant Director 4 years
- BCTF Judicial Council Chairperson 4 years
- BCTF AGM & Rep Assembly (delegate and local chair) 20+ years

#### **Local**

- Teacher - Kamloops Thompson School District 30 years
- Kamloops Thompson Teachers Association Executive 18 years
- KTTA Local President/Vice President 6 years

# **NOMINEES FOR ELECTION AT THE 2018 BCRTA AGM**

## **FOR DIRECTOR**

### **(OUTSIDE THE LOWER MAINLAND AND FRASER VALLEY REGIONS)**

## **TWO - 2 YEAR TERMS**

### **JANICE ANDROSOFF**

### **ROSSLAND**

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I would like to continue advocating for seniors by working as a BCRTA director.

#### **Local Experience:**

- KCRTA VP, President 5 years
- Primary and Special Ed teacher 23 years Trail, District #11 (after amalgamation, Kootenay Columbia #20)
- Local executive 22 years as staff rep, Status of Women chair, Working and Learning Conditions chair, bargaining
- Committee, Vice President, President
- President, board of directors Trail Seniors Advocacy group 2012-18; Rural Health Network 2018
- Organized all candidates forums in last federal and provincial elections

#### **Provincial Experience:**

- BCRTA Director 2017-18
- BCRTA Committees: Health and Housing, Heritage, Pension and Benefits
- BCTF Staff Rep trainer, Working and Learning Conditions Committee
- BC Health Coalition Steering Committee, 2012-17, Election Working Group 2016-17, Seniors Working Group
- 2016-Present

# **NOMINEES FOR ELECTION AT THE 2018 BCRTA AGM**

## **FOR DIRECTOR**

### **(OUTSIDE THE LOWER MAINLAND AND FRASER VALLEY REGIONS)**

## **TWO - 2 YEAR TERMS**

### **STERLING CAMPBELL**

### **CAMPBELL RIVER**

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#### **Education:**

- Wayne State U. B.A. Mass Communications
- Central Michigan U. M.A. Guidance Counseling
- Community Service Campbell River
- Chair Campbell River Hospital Foundation
- Vice Chair Tidemark Theatre Society
- Treasurer Campbell River local Olympic committee
- Co-author report for S.D. 72 "Year-round schools"

#### **Community Service Campbell River:**

- Chair Campbell River Hospital Foundation
- Vice Chair Tidemark Theatre Society
- Treasurer Campbell River local Olympic committee
- Co-author report for S.D. 72 "Year-round schools"

#### **Teaching Experience:**

- Secondary school media teacher
- Instructor First Nations Secondary school
- Guidance teacher Adult Co-op education

#### **Local BCRTA Experience:**

- 12 years local treasurer Campbell River RTA
- 7 Years Campbell River delegate provincial AGM

#### **Provincial BCRTA Experience:**

- 4 years member Membership and Communications Committee. - liaison between both committees
- Past chair Communications Committee.
- Designed province wide print media awareness campaign on private school funding.
- As membership committee member designed the permanent plastic membership card.
- Successful motion through Communications Committee to the board to engage a web master to revamp BCRTA web site.
- Negotiations with potential membership Advantage partners ongoing.
- Elected director 2015 and reelected 2017
- As director I successfully organized and chaired the Comox Valley revitalization project after inactive for four years.

#### **If Reelected:**

- I will continue to mentor the new Comox Valley R.T.A.
- I will continue to advocate for strategies and programs to recruit and retain members.
- I will continue to research potential member Advantage Partners.

## NOTES

It's Your  
Time.

G  
BRTA



# 2018-2019 BCRTA COMMITTEES - APPLICATION FORM

DEADLINE FOR RECEIPT OF APPLICATIONS: SEPTEMBER 22ND, 2018

BCRTA committees usually meet 6 times a year during a 2-day period prior to each Board of Directors meeting. Meetings are held in the BCTF Building, at 100-West 6<sup>th</sup> Avenue, Vancouver. Appointments are made at the post-AGM Board of Directors meeting, and terms are generally for 2 years. Members may serve on any one committee for up to a maximum of 4 consecutive years (i.e. two 2-year terms). Travel, accommodation and meal expenses are reimbursed.

**Members are no longer expected to sit on two committees.** For further information see the **Handbook** on our website ([www.bcrta.ca](http://www.bcrta.ca)), and look in "Section C-Procedures", parts 7 and 8.

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Postal Code: \_\_\_\_\_ Email: \_\_\_\_\_

Branch, if any: \_\_\_\_\_ Signed: \_\_\_\_\_

## Nominated by two BCRTA members in good standing:

Nominator (please print): \_\_\_\_\_ Signed: \_\_\_\_\_

Nominator (please print): \_\_\_\_\_ Signed: \_\_\_\_\_

## The BCRTA Committees are:

COMMUNICATIONS      EXCELLENCE IN PUBLIC EDUCATION      HERITAGE      MEMBERSHIP

PENSIONS & BENEFITS (A pensions background, e.g. in the BCTF or a local, is **required**.)

WELLBEING      [The FINANCE and PERSONNEL Committees are Directors only]

## Please list in order of preference:

Committee Applying for: #1 \_\_\_\_\_

Why would you be a good choice for this committee? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Committee Applying for: #2 \_\_\_\_\_

Why would you be a good choice for this committee? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Committee Applying for: #3 \_\_\_\_\_

Why would you be a good choice for this committee? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Outline positions held and/or the work you have done in your branch: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**Note:** Applicants will all be informed of the Directors' decisions concerning appointments.

Mail to BCRTA, 100 – 550 W 6<sup>th</sup> Ave., Vancouver, BC, V5Z 4P2, **or** email to [kristi@bcrta.ca](mailto:kristi@bcrta.ca)





# BCRTA DELEGATES TO THE 2019 BCTF ANNUAL GENERAL MEETING

## NOMINATION FORM

The **BC Teachers' Federation** holds its AGM each year during the March spring break. A block of time during the AGM is normally set aside for debating recommendations and resolutions relating to **pensions**. The BCRTA sends a number of delegates to participate and vote in the "in-committee" consideration of those motions. Our delegation consists of BCRTA directors and BCRTA members elected at the BCRTA Annual General Meeting—to be held this year at the Hilton Vancouver Airport Hotel in Richmond on September 22<sup>nd</sup>, 2018.

To be elected as a BCRTA delegate to the BCTF AGM, you must be an **active or life member of the BCRTA, and a member or honorary associate member of the BCTF**. If you were a BCTF member when you retired, you are almost certainly an honorary associate BCTF member now. If you are unsure, you should contact the BCTF to check. (Google "BCTF" to get phone nos. etc.)

A background of past membership on a BCTF or local association Pensions Committee is a requirement, and experience on BCRTA or Branch executive or other committees would also be helpful. If elected, you may be asked to attend a pre-AGM session to become familiar with the issues. You should be prepared to go to a microphone at the BCTF AGM, to speak for or against a motion if the opportunity presents itself, and to stay until the end of the Pensions section of the BCTF AGM agenda.

Filling in and submitting this form will result in your name being added to the list of candidates on the **BCRTA Delegates to the BCTF AGM** ballot, used in the elections at our BCRTA AGM, scheduled for September 22<sup>nd</sup>, 2018. Nominees do not have their expenses paid to attend our BCRTA AGM unless they are delegates. You will be notified after our AGM if you are elected. If elected, your expenses will be paid to attend the **BCTF** AGM.



# BCRTA DELEGATES TO THE MARCH 2019 BCTF ANNUAL GENERAL MEETING

## NOMINATION FORM

**MUST BE IN THE HANDS OF BCRTA STAFF BY 5 P.M. ON SEPTEMBER 21ST, 2018**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Postal Code: \_\_\_\_\_ Email: \_\_\_\_\_

Branch, if any: \_\_\_\_\_ Signed: \_\_\_\_\_

### Nominated by 2 BCRTA members:

Nominator (please print): \_\_\_\_\_ Signed: \_\_\_\_\_

Nominator (please print): \_\_\_\_\_ Signed: \_\_\_\_\_

Outline positions held and/or the work you have done in the BCTF and/or the BCRTA, with emphasis on your Pensions Committee experience:

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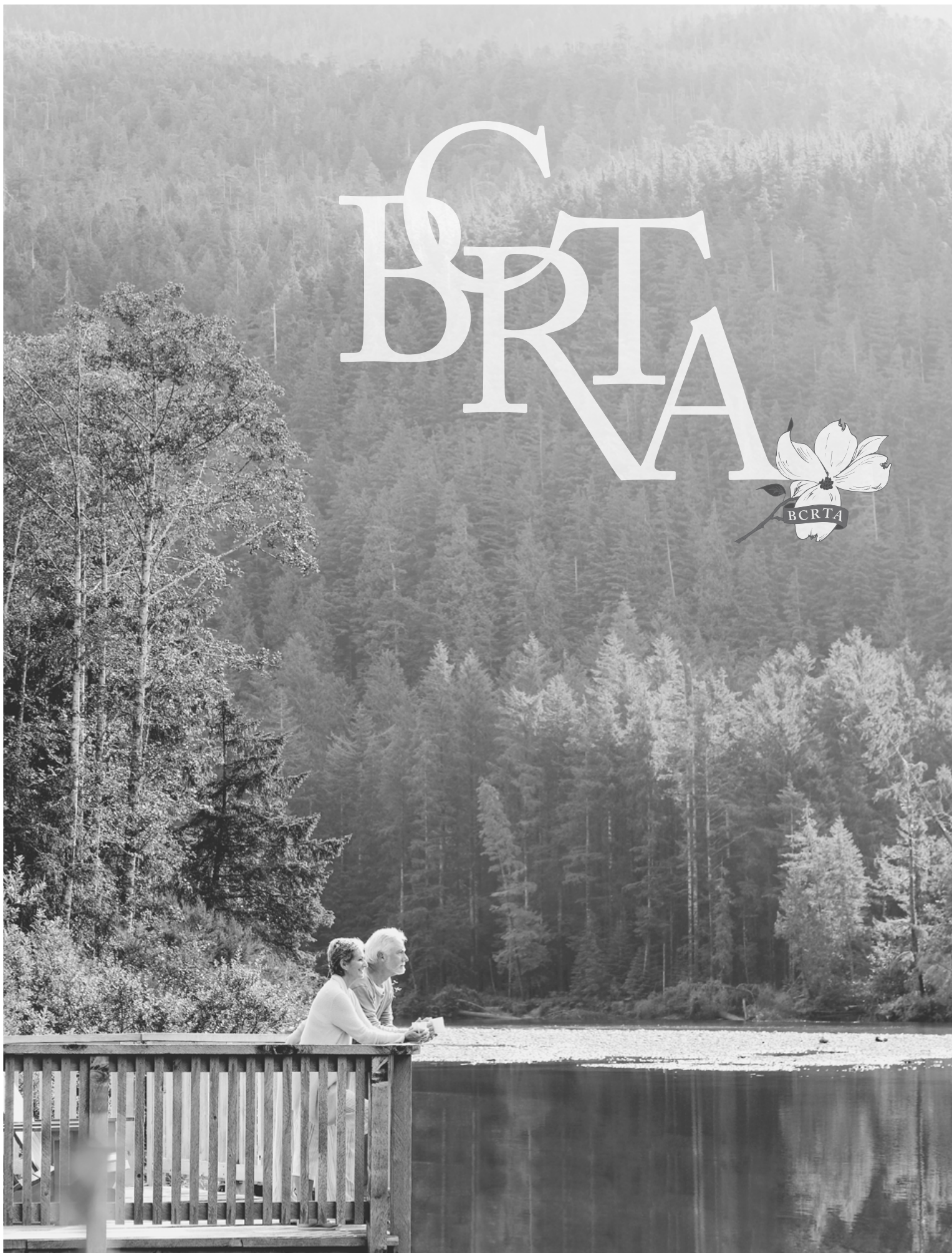
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Mail to: BCRTA, 100 – 550 W 6<sup>th</sup> Ave., Vancouver, BC, V5Z 4P2, or email scanned copy to [kristi@bcrtc.ca](mailto:kristi@bcrtc.ca)

# BCRTA



## NOTES



**BRITISH COLUMBIA RETIRED TEACHERS' ASSOCIATION**

100 – 550 WEST 6TH AVENUE, VANCOUVER, BC, V5Z 4P2

**PHONE:** 604.871.2260 | **TOLL FREE:** 1.877.683.2243 | **FAX:** 604.871.2265

**EMAIL:** OFFICE@BCRTA.CA | **WEBSITE:** WWW.BCRTA.CA