

36th AGM & Convention
May 16-19, 2016
Whistler, BC



**open
the
doors:**

**educators
organizing for change**

**supporting
documents**



Federation of
Post-Secondary Educators
of BC



2016 AGM & Convention

Supporting Documents and Supplemental Reports

Triennial Review of College Pension Plan (CPP) SRI Practices	2
<i>PC Resolution #4, AGM Handbook p.66</i>	
 The Transition to Retirement.....	16
<i>Joint PC/PAC Subcommittee on the FPSE Workplace Without Retirement, AGM Handbook p. 90</i>	
 Truth & Reconciliation Commission of Canada: Calls to Action	64
 International Solidarity Fund Report	78
 HRISC Speaker's Tour 2016 Report.....	91
 FPSE Pension Trustees' Report	97



Final Report of the FPSE Pension Advisory Committee
SRI Sub-Committee: A Review of The College Pension Plan's Socially
Responsible Investment Practices

February 26, 2016

Introduction

In spring 2014, The Pension Advisory Committee created the SRI sub-committee in order to carry out part of PAC's mandate under Section 5.12.2 of the FPSE *Policy & Procedures Manual*. That Policy states,

FPSE's Pension Advisory Committee shall review the College Pension Plan's socially responsible investing practices and triennially report on its findings to Presidents' Council.
(Revised: 2013 AGM)
(1990 AGM)

The members of the SRI Sub-Committee are:

- Ken Shaw, Local 11 and Chair of the Sub-Committee
- Derek Knox, Local 17
- Raphael Lagoutin, Local 5
- Robert Pepper-Smith, Local 8
- Penny Heaslip and Scott McLean as Chair of PAC
- Weldon Cowan as staff support

This is the first time that PAC has undertaken a review of the College Pension Plan's SRI practices under Policy 5.12.2. Consequently, in September 2014, Presidents' Council refined the mandate of the sub-committee as follows:

In its triennial review of the CPP's SRI practices, PAC shall:

- 1. Target the spring 2016 PAC meeting for its first report;*
- 2. Compare and Contrast CPP's SRI screens and actions to FPSE's SRI screens and actions;*

3. *For each year 2013-2015, inclusive, identify the major SRI initiatives the CPP has taken;*
4. *To the extent practicable and possible, identify exemplary SRI international practices;*
5. *Of the major CPP investments, attempt to identify the “worst” SRI offenders;*
6. *List other ideas for consideration*

This report is intended to complete the mandate of the SRI sub-committee. This report should be read in conjunction with the interim report tabled in February 2015.

The February 2015 report reviewed responsible investing and provided a comparison of the FPSE and College Pension Plan’s RI policies. This report deals with the following items:

- An overview of the major SRI initiatives undertaken by the College Pension Plan
- An overview of “Best Practices” including a discussion of divestment and impact investing
- An assessment of the College Pension Plan’s RI strategy
- Identification of RI “worst offenders” among the Plan’s investment portfolio
- Recommendations for consideration by the Pension Advisory Committee

Throughout the report, the committee will normally refer to bclMC rather than to the College Pension Plan. The SRI sub-committee was charged with reviewing the practices of the College Pension Plan, however, the Plan invests all its funds through bclMC. Consequently, the policies and practices of bclMC as the investment manager of the Plan’s assets are a key indicator of the Plan’s RI performance.

Best Practices in Responsible Investment

There is not a lot of scholarly information available that delineates a “best practices” model of responsible investment. However, research done by Mercer’s has found that the best responsible investment models tend to have the following common features:

- A demonstration that ESG factors feature in investment teams’ decision making process and corporate culture.
- An effort made to build ESG factors into valuation metrics, using the investment team’s own judgment about materiality and time frames.
- A long-term investment horizon and low portfolio turnover.
- Ownership policies and practices that include sufficient oversight, integration with investment decision-making and transparency.
- For alternative assets, evidence of pursuing best practices in transparency and evaluation, monitoring and improvement of ESG performance as relevant for portfolio companies and sectors.
- A demonstrated willingness to collaborate with other institutional investors to improve company, sector or market performance.
- A commitment to ESG integration across the organisation.

There seems to be a consensus among investors and asset owners that ESG analysis, voting of shares, and direct engagement are the cornerstones of a good RI practice. This is reflected in foundational documents such as the UNPRI Principles of Responsible Investment which provide clear direction to the investment community on the issue of responsible investment. The vast majority of large-scale institutional investors use an ESG/active engagement approach as their major RI strategy. The committee has included a glossary of literature which addresses the issue of best practice in RI. The literature supports the comments made above.

Fiduciary duty is a key consideration in responsible investment. Over the last twenty years, asset owners have developed a broader view of fiduciary duty. In the past this duty was seen as obligating asset owners to impose fairly narrow limits on the types of factors that could be considered in investment decisions. Asset owners were expected to limit their considerations strictly to financial factors; ESG issues were never factored into investment decisions. This is in sharp contrast to current views.

Today, fiduciary duty is generally understood to include a broad view of all factors that may affect value and returns over the long term, including non-economic factors such as environmental impact, human rights practices, and so on. There is a consensus among large scale investors and asset owners that it is not only appropriate but necessary to consider ESG issues when making investment decisions. Investors and asset owners also believe that fiduciaries have an obligation to take a more active role with their investments to improve the ESG performance of investments because, over time, those actions should improve returns.

Divestment: does it have a place as a Best Practice option?

There is a growing movement to encourage pension and other funds to divest from specific stocks. Is this a new area of “best practice”?

There have been a variety of divestment campaigns over the past several decades which include the arms trade, animal rights, Palestine, the use of sweatshop labor, landmines, and tobacco advertising. Currently, there is a focus on hydrocarbon based assets such as oil and coal. But undoubtedly the best known example of divestment occurred in the 1970s and '80s in response to the apartheid regime of South Africa. Retirement funds, mutual funds, and investment institutions across the country sold off shares of companies that did business in South Africa.

The conventional wisdom is that divestment from South Africa was a success; public pressure lowered targeted companies' stock prices and forced them to comply with the divestment activists' demands. However, the true impact of divestment from South Africa is unclear. In a 1999 study Ivo Welch and C. Paul Wazzan examined the impact of divestment from banks and corporations active in South Africa and found that these campaigns had almost no impact on public market valuations.

It is impossible to divest shares without a buyer and, undoubtedly, the new buyer will care less about whatever issue led to divestment than the previous owner. Thus from a strict financial perspective, divestment campaigns have not been too successful.

The chief value in divestment campaigns is around shaping public discourse and creating awareness of the social impact of investments. Currently, the fossil fuel divestment campaign is the most recent phenomena. These campaigns have yet to provide long-term empirical data, however the trend is gathering momentum quickly. One reason for this is that the recent climate accord in Paris has created a growing concern that investments in fossil fuels may soon become stranded assets.

In September 2014, 181 institutions representing \$50 billion in assets had made a divestment commitment. The fossil fuel divestment campaign broke a new record at COP21: more than 500 institutions representing over \$3.4 trillion in assets have made some form of divestment commitment according to 350.org and Divest-Invest, two organizations coordinating the growing movement.

The Norwegian Pension Fund and CalPERS are often cited as examples of large pension funds which have divested from coal. A closer look at both these cases shows a more complex reality than simple divestment.

Norwegian Pension Fund

The Norwegian Pension Fund is not actually a pension fund. It is a sovereign wealth fund owned by the Norwegian Government. The fund was created in 1990 as a fiscal policy tool to manage the phasing in of petroleum revenues into the Norwegian Economy. It currently has about \$900 Billion in assets.

The fund receives all oil and gas revenues collected by Norway. Those revenues are invested globally and provide the fund with investment returns. The government is allowed to withdraw a portion of the investment returns each year for use in its operational budget. The structure of the fund ensures Norway can benefit from oil revenues for the long term and prevents economic distortions that would otherwise occur if petroleum revenues flowed directly into the economy.

The fund is governed by the Norwegian Parliament. The Ministry of Finance is responsible for managing the fund. Operational management is carried out by the Norges Bank which is the Norwegian equivalent of The Bank of Canada.

In June 2015, the Norwegian Government passed a law forcing the Norwegian Pension Fund to divest from all companies that derive 30% or more of their business from the mining or burning of coal. Prior to making this decision, the Government had appointed an expert panel to study the issue. The expert panel actually recommended against divestment and supported active engagement instead. The Norges Bank made a submission to the panel supporting engagement as did a number of large Norwegian trade unions.

The Government's decision has had some unintended consequences. First, some companies, such as Anglo American and BHP Billiton which have some of the largest coal holdings and production in the world, were not captured by the new law because coal constitutes less than 30% of their business. Second, although the Fund did divest from roughly 15 coal companies in 2015, the fund's total oil and gas investment rose in the same year.

CalPERS

The California Public Employee Retirement System (CalPERS) provides defined benefit pensions to about 1.8 million members from over 3000 different public sector agencies in the State of California. The pension fund has about \$300 Billion in assets. Of the \$300 Billion, roughly \$167 Million is invested in thermal coal companies.

CalPERS is governed by a board of administration composed of six elected members, three Government appointees, and four ex officio members who are senior Government executives. Although the board is generally free from political interference, California law allows the State Government to prohibit specific investments if it determines that it is in the public interest to do so. For example, CalPERS is prohibited from investing in Iran and the Sudan.

In October 2015 Governor Gerry Brown signed State Bill 185 into law. The Bill requires CalPERS and CalSTRS (California State Teachers Retirement System) to divest from all thermal coal holdings by July 1, 2017.

Like the Norway case, CalPERS and CalSTRS supported engagement rather than divestment.

CalPERS is one of the best pension funds to look at for the long term historical success of divestment campaigns. In 2000 CalPERS divested from tobacco and a recent analysis in October 2015 stated that “Wilshire Associates concludes that the generally accepted academic argument is that limiting the opportunity set for investments has a deleterious impact on performance over long periods of time. For example, over a market cycle, a portfolio that can choose from all 500 stocks in the S&P 500 should outperform one that can only select from 450 stocks.” CalPERS Investment Policy as of 2015 states that divestment is usually an ineffectual strategy for achieving social or political goals. The current policy does not require them to undo past divestment activities.

What it all means for the College Pension Plan

There is no doubt that pension funds can divest from specific assets for operational reasons and that such divestment is sound on a fiduciary basis. However, divestment from a category of investment for ethical reasons is different. It is unclear whether that kind of divestment meets the test of fiduciary duty.

In both the Norwegian Pension Fund and CalPERS cases, the question of fiduciary duty was avoided because the funds were legislatively required to divest from coal. It is worth noting that in both cases, the people in charge of managing the funds were opposed to the divestment strategy.

A rigorous application of ESG criteria should meet some of the goals of divestment campaigns simply on the fact that those investments will have more risk associated with them which will lead to operational decisions by investors to reduce or eliminate exposure to those assets.

Impact Investing: does it have a place as a Best Practice option?

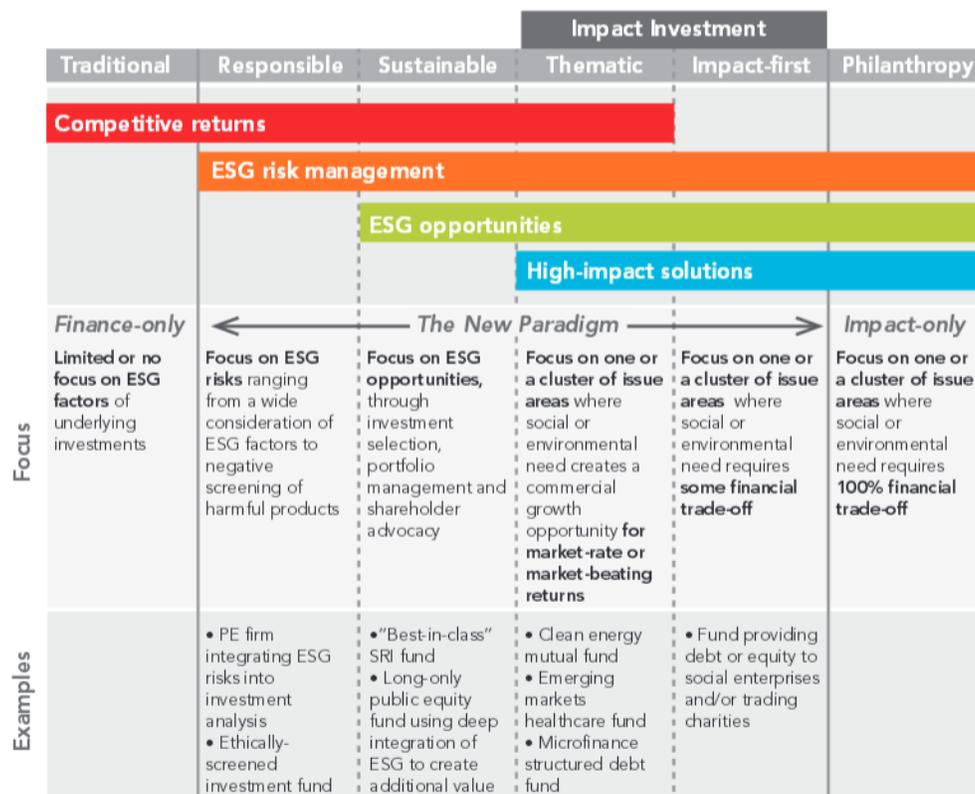
At the opposite end of the scale from divestment, is impact investing. Impact investing refers to investments "made into companies, organizations, and funds with the intention to generate a measurable, beneficial social or environmental impact alongside a financial return."

Impact investing can be viewed as the solution to the ongoing debate around divestment by FPSE members. Divestment attempts to create a better world through the allocation of capital away from less desired investments but says nothing about where that capital should go. As a strategy for change, this doesn't work too well.

Impact investing deals directly with the issue that arises from the power to influence society as a consequence of the size of the investment fund. Although pension funds technically exist for the sole purpose of funding the retirements of plan members, the magnitude and breadth of investments mean that those same pension funds possess significant economic influence. In the past, funds could avoid dealing with the social and environmental impact of their investments by applying a strict and narrow definition of fiduciary duty. That is no longer the case. Society has changed; pension plans and their members must deal with the fact they possess this power.

Clearly, bcIMC recognizes the power they possess to influence markets and companies. They currently apply that influence through shareholder engagement, proxy voting, and application of ESG criteria to investment selection.

Therefore, the question becomes more about where on the spectrum of active involvement should bcIMC be, what tools are available, and what philosophical foundation should underlie this approach.



Source: www.bridgesventure.com

The diagram above, which first appeared in the interim report, shows the continuum of investment strategies and the relationship between return, impact, and ESG strategies.

The literature, practices, and policies in existence today lend strong support to the use of ESG factors in investment product selection in combination with active ownership strategies of engagement and proxy voting. Good risk management simply means it is good business to pay attention to these factors.

As ESG becomes more mainstream, investors are using it to not only manage risk but also to identify investment opportunities. bcIMC’s recent movement into thematic based investment strategies is a good example of this. Research seems to support the notion that modern portfolio theory (the pre-eminent investment theory of the last 60 years) is no longer providing the diversification and stability traditionally sought after. The markets and asset classes of today are increasingly linked. Large institutional investors are seeking new ways to ensure diversification in their investment portfolios.

Impact investing is a relatively new approach to investment. However, it has the potential to be ideally suited as a long term investment approach.

An Assessment of bcIMC's RI Strategy

Overview

The RI approach used by the College Pension Plan through bcIMC is based on three broad pillars:

- Integration of ESG into investment analysis and decision making: This applies to all categories of investment.
- Active participation in capital markets: This include participation and leadership in assorted industry groups as well as advocacy with regulators and Government to create greater stability and integrity in markets.
- Active ownership: This includes proxy voting, and direct engagement.

These three pillars reflect bcIMC's commitment to the principles of the PRI. These three pillars are also consistent with FPSE policy for College Pension Plan investments. It is worth noting that bcIMC differs from many investment managers in one key area: bcIMC includes ESG analysis as a central part of its overall investment analysis process. By incorporating the ESG analysis process as an integral part of the investment decision process, bcIMC ensures that ESG considerations form a key part of the overall investment decision.

A brief description of the RI approach for each investment class is provided below.

Fixed Income:

ESG analysis is used assist the investment decision. bcIMC looks at the governance structures, executive compensation, and disclosure practices of the bond issuer.

Mortgages:

Mortgage lending practices are designed to favour properties that are using or implementing environmentally sound principles.

Public Equity

ESG considerations are integrated into the fundamental analysis of active Canadian investments. bcIMC has developed key performance indicators which include, among others, emissions, occupational health and safety, board structure, executive compensation, and water risk.

bcIMC also engages in proxy voting and direct engagement. Engagement is focused on climate change, water, human rights and shareholder rights.

Private Markets

ESG analysis is fully integrated into the initial investment decision. bcIMC ensures it has the right to appoint directors when is has a sizeable ownership interest. Companies are expected to address identified ESG risks, apply good governance principles, and conduct business operations in a responsible manner.

Real Estate

bcIMC focuses on engaging stakeholders, enhancing tenant satisfaction, tracking and reducing emissions and water usage. bcIMC also supports certification programs such as LEED and BOMA.

The UNPRI's Assessment of bcIMC

As a PRI signatory, bcIMC is participating in a PRI initiative that assesses the compliance of signatories with PRI objectives. PRI is currently running the assessment as a pilot project in order to fine tune the assessment tool. bcIMC is participating in the assessment pilot project. This is the second year of the pilot. The goal is to have a robust assessment process and have PRI publish the results of the assessments on a regular basis.

There is no easy independent way to assess bcIMC's RI performance on behalf of the College Pension Plan. However, the PRI assessment provides an excellent tool to measure the RI performance of bcIMC against that of other asset owners and investment managers who are PRI signatories.

The full assessment report is included as an appendix to this report. The chart below provides a succinct summary of the results.

	bcIMC 2015 Score	bcIMC 2014 Score	Median: All Respondents	bcIMC 2015 Rank
OVERARCHING APPROACH	A	A	B	Outperform / In Line
EXTERNAL MANAGERS				
Listed Equity	D	D	B	Underperform
Private Equity	A	A	B	Outperform
Infrastructure	A	A	C	Outperform
INTERNALLY MANAGED				
Listed Equity - Incorporation	A	A	A	In Line
Screening	A	A		In Line
Integration	A	A		In Line
Listed Equity - Active Ownership	A	A	B	Outperform
Individual Engagement	A	A		Outperform
Collaborative Engagement	A	A		Outperform
Proxy Voting	A	A		Outperform
Fixed Income - Corporate	B	B	C	Outperform
Fixed Income - Government	C	N/A	E	Outperform
Private Equity	A	B	B	Outperform / In Line

Property	B	B	C	Outperform
Infrastructure	A+	A	B	Outperform

As one can surmise from the tables above, bcIMC exceeds the median of their peers in most applicable areas. bcIMC also appears to be working to improve on a year to year basis. The improvements in private equity and infrastructure are not a surprise. In both cases these are investment categories where bcIMC normally owns the assets directly. Consequently, they have been able to affect change more efficiently.

Room for Improvement

PRI's assessment did highlight some areas where bcIMC needs to improve performance. These included:

- Overarching Approach: bcIMC needs to develop RI goals and objectives
- External Managers – Listed Equity: bcIMC scored a D in this area compared to a median response of B. bcIMC needs to increase ESG integration in the selection process for external managers. They also need to improve the general incorporation of ESG in monitoring of external managers.
- Listed Equity – Individual Engagement and Collaborative Engagements: bcIMC's indicator went down from last year. This is because of a reporting gap created when bcIMC went from quarterly reports for public assets to a new cross-asset class RI newsletter format.
- Private Equity: bcIMC needs to improve its post investment monitoring of ESG performance.
- Property: bcIMC needs to include RI and ESG in its fund placement documents and in the investment selection process

Responsible Investment Highlights

The committee had some difficulty pinpointing specific responsible investing highlights on a year to year basis. Most of the RI actions taken by bcIMC take place over several years even though they may be reported in a specific year.

The bcIMC website contains a great deal of information about the investment agent's RI activities. bcIMC regularly publishes a responsible investing newsletter and also provides an annual report. A review of those documents provides significant insight into the broad RI strategies employed by bcIMC.

bcIMC's RI activities are generally focused on governance and transparency in reporting. bcIMC believes that improvements in governance and transparency lead to positive changes in corporate practices and actions around issues such as climate change, labour rights, and

workplace safety. bcIMC advances these goals through a variety of means including: working through coalitions of investors and NGOs, lobbying of governments, voting of shares, ensuring bcIMC representation on Boards of Directors, and active leadership within a variety of organizations which support RI.

Below are a series of RI highlights taken from bcIMC quarterly and annual RI reports over the last three years.

Infrastructure/Private holdings:

bcIMC has focused a number of investments on water utilities in North America and the UK. bcIMC ensures that it holds seats on the Board of Directors of the water utilities it owns. bcIMC is able to provide capital so the utilities can improve their infrastructure. This has led to better water utilisation. For example, Utilities Inc. serves some 300,000 customers in 15 states. The company has recently developed a system to purify and recycle waste water as non-potable water used for industrial cooling, construction, and the watering of public spaces and golf courses.

Timberwest is a good example of a private holding. bcIMC owns 50% of the company and has been able to get the company to place a priority on worker safety. Programs have been put in place to train workers and contractors as well as raise awareness concerning workplace safety.

Real Estate:

On the real estate front, bcIMC has focused on improving the energy and water efficiency of their commercial real estate in order to reduce GHG emissions, energy consumption, and water use. For example, bcIMC has installed a deep lake water cooling system which provides efficient air conditioning for a number of properties in downtown Toronto. The system uses deep water from Lake Ontario cool water used for air conditioning. The warmed lake water is then fed into the city's regular water filtration system rather than returned to the lake. The deep water cooling system saves significant amounts of energy, thereby reducing the overall carbon footprint of the buildings.

On the residential front, bcIMC has developed significant consultative processes. For example, bcIMC is developing Northwoods Village in North Vancouver. Northwoods is a commercial and residential real estate development. bcIMC engaged in thorough community consultations before building this property. Based on community input, a local grocery store moved in as an anchor tenant, accessibility was improved to ensure a broader demographic could live and shop there, and the design and colour schemes of the suites were designed to meet local tastes and preferences.

Collaboration with Other Investors:

bcIMC has been working with about 100 other investors through the Sustainable Stock Exchange Initiative to develop sustainable stock exchanges. In fact, bcIMC is the Canadian co-lead for this group. The goal of SSE initiative is to get stock exchanges to

require all listed companies to uniformly disclose all factors relevant to ESG analysis. So far 25 exchanges around the world have agreed to participate.

As a consequence of efforts by bclMC and others, as of 2014 Canadian companies are required to disclose whether they have adopted a written policy regarding women on boards or disclose why they haven't. bclMC is also calling on regulators to establish a minimum standard of 30% participation by women on boards.

Governance:

Much of bclMC's proxy voting activity is focused on governance. Over 50% of the issues voted on by bclMC concern executive compensation and issues related to board diversity and experience. Almost 20% concern audit processes. bclMC has continued to push for "say on pay" initiatives, better representation of women on corporate boards, increased independence for directors, transparent audit processes and increased rights for shareholders.

The Worst Offenders

There is no easy way to compile a list of the "worst offenders" among the thousands of assets owned by the College Pension Plan. Like most large institutional investors, bclMC is a "universal" investor so it winds up holding investments in all parts of the economy. This "universality" is part of what informs bclMC's approach to RI. By using ESG analysis, engagement, proxy voting, and collaboration with like-minded investors, bclMC is able to change the practices of companies over time.

The essential premise of RI is that assets that mitigate risks associated with environmental, social and governance factors will, in the long run, outperform financially. By that measure, "good" companies are those that respond positively to engagement and who work to address ESG issues; "bad" companies are those that do the opposite. bclMC has generally had good success with direct engagement. Their experience is that most companies will respond positively to direct engagement and to shareholder motions. There are, however, some exceptions. Those exceptions make the list for "worst offenders" from an RI perspective.

Mining

Mining stands out as the one area slowest to respond to engagement. The industry tends to be defensive and resistant to changes related to human rights and environmental practices. Although it is difficult to pinpoint specific companies as "worst offenders" it is relatively easy to pinpoint mining as a "worst offender" category of investment. Mining companies working internationally have a dubious track record on environmental protection and on human rights.

A quick perusal of the internet offers myriad tales of mining companies engaging in human rights abuses and environmental damage in developing countries. These companies often employ private security forces who act with impunity. Examples of abuse range from serial rape to attacks against local citizens who oppose mining development to assassinations and wholesale environmental destruction.

The difficult reality is that developing countries with mineral wealth need foreign investment. Consequently, local governments are usually either complicit in human rights violations and environmental damage, or are powerless to stop them. The victims have little or no legal recourse. Often their own legal systems are corrupt and will refuse to take cases. At the same time, it is virtually impossible to pursue offending companies in the companies' home countries.

This issue is of particular concern for Canadian pension funds because mining represents a large part of the investment universe in this country. Companies such as Goldcorp and Barrick operate around the world and have poor reputations. bclMC has repeatedly engaged both companies on issues such as corporate governance, human rights, CEO compensation and the environment. bclMC has also led a number of shareholder attempts to bring about change. Although most mining companies are concerned about their reputations, they have demonstrated little progress in addressing human rights issues in particular.

Tobacco

The tobacco industry seems to have few redeeming qualities beyond ensuring the continued employment of oncologists. It is the only industry that produces a product which is hazardous to human health only when used correctly. It is also one of the few industries where improvements in ESG performance would actually result in lower returns. For example, any attempt to address health issues (not marketing to children, better warnings on product labels, limiting access to the product, removing carcinogens from the product) would all result in lower sales and profits.

Conclusions and Further Considerations

The College Pension Board appears to have a good policy framework for responsible investing. Its investment manager, bclMC, has developed a robust, multifaceted approach to RI based on engagement, proxy voting, ESG analysis, and collaboration with like-minded groups. The approach is consistent with the approach used by most large scale universal investors who are active in RI. The Plan's policies and the consequent approach used by bclMC are also consistent with FPSE's policies concerning the College Pension Plan's investments. Overall, the College Pension Plan/bclMC allows the plan to invest responsibly, comply with legislative considerations, and comply with the obligations of fiduciary duty.

The sub-committee makes the following recommendations to the Pension Advisory Committee.

- That FPSE continue to monitor the RI practices of the College Pension Plan.
- The sub-committee believes that climate change will dominate the RI universe for the foreseeable future. FPSE should remain current on issues related to climate change, greenhouse gas emissions, and possible developments in divestment from carbon based energy investments.
- That FPSE also maintain a focus on issues of human and labour rights within the College Pension plan investments.

- That FPSE appointed trustees work to ensure the College Pension Board of Trustees develop practices that allow it to more effectively oversee the RI practices and policies of bcIMC.
- There is a strong need for legal reform so that better and more accurate information is available concerning the operations of mining companies in the developing world and so that victims of human rights abuses are able to pursue these companies in Canada. The Pension Advisory Committee recommends that FPSE trustees engage this issue more actively.
- That opportunities for impact investing be investigated more fully and implemented where economic and ESG factors make sense.

All appendices to this report can be obtained by contacting the FPSE office.

Appendix 1: Literature review

Appendix 2: Pilot assessment report 2015. BC Investment Management Corporation

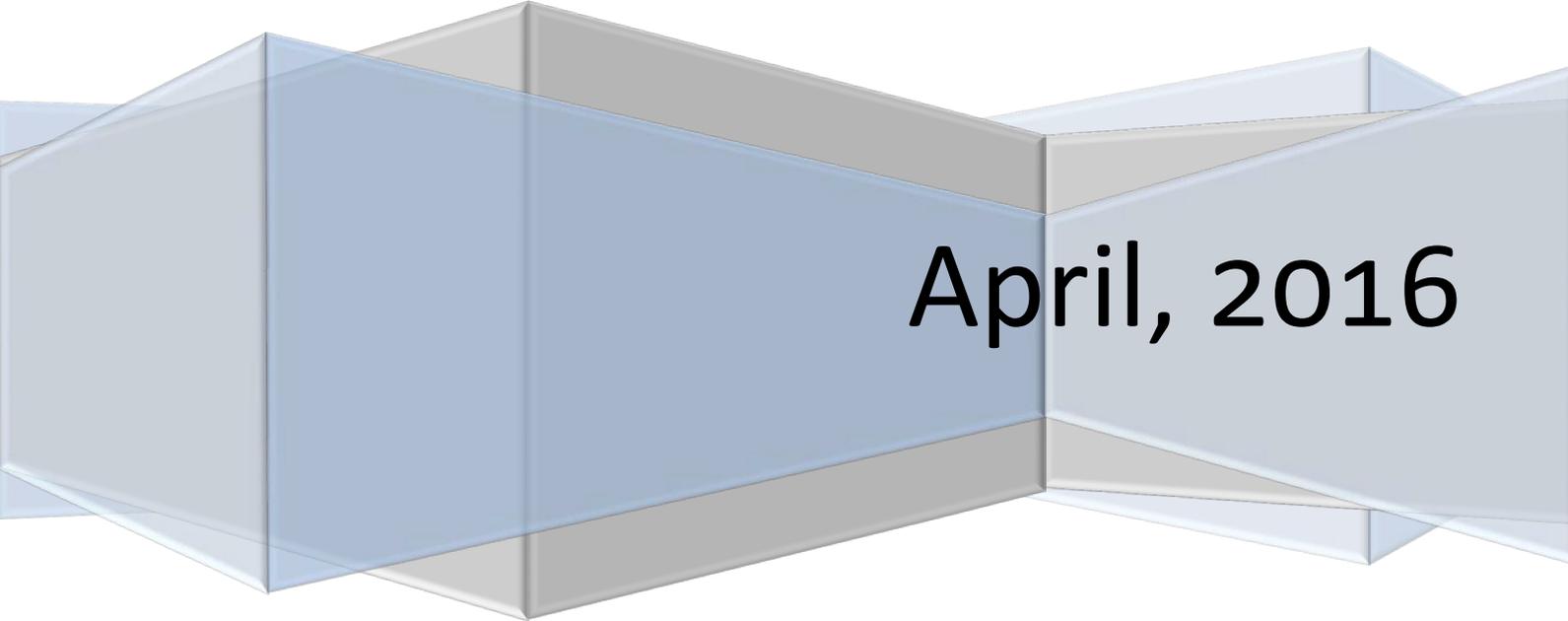
Appendix 3: Interim SRI Sub-Committee of the FPSE Pension Advisory Committee. February 24, 2015.



The Transition to Retirement

Report of the Joint PC/PAC Sub-Committee on the FPSE Workplace without
Mandatory Retirement:

**Frank Cosco, Scott McLean, Leslie Molnar, Sherrie Wang,
Alison Woods**



April, 2016

Table of Contents

Executive Summary.....	2
Introduction/Background	3
Part 1 - Context and Issues for Advocacy and Bargaining	5
1.1 Demographic Shift.....	5
1.2 Post-Retirement Medical/Dental Benefits.....	9
1.3 Pension Plan Rules and Legislation	10
Part 2 - Retirement-related Options/Benefits in Quebec and in FPSE Collective Agreements	11
2.1 Early Retirement Incentives.....	11
2.2 Retirement Incentives.....	11
2.3 Payout of Unused Sick Leave and Service Recognition Payouts.....	12
2.4 Supported Leaves.....	12
2.5 Phased Retirement/Voluntary Workload Reductions	12
2.6 Post-Retirement Options	13
Part 3 - Recommendations	14
3.1 Develop a Set of Principles.....	14
3.2 Prioritization of Initiatives.....	15
3.3 Limitations on Post-retirement Employment	15
3.4 Creating Transitions to Retirement	15
3.5 Pension Plan Rule Changes	16
3.6 Effects on Non Regular Faculty	16
3.7 Medical/Dental Benefits	16
3.8 Surveying our Members.....	16
3.9 Compliance with Human Rights Legislation.....	17
3.10 Updating of Recommendations from 2013 Report	17
Appendix 1 Review of the Recommendations from the 2013 FPSE Report, “The End of Mandatory Retirement: Adapting to the New Realities of Work and Retirement “	18
Appendix 2 FTE Above Age 65 Through 2007-2014 Period In Individual Institutions.....	21
Appendix 3 FPSE Policies on Retirement and related Pension and Benefit Issues	22
Appendix 4 Summary of Local Collective Agreements on Retirement.....	23
Appendix 5 Actual Local Collective Agreements on Retirement	27

Executive Summary

The end of mandatory retirement has brought significant changes to the post-secondary sector. Since the elimination of mandatory retirement in 2009, there has been a change in demographics with growth in members above the age of 60 and a decline in members younger than 60.

Growth to the 60+ demographic is not surprising as the 65+ group was starting from a base of nearly zero. The extent of this growth, and at what point it will become stable, is still unknown. The data used in this report does not suggest that the rate of growth in this demographic has levelled off. In a context of low growth in the post-secondary sector, expansion of the 60+ demographic is therefore coming at the expense of opportunities for younger instructors.

Our work as instructors is engaging, rewarding, relatively well-paid and provides extended health and dental benefits that are expensive to purchase as an individual. Many of the benefits and flexibilities guaranteed by our collective agreements are a functional disincentive to retirement. Additionally, once an individual reaches 71, they must begin to draw their pension, so an individual who is still working will enjoy two incomes and a 10% boost to their salary because of the end of pension contribution deductions. While the group of 71+ instructors is still small, if this group were to continue to grow, these non-contributing spots could have a financial impact on the pension plan.

This committee considered collective agreements across FPSE and provisions in Quebec in order to provide a list of potential incentives and approaches that may encourage retirement. More information is needed about individuals' retirement decisions before specific recommendations for bargaining can be made so we are recommending FPSE construct and conduct a comprehensive survey of active and retired members. We are recommending that FPSE locals adopt a set of principles to guide work in this area. They are summarized as below:

1. The goal is to encourage workforce transition, not to save the institutions money.
2. Any savings, should go to funds/incentives to encourage faculty transitions.
3. Alternatives that would allow continued, unreduced work to increase one's pension while also collecting one's pension should not be encouraged
4. Faculty Associations should always seek to balance the rights of the non-regular faculty members with the rights of the members who are later in their careers
5. It is important for FPSE unions to create active agendas

Introduction/Background

In 2012, the FPSE AGM passed a motion to review the effects of the removal of mandatory retirement. **The Report of the Working Group on the Effects of the Removal of Mandatory Retirement** went to Presidents' Council in May of 2013.

In 2015, both the Pension Advisory Committee and Presidents' Council decided to follow up on issues related to the effects of the end of mandatory retirement. It formed this joint PC/PAC Sub-Committee to report and make recommendations.

PC and PAC assigned Frank Cosco (PC VP1 and Executive Liaison to PAC), Scott McLean (PAC 14 and PAC chair), Leslie Molnar (PC 6 & VP2), Alison Woods (PAC 15), and Sherrie Wang (PAC 16) to this task. They were supported by Zoe Towle and Nancy Yip (FPSE staff).

The 2013 Report states in its introduction:

The world of work is changing rapidly as baby boomers reach traditional retirement age in this country. Mandatory retirement has been effectively eliminated. Increasingly, people are choosing to work longer. The world of post-secondary education is not immune from this trend. Indeed, it would seem that educators are attracted to the concept of work past age 65. At the same time, a new generation of educators wants to join the workforce.

Now in 2016, those trends continue. The post-secondary faculty workplace has been one where new workers start at a relatively late age. The Pension Plan reports that the average age of entry into the Plan is 42.¹ Meanwhile, faculty are working longer and there is no recent growth in the provincial faculty complement.² Here is some evidence. First, the average age of retirement has increased from 61 in 2011 to 62 in 2014.¹ Second, there is a much larger contingent of people working past Age 65; the Pension Plan reports that 5% of active members were over 65 in 2015, a full percentage point higher than the previous year.¹ Finally, In 2011, only eight members started their pensions at Age 71. By 2015, that number had grown to 33.¹ Clearly, people are choosing to work longer.

Unique Features of Post-Secondary Work

During a Lancaster House Audio Conference,³ a participant listed a number of initiatives that help retain older workers. The list included:

flexible scheduling

part-time work

¹ College Pension Plan Reports

² See Section 1.1, Demographic Shift

³ "Managing the Transition to Retirement: Flexible Work Arrangements and Other Critical Issues for Retiring Employees," Lancaster House, April 23, 2015.

tele-work	consulting work
comparable benefits at part-time	benefits past the age of 65
mentorship opportunities	opportunities to continue learning
being part of new initiatives	leave options
workload reduction options	sick leave, including family illness
accommodation of disabilities	compressed workweeks
re-employment after retirement	active re-engagement policies when ill

Many items on this list already exist at most of the FPSE public-sector workplaces. Additionally, our work is engaging and rewarding. The Committee's view is that there are enough attractions in the job itself along with these types of workplace provisions to keep most people working as long as they wish to.

Significant progress has been made in making post-65 health benefits more equitable. Pension plan changes, including removing the cap on the number of contributing years, have been made that attempt to ensure a sustainable plan, with better inflation protection. The changes were made in part as a reaction to the reality of a higher average age of retirement. "Early" retirement incentives were not working as designed and so ended up being repurposed. Their monetary value was used to "buy" improvements. These changes were achieved through the energy and concerted efforts of FPSE staff and leaders as well as local leadership groups, stewards and bargaining teams.

The Potential for Growing Interest in the "Anti-Retirement Incentive"

College Pension Plan rules mandate that one must start collecting one's pension after age 71. If a member is working at the age of 71, they will then receive their full pension in addition to their salary. They also receive a 10% boost in take home pay because of not having to pay pension premiums. The Committee is concerned that once these rules become more well-known, it will for many have the effect of an "anti-retirement incentive." Someone with 20 years in the system would get something close to a 50% raise in take home pay.⁴ That would create a new and significant de facto secondary scale.

In light of this context, the work of the Committee is centred on what "counterweights" can be developed in an attempt to balance the workplace so that those who wish to retire can do so in the way they wish, those who wish to reduce their workload can maintain as much of their compensation as possible, and those who do not have regular and full-time work will have opportunities they might not otherwise have had.

⁴ From the view of plan finances, both member and employer premiums are lost to the plan as there's no "active" contributions made to replace those for and by the "aged-out" member.

Time for Action

It is still within the first decade of the post-mandatory retirement regime. It is now time to try to ensure more balance between on the one hand, continuing to respect and support an older demographic and on the other, creating more work opportunities for those in younger demographics. In a relatively static growth environment, the default of doing nothing would decrease opportunities for younger workers. There needs to be intentional efforts on many fronts--local, provincial and federal--to achieve a more balanced workforce.

The Committee has tried to include a comprehensive menu of options that provides possibilities for locals and FPSE to explore, adopt or implement through bargaining or advocacy.

Option clusters include:

- Retirement Incentives
- Changes to post-retirement medical/dental benefits
- Establishing supported leaves for current senior faculty
- Phased Retirement options

Efforts in these areas always require respect for the many faculty who wish to work longer and their right to do so.

Part 1 - Context and Issues for Advocacy and Bargaining

1.1 Demographic Shift

With the elimination of mandatory retirement on January 1st, 2009, it was inevitable that there would be an increase in the number of members working past the age of 65. What was, and still is, unknown is the ultimate impact that elimination might have on the demographics of our institutions. The following is an attempt to quantify changes in the demographics since the elimination of mandatory retirement.

The data analyzed and presented in the figures below is taken from the Post Secondary Employers Association (PSEA) Human Resources Data Base.⁵ The key measure used is the "FTE", which captures the full-time equivalent of the members employed over any given fiscal year (ending March 31st). The fiscal years included are 2007/08, 2010/11 and 2013/14. The 2007/08 fiscal year captures the last year in which mandatory retirement was in place, 2013/14

⁵ Since Thompson Rivers University and Thompson Rivers University – Open Learning do not have the same relationship with PSEA as all other FPSE locals, these two institutions are not included in the data drawn from the PSEA database.

is the last fiscal year of data available from PSEA, and 2010/11 is included as a midpoint between the other two.

In Figure 2.1 below, the FTE by age category and across time are represented. Overall, between 2007/08 and 2013/14, there was an increase of 202 FTEs across all institutions. This increase of 202 FTEs was the result of a decrease of 136 FTEs in the combined age categories below age 60, and an increase of 338 FTEs in the combined age categories above 60 (there was a 212 FTE increase in the over 65 age category).

Figure 2.2 illustrates that the growth in the number of members in above 60 age categories has been in excess of the growth across other age categories. This can be seen in the rise of the percentages in the above 60 age categories and the decline in percentages in the age categories between 30 and 55 years. It is interesting that the largest percentage increase was in the over 65 category. This finding suggests that, over the time period examined, the end of mandatory retirement has had a significant effect on the timing of when a member retires.

Overall, the data supports the anecdotal reports that our institutions have been experiencing an increase in the number of members in older age categories. The result of the changing demographics was that the average age per FTE across all institutions increased from 49.6 in 2007/08 to 51.0 in 2013/14.

It also appears that the end of mandatory retirement has made significant impact to the demographics of the combined institutions (for a look at how the numbers above age 65 have behaved in individual institutions, please see the figures found in Appendix 2). It is too early to tell whether the effect of the elimination of mandatory retirement will continue to significantly influence the demographics of the institutions beyond what was experienced between 2007/08 and 2013/14, or if the growth will stabilize relatively soon.

Figure 2.1: **FTE by Age Category (All Institutions)** – The columns represent the age categories. The three sets of columns are for the different fiscal years.

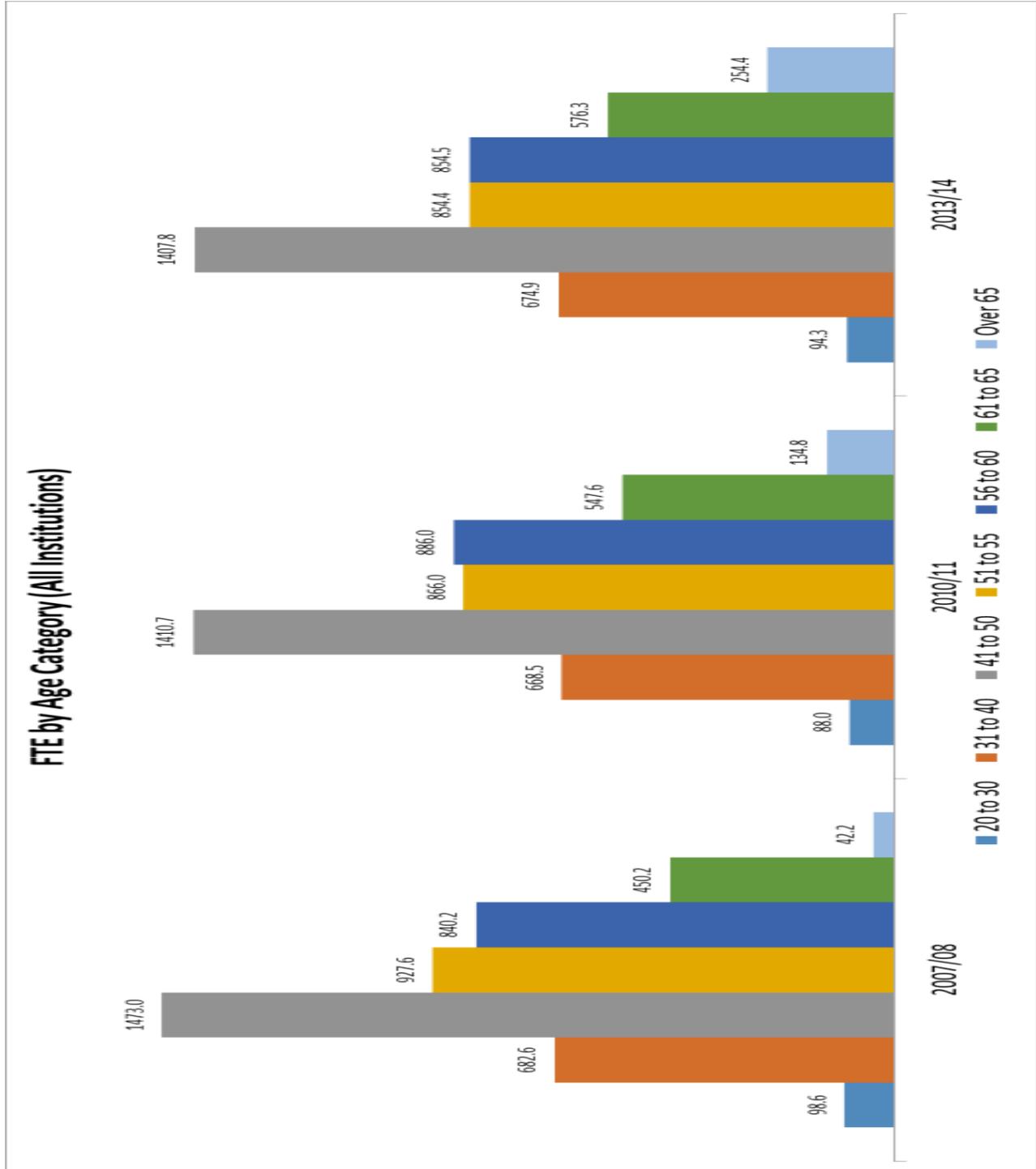
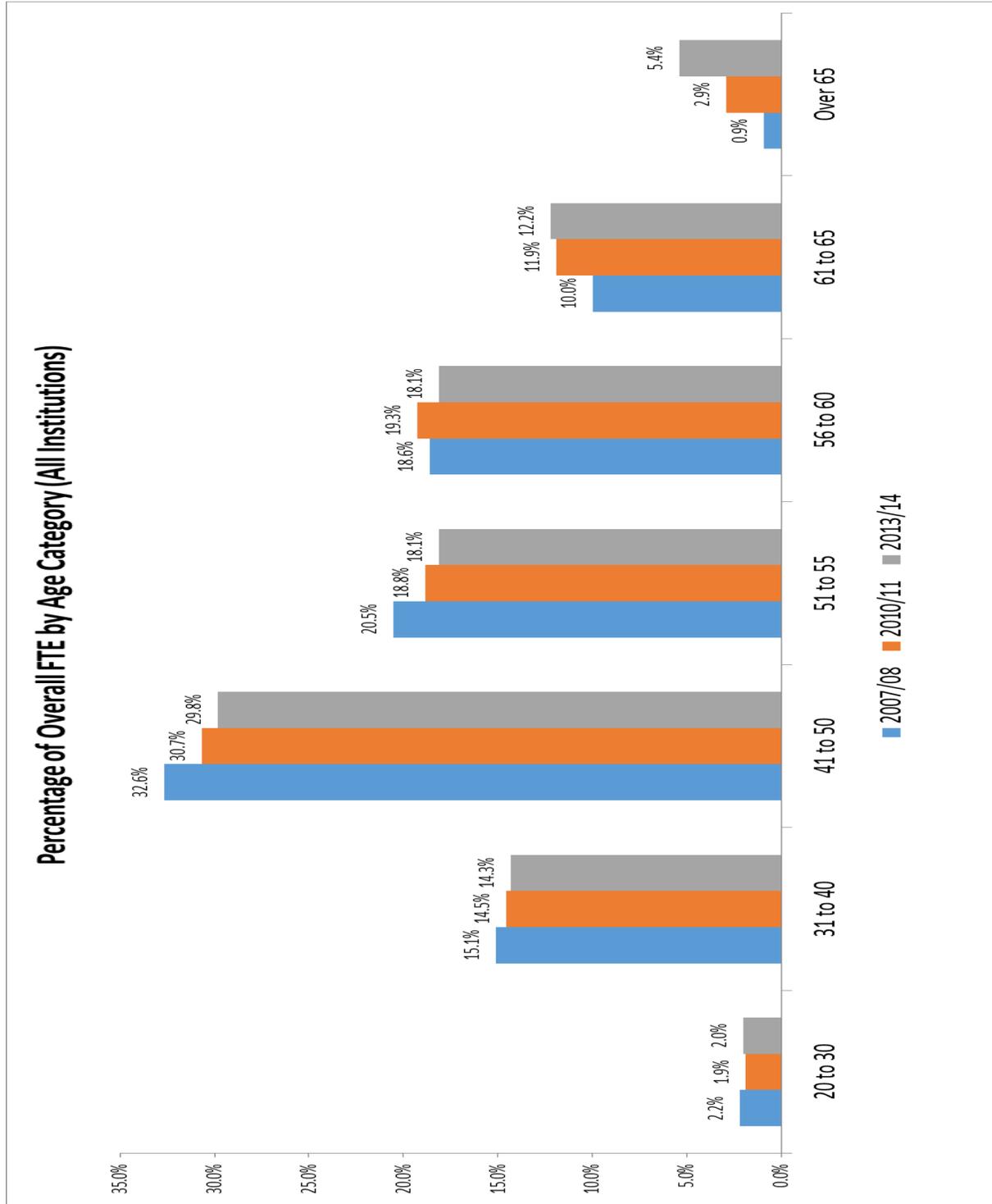


Figure 2.2: **Percentage of Overall FTE by Age Category (All Institutions)** – The columns represent the percentage of the overall FTE in each age category in each fiscal year. The seven sets of columns are for the different age categories.



1.2 Post-Retirement Medical/Dental Benefits

Active members of the public FPSE locals continue to enjoy premium-paid extended medical and dental benefits throughout their careers. Recent rounds of bargaining have even resulted in incremental improvements in benefits, while bargaining workplace rights has remained very difficult. Up until 2009, retirees also received extended medical benefits with their pension. The loss of these benefits was a shock to many, and it made many appreciate the plans they have as active workers even more. The loss of paid benefit plans in retirement may be a significant factor in keeping some working longer. The Committee recommends that the impact of benefits on retirement decisions should be explored through a comprehensive survey of active and retired members.

In 2008 and 2011, past FPSE working groups have reported out on benefit plans for retirees. In 2008, the recommended course was that some phased-in, partial user premium increases should be implemented. The next year the Plan nevertheless eliminated benefit plan subsidies completely. Their cost was seen as ever increasing and not adequately funded. The preferred focus became ensuring at least partial protection against inflation and monies used for benefit premium subsidy moved to support the Inflation Adjustment Account.

In 2011, with only the voluntary, user-pay option left, it was clear there was no appetite in the College Plan to integrate the cost of benefits back into plan benefit calculations. The FPSE working group made these recommendations:

- 1) Continue to explore joining with the Teachers' Benefit Plan for retirees
- 2) Look at ways to switch to a possibly cheaper Administrative Services Only plan
- 3) Consider the feasibility of at least a partial subsidy through payments by active members
- 4) Lower deductibles
- 5) Examining the feasibility of a benefits trust
- 6) Consider allowing retirees into current plans for active members

Since the 2011 report, there has been no significant progress towards any of these options. Some current retirees report that the voluntary plans available through the College Pension Plan are not attractive. Many retirees are choosing to enlist with other options such as the plan sponsored by the Retired Teachers of Ontario.

This Committee proposes the following ideas FPSE can research and explore:

- The Plan and bcIMC explore the feasibility of setting up and managing separate investment accounts/funds using investments so that a benefit program would not be dependent solely on contributory income. Contributions could be collected as an additional voluntary or mandatory premium while members are still active.

- The College Plan pooling resources with other BC Plans or other Plans to provide a lower cost option.
- FPSE lobbying government to revisit the idea that ICBC or an equivalent body set up a BC-wide extended health and/or dental plan.

1.3 Pension Plan Rules and Legislation

Canada Pension Plan Changes

In recent years, it has become possible to start collecting one's Canada Pension Plan and continue to contribute to it. This has caused many to wonder why that is not possible in the College Plan.

In 2016, the new federal government has once again opened the CPP file. FPSE has to monitor changes that may have unintended consequences on the College Plan and affect workplace demographics in unexpected ways.⁶

Working and Collecting Pension

Currently, faculty who retire start collecting their pension and sever their employment relationship. They can subsequently be re-hired but are ineligible to pay pension premiums. Unlike the plans for post-secondary faculty in Quebec, there is no way to increase one's pension by working after retirement. Faculty members can return to paid work post retirement pension-premium free. This is also a savings for the Employer except at Camosun, where the employer must pay an equivalent amount into a Retirement Savings Plan for the faculty member.

FPSE as a partner can and should continue to lobby for a change to pension rules in order that this advantage to the employer and retired member is taken away. There are already enough incentives to continue working in the system. Further, it is not good for the Plan to have a growing number of non-contributing faculty.

On the other hand, some flexibility in having one's full-salary level maintained through a combination of partial pension and reduced workload might be a feasible way of introducing a more effective phased retirement option into the BC college workplace. That approach would over the period of "phasing" create some less-than-full-time opportunities and after the phased period, mandate the creation of a full position. The combination of pension and salary should not go over full-time levels. It may be a difficult option for the Plan to implement, however, in the view of the Committee, it has merit that FPSE as a partner should explore.

For those members working past age 71, current federal law prohibits contributing to a pension

⁶ It is estimated that a raising of the YMPE to \$90,000 without any other adjustments to pension calculations would have the impact of reducing the pre-2016 College Pension of a member with a HAS of about \$80,000 and who had 20 years of service by roughly \$100 a month.

plan. The person must also begin to collect their pension. This can turn into an anti-retirement incentive of significant proportions for the member, and the Plan loses a contributing position. FPSE locals should focus on creating other incentives that would serve to encourage members to retire fully and prior to 71.

Part 2 - Retirement-related Options/Benefits in Quebec and in FPSE Collective Agreements

This section is the result of a survey of FPSE Agreements and some information from comparable contract arrangements in Quebec. It does not purport to be exhaustive.

2.1 Early Retirement Incentives

Most collective agreements have language on age-connected early retirement incentives (ERIs). The language is usually a leftover from when there was mandatory retirement at age 65. There are conditions -- usually a number of years of experience, being in a certain employment category, and being at a minimum age of 55.⁷ The percentage of salary offered depends on the age of the applicant. The language is usually permissive -- ERI's "may" be offered.

Perhaps, there's a way to preserve the intent of an ERI but move the target to those with a particular amount of service in the Pension Plan. This is an item that might become part of future bargaining agendas.

2.1.1 Benefits after an ERI

Several Collective Agreements have language saying the employee can stay on the Employer's medical and extended health plans for a period of up to 5 years, provided the retiree pays all of the premiums.⁸ Perhaps to enhance the incentive, those premiums could also be structured into it or added to the retirement incentive.

2.2 Retirement Incentives

Non-age connected Retirement Incentives are part of most Collective Agreements (at least as part of the menu of Labour Adjustment strategies when employers are wishing to downsize). Many were originally introduced through the Common Agreement. Most Collective Agreements also mention "trial retirement", although there does not seem to be a working definition or experience of that idea. The following list refers to free-standing retirement incentives that are not bound to workforce reduction situations.

2.2.1 Cash Lump-Sums

In the VCCFA 2014/19 Collective Agreement a mandatory five FTE Retirement Incentives (RIs) per fiscal were negotiated through "trading" a form of supported leave for the RIs. They are set at \$45,000 per FTE. The criteria for selecting from amongst applicants are the highest combination of service and age.

⁷ With age having a protected Human Rights status, all such provisions should be made age-neutral.

⁸ There is also language in these same agreements about applying to be on the College Pension Plan benefits, which no longer exist in the same form so that language should be updated.

2.2.2 Help with Pension Buy-Back of Service

Although application under the revised pension rules is perhaps limited, at Selkirk, the College will match employee contributions for buying back up to 3 years of pensionable service if the faculty member retires between age 55 and 65.

2.2.3 Incentive in a Layoff Situation

At Camosun, in areas facing reductions, a full-timer can reduce down to a minimum half-time status and continue work and be given an additional incentive worth 10% of annual pay times the number of years until age 65.

2.3 Payout of Unused Sick Leave and Service Recognition Payouts

A few Collective Agreements (CNC, Douglas, Okanagan) have a payout of unused sick days (up to a limit; e.g., 60 days at OC) upon retirement. Some of the GEU agreements also have had this provision since the 1970s. OC also has a service recognition accrual of 5 days per year.

2.4 Supported Leaves

At VCC, Retirement Preparation leaves of between 3 and 12 months for senior faculty do not mandate retirement but they do create re-occurring vacancies. These leaves are unpaid but a stipend of \$1000 a month allows one to continue with benefits and pension premiums, and the College will pay its pension premium amount. Any replacement work that goes to term faculty counts towards their regularization and all other accruals.

2.5 Phased Retirement/Voluntary Workload Reductions

Several agreements have these types of options where faculty members will agree to retire at the end of a set period and members are able to reduce their workload over one to three years. Salary is also reduced.

Some agreements provide for full benefits. Some have lump sum payments as an incentive. Many would seek to have one collect full or partial pension during this "phasing" period but that is not currently possible before their retirement.

2.5.1 Vancouver Island University

A lump sum incentive can be used to top up salary of the reduced workload to 100% for as long as the incentive lasts. If there is any left, that is paid out at retirement.⁹

2.5.2 Thompson Rivers University

This is a pre-retirement bridging option.¹⁰ It allows faculty to gradually retire, over a period of one to two years, with little effect on their benefits. Faculty have the potential to maintain a higher salary than if they just took a regular workload reduction. The faculty member does not retire or start to collect their pension, but reduce workload. The faculty member decides what sections to give up. The Dean decides who has rights to that work. If the work can be filled by a non-regular sessional faculty member, that creates a savings. The difference between what the

⁹ At VIU, the work freed up by the faculty member phasing in retirement does NOT count towards regularization.

¹⁰ This TRU system is dependent on a significant differential between non-regular and regular pay. Further, sessionals have no or very limited rights to regularization

faculty member would be paid for that work and what the sessional is paid for that work is calculated. That amount is given as a Phased Retirement Supplement (PRS) to the senior faculty member who has reduced their workload. The faculty member continues to get full medical and dental benefits.

2.5.3 Fraser Valley

One can reduce workload up to 50% by taking an unassisted leave, at 20 to 50% over a period of two years. The employer pays benefits during phased retirement period.

2.5.4 Examples from Quebec

There are two options listed on the Quebec Pension Plan website

www.rrq.gouv.qc.ca/en/flashretraiteqc/Pages/capsule_retraite_037.aspx

In brief, one can reduce one's workload but, with employer agreement, contribute to one's pension as if still at the same time-status.

Or, one can start to collect an "early retirement" income. One receives pension, income, and continues paying pension premiums. One's pension income is then increased in the following year by 0.5% of one's contributory income. Because this would allow a person to be compensated at more than full-time levels, it would probably not be an incentive to retire or reduce workload earlier,

2.6 Post-Retirement Options

The College Plan is clear that one must "sever" employment in order to start one's pension. However, at a few locals some kind of post-retirement work opportunity is thought of, to varying degrees, as possible or very probable.

The Committee does not know if this type of "incentive" actually leads to workload reductions or earlier retirements. It is perhaps an item that can be explored through a survey.

While some may argue that it's better to encourage "classic" retirement, post-retirement opportunities may hasten retirement for some.

It can lead to confusion when these **post-retirement** options are referred to as "phased" or "phased-in" retirement. In this report we reserve that terminology for **pre-retirement** options such as those discussed above in section 2.5.

2.6.1 Re-employment as Non-regular Faculty

At VCC and Douglas, retired faculty members can be re-employed as contract or auxiliary faculty members. This is not a guarantee nor is it a status with any particular rights, at least initially. However, there is no barrier to restarting on the seniority and status accrual tracks. One member at VCC was even getting close to regularization at one point. An advantage for both the college and the member is that neither has to pay a pension premium for the work.

2.6.2 Re-employment Rights with some Time-status Limitations

At Kwantlen, retired faculty members can be re-employed as non-regular faculty members. The retiree will automatically be placed on the interview list; however, appointments cannot exceed half time.

At Capilano, a member can retire, and therefore start their pension but then be appointed back to a non-regular position. The search process to fill this non-regular position may be restricted to internal candidates and retired employees. One can work up to 50%, unless the person took an ERI, then can only work up to two sections per year (25%). One cannot contribute premiums to the College's pension plan while collecting a pension

2.6.3 Re-employment Rights with Further Limitations

In the CORFA Agreement, retired faculty members can be re-employed as Post Retirement Faculty. One can work for up to a year at a time. They are paid on salary scale at the step they left at (usually top of scale) plus 10% in lieu of PD, vacation, and benefits and another 15% for non-instructional time. There is no right of first refusal.

This structure is designed as a financial dis-incentive to management to re-hiring retirees. Because the retiree would cost the college more than the typical non-regular, it is a balanced approach. Given that finding qualified people may be difficult in some departments or communities, it can help satisfy a legitimate need, while retaining the financial incentive to find a junior person at a lower cost as well as an opportunity to do so at least once a year.

2.6.4 Camosun FA's Article 18.03 Post Retirement Employment

Re-employment under this provision is for usually for a period of two years, which however, can be extended by mutual agreement. The faculty member actually retires (severs employment for at least one day) and starts to collect a pension. The College creates a special "post-retirement position," which is restricted to retired faculty. The faculty member can then be re-employed at 50%. The employer's former pension contribution will be pro-rated and placed in an RRSP for the faculty member. The faculty member gets paid as a 50% continuing faculty member and collects pension at the same time.

Part 3 - Recommendations

3.1 Develop a Set of Principles

That FPSE develop a set of principles to guide bargaining, advocacy and decision-making that includes the following:

- (1) Transitions to Retirement should be developed primarily as ways to encourage work-force transition not within a frame of cost-savings to institutions
- (2) Created savings derived from transition plans, such as the employer not having to pay pension premiums, should be separated off to plans/incentives/funds that can encourage full retirements and workload reductions

- (3) Alternatives like the Quebec example or the Canada Pension Plan that would allow continued, unreduced work to increase one's pension while also collecting one's pension should not be encouraged
- (4) Faculty Associations should always seek to balance the rights of the non-regular faculty members with the rights of the members who are later in their careers
- (5) That FPSE locals create active agendas that seek to counteract the probable tendency of the post-secondary workforce to hold on to their jobs to an extent that reduces options for newer faculty.

3.2 Prioritization of Initiatives

That locals considering initiatives to encourage retirement and/or workload reductions do so in the following priority order:

- (1) Full retirement
- (2) Phased retirement; that is, a process where the faculty member gradually reduces his workload, aiming towards a set retirement date
- (3) Only post-retirement re-employment options that limit re-employment and re-employment rights, see 3.3 below.

3.3 Limitations on Post-retirement Employment

If locals have bargained or are attempting to bargain models of post-retirement employment those provisions should only be activated in a sequence: after available work is offered to incumbent part-time and non-regular faculty; then if work is still available there should be a full posting for the work; then if the work is still available, it should be offered to retired faculty as:

- (1) limited term employment which is ineligible for re-regularization, paid benefits, or salary increment accrual, with
- (2) limited combined compensation of pension plus pay not exceeding the top of the faculty pay scale.

3.4 Creating Transitions to Retirement

That Policy 4.14 (2003) on Phased Retirement, see Appendix 3, be reviewed and that FPSE develop clearly defined and comprehensive model proposals for

- (1) early retirement and retirement incentives, and
- (2) phased retirement

3.5 Pension Plan Rule Changes

Since pension related legislation and current tax laws currently block some options, FPSE can and should continue to be a leader in advocating for change. As a Plan Partner and while cognizant of the need for stability in Plan rules, it is recommended:

- (1) That FPSE continue to pursue changes that would serve the overall goals of supporting senior faculty who wish to either retire or reduce their workload. Examples are partial pensions, or other forms of “pre-retirement” pensions. *See also FPSE Policy 5.1.5 (i), Appendix 3.*
- (2) That FPSE advocate for pension rules which would require both employers and employees to make contributions to the Pension Plan regardless of whether the employee is already collecting a pension. *See FPSE Policies 4.14.2.2 and 5.1.5 (f), Appendix 3.*

3.6 Effects on Non-Regular Faculty

- (1) When a regular faculty member retires, institutions should be obligated to fill those vacancies with regular positions or regularized faculty.
- (2) Retirement incentives should not result in cost savings that benefit only the employer. Any savings should go towards supporting and encouraging work-force transition, or towards regularizing non-regular faculty.
- (3) Work-force transition models should not rely on the lower wages of non-regular faculty nor encourage the lowering or capping of non-regular wages.
- (4) As such transition initiatives are to be standing, reoccurring features of workplace arrangements, the work created should lead to regularization or the regularization track

3.7 Medical/Dental Benefits

That FPSE continue to work towards improvements in access to affordable post-retirement benefits such as those summarized in section 1.2 herein. *See also FPSE Policies 5.1.4.8 (c) and 5.1.5 (c), Appendix 3.*

3.8 Surveying our Members

That FPSE undertake a survey of retired and non-retired members to answer such questions as:

To what degree do members delay retirement because they want to maintain their extended health and dental benefits?

Which measures would be most effective in encouraging retirement: phased retirement? partial retirement with pension? job share? post-retirement arrangements? or lump sum incentives?

3.9 Compliance with Human Rights Legislation

That locals review their collective agreements to ensure that language referring to mandatory retirement or the use of a member's age in calculating access to benefits or leaves have been removed or minimized so that they are in compliance with Human Rights legislation.

3.10 Updating of Recommendations from 2013 Report

see Appendix 1

(1) Evaluation

That FPSE locals are encouraged to negotiate effective evaluation language which will ensure fair treatment of faculty regardless of age and that BCC, CARC and locals should continue to monitor developments in this area.

(2) Potential Strains on the FPSE Workplace

That CARC and Locals include in their planning and work plans

--training modules on practical pitfalls and approaches in workplaces that have a greater number of older workers than they have ever had.

-- training modules for stewards on how to become more sensitized to the needs of older workers and on how to assist and facilitate when misunderstandings and conflicts occur.

Appendix 1 Review of the Recommendations from the 2013 FPSE Report, “The End of Mandatory Retirement: Adapting to the New Realities of Work and Retirement “

Recommendation 1

When discussing or proposing Plan design changes as a pension partner, FPSE should continue to consider carefully the predictable intergenerational effects those changes will have on the availability of work for newer faculty and on the amount of work older faculty may, with as little impact as possible, be able to let go of.

Recommendation 2

That FPSE develop a clearly-defined and comprehensive model proposal for both phased and for partial retirement pursuant to Policy 4.14 (2003)

Recommendations 3 and 4:

- *That FPSE locals are encouraged to file grievances where employers limit benefits after age 65.*
- *That FPSE continue to provide locals with the necessary support to successfully grieve or bargain benefit improvements for post-65 employees.*

2016 Commentary

Significant progress on post-65 benefits has been made since 2013. Locals either achieved increases through grievances or bargaining. The situation now does not merit special attention beyond that afforded such issues through contract administration or bargaining. The Committee believes the focus should now shift to possible measures to address post-retirement benefits, as per recommendation 3.7.

Recommendation 5

That FPSE locals are encouraged to negotiate effective evaluation language which will ensure fair treatment of faculty regardless of age.

2016 Commentary

This item should be referred to BCC, CARC and the locals for monitoring and any further action recommendations. *See Recommendation 3.10 (1)*

Recommendations 6 and 7

- *That FPSE locals are encouraged to negotiate provisions regarding the re-hiring of retired faculty which establish an appropriate balance between the rights of retirees and the rights of new faculty.*
- *That FPSE advocate for pension rules which would require both employers and employees to make contributions to the Pension Plan regardless of whether the employee is already collecting a pension.*

Recommendations 8 through 12

- *That FPSE conduct a comprehensive survey to determine a more accurate profile of the demographics and economic conditions of non-regular faculty.*
- *That FPSE task the NRFC with establishing new employment standards for FPSE to advocate for in its advocacy and for FPSE to bargain towards.*
- *That FPSE locals and the Bargaining Coordination Committee consider how to recommit to making non-regular issues in general and a major restructuring of work conditions for newer faculty top priorities for change over the next rounds of bargaining.*
- *That FPSE locals work towards reducing barriers to regularization wherever they exist in language and practice*
- *That FPSE locals without regularization of the person language continue to try to negotiate such language into their collective agreements.*

The 2013 Report states:

NRFC members believe that the real issue for new faculty is not so much what older workers are doing. Rather the issue is finding ways to have greater job security and better working conditions. There should be a renewed commitment to resetting the standards for employment in the post-secondary system. That can include a lower work level required for regularization, perhaps quarter-time; a shorter qualifying period, perhaps one year; that regularization become automatic; and that attendant medical and dental benefits start much earlier during one's probationary period. It should also include an elimination of secondary scales for like-work where they exist and seniority based access to work.

2016 Commentary

The Committee supports these recommendations and notes that the survey of non-regular faculty has already gone through one iteration. These items should be referred to NRFC and BCC for inclusion in their workplans and future agendas. Throughout this Report, the Committee attempts to maintain the principle that any work opportunities created through encouraging retirement be either a regular or regular-track job. See *Recommendations 3.1 (4) and 3.6*

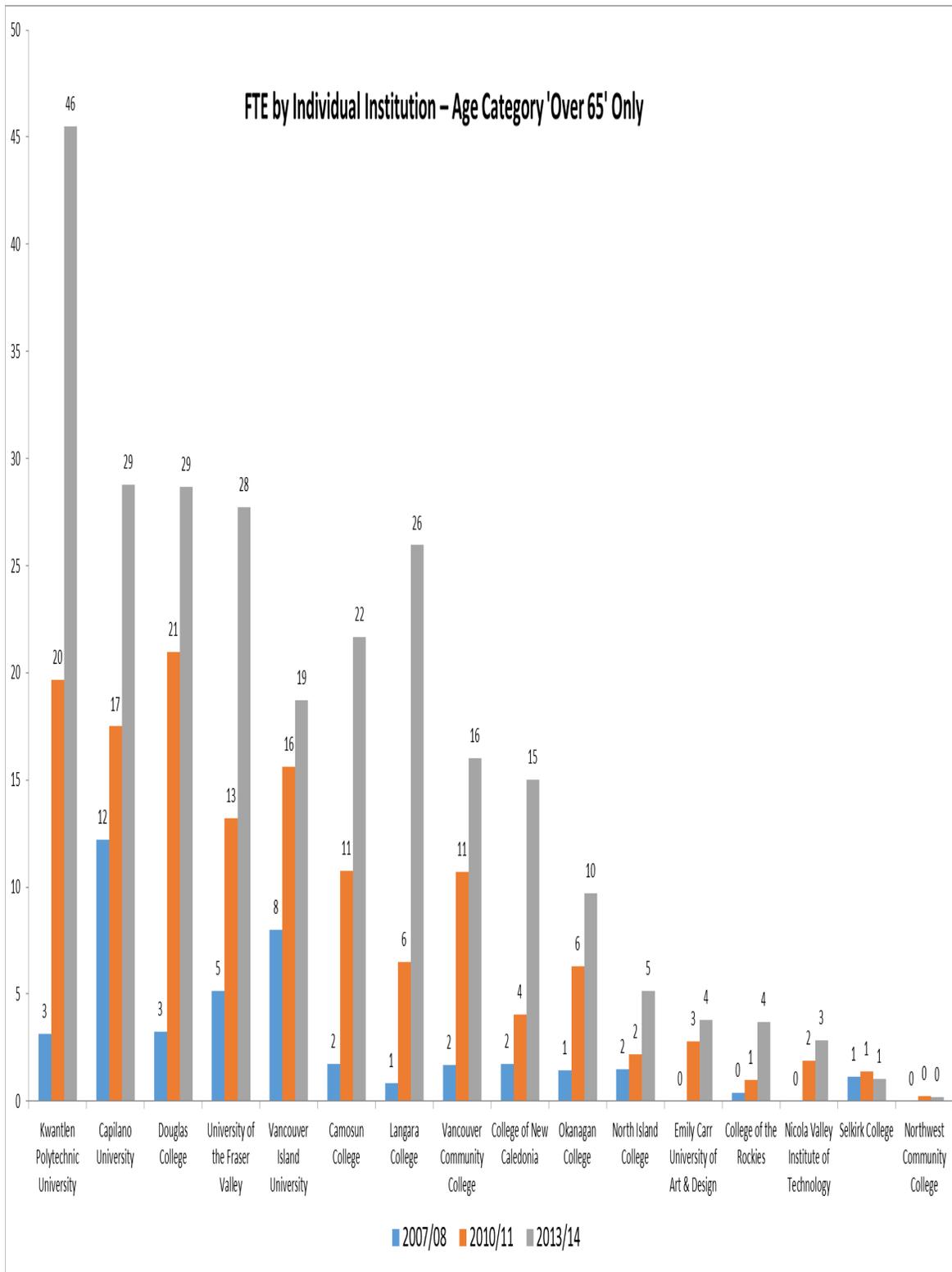
Recommendations 13 to 15

- *That FPSE develop training modules for leaders and general members on practical pitfalls and approaches in workplaces that have a greater number of older workers than they have ever had.*
- *That FPSE develop training modules for stewards on how to become more sensitized to the needs of older workers and on how to assist and facilitate when misunderstandings and conflicts occur.*
- *That the FPSE representatives on the joint FPSE/PSEA committee created to discuss harassment issues and training work to ensure that the training includes sensitivity to ageism.*

2016 Commentary

These items should be referred to CARC and the locals for their workplans or future agendas.
See Recommendation 3.10 (2)

Appendix 2 FTE Above Age 65 Through 2007-2014 Period In Individual Institutions



Appendix 3 FPSE Policies on Retirement and related Pension and Benefit Issues

4.14 RETIREMENT

4.14.1 Phased and Early Retirement

FPSE supports the development of phased retirement options and early retirement options (retirement options) for members. Phased retirement refers to a combination of work and pension income such that the total income not exceed a full-time salary.

Access to a range of retirement options benefits employees in easing the transition from regular employment to full retirement while maintaining income and benefit levels and working at less than full load.

Retirement options are valuable to employers and the post-secondary system as such options recognize the valuable contribution and experience that employees make to institutions and allow institutions to retain skilled older employees who would otherwise retire. Employers also benefit from retirement options by being able to plan and support workforce adjustment and transition more effectively.

Access to retirement options should not limit access to regular work for existing non-regular employees and for new employees. Access to retirement options may assist in avoiding layoffs in the context of workforce reductions. FPSE believes that the funding of retirement options is primarily an employer responsibility. Where retirement options are being considered, it is appropriate to assess the implications for the health of the College Pension Plan funding, including the impact on the Basic Account, the Inflation Adjustment Account, and the Plan's ability to subsidize health benefits for retirees. *(2003 AGM)*

4.14.2 Removal of Mandatory Retirement

4.14.2.1 When discussing or proposing Pension Plan design changes as a pension partner, FPSE should continue to consider carefully the predictable intergenerational effects those changes will have on the availability of work for newer faculty and on the amount of work older faculty may, with as little impact as possible, be able to let go of.

4.14.2.2 FPSE will advocate for pension rules which would require both employers and employees to make contributions to the Pension Plan regardless of whether the employee is already collecting a pension. *(2013 AGM)*

5 PENSIONS

5.1 Overview of Pension Partner and Trustee Roles and Obligations

5.1.4 Operating Principles

5.1.4.8 Economic Security

The financial aspects of the pension plan are important for both active members and recipients.

(c) Comprehensive post-retirement group benefits should be provided at an affordable cost for retirees.

5.1.5 Goals

FPSE should continue to maintain and work for:

(c) retiree access to fully-funded health benefit plans

(f) seeking legislative and regulatory changes that will have a positive effect on the plan

(i) bringing in a framework to allow partial retirement with corresponding access to partial retirement benefits

Appendix 4 Summary of Local Collective Agreements on Retirement

Disclaimer: This compilation is from sources available online in the spring of 2016. The Committee knows that several 2014-19 Agreements have not yet been through final edits, let alone been published on the web. Therefore, there are likely to be wording or numbering changes that we were not able to catch. Please connect with the local to ensure accuracy of the cited provision.

Local 1 – Capilano FA

- Mandatory retirement (Article 2.17) at age 70 (or 5 years past the earlier age to qualify for unreduced CPP_
- Retired employees can continue to participate in dental and extended health (100% employee paid) – Article 9.4.2.3)
- They have an Early Retirement Fund (\$30,000 per year plus there can be other employer contributions) to offer ERIs. Article 18.5 –Lump sum payout can be used for buying past service contributions.
- Phased in Retirement – Article 20 - really “post retirement”. Can be re-employed as a non-regular, up to 50% of a workload. If the retiree took an ERI, then can only work up two sections per year.
- An amount equal to the College’s contribution to the College Pension Plan for the workload of the retired employee subsequently hired as a non-regular employee will be added to the Early Retirement Fund – Article 20.1.3.

Local 2 – TRUFA

- Has early retirement and phased retirement as part of the Menu of Option for Labour Adjustment Strategies (Article 3.33)
- Offers a Retirement incentive (but no details) – Article 16.3
- Has Phased Retirement (Article 16.4) – employee is committed, irrevocably, to retire. Reduces workload. Paid for the work s/he still teaches plus a “Phased Retirement Supplement” (PRS). PRS = difference between the salary and benefits for that portion of the member’s workload no longer performed by the member and the salary and benefits of the sessional cost when that work is replaced. Continues to have fully paid benefits.

Local 3 – FACNC

- When the employee qualifies for a Pension, is paid the cash equivalent of accumulated sick leave up to a maximum of 60 days.
- Standard ERI language (Article 14.13)
- Will match the employee’s contribution for the buyback of up to 3 additional years of pensionable service, subject to the approval of the pension plan. (12.8.1.(e))

Local 4 – DCFA

- LOU #1 – Retirement Incentives – standard ERIP letter
- Article 6.07 (e) – A post-probationary regular faculty member planning to retire in the following academic year may request, for the academic year preceding retirement, a part-time workload spread across three (3) semesters. Access to this provision will be limited to one (1) occasion per faculty member.
- Article 13.02 (c) A regular faculty member who retires and who wishes to instruct as a contract faculty member must advise the College in writing. If a retired faculty member obtains employment as a contract faculty member, benefits will be made available to that faculty member in accordance with Article 16.09 until age seventy (70).

Local 5 – KFA

- Part of Menu of Labour Adjustment Strategies – Article 7.12
- Article 21 – Retirement – not in force because of LOU 13
- Article 22 – Early Retirement – Standard ERI
- LOU 13 – Elimination of Mandatory Retirement – about benefit coverages

Local 6 – CORFA

- Standard ERI – LOU 1
- LOU 9 – Post Retirement Faculty– retired faculty can be re-employed as PR faculty at top of scale, no R of FR, no benefits, PD, sick leave, or vacation (but 10% in lieu of benefits and vacation). Up to 100% for up to 1 year. Can have subsequent appointments, if there is no employee with R of FR to the work.

Local 7 – UFVFSFA

- Article 34 – Retirement – standard ERI language
- Article 34.5 Phased Retirement – can reduce workload up to 50%. Unassisted leave, 20% to 50% over a period of two years. Employer pays benefits during the phased retirement period as per their Article 28 (which I think means pro-rata costs but I’m not entirely sure.)

Local 8 – VIUFA

- Article 15.2. 1 to 15. 2 8 - Standard ERI language
- Article 15.2.9 – A faculty member receiving an ERI may choose to postpone their date of retirement for two years by means of a one-time reduction of their workload. The combined payout of the early retirement incentive and salary for part-time work in each fiscal year shall not exceed the salary the faculty members would receive if they were working full time. Any unpaid balance will be paid out at the end of the two-year period. Replacement work created by this reduction does not count towards regularization.

Local 9 – OCFA

- Article 30.1 – 30.2 – Retirement and ERI
- Article 30.3: Service Recognition on Retirement Allowance – 5 working days for every FTE year of service with OC, prorated. Also, MOU #1 – tells how this is funded.
- Article 30.1.2 - Get cash payment equal to accumulated sick leave and, to max of 60 days, and unused vacation to a max of 30 days.
- Early retirement and ERI part of the menu of labour adjustment strategies.

Local 10 – SCFA

- Article 9.8 Retirement Benefits – College will match employee contributions for buying back 3 years of service, if retires between age 55 and 65
- ERI – standard except the percentages are lower than other places.

Local 11 – AWU

- Seniority list for early retirement Article 15.7
- Article 16 – Early Retirement plan – standard ERI
- Article 6.7.6 An employee who has made no claim against the Sick Leave Plan in the 3 years prior to retirement shall be entitled to a lump sum payment of 2 months' salary upon retirement.
- Menu of labour adjustment options

Local 12 – Camosun CFA

- Article 18 – Early retirement, ERI, Post-retirement Employment
- Article 15.02 – payout of pre-1988 accumulated sick leave upon retirement
- Article 18.03 - Following retirement from the College, a previous Employee may be appointed to a post-retirement position in his/her previous department. With the approval of the appropriate Vice-President, the search to fill a specified post-retirement position may be restricted to retired faculty. The post-retirement appointment shall be for a period of two years, unless otherwise agreed to by the Employer and the Employee. Appointments may be extended subject to mutual agreement between the College and the Employee. The employee first retires and applies for pension.

Local 14 – Langara FA

- Article 10.5.1 – 6 months' notice to College before retiring
- Article 22 – Early Retirement Incentive – standard language

Local 15 – VCCFA

- Article 8.11 – Retirement preparation leave – 3 to 12 month leave (unpaid) but with benefits, ability to buy pensionable time, and a \$1200 per month stipend. Maximum of 20 such leaves per year. *Suspended for 2014-19 Agreement.*

- Article 8.12 – Renewal leave – 6 to 12 month leave with benefits and \$1200/month stipend. Maximum of 30 per year. *Five per year for 2014-19*
- Part of menu of labour adjustment strategies.
- Article 21 – 6 months’ notice
- Article 22 - Retirement Incentive (standard language)
- Appendix 26 – Retirement and Succession issues – joint committee to discuss transition into retirement and recruitment of new faculty.
- New 5 FTE Retirement Incentives a year at \$45000

Local 16 – NICFA

- Only has language about mandatory enrolment in the College Pension plan

Local 17 – TRUOLFA

- Article 11.7 – mandatory enrolment in the plan
- Article 12.8 – 12.8 Retirement No Employee shall be required to retire due to age, provided the Employee is capable of carrying out his/her duties. 12
- Article 12.10 Standard ERI language

Local 19 – NVITEA

- Article 30.1 Retiree Benefits – access to computers and a library card at no charge.

Local 22 – ECUADFA

- Standard Early retirement incentive language except they don’t have to fill positions vacated by early retirements.

Appendix 5 Actual Local Collective Agreements on Retirement

Disclaimer: This compilation is from sources available online in the spring of 2016. The Committee knows that several 2014-19 Agreements have not yet been through final edits, let alone been published on the web. Therefore, there are likely to be wording or numbering changes that we were not able to catch. Please connect with the local to ensure accuracy of the cited provision.

Local 1 – Capilano FA

2.1.7 Mandatory Retirement

- 2.1.7.1 The mandatory retirement age for an employee is the greater of age 70 or the age compounded by adding 5 to the earliest age for qualifying for an unreduced Canada Pension.
- 2.1.7.2 An employee who meets the mandatory retirement age shall lose his or her employment status except for the purposes of temporary substitution. This clause will not affect current employees who are age 55 or older as of April 1, 2001.
- 2.1.7.3 In exceptional circumstances, the functional area and Dean may agree to hire for one academic year at a time, a past employee over the mandatory retirement age.

9.4.2.3 Retired Employees

Enrolled employees may continue to participate in the dental and extended health benefits of the flexible benefits plan following retirement. The cost of such participation shall be one hundred percent (100%) employee paid.

11.6.3 Retirement

If an employee wishes to retire at age sixty-five (65) or earlier, the retirement shall coincide with the end of the term and s/he must give at least six (6) months' notice in writing to the President. These provisions may be waived or the date altered by mutual consent in writing.

Article 18 EARLY RETIREMENT PLAN

- 18.1 For the purpose of expending funds allocated for early retirement under this Collective Agreement, the College shall accept and approve, on the basis of seniority as applied in 18.1.2, applications for early retirement of employees meeting the qualifications of 18.1.1
- 18.1.1 Eligibility:
- An employee must be at the highest achievable step of the salary scale,
 - An employee must have a minimum of ten years of full-time equivalent service in the BC College and Institute System

- An employee must elect to cease employment with the College for purposes of retirement, unless 18.1.2 applies, and
- An employee must be age 55 or older.

- 18.1.2 For the purposes of Article 18 seniority is measured in accordance with 11.8.6 unless and employee qualifying under 18.1.1 can establish through certification of a physician jointly agreed upon by the Union and the College that the employee has significant outstanding health problems that would make continued employment at the College detrimental to the employee's medical condition. This employee shall have his/her seniority adjusted to 1.25 times seniority as measured by 11.8.6.
- 18.1.3 Employees accepting early retirement after the application of Article 18.1.2 cannot return to work at the College.

18.2 AGREEMENT

- 18.2.1 An employee has the right to accept or decline an early retirement incentive offer made by the college within thirty (30) days of the offer being proposed. In the event of acceptance of an offer of early retirement, the employee's date of retirement or commencement date of leave under Option "B" hereof shall be effective on a date mutually agreed upon between the employee and the College.
- 18.2.2 Agreement shall be in writing and shall specify the early retirement date with the incentive option agreed upon.
- 18.2.3 Acceptance must take place before the termination date of this Agreement. Retirement or commencement of leave under Option "B" hereof may take place after the termination date of this Agreement.

18.3 BENEFIT OPTIONS

- 18.3.1 Lump Sum Payment (OPTION "A")
The retirement benefit will be paid in one sum on the date of retirement or, on an agreed-upon deferred date or in predetermined installments acceptable to the employee, and will be based on scale salary without allowances in the following amounts:

Age of Retirement	Payout
55 to 59	100% of annual salary
60	80% of annual salary
61	60% of annual salary
62	40% of annual salary
63	20% of annual salary
64	0% of annual salary

- 18.3.2 Purchase of Past Service Contributions for Early Retirement (OPTION "B")

The College will purchase, on behalf of the employee, past service contributions to the College Pension Plan equivalent to the value of the lump sum payment to provide for immediate early retirement benefits.

18.4 FINANCIAL COUNSELLING

Each employee who accepts one of the foregoing incentives is entitled to attend with their spouse or another individual who advises the employee on his/her finances, a Financial Planning Workshop and to receive subsequent personal financial consultations conducted by a firm of qualified financial planners or consultants. Fees for the consultative sessions to a maximum of \$400 per session will be borne by the College.

18.5 EARLY RETIREMENT FUND

18.5.1 The College shall maintain an early retirement fund to fund early retirements under Article 18. The College shall add to this fund the following:

18.5.1.1 Thirty Thousand dollars (\$30,000) per year; and

18.5.1.2 Any amounts received by the College and specifically designated for the early retirement of its faculty.

18.5.2 The College shall deduct from this fund the amount of early retirement benefit options disbursed.

18.5.3 The College shall maintain records for the Early Retirement Fund. The Union shall be provided with an annual reconciliation summarizing the changes in the Early Retirement Fund. The Union shall be given access to the supporting records upon request.

Article 20 RETIRED EMPLOYEES

20.1 PHASED-IN RETIREMENT

Following retirement from the College, a previous employee may be appointed to a position as a non-regular employee. Such appointment shall be governed by 11.3 of the Collective Agreement. At the option of the functional area and with the approval of the Dean, the search process to fill a vacant non-regular position may be restricted to internal candidates and retired employees (see 11.7.2.4).

20.1.1 A previous employee who has retired and is subsequently appointed to a non-regular position may work up to one-half of a full duty load, provided that the employee was not in receipt of an early retirement from the College. Where the

- employee was in receipt of an early retirement incentive from the College, the employee may work up to two sections per year.
- 20.1.2 Appointments of retired employees shall be governed by 11.3. The probationary provisions of 11.4.1 shall not apply to retired employees who received non-regular appointments following retirement. At the option of the functional area, with the approval of the Dean, the search process to fill a vacant non-regular position may be restricted to internal candidates and retired employees.
- 20.1.3 An amount equal to the College's contribution to the College Pension Plan for the workload of the retired employee subsequently hired as a non-regular employee will be added to the Early Retirement Fund under 18.5.
- 20.2 Upon request, a retiree shall be provided with a library card at no charge as a community borrower and allowed access to the College's facilities as if s/he were a registered student. The Vice President may withdraw this benefit for a particular retiree. The withdrawal of the benefit will not take effect until the CCFA has been notified of the proposed withdrawal and provided with the reasons for this decision. This benefit shall not be unreasonably withdrawn.

Local 2 – TRUFA

The word "retirement" shows up in:

- Article 3.3.3 – part of the menu of Labour Adjustment strategies
- Article 16.3 – Retirement Incentive and Article 16.4 Phased Retirement

16.3 Retirement Incentive

16.3.1 Eligibility

- 16.3.1.1 An employee must be at least 55 years of age and at the highest achievable step of the Assistant Professor/ Lecturer/ Librarian I/ Counsellor I/ Instructional Support I salary scale or higher.
- 16.3. 1.2 An employee must have a minimum of ten years of full-time equivalent service in the BC Post-Secondary System.

16.4 Phased Retirement

- 16.4.1 Members may request and the University may grant Phased Retirement. Once an agreement for phased retirement has been reached and signed the member is irrevocably committed to retire.

- 16.4.2 Phased retirement will be available to members who are at the highest achievable step of the Assistant Professor/ Lecturer/ Librarian I/ Counsellor I/ Instructional Support I salary scale or higher on the 30th of June and have reached the age of 55 or greater.
- 16.4.3 A member will give written notice of his/her intention to participate in the one or two years phased retirement program twelve (12) months in advance of the proposed commencement of phased retirement along with the intended progressive reduced workload as per Article 10 for each year of the phased retirement program.
- 16.4.4 The salary of the member during the phased retirement period will be based on the following:
i. Actual workload performed; and
ii. Phased Retirement Supplement (PRS).
- 16.4.5 The PRS shall be equal to the difference between the salary and benefits for that portion of the member's workload no longer performed by the member and the salary and benefits of the sessional cost when that work is replaced. If the workload no longer being performed is not replaced, the PRS shall equal the salary and benefits for that workload. The research component for Tripartite Faculty is a three course release for the purposes of phased retirement calculations.
- 16.4.6 The member's and the University's contributions to the pension plan will be in accordance with the College Pension Plan guidelines based on the salary actually paid to the member.
- 16.4.7 TRU shall continue to pay 100% of all health and welfare benefits during the phased retirement program.

Local 3 – FACNC

- 12.8.1. e. Upon retirement, when a faculty employee has fulfilled the requirements to qualify for a pension under the Pension (College) Act, a faculty employee shall be paid the cash equivalent to his/her accumulated sick leave up to a maximum of 60 days. The cash equivalent shall be at the rate of pay in effect immediately prior to retirement.
- 14.1.2 Subject to approval of the Pension Corporation, the Employer will match the employee's contribution for three (3) years of additional pensionable service for employees who retire between the age of fifty-five (55) and sixty-five (65), and who have ten (10) years of service with the Employer and who are eligible under terms of the (College) Pension Plan. Employees who wish to apply for this benefit must submit notice of their intention to the College prior to December 1st of the year prior to the fiscal year the employee wishes to retire.

14.13 Early Retirement Incentive Plan

14.13.1 Where it is deemed possible by the Layoff Committee (6.4.9) to offset the impact of layoffs through the offering of early retirement incentives to an instructor, an incentive may be offered.

14.13.2 Eligibility

The College may offer to any employee the choice of an early retirement incentive provided the employee meets the following qualifications:

- a. is age 55 or over, or has a minimum of twenty (20) continuous years of service, and
- b. has a minimum of ten (10) years of pensionable service, and
- c. is a regular employee at the time of early retirement, and
- d. elects to cease employment with the College for purposes of retirement.
- e. For the purposes of this article, pensionable service denotes all periods of employment during which an employee was eligible to contribute to the College Pension Plan.

14.13.3 Process

a. In an academic year in which the College intends to offer any early retirements, the College shall send a letter to all faculty employees who meet the criteria in 14.13.2 advising them of that fact in October of that year. Employees who are interested in a potential early retirement shall respond within thirty (30) days.

b. If early retirement incentives are offered, the order shall be:

- i. to offset layoff
- ii. to eligible faculty by seniority.

14.13.4 Agreement

An employee who has been offered an early retirement incentive by the College has the right to accept or decline within thirty (30) calendar days of the offer being made.

In the event of acceptance of an offer of early retirement, the employee's date of retirement shall be effective on a date mutually agreed upon between the College and the employee.

14.13.5 Early Retirement Incentive

The retirement incentive will be paid in one lump sum on the date of retirement or, for optimum tax advantage, on an agreed-upon deferred date or in predetermined installments

acceptable to the employee and will be based on scale salary without allowances in the following amounts:

Full Years to Retirement:	Payout:
1	20% of annual salary
2	40% of annual salary
3	60% of annual salary
4	80% of annual salary
5 or more	100% of annual salary

14.13.6 Protection of Medical Benefit Coverage

a. Early retiring employees in receipt of a College pension are advised that they may apply for basic medical and extended health benefit and dental coverage through the Pension Corporation when they file a claim for pension. The Pension Corporation makes appropriate deductions from the monthly pension for premiums. Retired employees in receipt of a pension are advised that they are not allowed to choose to join these plans at a later date.

b. Early retiring employees not immediately commencing receipt of a College pension may elect to continue their basic medical, extended health and dental benefit coverage through the College during the period preceding receipt of pension, but in any event, not longer than five (5) years following retirement, provided that:

- i. written notification of the intent to continue these benefits is provided to the Human Resources Department six (6) weeks prior to the date of early retirement (election must be made at this time);
- ii. the individual maintains B.C. residency, and;
- iii. the participant pays all premium costs.

14.13.7 Financial Counselling

Each instructor who is offered an early retirement incentive is entitled to receive personal financial counselling conducted by a firm of qualified financial consultants selected by the College. Three (3) hours of consultation is available and up to three hundred dollars (\$300.00) for such consultation(s) shall be paid by the

Local 4 – Douglas CFA

- 6.07 (e) A post-probationary regular faculty member planning to retire in the following academic year may request, for the academic year preceding retirement, a part-time workload spread

across three (3) semesters. Access to this provision will be limited to one (1) occasion per faculty member.

13.02 Retirement

a. Faculty members shall provide the College with a minimum of four (4) months' notice of their retirement. The notice shall be in writing and delivered to the appropriate Responsible Administrator, with a copy to Human Resources

b. A regular faculty member who retires loses all seniority as defined in this Agreement.

c. A regular faculty member who retires and who wishes to instruct as a contract faculty member must advise the College in writing. If a retired faculty member obtains employment as a contract faculty member, benefits will be made available to that faculty member in accordance with Article 16.09 until age seventy (70).

Letter of Understanding #1 - RETIREMENT INCENTIVES

1. Qualification/Criteria

a. The College may offer to a faculty member, or a faculty member may request of the College, a choice of one of the early retirement incentive alternatives described herein, provided the faculty member meets the following qualifications:

i. is age 55 or over;

ii. has a minimum of ten (10) years' FTE service as a faculty member at Douglas College;

iii. is a regular faculty member on continuing appointment at the time of early retirement;

iv. is on the maximum step of the salary scale;

v. resigns for purposes of retirement as a regular faculty member.

b. Where the number of eligible faculty members under (a) is greater than the number of retirement incentives available in a given year, the allocation of retirement incentives shall be decided based on the following criteria:

i. faculty members will be ranked according to age plus FTE service; and

ii. in the event that two (2) or more faculty members are ranked identically according to (i), the faculty members with greater FTE service will be given preference.

c. Notwithstanding any other provision in this Agreement, no regular full-time faculty member shall be identified under Article 13.03.b (Layoff of Regular Faculty With Four (4) Calendar Years (or more) as Regular Faculty) where it would be possible to avoid termination or reassignment by offering early retirement incentive to a faculty member

described in paragraph (a), above, until and unless such offer(s) have been made and declined. The College may bypass selection criteria (other than the qualifications set out in paragraph (a), above) in order to give effect to this paragraph.

2. Agreement

a. A faculty member has the right to accept or decline an early retirement incentive offer made by the College within thirty (30) days of the offer being proposed. In the event of acceptance of an offer of early retirement, a faculty member's date of retirement or commencement date of leave shall be effective on a date mutually agreed upon between the faculty member and the President.

b. A faculty member who wishes to be considered for an early retirement incentive must make the necessary application by January 1. This application will be considered a standing application for the period January 1 to December 31. If a faculty member's application has not been approved by December 31, then he/she shall submit a new application if he/she wishes to be considered for an early retirement incentive in a subsequent year. This paragraph does not apply to applications considered pursuant to Qualification/Criteria (c).

The Association shall receive a copy of all early retirement incentive offers presented to faculty members by the College.

Agreement shall be in writing and shall specify the early retirement date with the incentive option agreed upon. Incentive will be based on agreed salary at retirement date.

3. Alternatives

a. Lump sum payment

The retirement allowance will be paid in one sum on the date of retirement, an agreed-upon deferred date, or in pre-determined instalments, acceptable to the faculty member, and will be based on scale salary without allowances in the following amounts:

Full years to Age 65	Pay Out
1	20% of annual salary
2	40% of annual salary
3	60% of annual salary
4	80% of annual salary
5 and greater	100% of annual salary

or

b. Monthly payment

The retirement allowance determined in alternative a. above, will be paid into a pre-designated Registered Retirement Savings Plan in the name of the retired faculty member to provide, at the discretion of the retired faculty member, a supplemental pension income prior to age 65. Payments into the Plan shall be made monthly and shall be in the amount of 20% of the retiring faculty member's pre-retirement monthly salary without allowances and shall continue until the full retirement allowance is paid. Payments into the Plan shall commence on the first day of the month coincident with, or next following, the date of early retirement. In the event the retired faculty member dies prior to the full retirement allowance being paid into the Plan, any payments outstanding shall be payable by the College in a lump sum amount to the estate of the deceased.

4. Protection of Medical Benefit Coverage

a. An early retiring faculty member in receipt of a College Pension may obtain basic medical and extended health benefit coverage through the Superannuation Commission when filing a Claim for pension. Appropriate deductions will be made from monthly pension on a premium shared basis.

Note: A pensioner who declines the Extended Health benefit coverage at retirement will not be eligible for coverage later unless he/she can prove continuous coverage under an extended health care plan (e.g. coverage under spouse's plan).

b. An early retiring faculty member not immediately commencing receipt of a College pension may elect to continue his/her basic medical and extended health benefit coverage through the College during the period preceding receipt of pension (but in any event, not longer than five (5) years following retirement) provided that

i. written notification of the intent to continue these benefits is provided to Human Resources six (6) weeks prior to date of early retirement;

ii. the individual maintains BC residency; and

iii. the participant prepays all premium Costs.

5. Financial Counselling

Each faculty member, if offered early retirement, is entitled to attend a Financial Planning Workshop and receive three (3) subsequent personal financial consultations to establish the most beneficial early retirement incentive package for that faculty member. These consultations will be conducted by a firm of qualified Financial Consultants selected by the

College and the fees for these sessions to a maximum of \$90.00 per session will be borne by the College.

This Letter of Understanding shall be effective for the term of the current Agreement and is therefore subject to renewal by mutual consent.

Local 5 – Kwantlen FA

- Article 21 – Retirement
- Article 22 – ERIP, including being able to purchase benefits through the employer for up to 5 years.
- LOU 13 – Elimination of Mandatory Retirement
- Article 7.12 – part of the menu of Labour Adjustment strategies

ARTICLE 21 – RETIREMENT – Note – ceases to have force after Jan 1, 2008 – See LOU 13

(a) A faculty member shall retire from continuous full-time employment at the University College on August 31st, following the faculty member's 65th birthday.

(b) A retiring regular faculty member may, upon his request, be offered employment as a non-regular type 1 faculty member, subject to the following conditions:

(i) the retiree shall be automatically placed on the interview list for non-regular type 1 employment consideration by the Search Committee;

(ii) those non-regular type 1 appointments shall not exceed half-time;

(iii) the retiree must re-apply annually for non-regular type 1 employment.

ARTICLE 22 – EARLY RETIREMENT INCENTIVE

- Note: This was basically the same language as everyone else's CA, so I didn't replicate it.

LETTER OF UNDERSTANDING #13 - ELIMINATION OF MANDATORY RETIREMENT

The Parties agree to the following:

1. Article 21 of the collective agreement ceases to have force and effect as of January 1, 2008.
2. Article 22.06 – As of January 1, 2008 “Full Years to Retirement” shall read in the context to mean “Full Year to Age 65”.

3. As of January 1, 2008 Health and Welfare benefit coverage, for eligible post age 65 faculty, will be in accordance with the schedule of benefits listed in the Plan and will be subject to the limitations specified in the Plan, including eligibility requirements.
- a. Basic Medical Insurance as per Article 15.01 (a)
 - b. Extended Health Benefits as per Article 15.01 (b)
 - c. Group Life Insurance at 1 times the annual earning. Coverage will terminate on the employee's seventy-first birthday or upon retirement, whichever occurs earlier.
 - d. Accidental Death and Dismemberment Insurance at 1 times the annual earning. Coverage will terminate on the employee's seventy-first birthday or upon retirement, whichever occurs earlier.
 - e. Dental Benefits as per Article 15.03
 - f. Disability Benefits as per Article 15.06 (a)

The Parties agree that faculty who turned 65 on or after September 1, 2007 will be captured effective January 1, 2008 by the elimination of mandatory retirement

Local 6 – CORFA

- LOU 1 – ERIP – standard language
and

9. Letter of Understanding re: Post Retirement (PR) Faculty

This letter of understanding will apply to College of the Rockies faculty who are re-employed after retirement. The parties agree to establish a new category of employee in the collective agreement to effect the re-employment of faculty after their normal retirement age. The following conditions describe that category of employment:

Definition

A PR Auxiliary is a person who has retired from the College as a member of the faculty bargaining unit and who is subsequently re-employed after retirement.

Duration of Employment

A PR Auxiliary is employed for up to one year. S/he may be employed for more than one year but each period of employment will initially not be longer than one year.

Workload

A PR Auxiliary may work up to 100% of a workload. If the workload is an instructional term assignment, the term of employment will include non-instructional duty days (front/during/end of term) amounting to fifteen percent (15%) of the instructional duty days.

Salary

A PR Auxiliary will be paid pro-rata based on their step placement prior to retirement. For example, a PR Auxiliary with an 80% workload will receive 80% of their annual salary pro-rated to the length of the teaching assignment (they would receive \$32,000 for such a workload if their term of employment was 8 months and if their annual salary were \$60,000). In addition to salary, a PR Auxiliary will receive 10% in lieu of vacation and benefits.

Health and Welfare Benefits

A PR Auxiliary is ineligible to participate in the College's health and welfare benefits plans.

Pension

While employed as a PR Auxiliary, an employee may contribute to or draw from the College Pension Plan per the rules and regulations of that Pension Plan.

Professional Development, Vacation and Sick Leave

A PR Auxiliary does not accrue nor can s/he use Professional Development days, Vacation or Sick Leave.

Right of First Refusal

Notwithstanding Article 6.4, a PR Auxiliary is not eligible to exercise right of first refusal.

Local 7 – UFVFS

Article 34 – Retirement – standard ERIP

34.5 Phased Retirement

Type A or B employees who are at least 55 years of age and have at least 15 years of service who wish to reduce their workload up to 50% prior to full retirement may be able to do so by requesting, in writing, access to Article 25.5 (General Leave). Such requests are subject to approval by the employer who will, in consultation with the relevant managers, determine if the employee's request can be accommodated without undue negative impacts to productivity within the employee's work unit. The employer will provide a written response within two months to an employee's request for access to Article 25.5 for the purposes of phased retirement. A copy of the employee's initial request and the employer's response will be provided to the FSA.

- (a) Employees should submit their request at least six months prior to the proposed start date of their phased retirement. This written request must specify the period of the leave and provide a date when the employee's retirement will commence.
- (b) The retirement notice will be irrevocable.

- (c) The reduction in work under the provision of unassisted leave could be from 20% to 50% over a period of up to two years.
- (d) During the phased retirement period, the employer will pay benefits according to the provisions of ARTICLE 28

Local 8 – VIUFA

- Article 15.2. 1 to 15. 2 8 - Standard ERI language

15.2.9 A faculty member receiving an ERI may not teach more than one course per term or two courses per academic year after retiring.

(a) Subject to approval by the Appropriate Senior Administrator, faculty members who are offered early retirement incentives may choose to postpone their date of retirement for two (2) years by means of a one-time reduction of their workload. The combined payout of the early retirement incentive and salary for part-time work in each fiscal year shall not exceed the salary the faculty members would receive if they were working full time. Any unpaid balance will be paid out at the end of the two-year period. The full regular position shall be posted at the end of the two years, in accordance with Article 9.3.1.

(b) The portion of the workload of a temporary faculty member who is replacing the work of a regular faculty member in accordance with a) above, shall not be eligible to be counted for regularization purposes.

6.15.2 (d), (g), & (i) - Part of the Menu of Labour Adjustment strategies

LOU: Policies on Retirement, Appreciation, and Parking

1. Vancouver Island University agrees to develop policies based on the drafts discussed at collective bargaining that will include provisions on:

a) access to certain Vancouver Island University services for retired employees;

Local 9 – OCFA

30.1.2

Upon retirement, a continuing employee shall be entitled to a cash payment equal to his or her accumulated sick leave to a maximum of 60 days, as well as the normal vacation benefits due for that year. Any cash payment of vacation shall be limited to the balance of unused vacation to a maximum of 30 days (see 43.1.4).

Article 30.1 to 30.2.3 – Retirement and ERI (standard language)

30.3 Service Recognition on Retirement Allowance

An employee on a continuing appointment who is retiring and who has a minimum of five (5) completed full-time equivalent years of service with the College or its predecessors shall, subject to the Memorandum of Agreement titled "Service Recognition on Retirement", receive a service recognition retirement allowance at the rate of five (5) working days for every year of completed full-time equivalent service with OC, prorated. Overload, summer session, extended semester and DE work shall not be included in the calculation of full-time equivalent service for the purposes of this clause.

The service recognition allowance shall not be payable to employees terminated for cause.

MOA #1 Provides details on where the savings come from to fund this, how the money is allocated, and that there will be an annual reconciliation of the costs and savings to and from this fund.

- Part of the menu of labour adjustment options

Local 10 – Selkirk CFA

9.8.1 Pension Buy Back

The College will match the employee's contribution for three (3) years of additional pensionable service for work at Selkirk College by employees who retire between the age of 55 and 65, who have ten (10) years of service with the College and who are eligible under the Pension (College) plan

Employees who wish to apply for this benefit must submit their application to the College prior to December 1 of the year prior to the fiscal year the employee wished to retire.

Enrolment in the College Pension Plan shall be provided in the Common Agreement.

Rest of Article 9.8 – ERI language – except percentages are lower than other places:

Full Years to Retirement	Payout
1	15% of annual salary
2	30% of annual salary
3	45% of annual salary
4	60% of annual salary
5 or more	75% of annual salary

Local 11 – AWU

Article 6.7.6 An employee who has made no claim against the Sick Leave Plan in the three (3) year period previous to retirement, or early retirement, shall be entitled to a lump sum payment of two (2) months' salary upon retirement, or early retirement. For an employee who has a

claim against the Plan, the lump sum payment shall be reduced by the number of days claimed by the employee during the three (3) year period but excluding days claimed in Article 6.7.5 above.

15.7 Seniority List for Early Retirement

The Employer shall maintain a seniority list for early retirees showing all the necessary information relevant to the application of *Article 16*. An *up-to-date* early retirement list shall be sent to the President of the Union on an annual basis.

Article 16 – Early Retirement Plan – standard ERI language

Local 12 – Camosun

Article 15.02 Accumulated Sick Leave
Pre-1988 Accumulation

- (a) All Faculty Members on continuing appointment who were under age fifty-five (55) on March 31, 1988, will have their sick leave accumulation payout credits frozen at the March 31, 1988 level.
- (b) The accumulated sick leave referred to in 15.02(a) shall be payable upon retirement, as defined in the Pension (College) Act. On retirement, the Employee may either:
 - (i) convert his/her accumulated sick leave to cash on the basis of fifty percent (50%) of one two hundred fiftieth (1/250) of his/her annual salary per day, to a maximum of two hundred fifty (250) days of accumulated sick leave; or
 - (ii) use the sick leave to retire early on the basis of fifty percent (50%) of one (1) working day for each day's accumulation to a maximum of two hundred fifty (250) days of accumulated sick leave; or
 - (iii) a combination of (i) and (ii).

Where an Employee retires on less than full pension, the number of days which may be converted under (i), (ii) and (iii) above shall be actuarially reduced in the same proportion as is his/her Pension (College) Act benefits.

Post-1988 Accumulation

- (d) Any sick leave accumulated after April 1, 1988 shall not be converted to payout on retirement.

18 Retirement

18.01 Early Retirement

A full-time Faculty Member, in order to facilitate gradual retirement, may, upon reaching the age of fifty-five (55), apply for status as a continuing part-time Employee, with the percentage of workload to be mutually acceptable to the Employer and the Employee, but

not less than fifty percent (50%). Salary and benefits shall be prorated in accordance with the percentage of workload.

18.02 Early Retirement Incentive

In those Departments in which a reduction in staff is required, a Faculty Member may instead volunteer to take early retirement and shall be eligible for an early retirement incentive providing he/she meets the following conditions:

- (a) is age fifty-five (55) years or over;
- (b) has a minimum of ten (10) years of service;
- (c) holds a continuing appointment at the College.

A Faculty Member who opts to take early retirement shall be paid a retirement incentive of ten percent (10%) of his/her annual salary times the number of years remaining until sixty-five (65) to a maximum of one (1) year's salary, in addition to other retirement benefits.

18.03 Post-Retirement Employment

- (a) Following retirement from the College, a previous Employee may be appointed to a post-retirement position in his/her previous department. With the approval of the appropriate Vice-President, the search to fill a specified post-retirement position may be restricted to retired faculty. The post-retirement appointment shall be for a period of two years, unless otherwise agreed to by the Employer and the Employee. Appointments may be extended subject to mutual agreement between the College and the Employee.
- (b) An Employee who has retired and is subsequently appointed to a post-retirement position may work up to a fifty percent (50%) work load. Should an Employee who has retired and who was in receipt of an early retirement incentive from the College be appointed to a post-retirement position prior to the period of time covered by the early retirement incentive, the Employee shall repay the portion of the early retirement incentive covering the period of time subsequent to assuming the post-retirement position.
- (c) Retired faculty covered by this article shall have the same rights and benefits as continuing Faculty Members, except the right to revert to a full-time position under Article 1.04(b); the right of first refusal under Article 1.04(c); the right to a continuing position under Article 1.04(e); seniority under Article 1.07; and layoff provisions under Article 3.01(b); 3.02, 3.03, and 3.04(b).
- (d) Retired faculty covered by this Article shall engage in instructional and organizational development activities approved by the College during their period of Scheduled Development. If the appropriate Dean agrees, the retired Faculty Member may engage in professional development during their Scheduled Development.
- (e) An amount equal to the College's contribution to the College Pension Plan for the workload of the retired Employee subsequently appointed to a post-retirement position will be paid by the College to an Employee nominated RRSP. This contribution shall continue to the same

age as pension contributions are required to be made by the College on behalf of Faculty Members not covered by this Article.

- (f) If any provision of the Article conflicts with the terms of the College Pension Plan, then that provision will be deemed to be null and void and the parties will negotiate a provision to substitute for the provision rendered null and void which does not conflict with the College Pension Plan. All other provisions of this article will remain in full force and effect.
- (g) Employees who moved to “Phased Retirement” prior to July 31, 2003 shall not be adversely affected by changes to the program.

Local 14 – Langara FA

- Article 10.5.1 – 6 months’ notice to College before retiring
- Article 22 – Early Retirement Incentive – standard language

Local 15 – VCCFA

8.11 Retirement Preparation *suspended for 2014-19*

8.11.1 In order to allow an employee nearing retirement age to prepare for retirement, and with the approval of the appropriate Vice President, an employee shall be granted a leave or leaves of absence of between 3 and 12 consecutive months providing the following qualifications are met:

- a) The employee has been a regular employee for a minimum of 5 years;
- b) The employee is at least 50 years old;
- c) The employee should be on the maximum salary step, or have 10 years of service; and
- d) An appropriately qualified replacement employee, if required, is available.

The ultimate replacement employee shall be identified and, wherever possible, be at the minimum step of the salary schedule.

8.11.2 A maximum of 20 employees shall be granted retirement preparation leave per fiscal year. The procedure for application and allocation shall be as follows:

8.11.2.1 Employees shall submit written applications for retirement preparation leave not later than December 31 for the following fiscal year.

8.11.2.2 Should the total number of leaves applied for under Article 8.11.1 exceed the maximum specified in Article 8.11.2, allocation of the 20 retirement preparation leaves shall be on the basis of seniority.

8.11.2.3 Should the maximum allowable number of leaves (20) not be reached through the process outlined above, further retirement preparation leaves shall be granted during the fiscal year

in which the leave(s) is to commence, provided the employee submits a written application for the leave a minimum of 3 months prior to the commencement of the leave. Such leaves shall be granted on a first-come, first-served basis.

8.11.2.4 Eligible employees may take this leave at either 50% or 100% of full-time to a maximum of one year. Alternate time status leaves over 50% may be available subject to the scheduling requirements of the department or area.

8.11.3 Retirement preparation leave shall be unpaid, but shall carry with it the following benefits:

- Medical, Extended Health, Dental and Group Life benefits;
- Provided the employee elects to purchase the period of leave for pension purposes and is given permission to do so by the Pension Corporation, the College shall pay its share of pension contributions for the period of leave being purchased;
- A stipend of \$1,000 per month for full-time employees and pro-rata for part-time employees and employees on part-time leave; and
- Employees taking retirement preparation leave may opt for the continuance of Short-term and Long-term Disability by payment of the necessary premiums.

8.11.4 Stipulations

8.11.4.1 An employee on unpaid retirement preparation leave who becomes disabled and who has accumulated sick leave credit, shall, concurrent with the commencement of said disability, be placed on sick leave as per Article 7.6, (Sick Leave Credit Accrual), and Article 8.5, (Illness or Injury Not Covered by Workers' Compensation), and the retirement preparation leave shall immediately cease.

8.11.4.2 An employee who works elsewhere while on retirement preparation leave and has any of the insurance benefits listed in Article 8.11.3 provided at a rate of contributions equal to or superior to the College's contributions shall notify the College and take the benefits available elsewhere.

8.12 Renewal Leave Limited to 5 FTE per year for 2014-19

8.12.1 In order to provide employees with an opportunity for renewal, the College shall, with the approval of the appropriate Vice President, grant renewal leaves of between 6 and 12 months, provided the following conditions are met:

- a) the employee is a permanent regular employee at commencement of leave granted hereunder;
- b) the employee should be on the maximum of the salary step,

8.12.3 Renewal leave shall be unpaid, but shall carry with it the following benefits:

- A stipend of \$1,200 per month for full-time employees and pro-rata for part-time employees and employees on part-time leave.
- Medical, Extended Health, Dental and Group Life benefits.
- Employees taking renewal leave may opt for the continuance of Short-term and Long-term Disability by payment of the necessary premiums.

Appendix 26 – Retirement and Succession issues

LETTER OF UNDERSTANDING

The College and the Association will establish a joint subcommittee to discuss the following:

- mechanisms for assisting existing faculty to transition into retirement, and for recruiting new faculty;
- succession planning and the creation of mentoring opportunities.

New: 5 FTE Retirement Incentives per year for 2016 to 2019

Local 16 - NICFA

- Only has language about mandatory enrolment in the College Pension plan
-

Local 17 – TRUOLFA

- Article 11.7 – mandatory enrolment in the plan
- Article 12.8 – 12.8 Retirement No Employee shall be required to retire due to age, provided the Employee is capable of carrying out his/her duties. 12
- Article 12.10 Standard ERI language
-

Local 19 – NVITEA

30.1 Retiree Benefits

Upon request, the Employer may provide retired employees access to computers and the library at no charge. If access is approved, retired employees will be issued a library and/or identity card.

Local 22 – ECUADFA

1.17 The Retirement Date for Faculty Members will normally occur on 31 July following their sixty-fifth birthday.

Article 33.03 – Early Retirement – standard language except for:

33.03.4.5 The University is not required to replace Faculty Members granted early retirement. All decisions to fill tenure track positions shall be made under the provisions of Article 10 – Hiring of Faculty.



**Truth and
Reconciliation**
Commission of Canada

Truth and Reconciliation Commission of Canada: Calls to Action



This report is in the public domain. Anyone may, without charge or request for permission, reproduce all or part of this report.

2015

Truth and Reconciliation Commission of Canada, 2012

1500-360 Main Street

Winnipeg, Manitoba

R3C 3Z3

Telephone: (204) 984-5885

Toll Free: 1-888-872-5554 (1-888-TRC-5554)

Fax: (204) 984-5915

E-mail: info@trc.ca

Website: www.trc.ca

Calls to Action

In order to redress the legacy of residential schools and advance the process of Canadian reconciliation, the Truth and Reconciliation Commission makes the following calls to action.

Legacy

CHILD WELFARE

1. We call upon the federal, provincial, territorial, and Aboriginal governments to commit to reducing the number of Aboriginal children in care by:
 - i. Monitoring and assessing neglect investigations.
 - ii. Providing adequate resources to enable Aboriginal communities and child-welfare organizations to keep Aboriginal families together where it is safe to do so, and to keep children in culturally appropriate environments, regardless of where they reside.
 - iii. Ensuring that social workers and others who conduct child-welfare investigations are properly educated and trained about the history and impacts of residential schools.
 - iv. Ensuring that social workers and others who conduct child-welfare investigations are properly educated and trained about the potential for Aboriginal communities and families to provide more appropriate solutions to family healing.
 - v. Requiring that all child-welfare decision makers consider the impact of the residential school experience on children and their caregivers.
2. We call upon the federal government, in collaboration with the provinces and territories, to prepare and publish annual reports on the number of Aboriginal children (First Nations, Inuit, and Métis) who are in care, compared with non-Aboriginal children, as well as the reasons for apprehension, the total spending on preventive and care services by child-welfare agencies, and the effectiveness of various interventions.
3. We call upon all levels of government to fully implement Jordan's Principle.
4. We call upon the federal government to enact Aboriginal child-welfare legislation that establishes national standards for Aboriginal child apprehension and custody cases and includes principles that:
 - i. Affirm the right of Aboriginal governments to establish and maintain their own child-welfare agencies.
 - ii. Require all child-welfare agencies and courts to take the residential school legacy into account in their decision making.
 - iii. Establish, as an important priority, a requirement that placements of Aboriginal children into temporary and permanent care be culturally appropriate.
5. We call upon the federal, provincial, territorial, and Aboriginal governments to develop culturally appropriate parenting programs for Aboriginal families.

EDUCATION

6. We call upon the Government of Canada to repeal Section 43 of the *Criminal Code of Canada*.
7. We call upon the federal government to develop with Aboriginal groups a joint strategy to eliminate

2 | Truth and Reconciliation Commission of Canada

educational and employment gaps between Aboriginal and non-Aboriginal Canadians.

8. We call upon the federal government to eliminate the discrepancy in federal education funding for First Nations children being educated on reserves and those First Nations children being educated off reserves.
9. We call upon the federal government to prepare and publish annual reports comparing funding for the education of First Nations children on and off reserves, as well as educational and income attainments of Aboriginal peoples in Canada compared with non-Aboriginal people.
10. We call on the federal government to draft new Aboriginal education legislation with the full participation and informed consent of Aboriginal peoples. The new legislation would include a commitment to sufficient funding and would incorporate the following principles:
 - i. Providing sufficient funding to close identified educational achievement gaps within one generation.
 - ii. Improving education attainment levels and success rates.
 - iii. Developing culturally appropriate curricula.
 - iv. Protecting the right to Aboriginal languages, including the teaching of Aboriginal languages as credit courses.
 - v. Enabling parental and community responsibility, control, and accountability, similar to what parents enjoy in public school systems.
 - vi. Enabling parents to fully participate in the education of their children.
 - vii. Respecting and honouring Treaty relationships.
11. We call upon the federal government to provide adequate funding to end the backlog of First Nations students seeking a post-secondary education.
12. We call upon the federal, provincial, territorial, and Aboriginal governments to develop culturally appropriate early childhood education programs for Aboriginal families.

LANGUAGE AND CULTURE

13. We call upon the federal government to acknowledge that Aboriginal rights include Aboriginal language rights.

14. We call upon the federal government to enact an Aboriginal Languages Act that incorporates the following principles:
 - i. Aboriginal languages are a fundamental and valued element of Canadian culture and society, and there is an urgency to preserve them.
 - ii. Aboriginal language rights are reinforced by the Treaties.
 - iii. The federal government has a responsibility to provide sufficient funds for Aboriginal-language revitalization and preservation.
 - iv. The preservation, revitalization, and strengthening of Aboriginal languages and cultures are best managed by Aboriginal people and communities.
 - v. Funding for Aboriginal language initiatives must reflect the diversity of Aboriginal languages.
15. We call upon the federal government to appoint, in consultation with Aboriginal groups, an Aboriginal Languages Commissioner. The commissioner should help promote Aboriginal languages and report on the adequacy of federal funding of Aboriginal-languages initiatives.
16. We call upon post-secondary institutions to create university and college degree and diploma programs in Aboriginal languages.
17. We call upon all levels of government to enable residential school Survivors and their families to reclaim names changed by the residential school system by waiving administrative costs for a period of five years for the name-change process and the revision of official identity documents, such as birth certificates, passports, driver's licenses, health cards, status cards, and social insurance numbers.

HEALTH

18. We call upon the federal, provincial, territorial, and Aboriginal governments to acknowledge that the current state of Aboriginal health in Canada is a direct result of previous Canadian government policies, including residential schools, and to recognize and implement the health-care rights of Aboriginal people as identified in international law, constitutional law, and under the Treaties.
19. We call upon the federal government, in consultation with Aboriginal peoples, to establish measurable goals to identify and close the gaps in health outcomes

between Aboriginal and non-Aboriginal communities, and to publish annual progress reports and assess long-term trends. Such efforts would focus on indicators such as: infant mortality, maternal health, suicide, mental health, addictions, life expectancy, birth rates, infant and child health issues, chronic diseases, illness and injury incidence, and the availability of appropriate health services.

20. In order to address the jurisdictional disputes concerning Aboriginal people who do not reside on reserves, we call upon the federal government to recognize, respect, and address the distinct health needs of the Métis, Inuit, and off-reserve Aboriginal peoples.
21. We call upon the federal government to provide sustainable funding for existing and new Aboriginal healing centres to address the physical, mental, emotional, and spiritual harms caused by residential schools, and to ensure that the funding of healing centres in Nunavut and the Northwest Territories is a priority.
22. We call upon those who can effect change within the Canadian health-care system to recognize the value of Aboriginal healing practices and use them in the treatment of Aboriginal patients in collaboration with Aboriginal healers and Elders where requested by Aboriginal patients.
23. We call upon all levels of government to:
 - i. Increase the number of Aboriginal professionals working in the health-care field.
 - ii. Ensure the retention of Aboriginal health-care providers in Aboriginal communities.
 - iii. Provide cultural competency training for all health-care professionals.
24. We call upon medical and nursing schools in Canada to require all students to take a course dealing with Aboriginal health issues, including the history and legacy of residential schools, the *United Nations Declaration on the Rights of Indigenous Peoples*, Treaties and Aboriginal rights, and Indigenous teachings and practices. This will require skills-based training in intercultural competency, conflict resolution, human rights, and anti-racism.

JUSTICE

25. We call upon the federal government to establish a written policy that reaffirms the independence of the

Royal Canadian Mounted Police to investigate crimes in which the government has its own interest as a potential or real party in civil litigation.

26. We call upon the federal, provincial, and territorial governments to review and amend their respective statutes of limitations to ensure that they conform to the principle that governments and other entities cannot rely on limitation defences to defend legal actions of historical abuse brought by Aboriginal people.
27. We call upon the Federation of Law Societies of Canada to ensure that lawyers receive appropriate cultural competency training, which includes the history and legacy of residential schools, the *United Nations Declaration on the Rights of Indigenous Peoples*, Treaties and Aboriginal rights, Indigenous law, and Aboriginal-Crown relations. This will require skills-based training in intercultural competency, conflict resolution, human rights, and anti-racism.
28. We call upon law schools in Canada to require all law students to take a course in Aboriginal people and the law, which includes the history and legacy of residential schools, the *United Nations Declaration on the Rights of Indigenous Peoples*, Treaties and Aboriginal rights, Indigenous law, and Aboriginal-Crown relations. This will require skills-based training in intercultural competency, conflict resolution, human rights, and anti-racism.
29. We call upon the parties and, in particular, the federal government, to work collaboratively with plaintiffs not included in the Indian Residential Schools Settlement Agreement to have disputed legal issues determined expeditiously on an agreed set of facts.
30. We call upon federal, provincial, and territorial governments to commit to eliminating the overrepresentation of Aboriginal people in custody over the next decade, and to issue detailed annual reports that monitor and evaluate progress in doing so.
31. We call upon the federal, provincial, and territorial governments to provide sufficient and stable funding to implement and evaluate community sanctions that will provide realistic alternatives to imprisonment for Aboriginal offenders and respond to the underlying causes of offending.
32. We call upon the federal government to amend the Criminal Code to allow trial judges, upon giving reasons, to depart from mandatory minimum sentences and restrictions on the use of conditional sentences.

33. We call upon the federal, provincial, and territorial governments to recognize as a high priority the need to address and prevent Fetal Alcohol Spectrum Disorder (FASD), and to develop, in collaboration with Aboriginal people, FASD preventive programs that can be delivered in a culturally appropriate manner.
34. We call upon the governments of Canada, the provinces, and territories to undertake reforms to the criminal justice system to better address the needs of offenders with Fetal Alcohol Spectrum Disorder (FASD), including:
 - i. Providing increased community resources and powers for courts to ensure that FASD is properly diagnosed, and that appropriate community supports are in place for those with FASD.
 - ii. Enacting statutory exemptions from mandatory minimum sentences of imprisonment for offenders affected by FASD.
 - iii. Providing community, correctional, and parole resources to maximize the ability of people with FASD to live in the community.
 - iv. Adopting appropriate evaluation mechanisms to measure the effectiveness of such programs and ensure community safety.
35. We call upon the federal government to eliminate barriers to the creation of additional Aboriginal healing lodges within the federal correctional system.
36. We call upon the federal, provincial, and territorial governments to work with Aboriginal communities to provide culturally relevant services to inmates on issues such as substance abuse, family and domestic violence, and overcoming the experience of having been sexually abused.
37. We call upon the federal government to provide more supports for Aboriginal programming in halfway houses and parole services.
38. We call upon the federal, provincial, territorial, and Aboriginal governments to commit to eliminating the overrepresentation of Aboriginal youth in custody over the next decade.
39. We call upon the federal government to develop a national plan to collect and publish data on the criminal victimization of Aboriginal people, including data related to homicide and family violence victimization.
40. We call on all levels of government, in collaboration with Aboriginal people, to create adequately funded and accessible Aboriginal-specific victim programs and services with appropriate evaluation mechanisms.
41. We call upon the federal government, in consultation with Aboriginal organizations, to appoint a public inquiry into the causes of, and remedies for, the disproportionate victimization of Aboriginal women and girls. The inquiry's mandate would include:
 - i. Investigation into missing and murdered Aboriginal women and girls.
 - ii. Links to the intergenerational legacy of residential schools.
42. We call upon the federal, provincial, and territorial governments to commit to the recognition and implementation of Aboriginal justice systems in a manner consistent with the Treaty and Aboriginal rights of Aboriginal peoples, the *Constitution Act, 1982*, and the *United Nations Declaration on the Rights of Indigenous Peoples*, endorsed by Canada in November 2012.

Reconciliation

CANADIAN GOVERNMENTS AND THE UNITED NATIONS DECLARATION ON THE RIGHTS OF INDIGENOUS PEOPLE

43. We call upon federal, provincial, territorial, and municipal governments to fully adopt and implement the *United Nations Declaration on the Rights of Indigenous Peoples* as the framework for reconciliation.
44. We call upon the Government of Canada to develop a national action plan, strategies, and other concrete measures to achieve the goals of the *United Nations Declaration on the Rights of Indigenous Peoples*.

ROYAL PROCLAMATION AND COVENANT OF RECONCILIATION

45. We call upon the Government of Canada, on behalf of all Canadians, to jointly develop with Aboriginal peoples a Royal Proclamation of Reconciliation to be issued by the Crown. The proclamation would build on the Royal Proclamation of 1763 and the Treaty of Niagara of 1764, and reaffirm the nation-to-nation relationship between Aboriginal peoples and the Crown. The proclamation would include, but not be limited to, the following commitments:

- i. Repudiate concepts used to justify European sovereignty over Indigenous lands and peoples such as the Doctrine of Discovery and *terra nullius*.
 - ii. Adopt and implement the *United Nations Declaration on the Rights of Indigenous Peoples* as the framework for reconciliation.
 - iii. Renew or establish Treaty relationships based on principles of mutual recognition, mutual respect, and shared responsibility for maintaining those relationships into the future.
 - iv. Reconcile Aboriginal and Crown constitutional and legal orders to ensure that Aboriginal peoples are full partners in Confederation, including the recognition and integration of Indigenous laws and legal traditions in negotiation and implementation processes involving Treaties, land claims, and other constructive agreements.
46. We call upon the parties to the Indian Residential Schools Settlement Agreement to develop and sign a Covenant of Reconciliation that would identify principles for working collaboratively to advance reconciliation in Canadian society, and that would include, but not be limited to:
- i. Reaffirmation of the parties' commitment to reconciliation.
 - ii. Repudiation of concepts used to justify European sovereignty over Indigenous lands and peoples, such as the Doctrine of Discovery and *terra nullius*, and the reformation of laws, governance structures, and policies within their respective institutions that continue to rely on such concepts.
 - iii. Full adoption and implementation of the *United Nations Declaration on the Rights of Indigenous Peoples* as the framework for reconciliation.
 - iv. Support for the renewal or establishment of Treaty relationships based on principles of mutual recognition, mutual respect, and shared responsibility for maintaining those relationships into the future.
 - v. Enabling those excluded from the Settlement Agreement to sign onto the Covenant of Reconciliation.
 - vi. Enabling additional parties to sign onto the Covenant of Reconciliation.

47. We call upon federal, provincial, territorial, and municipal governments to repudiate concepts used to justify European sovereignty over Indigenous peoples and lands, such as the Doctrine of Discovery and *terra nullius*, and to reform those laws, government policies, and litigation strategies that continue to rely on such concepts.

SETTLEMENT AGREEMENT PARTIES AND THE UNITED NATIONS DECLARATION ON THE RIGHTS OF INDIGENOUS PEOPLES

48. We call upon the church parties to the Settlement Agreement, and all other faith groups and interfaith social justice groups in Canada who have not already done so, to formally adopt and comply with the principles, norms, and standards of the *United Nations Declaration on the Rights of Indigenous Peoples* as a framework for reconciliation. This would include, but not be limited to, the following commitments:
- i. Ensuring that their institutions, policies, programs, and practices comply with the *United Nations Declaration on the Rights of Indigenous Peoples*.
 - ii. Respecting Indigenous peoples' right to self-determination in spiritual matters, including the right to practise, develop, and teach their own spiritual and religious traditions, customs, and ceremonies, consistent with Article 12:1 of the *United Nations Declaration on the Rights of Indigenous Peoples*.
 - iii. Engaging in ongoing public dialogue and actions to support the *United Nations Declaration on the Rights of Indigenous Peoples*.
 - iv. Issuing a statement no later than March 31, 2016, from all religious denominations and faith groups, as to how they will implement the *United Nations Declaration on the Rights of Indigenous Peoples*.
49. We call upon all religious denominations and faith groups who have not already done so to repudiate concepts used to justify European sovereignty over Indigenous lands and peoples, such as the Doctrine of Discovery and *terra nullius*.

EQUITY FOR ABORIGINAL PEOPLE IN THE LEGAL SYSTEM

50. In keeping with the *United Nations Declaration on the Rights of Indigenous Peoples*, we call upon the federal government, in collaboration with Aboriginal organizations, to fund the establishment of Indigenous law institutes for the development, use, and

understanding of Indigenous laws and access to justice in accordance with the unique cultures of Aboriginal peoples in Canada.

51. We call upon the Government of Canada, as an obligation of its fiduciary responsibility, to develop a policy of transparency by publishing legal opinions it develops and upon which it acts or intends to act, in regard to the scope and extent of Aboriginal and Treaty rights.
52. We call upon the Government of Canada, provincial and territorial governments, and the courts to adopt the following legal principles:
 - i. Aboriginal title claims are accepted once the Aboriginal claimant has established occupation over a particular territory at a particular point in time.
 - ii. Once Aboriginal title has been established, the burden of proving any limitation on any rights arising from the existence of that title shifts to the party asserting such a limitation.

NATIONAL COUNCIL FOR RECONCILIATION

53. We call upon the Parliament of Canada, in consultation and collaboration with Aboriginal peoples, to enact legislation to establish a National Council for Reconciliation. The legislation would establish the council as an independent, national, oversight body with membership jointly appointed by the Government of Canada and national Aboriginal organizations, and consisting of Aboriginal and non-Aboriginal members. Its mandate would include, but not be limited to, the following:
 - i. Monitor, evaluate, and report annually to Parliament and the people of Canada on the Government of Canada's post-apology progress on reconciliation to ensure that government accountability for reconciling the relationship between Aboriginal peoples and the Crown is maintained in the coming years.
 - ii. Monitor, evaluate, and report to Parliament and the people of Canada on reconciliation progress across all levels and sectors of Canadian society, including the implementation of the Truth and Reconciliation Commission of Canada's Calls to Action.
 - iii. Develop and implement a multi-year National Action Plan for Reconciliation, which includes research and policy development, public education programs, and resources.
54. We call upon the Government of Canada to provide multi-year funding for the National Council for Reconciliation to ensure that it has the financial, human, and technical resources required to conduct its work, including the endowment of a National Reconciliation Trust to advance the cause of reconciliation.
55. We call upon all levels of government to provide annual reports or any current data requested by the National Council for Reconciliation so that it can report on the progress towards reconciliation. The reports or data would include, but not be limited to:
 - i. The number of Aboriginal children—including Métis and Inuit children—in care, compared with non-Aboriginal children, the reasons for apprehension, and the total spending on preventive and care services by child-welfare agencies.
 - ii. Comparative funding for the education of First Nations children on and off reserves.
 - iii. The educational and income attainments of Aboriginal peoples in Canada compared with non-Aboriginal people.
 - iv. Progress on closing the gaps between Aboriginal and non-Aboriginal communities in a number of health indicators such as: infant mortality, maternal health, suicide, mental health, addictions, life expectancy, birth rates, infant and child health issues, chronic diseases, illness and injury incidence, and the availability of appropriate health services.
 - v. Progress on eliminating the overrepresentation of Aboriginal children in youth custody over the next decade.
 - vi. Progress on reducing the rate of criminal victimization of Aboriginal people, including data related to homicide and family violence victimization and other crimes.
 - vii. Progress on reducing the overrepresentation of Aboriginal people in the justice and correctional systems.
56. We call upon the prime minister of Canada to formally respond to the report of the National Council for Reconciliation by issuing an annual "State of Aboriginal Peoples" report, which would outline the government's plans for advancing the cause of reconciliation.

PROFESSIONAL DEVELOPMENT AND TRAINING FOR PUBLIC SERVANTS

57. We call upon federal, provincial, territorial, and municipal governments to provide education to public servants on the history of Aboriginal peoples, including the history and legacy of residential schools, the *United Nations Declaration on the Rights of Indigenous Peoples*, Treaties and Aboriginal rights, Indigenous law, and Aboriginal–Crown relations. This will require skills-based training in intercultural competency, conflict resolution, human rights, and anti-racism.

CHURCH APOLOGIES AND RECONCILIATION

58. We call upon the Pope to issue an apology to Survivors, their families, and communities for the Roman Catholic Church's role in the spiritual, cultural, emotional, physical, and sexual abuse of First Nations, Inuit, and Métis children in Catholic-run residential schools. We call for that apology to be similar to the 2010 apology issued to Irish victims of abuse and to occur within one year of the issuing of this Report and to be delivered by the Pope in Canada.
59. We call upon church parties to the Settlement Agreement to develop ongoing education strategies to ensure that their respective congregations learn about their church's role in colonization, the history and legacy of residential schools, and why apologies to former residential school students, their families, and communities were necessary.
60. We call upon leaders of the church parties to the Settlement Agreement and all other faiths, in collaboration with Indigenous spiritual leaders, Survivors, schools of theology, seminaries, and other religious training centres, to develop and teach curriculum for all student clergy, and all clergy and staff who work in Aboriginal communities, on the need to respect Indigenous spirituality in its own right, the history and legacy of residential schools and the roles of the church parties in that system, the history and legacy of religious conflict in Aboriginal families and communities, and the responsibility that churches have to mitigate such conflicts and prevent spiritual violence.
61. We call upon church parties to the Settlement Agreement, in collaboration with Survivors and representatives of Aboriginal organizations, to establish permanent funding to Aboriginal people for:
- i. Community-controlled healing and reconciliation projects.

- ii. Community-controlled culture- and language-revitalization projects.
- iii. Community-controlled education and relationship-building projects.
- iv. Regional dialogues for Indigenous spiritual leaders and youth to discuss Indigenous spirituality, self-determination, and reconciliation.

EDUCATION FOR RECONCILIATION

62. We call upon the federal, provincial, and territorial governments, in consultation and collaboration with Survivors, Aboriginal peoples, and educators, to:
- i. Make age-appropriate curriculum on residential schools, Treaties, and Aboriginal peoples' historical and contemporary contributions to Canada a mandatory education requirement for Kindergarten to Grade Twelve students.
 - ii. Provide the necessary funding to post-secondary institutions to educate teachers on how to integrate Indigenous knowledge and teaching methods into classrooms.
 - iii. Provide the necessary funding to Aboriginal schools to utilize Indigenous knowledge and teaching methods in classrooms.
 - iv. Establish senior-level positions in government at the assistant deputy minister level or higher dedicated to Aboriginal content in education.
63. We call upon the Council of Ministers of Education, Canada to maintain an annual commitment to Aboriginal education issues, including:
- i. Developing and implementing Kindergarten to Grade Twelve curriculum and learning resources on Aboriginal peoples in Canadian history, and the history and legacy of residential schools.
 - ii. Sharing information and best practices on teaching curriculum related to residential schools and Aboriginal history.
 - iii. Building student capacity for intercultural understanding, empathy, and mutual respect.
 - iv. Identifying teacher-training needs relating to the above.
64. We call upon all levels of government that provide public funds to denominational schools to require such schools to provide an education on comparative religious studies, which must include a segment on

Aboriginal spiritual beliefs and practices developed in collaboration with Aboriginal Elders.

65. We call upon the federal government, through the Social Sciences and Humanities Research Council, and in collaboration with Aboriginal peoples, post-secondary institutions and educators, and the National Centre for Truth and Reconciliation and its partner institutions, to establish a national research program with multi-year funding to advance understanding of reconciliation.

YOUTH PROGRAMS

66. We call upon the federal government to establish multi-year funding for community-based youth organizations to deliver programs on reconciliation, and establish a national network to share information and best practices.

MUSEUMS AND ARCHIVES

67. We call upon the federal government to provide funding to the Canadian Museums Association to undertake, in collaboration with Aboriginal peoples, a national review of museum policies and best practices to determine the level of compliance with the *United Nations Declaration on the Rights of Indigenous Peoples* and to make recommendations.
68. We call upon the federal government, in collaboration with Aboriginal peoples, and the Canadian Museums Association to mark the 150th anniversary of Canadian Confederation in 2017 by establishing a dedicated national funding program for commemoration projects on the theme of reconciliation.
69. We call upon Library and Archives Canada to:
- i. Fully adopt and implement the *United Nations Declaration on the Rights of Indigenous Peoples* and the *United Nations Joint-Orientlicher Principles*, as related to Aboriginal peoples' inalienable right to know the truth about what happened and why, with regard to human rights violations committed against them in the residential schools.
 - ii. Ensure that its record holdings related to residential schools are accessible to the public.
 - iii. Commit more resources to its public education materials and programming on residential schools.
70. We call upon the federal government to provide funding to the Canadian Association of Archivists to undertake, in collaboration with Aboriginal peoples, a national review of archival policies and best practices to:

- i. Determine the level of compliance with the *United Nations Declaration on the Rights of Indigenous Peoples* and the *United Nations Joint-Orientlicher Principles*, as related to Aboriginal peoples' inalienable right to know the truth about what happened and why, with regard to human rights violations committed against them in the residential schools.
- ii. Produce a report with recommendations for full implementation of these international mechanisms as a reconciliation framework for Canadian archives.

MISSING CHILDREN AND BURIAL INFORMATION

71. We call upon all chief coroners and provincial vital statistics agencies that have not provided to the Truth and Reconciliation Commission of Canada their records on the deaths of Aboriginal children in the care of residential school authorities to make these documents available to the National Centre for Truth and Reconciliation.
72. We call upon the federal government to allocate sufficient resources to the National Centre for Truth and Reconciliation to allow it to develop and maintain the National Residential School Student Death Register established by the Truth and Reconciliation Commission of Canada.
73. We call upon the federal government to work with churches, Aboriginal communities, and former residential school students to establish and maintain an online registry of residential school cemeteries, including, where possible, plot maps showing the location of deceased residential school children.
74. We call upon the federal government to work with the churches and Aboriginal community leaders to inform the families of children who died at residential schools of the child's burial location, and to respond to families' wishes for appropriate commemoration ceremonies and markers, and reburial in home communities where requested.
75. We call upon the federal government to work with provincial, territorial, and municipal governments, churches, Aboriginal communities, former residential school students, and current landowners to develop and implement strategies and procedures for the ongoing identification, documentation, maintenance, commemoration, and protection of residential school cemeteries or other sites at which residential school children were buried. This is to include the provision of

appropriate memorial ceremonies and commemorative markers to honour the deceased children.

76. We call upon the parties engaged in the work of documenting, maintaining, commemorating, and protecting residential school cemeteries to adopt strategies in accordance with the following principles:
- i. The Aboriginal community most affected shall lead the development of such strategies.
 - ii. Information shall be sought from residential school Survivors and other Knowledge Keepers in the development of such strategies.
 - iii. Aboriginal protocols shall be respected before any potentially invasive technical inspection and investigation of a cemetery site.

NATIONAL CENTRE FOR TRUTH AND RECONCILIATION

77. We call upon provincial, territorial, municipal, and community archives to work collaboratively with the National Centre for Truth and Reconciliation to identify and collect copies of all records relevant to the history and legacy of the residential school system, and to provide these to the National Centre for Truth and Reconciliation.
78. We call upon the Government of Canada to commit to making a funding contribution of \$10 million over seven years to the National Centre for Truth and Reconciliation, plus an additional amount to assist communities to research and produce histories of their own residential school experience and their involvement in truth, healing, and reconciliation.

COMMEMORATION

79. We call upon the federal government, in collaboration with Survivors, Aboriginal organizations, and the arts community, to develop a reconciliation framework for Canadian heritage and commemoration. This would include, but not be limited to:
- i. Amending the Historic Sites and Monuments Act to include First Nations, Inuit, and Métis representation on the Historic Sites and Monuments Board of Canada and its Secretariat.
 - ii. Revising the policies, criteria, and practices of the National Program of Historical Commemoration to integrate Indigenous history, heritage values, and memory practices into Canada's national heritage and history.

- iii. Developing and implementing a national heritage plan and strategy for commemorating residential school sites, the history and legacy of residential schools, and the contributions of Aboriginal peoples to Canada's history.

80. We call upon the federal government, in collaboration with Aboriginal peoples, to establish, as a statutory holiday, a National Day for Truth and Reconciliation to honour Survivors, their families, and communities, and ensure that public commemoration of the history and legacy of residential schools remains a vital component of the reconciliation process.
81. We call upon the federal government, in collaboration with Survivors and their organizations, and other parties to the Settlement Agreement, to commission and install a publicly accessible, highly visible, Residential Schools National Monument in the city of Ottawa to honour Survivors and all the children who were lost to their families and communities.
82. We call upon provincial and territorial governments, in collaboration with Survivors and their organizations, and other parties to the Settlement Agreement, to commission and install a publicly accessible, highly visible, Residential Schools Monument in each capital city to honour Survivors and all the children who were lost to their families and communities.
83. We call upon the Canada Council for the Arts to establish, as a funding priority, a strategy for Indigenous and non-Indigenous artists to undertake collaborative projects and produce works that contribute to the reconciliation process.

MEDIA AND RECONCILIATION

84. We call upon the federal government to restore and increase funding to the CBC/Radio-Canada, to enable Canada's national public broadcaster to support reconciliation, and be properly reflective of the diverse cultures, languages, and perspectives of Aboriginal peoples, including, but not limited to:
- i. Increasing Aboriginal programming, including Aboriginal-language speakers.
 - ii. Increasing equitable access for Aboriginal peoples to jobs, leadership positions, and professional development opportunities within the organization.
 - iii. Continuing to provide dedicated news coverage and online public information resources on issues of concern to Aboriginal peoples and all Canadians,

including the history and legacy of residential schools and the reconciliation process.

85. We call upon the Aboriginal Peoples Television Network, as an independent non-profit broadcaster with programming by, for, and about Aboriginal peoples, to support reconciliation, including but not limited to:
- i. Continuing to provide leadership in programming and organizational culture that reflects the diverse cultures, languages, and perspectives of Aboriginal peoples.
 - ii. Continuing to develop media initiatives that inform and educate the Canadian public, and connect Aboriginal and non-Aboriginal Canadians.
86. We call upon Canadian journalism programs and media schools to require education for all students on the history of Aboriginal peoples, including the history and legacy of residential schools, the *United Nations Declaration on the Rights of Indigenous Peoples*, Treaties and Aboriginal rights, Indigenous law, and Aboriginal-Crown relations.

SPORTS AND RECONCILIATION

87. We call upon all levels of government, in collaboration with Aboriginal peoples, sports halls of fame, and other relevant organizations, to provide public education that tells the national story of Aboriginal athletes in history.
88. We call upon all levels of government to take action to ensure long-term Aboriginal athlete development and growth, and continued support for the North American Indigenous Games, including funding to host the games and for provincial and territorial team preparation and travel.
89. We call upon the federal government to amend the Physical Activity and Sport Act to support reconciliation by ensuring that policies to promote physical activity as a fundamental element of health and well-being, reduce barriers to sports participation, increase the pursuit of excellence in sport, and build capacity in the Canadian sport system, are inclusive of Aboriginal peoples.
90. We call upon the federal government to ensure that national sports policies, programs, and initiatives are inclusive of Aboriginal peoples, including, but not limited to, establishing:
- i. In collaboration with provincial and territorial governments, stable funding for, and access to, community sports programs that reflect the diverse

cultures and traditional sporting activities of Aboriginal peoples.

- ii. An elite athlete development program for Aboriginal athletes.
 - iii. Programs for coaches, trainers, and sports officials that are culturally relevant for Aboriginal peoples.
 - iv. Anti-racism awareness and training programs.
91. We call upon the officials and host countries of international sporting events such as the Olympics, Pan Am, and Commonwealth games to ensure that Indigenous peoples' territorial protocols are respected, and local Indigenous communities are engaged in all aspects of planning and participating in such events.

BUSINESS AND RECONCILIATION

92. We call upon the corporate sector in Canada to adopt the *United Nations Declaration on the Rights of Indigenous Peoples* as a reconciliation framework and to apply its principles, norms, and standards to corporate policy and core operational activities involving Indigenous peoples and their lands and resources. This would include, but not be limited to, the following:
- i. Commit to meaningful consultation, building respectful relationships, and obtaining the free, prior, and informed consent of Indigenous peoples before proceeding with economic development projects.
 - ii. Ensure that Aboriginal peoples have equitable access to jobs, training, and education opportunities in the corporate sector, and that Aboriginal communities gain long-term sustainable benefits from economic development projects.
 - iii. Provide education for management and staff on the history of Aboriginal peoples, including the history and legacy of residential schools, the *United Nations Declaration on the Rights of Indigenous Peoples*, Treaties and Aboriginal rights, Indigenous law, and Aboriginal-Crown relations. This will require skills based training in intercultural competency, conflict resolution, human rights, and anti-racism.

NEWCOMERS TO CANADA

93. We call upon the federal government, in collaboration with the national Aboriginal organizations, to revise the information kit for newcomers to Canada and its citizenship test to reflect a more inclusive history of the diverse Aboriginal peoples of Canada, including

information about the Treaties and the history of residential schools.

94. We call upon the Government of Canada to replace the Oath of Citizenship with the following:

I swear (or affirm) that I will be faithful and bear true allegiance to Her Majesty Queen Elizabeth II, Queen of Canada, Her Heirs and Successors, and that I will faithfully observe the laws of Canada including Treaties with Indigenous Peoples, and fulfill my duties as a Canadian citizen.

Truth and Reconciliation Commission of Canada

1500-360 Main Street

Winnipeg, Manitoba

R3C 3Z3

Telephone: (204) 984-5885

Toll Free: 1-888-872-5554 (1-888-TRC-5554)

Fax: (204) 984-5915

E-mail: info@trc.ca

Website: www.trc.ca



Federation of
Post-Secondary Educators
of BC

FPSE International Solidarity Fund

REPORT TO AGM 2016

RECIPIENTS 2016

Co-Development Canada	\$9000
Enhancing Employability of Youth and Women in Lamwo District (Uganda)	\$7500
Red de Apoyo para Migrantes Agrícolas (RAMA):..... Migrant Farmworkers Support Network (Okanagan)	\$7000
Rights Action: Community Development and Environmental Justice in Mining Affected Communities of Guatemala	\$5000
Leaving Footprints (Petén, Guatemala).....	\$4500
Equality for Growth (Tanzania).....	\$4000
Alianza Prenatal Program (Guatemala)	\$3750
Community-Based Primary Health Care in Nicaragua.....	\$2000
Seeds of Peace (Bosnia).....	\$1550
Diyar Academy for Children and Youth Book Writing Workshop (Bethlehem)	\$1550

CO-DEVELOPMENT CANADA

APSIES – Salvadoran Association for Integrated health and Social Services, El Salvador

APSIES is an organization that works for holistic health and the improvement of public health and other social services in five municipalities in the Esperanza Valley in southeastern El Salvador. APSIES works with community organizations in these municipalities to train people to improve living conditions in their communities. It also facilitates independent monitoring of the quality and effectiveness of public services in the region. FPSE has been working in partnership with APSIES since 2003.

Among the achievements of APSIES' work during this past fiscal year are:

- 12 social audits of public hospitals carried out by local health committees. Local health committees are made up of citizens trained by APSIES, and have resulted in an improvement in patient care and a reduction in corruption and misuse of public health care funding.
- Regular meetings with local health committees and hospital authorities and health union representatives to review and tabulate results of APSIES-installed suggestion boxes. Suggestion boxes are distributed throughout local hospitals, clinics and other public healthcare institutions. After reviewing results, action plans are developed to address the issues identified.
- Ongoing participation in the Citizen's Alliance Against the Privatization of Healthcare and the National Health Forum. APSIES held multiple workshops to increase citizen capacity to participate in El Salvador's National Health Forum, a 5-year old program started by the Ministry of Health to facilitate citizen participation in health care reform. Thanks to this capacity building, citizens participated in multiple meetings with the Ministry of Health through National Health Forum and contributed their proposals and priorities for strengthening public health care.
- APSIES supported five women's organizations in the five municipalities of Valle La Esperanza, including ongoing support to ensure they meet legal and financial obligations (e.g. filing annual reports, electing of boards of directors). In addition to the 5 women's organization, APSIES held numerous meetings with the newly created "Esperanza Women's Association", an Inter-municipal network of the 5 women's organizations, established in the previous reporting year. This network takes the work of the 5 organizations to the municipal level, allowing them to coordinate efforts on women's leadership, micro-finance and women's rights.



Training workshop with the Estanzuelas women's organization on tomato cultivation, organized with support from APSIES in coordination with the National Centre for Agricultural Transformation (Photo: APSIES)

The Network: the Central American Women's Network in Solidarity with Maquila Workers

In 2015-16 the Network and its member organizations continued implementing the Labour Rights Agenda for Women Maquila workers. This Agenda was two years in the making and involved the participation of over 4,000 Central American maquila workers debating and discussing their priorities and strategies.

The agenda is a concise and remarkable document that outlines the six priority themes for the maquila workers and concrete actions that Central American governments and institutions as well as other national and international actors can and should take to improve on these six themes. The themes include:

- The right to occupational health and safety
- The right to sexual and reproductive health and,
- The right not to be subjected to physical violence, sexual harassment or bullying at work.

Occupational Health and Safety continues to be the primary focus of the Network's activities. As a result of the crushing workload and fast pace required by the maquila industry, maquila workers are subject to numerous work-related injuries and conditions related to repetitive strain. Member organizations worked to provide scientific evidence to demonstrate the link between high work quotas and occupational injuries and diseases, and at the regional level shared strategies and tools for advocating for systemic change.

The Network held the first of its regional conferences in Honduras in August 2015. The Network's conference brought together 19 women from their seven member organizations from Guatemala, El Salvador, Nicaragua and Honduras. The focus of this conference was on occupational health and safety, with an emphasis on both the common injuries and illnesses, reviewing and comparing OH&S legislation in the Central American region, and the strategies for improving, changing and introducing new OH&S legislation. For example, the Honduran Women's Collective has taken a case against the Honduran State to the Inter-American Human Rights Court for violating worker rights by not complying with a Honduran Supreme Court order to improve ergonomic conditions in maquilas.



MEC, a member of the Network, holds their annual meeting to strategize on creating better working conditions for maquila workers.

ENHANCING EMPLOYABILITY OF YOUTH AND WOMEN IN LAMWO DISTRICT (UGANDA)

The Lamwo Rock Foundation is dedicated to educating and empowering vulnerable Ugandans. Last year they received a \$5000 grant from FPSE and used it to construct a vocational school in Lokung county, Lamwo District, Uganda. This is in the far northern region of Uganda. The Acholi people in Northern Uganda are in the slow process of recovery after more than two decades of civil war waged by Joseph Kony and the LRA. HIV/AIDS has also contributed to the devastation and innumerable children have been left orphaned. Most of the population spent many years in IDP camps but now that foreign aid no longer supports those camps they are returning to their villages to try to rebuild their lives.

Lamwo is one of the most remote and most poverty stricken districts in Uganda. It shares its northern border with South Sudan. The total population of Lamwo District is approximately 137,000 reflecting a relatively low population density of 29 people per square kilometer. According to the Uganda Bureau of Statistics (UBOS) Lamwo and neighboring Kotido are the poorest districts in Uganda.

The Lamwo Rock Foundation, a community based Ugandan NGO, is dedicated to improving the lives of the Acholi people, in particular women, children, and youth. The executive director is a dynamic woman named Grace Labong. She is a counsellor and works tirelessly with HIV/AIDS patients. She and her group have a vision and a mission to bring education and hope to the marginalized women and youth of the region. Along with HIV/AIDS education they believe vocational training is one of the best routes to improving the quality of life for local women and youth, especially those that were unable to finish school due to financial hardship. If they can learn a trade, then they can work to support themselves and their families. There are currently no other vocational training facilities in the district.

With the help of a \$5000 grant from FPSE Lamwo Rock Foundation has now built the first stage of the vocational school on land which was donated by the local community. The school was built by local Ugandan volunteers. A tailoring program is already running and the first class has graduated.



LEFT: Grace Labong of the Lamwo Rock Foundation on the land that was donated by the local community for construction of the centre.

RIGHT: The first tailoring class presented by Lamwo Rock Foundation

RED DE APOYO PARA MIGRANTES AGRICOLAS (RAMA) MIGRANT FARMWORKERS SUPPORT NETWORK (OKANAGAN)



RAMA is a migrant justice collective that advocates for Latin American and Caribbean migrant farmworkers who come to the Okanagan Valley as temporary foreign workers. Our main goal is to work alongside migrant farmworkers to build radically inclusive and more socially just communities. We together strive to make this goal a reality by engaging in direct support work, documentation of worker housing and labour abuses,

facilitating English language learning opportunities, political advocacy, and public awareness campaigns. RAMA is a not-for-profit organization that is completely run by a dedicated core of volunteers and migrants.

RAMA collaborates actively with other transnational, grassroots, non-profit collectives, as well as unions, religious groups, and immigrant services societies who situate themselves as part of the broader movement for migrant justice. Since its inception, RAMA has actively worked with Justicia for Migrant Workers (J4MW) in exposing the unfair conditions that migrant workers face upon arrival in Canada. Over the past three years, we have also built strong partnerships with the BC Federation of Labour, the Agricultural Workers Alliance (AWA, part of the UFCW), No One is Illegal, El Faro, Dignidad Migrante, and Kelowna Community Resources (just to name several). In 2015, RAMA was part of a national coalition of migrant rights organizations that launched the *Coalition for Migrant Worker Rights Canada*. This campaign has as its central goal to fight “to rebuild the immigration system to ensure basic dignity and fairness to everyone”.



TOP: Migrant workers during the summer of 2015 on a farm near Armstrong BC

BOTTOM: RAMA collective members participate in a public panel held at Okanagan College discussing the role of Canadian and foreign governments' neo-liberal policies and their effects on temporary workers.

RIGHTS ACTION: COMMUNITY DEVELOPMENT AND ENVIRONMENTAL JUSTICE IN MINING AFFECTED COMMUNITIES OF GUATEMALA

FPSE ISF funds which Rights Action has received go towards supporting the immediate needs of community-based campesino and Indigenous organizations. These organizations are working for community-controlled development, environmental defense and human rights, and are also working to remedy harms and violations caused by global (and mostly Canadian-based) mining companies. This reflects the goals of the ISF, which *“will support projects and actions in disadvantaged countries that advance human rights, workers’ rights and community development.”*

Local organizations are engaged in reclaiming the right to their land, their water, their health and their future self-determination in the face of powerful global mining companies. It is of critical importance to continue to fund this type of solidarity. Realities on the ground include, but are not limited to:

- Ongoing pressure on poor, Indigenous and campesino communities in Guatemala to relinquish their lands and traditional farming lifestyle/culture to make way for powerful global corporations (like Canada’s Goldcorp).
- Guatemalan government pressure (in part due to Canadian economic interests) is pushing forward mining and mega-dam projects across the country, claiming that economic interests trump community rights (largely on Mayan Indigenous ancestral territory, despite the fact that Guatemala signed the UN Declaration of the Rights of Indigenous Peoples)
- Threats against local grassroots organizations and community activists by the Guatemalan government and army, police and mining company security personnel have continued
- Military interventions, arrests, forced evictions from Indigenous lands, threats, beatings and assassinations continue to take place to protect Canadian economic interests in the region

As you can imagine, all of the above impacts the well-being of the communities and causes great strain on already stretched grassroots organizations and community activists. In the face of this, and evidenced by the recent toppling of the government, the people in these communities continue to organize, rise up and speak their truth. Rights Action offers direct and immediate support to mining-impacted communities across Guatemala as they unite, share resources and build supportive networks with each other. Rights Action directs funds towards:

- **travel costs for local organization members and activists**
- **communication systems** (e.g. internet access and cell phones, key modes of communication between individual activists and amongst organizations)
- **food and accommodation costs** for human rights and community development meetings
- **emergency response to health harms** (mining-related)
- **legal costs** (for protecting organizations from further repression)

LEAVING FOOTPRINTS (GUATEMALA)



Presentation of issues and demands to government official during International Women's Day March 2016.

The Project directly benefits 190 rural and indigenous women in three separate communities who are members of the larger group of Leaving Footprints. Indirectly, this Project benefits all of the women of the Department of the Petén (179,507), as it brings into relief the status and position that women have in the Department, and in turn stimulates and directly helps other women who are beginning to articulate information and understanding of their needs and issues as women in their communities but are not yet organized.

Leaving Footprints was born in 2004 from a group of women trained in various subjects, who decided to come together as a group of facilitators committed to the methodology of popular education. Its intention is to break with the inequalities and the roles that have traditionally limited the development of women. It seeks to share the power that exists in both public spaces and homes, through affirmative actions and actions oriented to addressing discrimination so as to reduce the gaps in human rights between men and women that currently exist. The training topics are: community organizing, self-esteem, gender, empowerment, identity, leadership, citizen participation, violence against women, women's participation to make visible and strengthen their productive role in society, political participation and citizenship of women, food security, nutrition and self-care of the women, health and reproductive sexual rights, HIV-AIDS, sexual transmission infections, and sociopolitical, historical, and economic analysis of the current context.

EQUALITY FOR GROWTH (TANZANIA)

The 2015 FPSE solidarity fund provided to Equality for Growth (EfG) succeeded in training women market traders in Temeke Municipality to understand their economic rights and develop their ability to advocate for those rights. The proposed 2016 project will build on this work by supporting the formation of a National Women's Association (NWA) for women informal market traders across Tanzania. By creating this national solidarity network between women market traders, FPSE members will directly contribute to the global struggle against economic injustices resulting from the global capitalist system and unfair trade agreements that serve to further embed the marginalization of disadvantaged countries and people.

EfG and FPSE will help establish a strengthened, unified voice for market women by supporting them to create a human rights-based labour movement where they are better able to advocate for human rights, gender equality, improved working conditions, better livelihoods, and increased recognition of the informal sector as a whole. It will also serve to address the global education deficit by connecting women market traders to educational opportunities for leadership, human rights awareness, advocacy skills, business knowledge, and socioeconomic empowerment.



The formation of a national women's association of women informal market traders in Tanzania will establish a unified, strengthened voice amongst women market traders allowing them to advocate for human rights, gender equality, improved working conditions, better livelihoods, and increased recognition of the informal sector as a whole.

ALIANZA PRENATAL PROGRAM (GUATEMALA)

Alianza Canada-Comitancillo Alliance for Rural Health is a non-profit organization overseeing projects in preventive and primary health care and offering scholarships in Comitancillo, San Marcos, Guatemala. San Marcos is the poorest department in Guatemala; 99% of the population is Mayan.

Alianza contributes to improvements in the health of the rural population of the province of Comitancillo through long term, community-directed programs which seek to provide health education, promotion of education, and provision of accessible health care services. Alianza is committed to a collaborative approach which values community input in all aspects of the project and is respectful of the cultural context in which we are working.

Alianza was founded in the Spring of 2004 by Dr. Rebekah Shoop, a graduate of the VIU nursing program. Several VIUFA members have or are serving on the Alianza Board, including Leslie Sundby, Robert Pepper-Smith and Sharon Hobenshield. Robert Pepper-Smith was a founding director.

WHO: 10 women in the village of Comitancillo, Guatemala.
Facilitated by: Alianza staff, Sofia Salvador and Magnolia Matias

WHAT:

- Biweekly delivery of food supplements: oil, milk powder, eggs, beans, corn
- Prenatal vitamins
- Monthly prenatal/newborn care classes with Alianza staff and Registered Nurse.
- Biweekly weigh-ins of participants, then newborns.
- Receiving blanket, outfit and carrying sheet for each newborn
- Emergency funds for transportation, ultrasound and consult in nearby city when need identified by Alianza staff (sufficient for 3 women)

WHEN: starting as soon as funds available, runs for 9 months from registration date (i.e. from about 3-4 months gestation to newborn 3-4 months old)

WHERE: Alianza community center, Comitancillo, Guatemala. Northern highlands of Guatemala, about 2 hours south of the Mexican border.

WHY:

- Infant mortality rate of 25/1000 live births (compared to Canada, 5/1000 live births)
- Maternal mortality rate (MMR) one of the highest in Latin America and the Caribbean (only Haiti has higher rate). Between 153-290 maternal deaths/100,000 live births.
- Main causes of maternal mortality: pre-eclampsia, sepsis, post-partum hemorrhage.
- 98% of women in this community deliver at home without a skilled birth attendant.

OUR GOALS ARE TO:

- Promote a healthy pregnancy through adequate nutrition (calorie, protein and micronutrient intake) and monitoring for appropriate weight gain for both mother and newborn
- Educate women about warning signs of complications of pregnancy and delivery, and when to seek help
- Provide emergency funds for women who experience complications
- Educate women about reproductive health, family planning, nutrition, risks and complications of pregnancy, care of the newborn.
- Create a caring, supportive environment where women can meet, talk, ask questions, and receive practical help with nutrition and newborn care.

COMMUNITY BASED PRIMARY HEALTH CARE IN NICARAGUA

Since 1999, World Community, a small volunteer driven non-profit organization based in the Comox Valley, B.C. has been directing ten to fifteen thousand dollars annually to assist the organization Atencion Primaria en Salud (APS) in Nicaragua. APS is a Nicaraguan non-profit organization established by Nicaraguan health professionals to improve the availability and quality of primary health care in over 195 rural communities as well as in Managua.

Matching funds from CIDA were terminated six years ago, resulting in cutbacks to the APS project. World Community has been struggling to maintain the level of support necessary to fund APS activities through sales of Fair Trade Nicaraguan coffee and other fair trade goods. The low Canadian dollar has also had a negative impact on the value of funds sent hence we have increased the amount of our request for funding. With FPSE's contribution through the ISF, World Community is the largest funder of this organization.

Aiming to build an alternative community based health care system grounded in preventative and curative primary health care services, APS:

- Extensively trains community health promoters to be able to diagnose, treat and provide health education on a wide variety of health issues such as hygiene, maternal and infant health issues, water quality, and disease prevention. Training sessions are generally held monthly or bi-monthly.
- Supplies health promoters with a health kit including an illustrated health manual which is used both as a teaching tool and a reference guide. Some, but not all, kits currently include stethoscopes, blood pressure cuffs, watches, and thermometers.
- makes affordable medicines available;
- unites all the promoters into a country wide union of health promoters.

Based from their homes, health promoters provide free consultations to community members and provide medicines below retail cost within their communities.

For the past four years, the funding from FPSE has been used to update the training manuals and has allowed new health promoters to get initial and subsequent training in 15 rural communities in the Mulukuku region on the Atlantic coast where there had been no other health services. This program has saved lives and improved living conditions.

FPSE's basic outlook and objectives includes the statement "The right to an education is a gateway right, a right fundamental to the promotion of other human rights and to the promotion of well-being and dignity." The work of APS is consistent with the FPSE overall goals for individuals and communities particularly in low resourced areas of the globe where there is limited access to health services and education for those services. For many health promoters, the training provided by APS is the best and only opportunity to gain education which leads to concrete improvements in their own lives and in their communities.

SEEDS OF PEACE: “GIVING FROM THE HEART” (BOSNIA)

In the twenty years since the end of the Bosnian conflict, there has been little reconciliation in Bosnia-Herzegovina. Even though Serb, Croat, and Muslims live near or beside each other, they live separately, entrenched in their own communities. The Zavidovici area is indicative of this unfortunate situation. Young people are growing up with little contact with those in the other ethnic/religious communities around them. To prevent the deepening of division and conflict, there is a real need to break through this isolation, and the “Giving from the Heart” peace project is the ideal vehicle for this breakthrough.

The project brings 30 high school students from three towns (Maglaj, Zavidovici and Zepce) and three religious communities (Catholic, Muslim and Orthodox) together to promote cultural understanding and solidarity through seminars in non-violent communication and practical exercises in peace-building.

The project has several phases:

1. *Three day peace camp*—training in non-violent communication and peaceful action
2. *Day of peace in action*—doing volunteer work in the three communities involved
3. *Week of solidarity*—exploring and worshiping together at various religious sites and institutions; assisting the elderly and disabled in the three communities
4. *Fine Arts Competition*—awards given for best student drawing/painting, photography, and video developing the theme of “solidarity and Unity” (not restricted to Peace camp participants or high school students—all students in all communities eligible)
5. *Media Promotion*—radio and TV shows on the project as well as Internet and print media releases
6. *International Family Day*—a final get-together of the communities and an awards ceremony

The project:

- promotes the values of solidarity and unity among the young people involved and the communities they come from.
- develops non-violent communication skills and a culture of non-violence and cooperation in the youth who attend.
- forms and develops teams of young peace-builders to spread these values and skills.
- Strengthens and promotes cooperation between NGOs, religious organizations, and the three municipal governments.

DIYAR ACADEMY FOR CHILDREN AND YOUTH BOOK WRITING WORKSHOP (BETHLEHEM)

During 2015, Diyar Academy for Children and Youth carried out a unique children's book writing workshop for 19 children and youth between the ages of 10 to 16 years old from the Bethlehem district, particularly from marginalized communities including villages, refugee camps and area C, that contributed to empowering these young children to learn how to turn their personal narratives through illustration, with the Universal Declaration of Human Rights being the framework, into story books. With this training, the participating children and youth gained the following:

- The young participants explored, challenged, developed and expressed their own ideas, using the skills, language, techniques, and processes of the arts.
- The children and youth participants created their own stories which consist of human rights issues important for them and relate to their lives.
- The participants employed critical thinking and reflection throughout the training.
- The participants, by interacting with the visiting artist, were exposed to other contexts, perspectives and approaches in art and storytelling.
- The participants acquired new skills in how to apply problem-solving strategies to reflect on and respond to their own and others' expressive stories.
- The participants learned new ways of how to deal with stress, fear and anxiety through art expression.

However, the intention behind such workshop aside from equipping these children and youth with critical skills of free expression and enhanced knowledge about core human rights was also to publish the best illustrated stories in small books for other children to read, learn about other contexts, become exposed to these critical issues, and be inspired to follow suit. It is also critical for those who engaged in such activity to get a chance to publish their own story and tangibly share a personal achievement that can be experienced with family, friends and school mates. Publishing the books will increase the sense of the child's and youth's sense of productivity and promote expressive education as an integral part of their development.

As such, we are seeking again the generous support of the FPSE Human Rights & International Solidarity Fund Committee to help us with publishing the best stories that emerged from the book writing workshop, which is a total of six. These stories speak about a unique situation, in that they tell the stories of children and youth who grew up only to know a life of occupation that impacts all aspects of their lives, and yet hold on to hope that one day they shall be free by daring to dream of better futures and through their now newly acquired knowledge about human rights and children rights, and how these rights relate to their lives. They interpret these rights from their own perspective, so that one story for example speaks about Christmas in Bethlehem and what is it like for a child who lives in this little town that is surrounded with the Separation Wall. Another envisions herself as a dancer, a dream we hope one day she can realize. A third speaks about peace, a condition that the Palestinian children and youth never have experienced but look forward to one day.

The six proposed published books whose content qualified them for a professional publication differ in terms of the number of illustrated pages and also the design. For some, it is 42 pages of illustrations while others it is 17 pages and therefore on average the books are 23 pages each. In terms of design, some will have a square 21cm by 21cm design, while others with landscape shape. For each of the selected stories, 500 copies will be printed, a total of 3000 copies to be distributed to many places where the children and youth have access, including libraries, schools and clubs.

FPSE SPEAKER'S TOUR 2016 REPORT

Submitted on behalf of the 2015/16 HRISC to Presidents' Council April 6, as a supplement to HRISC report for the 2016 AGM, by: Eliza Gardiner, Chair FPSE HRISC (VIUFA, Local 8)

"Decolonization, Reconciliation, and New Directions" featuring Arthur Manuel

TOUR DESCRIPTION

In 2011 the FPSE HRIS Committee organized the fall tour initiative, which saw Consul General of Cuba Mr. Jorge Soberon visit five of our local campus venues, educating audiences on the topic of the Cuban Five and the Cuban Medical Mission in Haiti. All the expenses of the 2011 tour were covered by faculty association executives, combined with donations from community partners and event revenues. The tour raised funds beyond the expenses, which were donated to the Cuban Medical Mission in Haiti.

In 2012, the HRIS Committee's tour initiative featured Québec student union speaker as a guest at multiple campuses. Éliane Laberge, president of FECQ, shared her experiences and perspectives on post-secondary issues at five campuses thanks to \$2,750.00 in revenue generated from locals and generous donors. The excess revenue of \$524.91 (after \$2,025.19 in expenses) was donated to the Québec Federation of College Students defense fund.

In 2013/14, the HRISC accomplished another successful collective project that served the membership and its terms of reference, this time with a \$1,212 of International Solidarity Fund grant and an AGM-approved FPSE allocation of \$5,000. With this \$6,212, the Committee moved forward with its largest tour to date, dividing it into smaller 'legs' which made organizing more manageable, honouring the UN International Year of Water Cooperation with special guests Paul Manly and Kerry Coast visiting 7 locals. With continued FPSE funding, in 2015, the Speaker's Tour grew again, and saw First Nations environmental leader Jacinda Mack visit our campus communities to speak about the environmental tailings pond breach disaster at BC's Mt. Polley gold mine.

This academic year, due to the federal elections taking place in the fall, the fifth annual Speaker's Tour took place during the winter semester of 2016. Special guest Arthur Manuel travelled to 14 FPSE campus communities, to speak on the important and timely topic of "Decolonization, Reconciliation, and New Directions." The Committee received \$5,000 again this year for the Tour, and local executives also continued the pattern of contributing further funds towards its success; FPSE funds typically cover the honoraria, flights, and incidentals while individual faculty association backing pays for local transportation, accommodation, and food.

TOUR ITINERARY 2016

1. **FEB 29-MARCH 3: TERRACE LEG, with LFA/NVITEA Burnaby**

Highlights and Notes:

- Arthur was interviewed by a TV host for a local program, and on local radio CFNR
- Local 11 Academic Workers' Union (Northwest Community College) local rep Sheree Ronaasen said, *"Arthur is an amazing speaker, and inspired those who attended. We were*

- lucky to have sun while in Rupert, and we were able to get out on the water. We took good care of Arthur, and enjoyed his company."*
- Local 14 Langara Faculty Association rep Bradley Hughes said, "Great talk today! 65 people in the room."
 - NVITEA Burnaby was visited for the first time in Tour history, thanks to the organizing of Nedra McKay

2. MARCH 8-9: PRINCE GEORGE LEG

Highlights and Notes:

- Local 3 Faculty Association of the College of New Caledonia final budget:
 - Mileage: \$37.74
 - Accommodation: \$120.53
 - Honoraria and Gifts for Aboriginal Resource Centre Rep, MC, Drummers, Bannock & Tea Makers, and Helpers: \$412.27
 - Publicity: \$22.50
 - Refreshments: \$111.15
 - Other Miscellaneous Materials: \$39.57
 - Guest Speaker Meals: \$73.00
 - Tech Assistance: \$200
 - Total from Faculty Association Development Fund: \$1,016.76
- 65 people attended, and 45 responded to the post-event survey
- Mr. Manuel was able to attend several classes as a guest speaker, and also met with several groups on campus; Tour stop helped mark the evening before annual Cultural Days events; college president attended, formal First Nations greeting, native drummers, bannock and tea/coffee
- *"Overall, people seemed very connected to this event. I did a radio interview and Mr. Manuel also did a radio interview before the event to help promote the event and to bring in a greater attendance...The HRISC Committee linked up and worked extensively with the Aboriginal Resource Centre (ARC) at CNC to reach out to other aboriginal groups in the greater Prince George Area including the UNBC Aboriginal Centre, for Centre for Aboriginal Friendship, as well as several local bands in the area...Mr. Manuel's attendance of classes, the video of the event, and his attendance and meeting with several groups on campus helped to increase our community profile and to increase awareness of important issues."*

3. MARCH 15-18: VANCOUVER ISLAND LEG, visiting NICFA, VIUFA, CCFA

Highlights and Notes:

- Local 16 North Island College Faculty Association rep Naomi Wolfe organized daytime and evening presentations...highest guest count yet, 100+!
- three daytime classroom presentations were booked at VIU Nanaimo including: Professor Michael Down's "Intro to Canadian Legal System," Professor Ann Rogers' POLI 100 class that has studied TRC and read report, Dr. Catherine Schittecatte's POLI 302 "Political Dimensions of International Development" lecture that focuses on indigenous peoples and development
- the evening public event at Local 8 Vancouver Island University Faculty Association attracted an audience of both faculty, students and community members and began with a traditional welcome by a VIU Elder and an intro by the VP of Aboriginal Education

- local rep Eliza Gardiner drove Mr. Manuel to VIU's Cowichan campus for a lunchtime presentation enroute to local rep Larry Hannant's Local 12 Camosun College Faculty Association events in Victoria
- local 8 VIUFA's HRISC covered:
 - Hotel \$287.50, Meals \$78.83, Honorarium \$150 = \$516.33
- *"Arthur Manuel spoke to an audience of about 65 people from Camosun College and the Victoria community, in an event co-sponsored by the Centre for Indigenous Studies and Community Connections at the college. His presentation was well received with a lively question-and-answer and discussion period continuing after the end of the formal presentation. Victor Underwood, a Tsawout elder from east Saanich, provided an opening welcome."*
- The CCFA HRISC absorbed the following costs:
 - Hotel \$109.25, Meals \$65.00, Parking \$6.50, Airport transport \$25.00 for a total of \$205.75
- (Larry personally covered further transport and lunch costs of \$80, thank you!)

4. MARCH 21-24: KOOTNEY LEG with Vancouver stopovers

Highlights and Notes:

- Local 4 Douglas College Faculty Association rep Peggy Wyatt organized an evening event that went smoothly – this was the first time that the Tour has stopped at Douglas, brava!
- Mary Ann Morris at Local 10 Selkirk College Faculty Association coordinated three speaking engagements including a public event that was attended by 60+ folks in the central "pit" of the college, meetings with student, support workers and community members, and SCFA and PPWC representatives
- Thanks to donations gathered at the evening event, rental costs of \$157.00, Arthur's dinner of \$34.00 and a gift of Oso Negro coffee of \$10.00 were covered.
- Arthur sold approx. 16+ books at the Selkirk events, and about at least that number during each leg of the Tour
 - SCFA local 10 covered three meals during his visit totaling approx. \$60.00, accommodation at \$178.00, and gifts at \$55.00 = \$293
- *"Thank you for the opportunity to meet Arthur who truly was a pleasure to work with and an incredible spokesperson that absolutely engaged his audiences at each event."*
- Local 7 local rep Rajnish Dhawan organized the first ever FPSE Speaker's Tour stop at University of the Fraser Valley

5. April 4-8: FINAL LEG to TRUFA, OCFA and CORFA

Highlights and Notes:

- TRUFA enjoyed events at both their Kamloops and Williams Lake campuses, coordinated by HRISC rep Nicole Schabus, who also assisted greatly with general Tour planning
- OCFA's Amy Cohen hosted Mr. Manuel as well, as did Rezin Butalid (Butch) at College of the Rockies Faculty Association
- Expenses incurred at CORFA included:
 - Hotel \$124.30, Meals \$124.30, Mileage \$41.16, Honorarium \$150 = \$470.03
- The Aboriginal Coordinator also contributed from a separate budget about \$100 for refreshments such as coffee, tea, pastries, fruits, nuts and juices

- The Speaker was hugely dedicated to this year's Tour, often going out of pocket to cover incidentals and driving to satellite campuses himself in order to make travel more efficient

This Tour was again a celebration of our collective achievement and service to members and campus communities, and the Committee appreciates profoundly the support of FPSE and local executives in undertaking this shared initiative.

Furthermore, Charles Boylan at Local 21 organized a presentation by Grand Chief Stewart Phillip, funded by his local. This event was meant to be expanded to include multiple metropolitan Vancouver locals, functioning in tandem with the Arthur Manuel tour, but proved challenging to schedule. Other HRISC chairs really wanted a visit from the Speaker, but couldn't be fit into the schedule this year, notably Capilano University Faculty Association and Emily Carr University of Art & Design Faculty Association.

Mr. Manuel said: "I would like to thank you as organizers or hosts of the Federation of Post-Secondary Educators, Human Rights and International Solidarity Committee's Speaker's Tour 2016. I enjoyed speaking about Decolonization, Reconciliation and New Directions because it allowed me to talk about the work I am doing. I know these topics are critical for British Columbia's future...I feel the FPSE Human Rights and International Solidarity Committee should follow up on this topic and provide leadership in the labour movement."

Respectfully submitted,

Eliza Gardiner

Chair, Human Rights & International Solidarity Committee (Local 8, VIUFA)

SAMPLE MEDIA RELEASE

VIUFA's Human Rights and International Solidarity Committee is proud to present First Nations leader Mr. Arthur Manuel on Wednesday, March 16. Mr. Manuel is visiting Vancouver Island University as part of this year's Federation of Post-Secondary Educators Speaker's Tour, on "Decolonization, Reconciliation and New Directions."

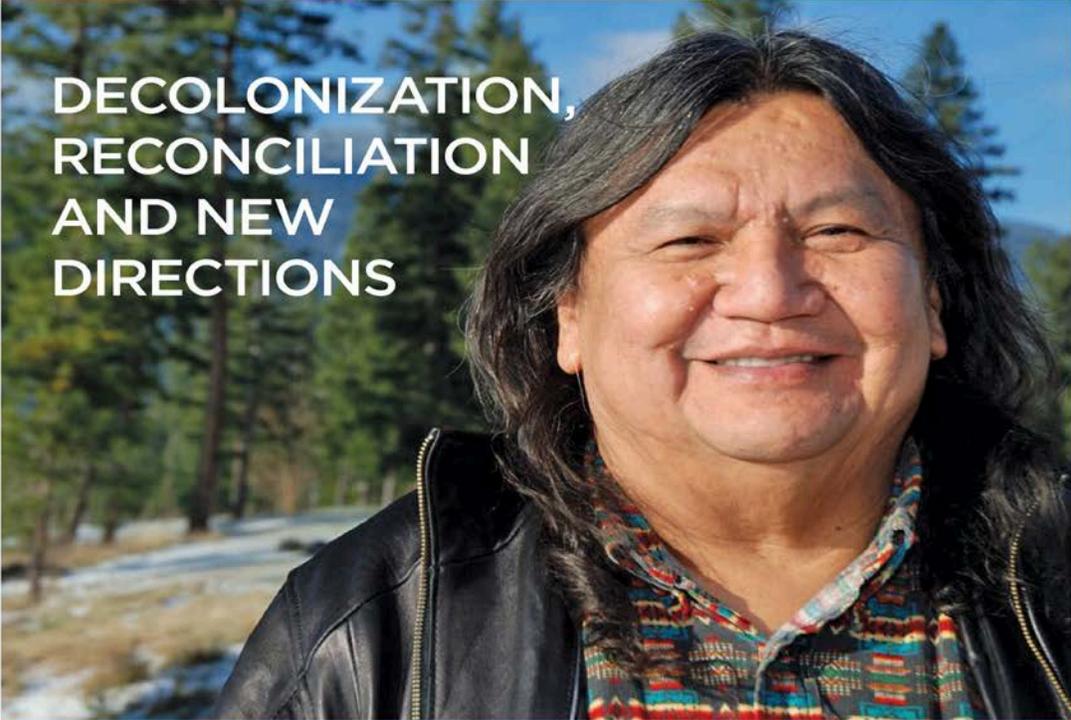
Mr. Manuel is one of Canada's foremost advocates for Aboriginal self-determination. He was four times elected Chief of his Neskonalith Indian Band (1995-2003) and three times elected Chair of the Shuswap Nation Tribal Council (1997-2003). He also served as spokesperson of the Interior Alliance of BC Indigenous Nations and co-chaired the Assembly of First Nations Delgamuukw Implementation Strategic Committee. An activist and storyteller, Mr. Manuel has fought for Aboriginal rights nationally and internationally at the United Nations Permanent Forum on Indigenous Issues and the Indigenous Network on Economies and Trade. In 2015, he wrote *Unsettling Canada, A National Wake Up Call* with Grand Chief Ronald Derrickson. This highly recommended book has been dubbed a call to action and must-read for every Canadian.

Against a backdrop of recent victories and setbacks for Aboriginal rights and titles in Canada, and the release of the Truth and Reconciliation Commission's final report, Mr. Manuel will speak about decolonization and the path ahead at over 12 FPSE colleges and universities across British Columbia.

Mr. Manuel is visiting three different classrooms at the Nanaimo Campus on Wednesday, March 16 as well as presenting at a public event that takes place at 7pm in bldg. 355 rm 203. The VIU public event takes place at 7pm on Wed. March 16, in bldg. 355 rm 203. All are welcome!

Mr. Manuel will also be presenting at the Cowichan Campus Lecture Theatre rm 140 on Thursday, March 17 from 12-1pm, enroute to his next stop at Camosun College in Victoria.

SAMPLE POSTER



DECOLONIZATION, RECONCILIATION AND NEW DIRECTIONS

A Talk With Mr. Arthur Manuel

The Federation of Post-Secondary Educators
— Human Rights and International Solidarity
Committee's Speaker's Tour 2016

April 7th 6:30 - 8:30 pm
Aboriginal Gathering Place
Cranbrook Campus

Arthur Manuel was four times elected chief of his Neskonlith Indian Band (1995-2003) and three times elected chair of the Shuswap Nation Tribal Council (1997-2003). He also served as spokesperson of the Interior Alliance of B.C. Indigenous nations and he co-chaired the Assembly of First Nations Delgamuukw Implementation Strategic Committee (DISC). On the international stage, he served as co-chair of the Global Indigenous Caucus at the U.N. Permanent Forum on Indigenous Issues and he is currently co-chair of the Forum's North American Caucus. Since 2003, he has served as spokesperson for the Indigenous Network on Economies and Trade (INET). Three of INET's amicus curiae briefs were accepted by the World Trade Organization and one by the North American Free Trade Agreement showing how Canada's failure to recognize and compensate Aboriginal people for the lumber taken off their traditional lands was a form of subsidy to the lumber industry. Arthur Manuel is a member of the board of directors of the Seventh Generation Fund for Indigenous Peoples and a spokesperson and one of the founders of the Defenders of the Land.



FPSE PENSION TRUSTEES' REPORT TO THE 2016 ANNUAL GENERAL MEETING

This has been an important year for the College Pension Plan. The last year has seen decent investment performance in the context of turbulent markets. The Plan achieved a 7.4% return on investments as of December 31, 2015. This result exceeds the benchmark of 6.7% for the same period. Over the last ten years, the Plan has had an average return of 7.2%, one full percentage point above the benchmark and comfortably above the expected rate of return of 6.5% annually. A valuation of the Plan as of August 31, 2015 was presented to the Board last week. The Plan recorded a modest surplus as of that date. This is great news for the long term sustainability of the pension plan. The FPSE trustees continue to focus on maintaining the long term stability and sustainability of the pension plan.

The new Plan rules took effect January 1, 2016. The transition has been very smooth. The Board has also implemented the partners' agreement around contribution increases to the Inflation Adjustment Account.

FPSE trustees continue to strongly support initiatives which defend and promote retirement security for all members of society. To that end, the Board has been active in the Canadian Public Pension Plan Leadership Council (CPPLC). The CPPLC is using evidence based research to promote informed debate on retirement income issues. The organization has been in existence for about three years and represents several public sector pension plans from across the country.

This year, all three FPSE trustees have undertaken significant educational opportunities in order to improve our skills and deepen our knowledge of pensions and governance. We strongly believe that continuous education is essential to properly serve plan members and meet our moral and legal obligations.

The FPSE trustee contingent is set to grow by one in September. FPSE and BCGEU have jointly appointed Paul Ramsey as a trustee effective September 1, 2016. He will be replacing Danny Bradford. Paul has already attended a Board meeting as an observer. He brings great wisdom and intellect to the table. We are all looking forward to working with him.

FPSE trustees have traditionally maintained a high degree of engagement on the various committees that operate within BC's public sector plans. This year was no different. During 2016/17, FPSE trustees were active on the following boards and committees:

- BC Pension Corporation Board of Directors and associated committees
- Benefits Committee
- College Pension Board of Trustees*

- Communications Committee
- Governance Committee[†]
- Interplan Executive Committee
- Interplan Investment Committee
- Interplan Trustee Education Committee*
- Post-Retirement Group Benefits Committee
- Interplan Website Redesign Committee
- Interplan Audit Committee

**Committees marked with an asterisk are currently chaired by an FPSE trustee.*

Committees marked with a [†] were chaired by an FPSE trustee since the last AGM but not currently.

Respectfully submitted,

Weldon Cowan, Trustee
Candace Fertile, Trustee
Doug Birtwistle, Trustee