

RALUT

Retired Academics & Librarians
of the University of Toronto

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An Important Message from the RALUT Board of Directors

Negotiations between RALUT and UTFA are under way which may lead to the dissolution of RALUT and the establishment of a standing committee for retiree affairs in UTFA.

A variety of issues led the Board to initiate these discussions, including a steady decrease in RALUT's membership; the establishment of Senior College, which has taken over some functions previously performed by RALUT; and the fact that many RALUT members already belong to UTFA. And, while RALUT was established to promote the concerns of retirees, it is UTFA that negotiates with the University on retirees' behalf.

At its last meeting in 2014, the RALUT Board established a committee led by John Valleau to begin negotiations with UTFA. Other members of the committee are Jody Macdonald, Kent Weaver and Mary Alice Guttman.

When negotiations with UTFA have been finalized, we will provide you with full details of their outcome. If the final proposal is that RALUT be dissolved, paid-up members of RALUT who are present at the 2015 AGM will have the opportunity to vote on whether to accept the proposal. Two drop-in sessions were held at 256 McCaul in late February and we welcome responses sent to ral.ut@utoronto.ca.

Upcoming Events

April 1 – noon
Faculty Club lunch

April 23
2015 RALUT AGM

President's Report

Our 2014 AGM is the focus of this unavoidably delayed issue of the RALUT Reporter and this issue is largely concerned with that event. Meanwhile RALUT's Board of Directors has for much of the past year been considering how best to address the issue of decreasing membership numbers, among other concerns. Information regarding this has recently been sent to our members, and positive responses have been received. Further and more detailed information will be forthcoming in the next, pre-2015 AGM, issue of the RALUT Reporter.

RALUT members present at the 2014 AGM elected the following new members to the RALUT Board of Directors for two year terms: Birgit Harley, Tony Key, Brenda Mallouk, Bob Pilliar and Kent Weaver. It is gratifying to report that Bob Pilliar has since agreed to chair the Commemorative Initiatives committee while Kent Weaver was subsequently elected as Treasurer, taking over from Elinor Fillion who had decided to step down from this office following many years of expert fiscal monitoring of RALUT's budget.



Due to current circumstances referred to in the introductory paragraph, our regular routine of presenting a slate of nominees at the upcoming AGM for the five person executive as well as the other Board members will be omitted in 2015, all current Board members having agreed to extend their terms from May 1st until October 31st 2015. The fundamental changes now being negotiated should by then have been decided upon.

A committee change was initiated last September, the current Membership and Events Committee being replaced by two independent committees called the Membership Committee and the Events Committee. The Membership Committee, expertly chaired by Jody Macdonald, has retained its previous 'membership' responsibilities while the Events Committee is responsible for the considerable workload associated with the organization of events (which had previously been one of the responsibilities of the Membership and Events committee). This new Events committee, chaired by Kent Weaver, is responsible for organizing the RALUT AGM, as well as any additional events.

This year has also seen a significant change in the RALUT office, Judy Sherk having decided to retire following many years of dedicated and enthusiastic service. RALUT is extremely fortunate in having had Vennese Croasdaile take over the on-going responsibilities of Office Manager and Recording Secretary this past September.

The current year, commencing immediately after our 2014 AGM, is now exploring a rather different path from the one then anticipated. The RALUT Board of Directors however strongly believes that the changes currently being negotiated with UTFA by the RALUT committee consisting of John Valleau (chair) together with Mary Alice Guttman, Jody Macdonald and Kent Weaver, if subsequently accepted by a majority of our current paid-up members, will provide us with a much more viable future.

The Retired Academics and Librarians of the University
of Toronto invite you to attend:

The 2015 RALUT
Annual General Meeting
Thursday, 23 April 2015
in the Music Room at Hart House

Registration and Coffee from 11:30 am

Buffet Lunch from 12:00 pm

1:00 pm Andrew Prossin

Founder and Managing Director of One Ocean Expeditions

“Discovery of Sir John Franklin's long-lost ship, the
HMS Erebus”

2:00 pm Annual General Meeting

R.S.V.P.:

The RALUT office by

Monday, April 13, 2015

ral.ut@utoronto.ca or 416-978-7256

Reports of Members of the Executive

President's Report

As many of you are aware, during this past year we have tragically lost two Board members whose dedicated service to RALUT had been greatly valued for many years. John Munro died in December 2013 while Doug Creelman passed away in February this year; leaving those of us who had been privileged to know them in shocked and saddened disbelief.

Advocacy on behalf of our members, especially in connection with their pensions and benefits, has traditionally been RALUT's primary focus. Our credibility and effectiveness in this context is clearly related to membership numbers and these are presently in decline largely due to our unavoidable demographic parameters. Although total active membership had increased to over 700 in April 2008 while I was Membership chair, for a number of years now it has been decreasing (currently being less than 600) despite regular concerted recruiting efforts such as RALUT's "New Retiree Reception" on October 1st 2013 enlivened by guest speaker Dr. Samir K. Sinha (see RALUT Reporter Vol. 13 #2 for further details).

Thankfully, Jody Macdonald, our visionary current Membership chair, is taking energetic steps to reverse this negative trend: Such as the joint workshop recently put on by RALUT and UTFA exploring "Retiree Perspectives on Retirement" for the benefit of an

to the 2014 AGM

enthusiastic and involved capacity audience contemplating retirement. Since this audience presented an appropriate recruiting opportunity, they were alerted to RALUT's recently implemented incentive to join: A one year free membership in RALUT the year immediately following retirement. This then produces a challenge to be met for the desired end result of a lasting increase in membership to be achieved.

An influx of new members is of course advisable for several reasons in addition to the numbers issue: New ideas, fresh energy as well as, co-incidentally, being somewhat younger than most of us veteran members; thus rendering many of these recruits highly desirable new Board members.

At our previous 2013 AGM several new members were elected to the Board by the RALUT membership then present: Michael Finlayson, Mary Alice Guttman, Robin Healey, and Jody Macdonald. This year, thanks to Nominations chair Michael Finlayson we prepare to welcome five further new Board members who are scheduled to personally introduce themselves to our membership audience later during this meeting.

In addition to customary pension and benefit concerns, RALUT endeavors to respond to other issues and some disturbing practices have come to our attention: Restrictions by the Canadian

government on the ability of federally employed scientists to publicize any results which might contradict their policies. A comprehensive article on this matter created by editor Robin Healey is available in the current RALUT Reporter (Vol. 13 #3).

Treasurer Elinor Fillion has decided to step down this year; on behalf of us all I want to express our profound gratitude for the expert fiscal guidance she has provided during her years of tenure in that office. Two long-standing Board members are now retiring from the Board: Roselyn Stone, Vice-President (Operations) and Scott Rogers. For longer than I can remember, including this year, Roselyn has not only expertly negotiated the intricate fine-tuning required to bring our AGM to vibrant fruition, but also dealt calmly and competently with whatever crisis happened to land on her (V.P. Operations) doorstep.

We are also regretfully bidding farewell to Judy Sherk, RALUT's capable, efficient and conscientious Office Manager and Recording Secretary; our very best wishes will be accompanying her as we wish her all the very best for the future.

I now want to conclude by expressing our collective appreciative thanks for all their many years of highly valued service.

Beate Lowenberg
President

Report of the Benefits Committee

RALUT's Benefits Committee convened its first meeting in October 2013 and its second meeting in November 2013 under the chairmanship of Mary Alice Guttman

Unfortunately, the committee did not meet during the spring of 2014 due to the death of its co-chair, Doug Creelman. The Chair wishes to thank the members of the committee for their work. The members are Lino Grima, Doug Creelman (co-chair), Tom Alloway, Jody Macdonald, John Valleau, and Claudia Colas.

During the meetings the committee members discussed ways to improve the benefits package of retirees. In particular, they discussed ways to improve the dental benefits including expansion of the plan to include such benefits as dental implants and regeneration of gum tissue costs, and other ways to improve dental benefits. Some members recommended that UTFA bargain for covering the cost of home care visits for home-bound retirees and their spouses. These recommendations and other general recommendations for the improvement of the benefits package were presented by Mary Alice Guttman to UTFA's Salaries, Benefits and Pensions Committee for its consideration. UTFA agreed to consider these issues and present them in a survey to its general membership. UTFA will begin negotiating a new contract for July 2014 this spring.

The RALUT Benefits Committee also collaborated with RALUT's Membership Committee in presenting a joint RALUT and UTFA workshop on Retirement Perspectives. Mary Alice Guttman, Lino Grima, Tom Alloway and Jody Macdonald (chair) were presenters. Our Committee congratulates Jody Macdonald for a superb job. It was an exciting day for retirees and current faculty members.

RALUT's Benefits Committee wishes to salute all the efforts and work of Doug Creelman in promoting the interests of retired university members.

Mary Alice Guttman
Chair

Report of the Commemorative Initiatives Committee: RALUT Memorial Awards

With the intention of providing aid to financially needy and academically excellent students while also commemorating deceased members of RALUT, the decision was made in April 2007 to establish the **RALUT Endowed Memorial Fund** which grew rapidly thanks to the generosity of our donors and the then available Ontario government Trust for Student Support (OTSS) donation-matching program.

When OTSS donation matching was discontinued, the decision was made in November 2012 to inaugurate the new **RALUT Boundless Memorial (BPP) Fund**, due to its eligibility for eventual matching of its awards, 1:1 by the University of Toronto once the specified \$25,000 total

amount has been reached (which amount must be achieved within five years of inauguration). This new fund likewise commemorates RALUT's deceased members and financial need is also a primary consideration in the selection of its awardees.

During the 'growing' phase of this new RALUT Boundless Memorial Fund, we are just using the income payout earned during the previous fiscal year by our original and now self-sustaining (no longer receiving donations) RALUT Endowed Memorial Fund for making awards to carefully selected financially needy students. This year we are again, as in the previous 2012—2013 academic year, able to award each of three undergraduate students \$1000. Here are excerpts from their subsequent letters of thanks:

1. Stephanie Burdzy: *"My most sincere gratitude...for the RALUT Memorial Award of \$1000...The generous gift has relieved some of my financial worries...and has instilled me with confidence in moving forward to pursue graduate studies. I would like to emphasize the extent to which scholarships can benefit a student like myself...The support that I have received...has been crucial in allowing me to pursue my co-curricular interests while remaining financially grounded."*

2. Sarah Longhurst: *"...Many thanks for the RALUT Memorial Award...I am so honoured and grateful to receive such a generous award and it has helped me in*

so many ways...I have put myself through all of school financially by working many hours a week...It is definitely not easy going to school full time and working 30 hours a week...This award has helped by allowing me to cut back a few hours of work each week, leaving me with more time to focus on my studies. It has also given me some much needed peace of mind about my financial situation..."

3. Geoffrey Wilson: "I would like to express my gratitude for being a recipient of the RALUT Memorial Award for the 2013—2014 academic year. The funds from this award aided me in partially funding an academic service-learning placement called Intercordia Canada through St. Michael's College. During the summer of 2013, I was an international volunteer for a public grade school in Honduras, teaching English. Thank you for providing funds which supported my altruistic and academic aspirations."

These students are not isolated examples or unique scenarios; there are many more students such as these three just cited who are in desperate need of financial assistance. Our newly inaugurated RALUT Boundless Memorial Fund currently has a total value of \$8,980 and we are appealing to the generosity of our members and friends to help us achieve our goal of raising an additional \$16,020 in order to reach the required \$25,000 total by November 2017. Only then will we be able to benefit from the matching of fund-derived income 1:1 by

the University of Toronto, thus generating further awards to benefit additional students in urgent need. Donations of any size to this fund are gratefully received:

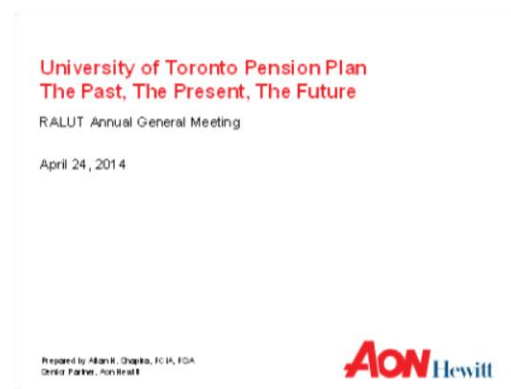
1. Online using the University of Toronto link on the University or RALUT websites: <https://donate.utoronto.ca/> Enter RALUT in the search box.

2. For those who prefer the more traditional alternative, donation pledge forms accompany the RALUT Reporter or can be obtained from the RALUT office as well as the RALUT website. A university-issued tax-deductible receipt will be sent for each donation
Timely help making a significant difference.

With grateful thanks to committee member Diane Henderson.

Beate Lowenberg
Chair

Allan Shapira, senior partner at AON-Hewitt, spoke on "University of Toronto Pension Plan: The Past, The Present, The Future"; to see the content of his PowerPoint presentation, please click [here](#)



RALUT: Retired Academics and Librarians of the University of Toronto
Annual Financial Report, 2013

Balance, January 1 **57,436**

Income

Membership fees	18,066	
Donations	3,078	
Interest	<u>472</u>	
Total		21,616

Expenditures

Administration		
Staff	6,178	
Supplies	725	
Copying	300	
Postage	625	
Telephone	<u>539</u>	
Total		8,367
Reporter (including postage)	1,972	
Web	742	
AGM	2,635	
Affiliations (CURAC, AROHE memberships)	407	
Conference travel and expenses	1,138	
Board of Directors	1,993	
Bank charges	145	
Forum	2,480	
Refund of deceased members' fees	85	
New retirees' event (50%; balance paid by ARC)	296	
Computer support	136	
ARC coffee supplies	163	
Petty cash (carried forward from 2012)	<u>-17</u>	
Total		<u>20,542</u>

Difference between income and expenditures **1,074**

Balance, December 31 **58,510**

Appropriations for special funds

Legal	10,000
Special projects	14,500
General contingency	<u>11,000</u>
Total	35,500

My thanks to Connie Reed, who checked the cash transactions.

Submitted by Elinor Fillion, Treasurer

Report of the Membership Committee

Chair: Geraldine (Jody) Macdonald
Members: Claudia Colas (resigned 2013), Elinor Fillion, Lino Grima, Mary Alice Guttman, Diane Henderson, Roselyn Stone, Additional UTFA members participating on the planning for the Retiree Perspectives on Retirement Workshop sponsored by RALUT & UTFA included Michael Meth (UTFA Treasurer) & Michael Attridge (UTFA).

During the 2013/14 academic year our committee met October 2, 2013, November 6, 2013, January 29, 2014, March 19, 2014 via email, April 2nd, 2014 and we were in attendance at the Retiree Perspectives on Retirement Workshop with UTFA on April 3, 2014.

This year we began by reviewing our membership statistics. Our current membership sits at approximately 582 which is a total of regular and spousal members. This is down considerably from membership when RALUT was formed, and while still a healthy number, the downward trend was identified as a concern. In particular, we are concerned about the limited number of new retirees joining RALUT. We identified the need to focus on attracting new members to RALUT as faculty/librarians transition from active employees of U of T to retired members of RALUT.

Members of the RALUT Membership Committee and Board met with Scott Prudham, President of UTFA, to discuss opportunities to collaborate together to promote the interests of the retired members of UTFA and RALUT. We agreed to begin by collaborating to host a joint workshop for active UTFA members, focused on retirement narratives from RALUT members. We obtained support from both the RALUT Board and the UTFA Council and set about

planning an engaging workshop, 'Retiree Perspectives on Retirement', held on April 3, 2014. A flyer was sent to all active UTFA members, including faculty and librarians in the University of Toronto. This was great advertising for RALUT as many active UTFA members were not aware of RALUT. We hoped for approximately 25 participants and were delighted with a robust registration of approximately 70 UTFA members and 20 RALUT members.

UTFA members who registered were invited to complete a brief needs assessment for the workshop, via Survey Monkey. Results of the 50 UTFA members who completed the needs assessment identified the following: Current Position: Professors (64%), Librarians (16%), Senior Lecturers (14%), Lecturers (2%), Senior Academic (2%), and other (2%); Gender: female (56%), Male (44%), Age : 60 to 64 (32.65%), 55 to 59 (28.57%), 65 to 69 (26.53%), 50 to 54 (8.16%), 70+ years (4.08%); Reasons people might retire included: 28.7% has accomplished key work at U of T, 28.5% were ready for a change, 28% other, 24.49% wanted to focus on scholarship, 24.49% found work stressful, 26.53% wanted time for own interests, 22.44% were considering other work options, and 4% sited poor health of self/family; Plans for retirement found the largest group uncertain about plans with some planning to work past 65 years (normal retirement date), a small number planning to retire early, and even less considering or in phased retirement; Interest in planned panel presentations were highest for the Pensions/Benefits but also strong for hearing about early/phased retirement and life after retirement.

The workshop was held at the Faculty Club in the main dining room and lunch was served. The venue and food was positively evaluated. Twenty-six participants

completed the workshop evaluation form and of these 80.8% recommended future retirement events be planned for the UTFA members. The overall evaluation was positive, but many indicated that they wanted more specific information about pensions, benefits, and about phased retirement. Human Resources of U of T puts on a yearly retirement event where these details are shared, and one participant recommended that we invite an HR representative to address participants in a future retirement event. Working with UTFA was a strength for the planning committee as we were able to access the key administrative support required to host such an event. The RALUT Membership Committee would like to extend our appreciation to our colleagues at UTFA who provided crucial support for this event. Prior to the workshop the Membership Committee supported a new option that was taken to the RALUT Board by the Chair of Membership and approved. This decision was "All retired academics and librarians as well as senior administrators will be given a one year free membership in RALUT the year immediately following retirement, beginning July 1st, 2014". This will boost membership for the 2014/15 academic year. The challenge will be to ensure that RALUT is attractive enough to have these new retirees transition into paying members of RALUT the year following their retirement.

Membership future recommendations include a) to encourage ongoing collaboration with UTFA to attract new RALUT members, b) to consider a joint retirement event with UTFA or support UTFA to host its own retirement event(s) which specifically address pension and benefit and early/phased retirement choices; and c) to identify increased administrative resources from RALUT if we are to undertake new

events. New members are welcome and needed for the Membership Committee in the 2014/15 academic year.

Jody Macdonald
Chair

Report of the Nominations Committee

In preparing a slate of 15 to be elected to the Board by the RALUT members present at the 2014 AGM, we have been guided by Articles Three and Four of the RALUT By-law, RALUT custom and certain other considerations. Specifically we understood that we should:

- a) Find replacements for the two Board members, John Munro and Doug Creelman, who, sadly, died this year and for the three other members who have retired from the Board;
- b) Achieve a balance of new and returning members so that the rotation policy set out in the Constitution, Article 3.03, can be maintained;
- c) Achieve an equitable gender balance on the Board.

The resulting slate of nominees is:

New Members: two-year terms, starting at AGM 2014 and ending at AGM 2016

1. Birgit Harley
2. Tony Key
3. Brenda Mallouk
4. Bob Pilliar
5. Kent Weaver

Returning Members: two-year terms, starting at AGM 2014 and ending at AGM 2016

6. Beate Lowenberg
7. David Olson
8. Robin Healey

Returning Members: one-year terms, starting at AGM 2014 and ending AGM 2015

9. Elinor Fillion

10. Michael Finlayson
11. Mary Alice Guttman
12. John Valleau
13. Geraldine (Jody) Macdonald
14. Fred Wilson
15. George Luste

Ex Officio

16. Peter Russell (Honorary President)
17. Tom Alloway (Past President)

Notes on Board nominations:

- 1) If there are nominations from the floor at the 2014 AGM, an election by written ballot will be held.
- 2) With 8 two-year term members and 7 one-year term members, the rotation possibility provision is settled as nearly as possible with 15 to be elected. Those elected for a one-year term would still be eligible for another nomination at the 2015 AGM.
- 3) The gender balance is unchanged from last year, with 6 women nominated out of 15.

Furthermore, for information and comments only, the committee reports that it will recommend to the Board of Directors as Officers for 2014:

President: Beate Lowenberg

Vice-President (Policy): John Valleau

Corporate Secretary: David Olson

Treasurer: Kent Weaver

The committee has no recommendation at this time for the position of Vice-President (Operations)

Nominations Committee: Michael Finlayson (Chair), John Valleau, David Olson, Peter Russell.

Report of the Pensions Committee

As George Luste has explained on a number of occasions, the solvency of the U. of T.

pension plan is a concern; and that continues to be the case. Two factors that contribute to this concern are the high cost that the University pays for investment management and the fact that the U. of T. is not as transparent about the nature of its investments as some other universities are.

An interesting development that warrants close scrutiny is the fact that consultations are currently under way about the possibility of combining the pension fund assets of all universities in Ontario. These discussions appear still to be in a preliminary stage, but their outcome could be very important in future. A very important question is how best to combine the assets of defined benefit and defined contribution pension plans.

Tom Alloway
Chair

Deceased Members: May 2013 – April 2014

- Abrams, Marjorie
- Barber, Wanda
- Bell, James
- Berman, Audrey
- Creelman, Doug
- Hume, J.N. Patterson
- Lee, Stewart
- Leon, Pierre
- McCormick, William
- Munro, John
- Neill, Desmond
- Sirluck, Ernest
- Spevak, Eva
- Vise, Joseph

University Arts Women's Club (UAWC)

The University Arts Women's Club (UAWC) was originally founded in 1929 by Lady Falconer, wife of Sir Robert Falconer, then President of the University of Toronto. The purpose was to provide friendship, support and interesting activities within the Faculty of Arts and Science for faculty wives and female members of both faculty and senior staff. The purpose of the Club has remained the same, but its focus has evolved through the years as lifestyles have changed.

Currently membership is open to all University female faculty as well as faculty wives and female members of Senior Administrative Staff (active or retired) including those from the library services, a number of whom have chosen to join at the time of their retirement, welcoming an opportunity to maintain a contact with the University.

Our programme includes three General Meetings a year held in St Thomas' Church Hall at 383 Huron Street. Each meeting starts at 12:45 p.m., with a light lunch and an opportunity for social interaction followed by a short business meeting starting at 1:30 p.m., and a lecture at 1:45 p.m.

Our first General Meeting this year will be held on Thursday, October 16th, 2014, when Kimberly Strong, Director of the School of Environment, and Professor, Department of Physics, University of Toronto, will be speaking on "The Air in our Environment".

At the second General Meeting scheduled for Thursday, November 20th, 2014, Steve Engels, Senior Lecturer, Department of Computer Science, University of Toronto, will address the topic "Twenty Years in Computer Science". At the third General Meeting scheduled for Thursday March 19th, 2015, Heather Darling

Pigat, Collections Manager of the Art Centre, University of Toronto, will speak about "Art and the University".

At the Annual Spring Luncheon scheduled for Thursday, April 16th, 2015, the speaker will be the Honourable Roland "Roy" McMurtry, OC, O.Ont., QC, Former Chief Justice of Ontario, High Commissioner to Great Britain, and Attorney General for Ontario. Title of speech remains To Be Announced.

We also have a variety of interest groups which cater to a broad range of interests: Antiques and Art Appreciation, Gourmet Lunch, Outings, Reading, and Theatre. These groups meet independently once or twice a month. New groups are formed according to the wishes of the members.

Membership fees of \$40.00 cover all General Meetings, which include a light lunch and participation in the Interest Groups. Guests are welcome at our General Meetings with a charge of \$8.00, for lunch and the presentation. The Christmas Party will be held at the President's House, at a cost of \$15.00 per person. Our Annual General Meeting (AGM) which is our Annual Spring Luncheon will be held at the Faculty Club, University of Toronto, at a cost of \$35.00 per person. Guests are welcome.

Those interested in joining UAWC are invited to contact Shirley Zaky, Vice President of Membership, (safwat.zaky@utoronto.ca, 416-766-2150).

Submitted by
Maggy Stepanian, Vice President
UAWC – Interest Groups.

RALUT Board of Directors

Beate Lowenberg, President

Elinor Fillion, Vice President, Operations

John Valleau, Vice President, Policy

David Olson, Corporate Secretary

Kent Weaver, Treasurer

Tom Alloway, Past President

Peter Russell, Honourary President

Michael Finlayson

Mary Alice Guttman

Birgit Harley

Robin Healey (resigned for health reasons, January 2015)

Tony Key (resigned October 15, 2014)

George Luste (on leave for health reasons)

Jody Macdonald

Brenda Mallouk

Bob Pilliar

Fred Wilson

Committee Chairs

Benefits – Mary Alice Guttman

Communications – Robin Healey (until January 2015)

Finance – Kent Weaver

Membership – Jody Macdonald

Events – Kent Weaver

Nominations – Michael Finlayson

Pensions – George Luste