

LUFA News

Fall 2012

LUFA GENERAL MEETING

Friday, November 9, 2012, 10:30 am

ATAC 2021 and HP Boardroom (via video conference)

Guest Speaker: **Brian Brown**, President, CAUT Defence Fund



President's Report

Glenna Knutson, gknutson@lakeheadu.ca

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Rarely have faculty associations found themselves responding to such a number and range of government interventions in the lives of university academics. While the McGuinty government has resigned, we believe that the issues and interventions of government will continue into the middle term and longer. Three major government initiatives, introduced during 2012, have already required that we work together to consider the most appropriate responses.

In the spring of 2012, both the Drummond Report and the Ontario government budget underlined government interest in the structure of pension plans in the broader public sector including universities. Early summer brought the discussion document of Glen Murray, the Minister of Training Colleges and Universities (MTCU), *Strengthening Ontario's Centres of Creativity, Innovation and Knowledge*. The round-table discussions over the summer, and the requirement that each university submit a Strategic Mandate Agreement (SMA) by the end of September, signaled a dramatic increase in government intervention in the postsecondary sector. A draft legislative change, entitled the "Protecting Public Services Act", would have given the government unprecedented control over collective bargaining in universities and other parts of the broader public sector.



The "Protecting Public Services Act" died when Premier McGuinty sought prorogation of the provincial legislature.

The proposed changes to pension plans, including pooling of assets, 50:50 contributions and proposals for shared governance of defined benefit pension plans, may have impacts on Lakehead's defined contribution pension plan as well. Please review Jerry Phillips' report on behalf of the LUFA Pension Committee and attend the General Meeting to learn more about this issue.

The MTCU consultation document and the universities' SMAs continue to draw our attention, particularly in terms of the ways in which these may factor into changes in universities even without a sitting government. Philip Allingham, Scott Pound and I attended the OCUFA Board meetings on October 27 and 28, 2012. Please see the report by Philip Allingham, Board member for LUFA, in this newsletter.

The "Protecting Public Services Act" died when Premier McGuinty sought prorogation of the provincial legislature. However, the contents of that proposed act, or worse legislation, may face us in 2013. Again, there is a report in this newsletter by Jerry Phillips, Chief Negotiator, discussing the current collective bargaining climate in Ontario.

LUFA's grievance officers and several LUFA committees have been busy since the last general meeting, and have provided reports in this issue of LUFA News. Please read these reports carefully.

We are very pleased to have Brian Brown as an invited guest at our LUFA General Meeting. Brian is President of the University of Windsor Faculty Association, Chair of the CAUT Defense Fund, and Chair of the OCUFA Board. Many of you will recall Brian's rousing oratory during the LUFA protest of the university closure on Dec. 21, 2009. Brian brings a breadth of experience and knowledge with him, and will certainly provide interesting and informative comments on the current situation facing Ontario faculty associations. I look forward to seeing you at the LUFA General Meeting on Nov. 9 at 10:30.

OCUFA Report

Philip Allingham, pallingh@lakeheadu.ca

The whole sordid matter of enforced wage restraint hung over the OCUFA Directors' meeting last weekend. The Saturday morning concessionary demeanour of MTCU's Glen Murray did nothing to allay the association's fears that Ontario's university faculty associations can expect to be the sacrificial lambs on the twin altars of deficit reduction and a balanced provincial budget, no matter which party emerges as government next spring.

Minister Murray continued to advance his Strategic Management Agreement as a vehicle for "Transformational Change" (i. e., increased productivity and cost-saving innovation), with \$30 million at stake for six cooperating institutions. However, he is pushing his change mantra more gently now, outlining three classes of initiative: 1. Short term pilot projects on which there is general agreement; 2. Areas such as the BIU funding formula, on which there is some disagreement; and 3. Areas upon which there is general disagreement. He is no longer aggressively pushing credit transfer between the colleges and universities since "external" agreements (between Ontario institutions and those outside Ontario) are now the trend.

He now wants a voluntary "compensation restraint" from the OCUFA member associations, amounting to a net zero approach over two years; for LUFA, that period of austerity would begin as soon as our present collective agreement expires. The legislation that was on the table before the Premier prorogued the legislature would have conferred unprecedented powers upon the government, affecting some two thousand public sector agreements and half-a-million public sector workers. The legislation proposed by the Liberal government, which wished to have forty days to pronounce on any

negotiated settlement between a faculty association and a university administration, could have gone so far as affecting **all** aspects of compensation and "service delivery," including workload, CDIs, and merit pay.

Murray pleaded with the Directors: "We need your voluntary cooperation in order to save liberalism. What was on the table [punitive legislation] is now off the table." But public sector restraint is still necessary, he contends, because the 2008 recession has resulted in a drastic decline in government revenues. As for pension reform, he was emphatic about wanting OCUFA and its member associations "in the driver's seat," and even went so far as to announce a research grant of \$140,000 to OCUFA. He expects that the Morneau report, out soon, to respect OCUFA's key criteria. The Ministry will evaluate any given plan only every four years, rather than annually, as originally proposed. A motion was subsequently passed that OCUFA contact other public sector entities to discuss pension plan reforms.

To address this assault on the collective bargaining rights of its member associations, OCUFA is initiating a "We Teach Ontario" public information campaign, which will demonstrate to the public how research and teaching are intimately connected, thereby forestalling any government initiative to create "teaching only" universities. The Minister actually received a sneak preview of the OCUFA publicity video featuring two of the total five faculty "profiles," interviews with highly articulate and engaging academics in the fields of engineering, geography, journalism, law, and medicine.

Although the Minister addressed our questions frankly, he continued to describe BIU funding as "irrational"; he favours a new formula that is more equitable than 1 BIU for a student in a three-year degree program versus 1.5 BIUs for a student in a four-year degree program. He would like a formula based "on the quality of the learning experience," but did not elaborate. Although he conceded that colleges should not be doing "research-intensive" degrees, he continues to defend the "applied" degrees of the colleges. He will let universities control professional and graduate programs, arguing that, if 80% of the jobs in the new Ontario economy will require university degrees of its work force, the shorter, less expensive and more targeted college degrees will fill the gap. However, given the standing of the Liberals in the polls, Murray is not merely a *lame* but a **dead** duck: don't expect him to be in the Minister's chair six months from now.

The new contrition of the Minister of Training, Colleges, and Universities should not delude us. Draconian legislation is almost certainly in the works, although put on hold by prorogation. Despite the breathing window that the shutting down of the legislature gives us, given the magnitude of the threat to public sector collective bargaining, every Ontario faculty association must start mobilizing immediately to face the long fight as the new government is likely to characterise us as stagnant, pampered, and drastically underworked and overpaid. If faculty are not ready to face the kind of legislation imposed on teachers already, we shall have to engage the public with our own agenda, and convince the electorate of our value to Ontario society.

LUFAs Congratulates Dr. Laura Buker, the Latest Member of OCUFA's Status of Women Committee. Buker, an Associate Professor in the Faculty of Education, brings to the provincial stage her commitment to equity, a common-sense approach, and considerable problem-solving skills.

Minister Murray
continued to advance
his Strategic
Management
Agreement as a vehicle
for "Transformational
Change."

Chief Negotiator's Report

Jerry Phillips, gphil@lakeheadu.ca

LUFA watched carefully this fall as the provincial government passed Bill 115, designed to place limitations on teachers' collective bargaining ability. On the heels of that legislation, we were informed that the government intended to introduce the "Protecting Public Services Act". If enacted, that law would have allowed current public sector collective agreements to run out as negotiated, without government intervention. However, any new collective agreements would have been vetted by government, giving the Minister the power to add or remove language from collective agreements. In that way, the legislation would have reached far beyond a two-year wage freeze, severely limiting collective bargaining by unions in the broader public sector well into the future.

The draft bill effectively died once Premier McGuinty resigned and the legislature was prorogued. However, it is very likely that there will be a spring election, and the Hudak Conservatives have already signaled a clear intention to enact anti-union legislation if elected. Within less than a year, LUFA and other unions may be facing even more draconian legislation than the draft "Protecting Public Services Act". LUFA continues to monitor the situation carefully and our President and Vice President are working closely with OCUFA in this matter.

During the last negotiations, we signed a Letter of Understanding about amending the antiquated Employment Equity Policy. Now that the new Administration team is finally in place, we are ready to go forward in this matter. We hope to seek input from our members and then commence negotiations on this matter in the new year. I will keep you updated on progress in this matter.

Pension Report

Jerry Phillips, gphil@lakeheadu.ca

As of the end of September, our plan was up by about 6% on a year to date basis. October was a volatile month, and we may have lost a bit of ground, but we are hopeful of ending with a reasonable return for 2012.

The Ontario government is currently looking into alternatives for merging university pension plans and reducing the liabilities of Universities. OCUFA has conducted a series of webinars on the matter to educate concerned members about the complex issues involved. LUFA is monitoring the matter closely to ensure that any changes are in the best interests of our members.

On December 7, there will be a meeting of the Pension Board and some of our fund managers will be present to provide an update on their performance. All LUFA members are welcome to attend Pension Board meetings.

Contract Lecturers' Committee Report

Laurie Forbes, laurie.forbes@lakeheadu.ca

The Contract Lecturers/Continuing Contract Lecturers hosted their Fall Annual General Meeting on October 23, during Fair Employment week. Discussion focused around the issues raised by CAUT that impact on the working conditions of Contract Academic Faculty. There will be a survey sent to all our members and we ask that you take the time to fill these out.

If you have questions or concerns please get in touch with us. Enjoy the rest of the semester.

Research Committee Report

Thamara Laredo, tlaredo1@lakeheadu.ca

The Research Committee welcomed its new members in a meeting at the beginning of the academic year. The committee discussed concerns in regards to the low success rates of Lakehead faculty in attracting external funding, in particular for NSERC eligible researchers, as the Discovery Grants have become extremely competitive. The committee will meet again in the near future to discuss the members' options on this regard and other concerns surrounding the issue.

Also, Orillia members have expressed interest in establishing an Office of Research or a representative of such office permanently at the Orillia Campus. This will be discussed further in future meetings.

Please contact Thamara Laredo at tlaredo1@lakeheadu.ca if you have any questions or concerns.

Librarians' Committee Report

Janice Mutz, janice.mutz@lakeheadu.ca

The Law Librarian position has been advertised, and interviews are expected to take place shortly.

Orillia Committee Report

Chris Murray,
cmurray1@lakeheadu.ca

The Orillia Committee consists of Dr. Syed Islam (Political Science), Dr. Curtis Fogel (Criminology), Dr. Reg Horne (Interdisciplinary Studies), Dr. Cheryl Lousley (English), Dr. Nanda Kanavillil (Biology) and myself, Dr. Christopher Murray (Interdisciplinary Studies). For members who may not have had interactions with us already, the role of the Orillia Committee is to discuss LUFA issues facing Orillia faculty members that may not apply to our colleagues at the Thunder Bay campus, and to bring these to the attention of the LUFA Executive. It is noteworthy that the current Orillia Committee is comprised of members from the Department of Interdisciplinary Studies only. Members in the departments of Social Work, Education and Business are reminded that this Committee is in place to meet their needs, as well as those of colleagues in Interdisciplinary Studies. If any Orillia member has a concern they feel may be a LUFA matter, they are encouraged to contact one of the Committee members named above.

Some of the concerns specific to Orillia members that are currently being discussed within the Executive are listed below.

Promotion, Tenure, Renewal and Merit: many Orillia members who are submitting applications for PTR and Merit may have their files reviewed and voted on by colleagues that have little or no familiarity with their disciplinary background. For members that are only appointed to the Department of Interdisciplinary studies, they may not have **any** colleagues familiar with their field of research voting on their applications. It is felt by some that this puts Orillia members at a disadvantage

compared with colleagues in Thunder Bay. Additionally, there is currently no provision in the Collective Agreement to accommodate Orillia members wishing to travel to Thunder Bay for their PTR hearings. The Dean's Office has so far reimbursed the cost of these trips, but there is still an obvious burden being placed on Orillia members who wish to meet their review Committee in person.

Research: Orillia members are suffering from very low success rates in competitions for both internal and external research funding, in part due to the almost complete lack of research facilities at the Orillia campus and lack of any staff associated with the Office of Research, Economic Development and Innovation being dedicated to Orillia. Several members are concerned that while Orillia faculty are expected to generate the same level of research output as colleagues in Thunder Bay, resources made available to Orillia faculty are practically non-existent.

Teaching: Members working in Orillia have expressed concerns over hiring procedures, including interpretation of the right of first refusal for contract lecturers. Orillia's Department of Interdisciplinary Studies is unique in both the fraction of positions filled every semester by contract lecturers and the wide range of disciplinary backgrounds required to fill these positions, which are associated from more than twenty "companion" departments in Thunder Bay. Additionally, concerns have been raised regarding last-minute changes to teaching assignments and disparities between the class caps, available marking/teaching assistance and overall workload between members at our two campuses. Any members with concerns related to these issues are encouraged to make their opinions known to the Orillia Committee members.

CAUT Defence Fund Report

Brad Wilson,
brad.wilson@lakeheadu.ca

The primary purpose of the CAUT Defence Fund (DF) is to provide strike benefits to associations while its members are engaged in a strike or lock-out and experiencing loss of salary. The DF also provides financial assistance to member unions which incur costs of mediation and/or interest arbitration in settlement of contract negotiations. The DF has now grown to 48 member unions representing over 21,200 academics from St. John's to Victoria.

I recently returned from the DF's Annual General Meeting held on Oct. 20th in Toronto. While many topics were discussed and many housekeeping tasks were completed, the only significant change to the DF's Standing Rules and Regulations was to increase the Daily Benefit for strikes or lock-outs to \$84 per day for each dues paying member. This is the first increase in 3 years and is meant to keep strike pay at a similar level to the salary of a new Assistant Professor. This increase triggers a tiny increase from \$5 to \$5.25 per month in our dues because the DF's Standing Rules and Regulations 3.1 states that the Daily Benefit cannot exceed 16 times the monthly dues rate. This increase will be effective February 1, 2013. This is the first dues rate increase in several decades.

I am convinced more than ever that belonging to the CAUT Defence Fund is a superb idea and I will continue to advocate for our participation. Please feel free to email me at: bwilson@lakeheadu.ca or call me at 343-8746 if you have any questions. If you would like to learn more about the DF, please visit their website at: defencefund.caut.ca

Emeritus Committee Report

David Kemp, dkemp@lakeheadu.ca

The 10th Annual Conference and General Meeting of the College and University Retirees'

Associations of Canada took place at the University of Victoria in Victoria, BC from April 18 to 20, 2012. Some 70 delegates attended from across Canada and several members of AROHE – the US equivalent of CURAC – also participated.

The Conference sessions covered a number of themes, including the sharing of best practices, options for seniors' living arrangements, retirees' health and wellness as well as perennial favourites such as issues in pension plan governance

Two sessions considered so-called 'best practices' or the ways in which individual organizations have worked successfully to provide for their membership. The results of a 2011 CURAC survey of best practices were presented by John Meyer (University of Windsor RA) and those from AROHE surveys in 2008 and 2010-12 by Janette Brown (Executive Director of AROHE). The results of the Canadian and US surveys were remarkably similar. The primary purposes of most retirees' organizations include such elements as contributing to the intellectual, social and physical fulfillment of their membership, advocacy in such areas as pensions and benefits, retirement preparation for new retirees and the promotion of university service and teaching. The most common activity at most retirees' organizations is the hosting of social events followed by a mix of other pursuits - community presentations, topical speakers, raising scholarship funds, for example – that vary from institution to institution depending on local conditions. The benefits that retirees receive from the institution

from which they retired are also similar on both sides of the border. They include internet access, the use of library facilities, parking, health benefits and office space. Again, variations occur from place to place. In the CURAC survey, for example, 90% of respondents reported access to the internet and library facilities, while only 38% had office space provided.

To elaborate on the information provided in the surveys, a number of significant initiatives were described. The University of Victoria Retirees' Association, in collaboration with the university's Centre on Aging has developed an annual Masterminds Lecture series in which retirees present talks on a diversity of topics during the month of April. The series, which has been operating for seven years now, regularly attracts audiences of over 100 people

Given that academics spend their careers researching and writing it is not surprising that retirees have produced histories of their institutions. A recent example is a book of reminiscences produced in 2011 by the Wilfrid Laurier University RA to mark the Centennial of the university. For additional information on the book see www.wlupress.wlu.ca

Retirees have always been active in donating to scholarship and bursary funding. In one of the sessions, the success of the McMaster University RA in creating an endowment fund was described. The retiree associations at Regina and Windsor also provide student bursaries.

The role of retirees as volunteers was also highlighted. Volunteerism can take place at the institution from which the volunteer retired or in the local community, with some volunteering as individuals, others as part of a specific volunteer program. The retiree association at the University of North Carolina at Chapel Hill, for example, set out to raise its profile in the community, with volunteers as a central element in their campaign. Volunteers became involved in

ushering at concerts, serving on mock juries in the Law School and working with the Institute for Aging to develop approaches to work with older people

The second day of the conference dealt with issues that have an impact on the health and wellness of retirees. Topics covered included, alternative living arrangements for seniors, the maintenance of physical fitness and cognitive functioning, measures of wellness and their geographical distribution, the upcoming Canada Health Accord and issues in pension plan governance.

As retirees age their housing needs tend to change. Some may be lucky and be able, as the researchers say, "to age in place", that is to remain in the family home. In many cases, however, changing health conditions, family issues or financial matters can lead to the need to relocate. A review of alternatives available for seniors' living arrangements indicated that there are in fact many options ranging from institutional care through assisted living to co-op facilities and multigenerational housing. A growing trend is the development of age friendly communities where affordable housing, transportation facilities, community support and health services are designed with seniors in mind. One comprehensive approach, providing condo-style living with all that they feel seniors, require was described by a representative of Tapestry Retirement Communities. They are essentially equivalent to very expensive boutique hotels, with rates ranging from \$4,000 to \$7,000 per month, and probably beyond the reach of many, if not most, academic retirees.

Another type of development that was described in detail was UniverCity, a sustainable residential and commercial community, in which more than 3000 people live, atop Burnaby Mountain, adjacent to Simon Fraser University. It is an eco-friendly, energy efficient, multi-generational community with

stores, schools and parks that would appeal to retirees who prefer to live in the social equivalent of a traditional neighbourhood rather than a community focused entirely on seniors. More information on UniverCity is available at www.univercity.ca

Whatever type of accommodation retirees might prefer, changing health conditions may have a strong influence on their final decisions. Those suffering chronic conditions, for example, may have no choice but some form of institutional care. There is no denying that physical health does decline in old age and as the number of seniors in the population continues to grow many observers have begun to question the ability of society to provide the health care that will be required at a cost that society can afford. Research at the Centre for Aging at UVic suggests that it is possible. Savings can be made through a combination of informal care – provided by family and friends – and home care, which has been shown to be cost effective. Governments have claimed to recognize the importance and effectiveness of home care, but since the early 2000s have been less willing to invest in it. Health care costs are continuing to rise and in Canada decisions on dealing with that depend upon discussion among the Federal and Provincial governments. The current Health Care Accord is up for renewal in 2014, but the Federal government has already released the percentage increases in funding it is willing to consider, and the nature of other possible revisions to the accord remain to be seen. CURAC is planning to prepare a position paper on the health needs of seniors for release in conjunction with the Accord discussions.

For many retirees, decisions on life after retirement depend very much on pension income, which in turn is linked to the financial success of the pension plan in which they were enrolled. A session on pension plan governance

provided information on how pension reform might improve their overall efficiency. Pension reform is a hot topic across the country. In Alberta and BC, for example, a Joint Expert Panel on Pension Standards (JEPPS) has completed a comprehensive review, which provides more than 100 recommendations for better pension plan governance. One of the concerns identified by the JEPPS was the limited training that most pension plan trustees have received and it recommended more or better training for trustees with the suggestion that in the future trustees may be required to obtain certification before sitting on a Pension Board. Similar concerns were expressed by representatives from York University and Dalhousie RAs. The representative from Dalhousie pointed out that for a plan to be successful the relationship between the Pension Board and the university Board of Governors, must be made clear and it should be spelled out that trustees have a fiduciary responsibility to the plan members not the Board of Governors. Otherwise, the viewpoint of the latter tends to prevail. He further suggested that active and pensioner members of any plan should make up the overwhelming majority on any Pension Board.

In looking at future developments in university pension plans, the JEPPS identified smaller plans as those facing the biggest problems and suggested that some degree of amalgamation might be required. A similar conclusion was reached in the Drummond Report in Ontario, which suggested possible consolidation of smaller university plans into a format comparable to that of the Ontario Community College system.

After 10 years of Annual CURAC Conferences, there was a feeling among some of the delegates that some benefits might be derived by having regional meetings. Regional structures existed in the early days of CURAC and over the past several years there have been very successful Atlantic Regional

conferences. Many RAs have only limited finances and are more likely to be able to attend a regional conference. This appears to be particularly true of RAs in the college system. Currently there are 33 university RAs in CURAC, but only 2 from the college system. Regional conferences might help to increase the latter number. In addition, many issues – benefits and pensions, for example – have a regional base, which might be more effectively considered by a local group. Comments from the conference attendees suggested that regional conferences would be an appropriate addition to CURAC's activities.

The 10th Annual CURAC Conference was very interesting and informative. It ran smoothly and the local organizing committee are to be commended.

12/13 LUFA Executive	
<i>President</i>	<i>Glenna Knutson</i>
<i>Vice-President</i>	<i>Philip Allingham</i>
<i>Treasurer</i>	<i>Gautam Das</i>
<i>Secretary</i>	<i>Scott Pound</i>
<i>Past-President</i>	<i>Joey Farrell</i>
<i>Elected Members</i>	<i>Doug West & Liping Liu</i>
<i>Chief Grievance Officer</i>	<i>Laurie Forbes</i>
<i>Chief Negotiator</i>	<i>Jerry Phillips</i>
<i>CAUT Rep</i>	<i>Glenna Knutson</i>
<i>CAUT Defence Fund Rep.</i>	<i>Brad Wilson</i>
<i>OCUFA Rep.</i>	<i>Glenna Knutson</i>
<i>OCUFA Collective Bargaining</i>	<i>Jerry Phillips</i>
<i>Status of Women Rep.</i>	<i>Rachel Warburton</i>
<i>Staff/Admin. Assistant</i>	<i>Angie Kozak</i>