

National Association of Federal Retirees Prince George Branch BC15
Treasurer and Advocacy Report AGM March 14, 2022 – Rose Bowker

After the March 8, 2021 AGM, I accepted the treasurer role and continued as the branch advocacy liaison. Once again, 2021 was a challenging year with the continued COVID-19 pandemic restrictions. Our activities were limited to virtual meetings for the most part, and advocacy campaigns continued in electronic format.

Treasurer's Financial Report

Annual Financial Statements (Balance Sheet and Earnings Statements attached)

For the year ending December 31, 2021 our branch financial statements were reviewed by Billie Sherwin and Hennie Cook. Finalized statements are as follows:

- Branch revenues totaled \$2,684.38; expenses \$808.56; for net earnings of \$1,875.82
- Branch net assets total \$8,996.34 with a corresponding total equity of the same amount.

We need a motion to approve the December 31, 2021 financial statements.

Billie Sherwin and Hennie Cook have indicated they could complete the review of the 2022 financial statements again next year. We also need a motion to approve these two members to conduct the 2022 review.

Budget for 2022

The attached budget forecast for the year 2022 shows revenues of \$2,410.00 with corresponding expenses for the same amount, resulting in no net earnings or loss for budget purposes.

We need a motion to approve the 2022 budget.

Reserves for the period ending December 31, 2021

Reserves are created to provide funds for use at a future time, for non-routine events or purchases. They must be for reasonable purposes, and must be used within a reasonable timeline. These reserve amounts are calculated and set up using national regulation and Canada Revenue Agency not-for-profit (NFP) laws and are a way to manage our NFP status. A new regulation was established in 2021, at the National level, allowing branch executives to determine what reserves are needed. Reserves are then presented as information at the annual AGM.

As at Dec 31, 2020, reserves totaled \$3,513.50. Additional surplus funds in the amount of \$2,486.50 were set up as reserve funds for the period ending Dec 31 2021, by the executive, to provide funds for various future activities. The attached Reserve Template represents the various reserves totaling \$6,000 for the period ending December 31, 2021.

In the fall of 2022, surpluses will be reviewed by national office and funds that are not allocated will be transferred to national office reserve funds, to ensure that the association as a whole maintains its Not-for-profit status with the Canada Revenue Agency.

Webinars and Meetings

Since the 2021 AGM, I attended the following meetings/webinars:

- Zoom Apr 8/2021 – “2021 Political Outlook” hosted by Joane Miron, Linda MacDonald with guest speaker John Dalcourt. Mr. Dalcourt provided the minority government outlook. National office is getting ready for a potential federal election this year.
- Zoom Apr 15/2021 – “Moving Canada Forward” hosted by Sayward Montague and Joane Miron with guest speaker Colleen Flood (Professor and Director of the U of Ottawa Centre for Health, Law, Policy

and Ethics). The presentation focused on moving Canada towards national standards in long-term care and paths toward older adult care transformation in Canada.

- Zoom May 19/2021 – “How to Retain More Members Through Renewal Calls” hosted by Joane Miron, Patrick Bennard and Jeff Wolfson. Jeff delivered the presentation for this new initiative regarding membership retention, which was developed to address renewal issues noted during the COVID-19 pandemic. A new report is available to branches, through the CRM operating system, the first Monday of every month to facilitate the initiative. The initiative also focuses on making membership renewals easier and provides a consistent message. There is no pressure for the branches to use this.
- Zoom May 28/2021 – “BC/YK District Advocacy Meeting” hosted by the provincial leadership team with Sayward Montague, Director of Advocacy from National Office attending. Agenda:
 - ◆ Update on Reach 338, branches continue their efforts to reach out to MPs.
 - ◆ Planning continues for a potential federal election this year continues.
 - ◆ It’s the hope that COVID restrictions will ease and that Remembrance Day and fairs events will happen.
 - ◆ Each branch was asked to give a brief update on their Reach 338 activity status.
 - ◆ COSCO conference is to be held virtually on Sept 27 and 28th. Leslie Gaudette attends.
 - ◆ National office meets with the Treasury Board sometime this week regarding the PSHCP and Sayward notes that they will bring up the Phoenix settlements for qualifying retirees at that time.
- Zoom Jan 28/2022 – Treasurers and Year End Procedures webinar
- Zoom Feb 9/2022 – Branch Treasurer Reserves and Surplus Funds webinar
- Will attend Zoom Mar 10/2022 – Direct Member Benefits and Branch Subsidies webinar

Advocacy Report

National Public Service Week (NPSW) June 13 to 19, 2021–

Once again, our branch took the opportunity to recognize and honor current federal employees for their service to Canadians. Due to the COVID-19 in-person event restrictions, we were limited to the following:

- Sent “Thank you for protecting the health and safety of Canadians” posters along with an email message to federal employers on June 11, 2021 asking them to distribute our message during NPSW. This poster also highlighted membership awareness, our local branch and was circulated to 12 federal departments.
- A personalized PG Thank You poster and message was also sent to Tracy Arrowsmith of the Union of Taxation Employees for posting on their Facebook page.

At this point in the pandemic, it is unclear if our branch will be able proceed with an in-person coffee break event similar to the one in 2019.

Reach 338 Advocacy Work–

Reach 338 is our national strategy to ensure that the National Association of Federal Retirees, our members and our key priorities are seen and understood by every single Member of Parliament in all 338 constituencies across Canada. Our branch was selected as one of the first 75 branches to participate in and implement this strategy.

The national strategic plan covers the period between July 2019 and June 2024. The 3 main goals are:

- 1) To advocate in the best interest of our members and seek to be recognized as a respected national voice supporting secure, healthy and dignified retirement for federal retirees and all Canadians;
- 2) To promote membership retention and growth;
- 3) To pursue organizational excellence at all levels of the Association.

Federal MPs -

In the fall of 2020, our branch was selected to reach out to its three MPs within our branch boundaries. Three members of our board met virtually with the three MPs to highlight our priorities as well as our long-term care and home care campaign.

With the call of the September 2021 federal election, National office initiated a federal election advocacy letter campaign. BC Branch 15 issue letters (with the assistance of the National office templates) to seventeen (17) of the various party candidates within our branch boundaries. Our letter elaborated on our Pharmacare priority as we have already placed a significant emphasis on the National Seniors Strategy, inclusive of long-term and home care in past campaigns.

On January 25, 2022, congratulation letters were sent via our new email (princegeorgebranch@federalretirees.ca) to the following MPs re-elected within our branch boundaries:

- The Honorable Taylor Bachrach MP, Skeena-Bulkley Valley
- The Honorable Todd Doherty MP, Cariboo-Prince George
- The Honorable Bob Zimmer MP, Prince George-Peace River-Northern Rockies

Provincial Candidates and MLAs via Email-

In January 2021, our branch concluded the BC Provincial Election Letter Campaign which started in October 2020. Congratulation letters were sent via email to the eight (8) elected MLAs within our branch boundaries.

This campaign highlighted our organization and its current key priority of older adult care. “Transforming health care in BC” was prepared by national office.

All initiatives undertaken are very well supported by national office. Letters, kits, reports and corresponding emails will be archived on the Branch laptop.

Member Contact Groups in Various Communities –

At our Sept general meeting we were joined by a member from Smithers. Our branch purchased a computer camera and microphone to facilitate out of town members to join us via Zoom when our meetings resume in person. We hope to also set up member groups for Smithers, Quesnel and Vanderhoof. One idea was to start in Smithers, restrictions permitting, to have Smithers members meet for coffee and join in the general meetings. Then we would expand this to Quesnel and Vanderhoof if there was enough interest.

Membership Renewals –

For those of you who are not on monthly pension cheque deductions / Dues Deduction at Source (DDS), forms are available on the national website for you to convert to, should you wish to do so.

Other -

2022 is the 60th Anniversary of the National Association of Federal Retirees. This year, we hope to host our general meetings in person, with a Zoom component and to host various member related/volunteer recognition activities (Restrictions and venues permitting).

Rose Bowker

March 7, 2022