

## National Association of Federal Retirees Prince George Branch BC15

### Treasurer and Advocacy Report AGM March 20, 2023 – Rose Bowker

After the March 14, 2022 AGM, I continued as the treasurer and the branch advocacy liaison. 2022 was somewhat challenging with some continued COVID-19 pandemic restrictions. Advocacy campaigns continued in electronic format.

#### Treasurer's Financial Report

##### Reserves for the period ending December 31, 2021

The Reserves Motion Template totaling \$6,000.00 with additional allocations for 2021 in the amount of \$2,486.50 was presented and approved at the March 7, 2022 executive meeting. Categories were reviewed as detailed on the reserve template for 2021. Reserves are adjusted as follows: add Special Events \$300; reclassifying 2020 Special Event \$1,198.81 to Recruitment (per National office) and top up to \$1,200; add Advocacy \$500; add IT & Equipment \$1,000; and top up 2020 Training to \$3,000 (an additional \$685.31 added to this 2020 reserve).

**The national office noted in our annual review that this template should have been approved by the membership at the March 14, 2022 AGM.** A regulation was established at the National level regarding reserves to allow the branch executive to determine what reserves are needed, to approve those reserves and to present them at the annual AGM. However, for the 2021 reserves, the branch by-laws needed to be amended to facilitate this process. This was a misunderstanding on my part.

**As a result, a motion to approve the 2021 reserves totaling \$6,000.00 as per the above noted categories and allocations was made and carried.**

##### Reserves for the period ending December 31, 2022

Our national office advised us to proceed with the presentation of the 2022 reserves at this AGM, as approved at our February 14, 2023 executive meeting. The attached Reserve Template represents the various reserves set up for the year ending December 31, 2022. These reserve amounts are calculated and set up using national regulation and Canada Revenue Agency not-for-profit laws.

This Reserves Motion Template totaling \$6,100 was adjusted by \$259.63 (IT & Equipment) to reflect the purchase of a printer during 2022 and additional allocations for 2022 in the amount of \$359.63. Resulting in an overall increase of \$100 to reserves. As at Dec 31, 2022, reserves balances are: Special Events \$400 (increased by \$100); Recruitment \$1,200; Advocacy \$500; Training \$3,100 (increased by \$100); and adjust IT & Equipment to \$900 (decrease by \$259.63 for printer purchased and increase by \$159.63). Motion to approve made by Marian Muir. Approved by consensus.

##### Annual Financial Statements (Balance Sheet and Earnings Statements attached)

For the year ending December 31, 2022 our branch financial statements were reviewed by Billie Sherwin and Hennie Cook. Finalized statements are as follows:

- Branch revenues totaled \$2,749.34; expenses \$2,522.12; for net earnings of \$227.22.
- Branch net assets total \$9,223.56 with a corresponding total equity of the same amount.

A motion to approve the December 31, 2022 reviewed financial statements was made and approved.

##### Reviewers for the Dec 31, 2023 year-end:

Billie Sherwin and Hennie Cook have indicated they were willing to complete the review of the 2023 financial statements again next year. A motion to approve these two members for the 2023 review was made and approved.

## Budget for 2023

The attached budget forecast for the year 2023 shows revenues of \$2,644.00 with corresponding expenses for the same amount, resulting in no net earnings or loss for budget purposes. Note the anticipated reserve spending in the amount of \$1,600.00!

A motion to approve the 2023 budget was made and approved.

## Webinars and Meetings

Since the 2022 AGM, I attended the following meetings/webinars:

- Executive meetings May 30, Sept 12, Nov 28, 2022, and Feb 14, 2023.
- General meetings / events June 13, Sept 19, and Dec 12, 2022.
- Feb 18, 2022 – Regional conference in Aldergrove, BC
- May 17-19, 2022 – District training conference in Abbotsford, BC
- Sept 2022 – PGCOS annual meeting
- Zoom Nov 15, 2022 PSHCP update
- Zoom Dec 1, 2022 Federal Budget 2023
- Zoom Jan 24, 2023 Year End Procedures webinar
- Zoom Feb 7, 2023 Direct Member Benefits webinar
- Feb 23, 2023 Regional District conference in Aldergrove
- Zoom Feb 28, 2023 Reserves and Surplus Funds webinar

## Advocacy Report

### *National Public Service Week (NPSW) June 12 to 18, 2022 –*

Once again, our branch took the opportunity to recognize and honor current federal employees for their service to Canadians via an electronic campaign. We issued the following:

- Sent “Thank you for your service to Canada. From one generation to another.” Posters in an email message to federal employers on June 10, 2022 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.

For 2023, our branch will plan to celebrate NPSW once again.

### **60<sup>th</sup> Anniversary of the National Association of Federal Retirees**

This year marks the 60<sup>th</sup> Anniversary of the National Association of Federal Retirees. We plan to celebrate this milestone. Some of the historical accomplishments of the Association are:

- 1963 - The association (Federal Superannuates National Association) was established due to the need for changes in pensions.
- 1973 – Years of consistent lobbying by the Association results in full pension indexation.
- 1983 – Compensation restraint legislation imposed on public sector pensions, Association gains an additional 0.5 % for federal pensioners.
- 1999 – Challenge the government’s appropriation of a \$30-billion pension surplus.
- 2000 – The Association is officially recognized as one of the three parties governing the PSHCP.
- 2001 – Association advocacy efforts lead to the creation of Pensioners’ Dental Services Plan.
- 2016 – the Association successfully lobbies against Bill C-27, dangerous legislation that would put pension security at risk. The legislation never passed.
- 2019 – After calling for a dedicated voice for seniors in the federal government for years, the Association sees the creation of a new cabinet role – seniors minister.

- 2022 – The Association’s hard work at the negotiation table pays off, and Treasury Board approves the proposed PSHCP renewal deal.

### 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 recognized 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 three 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.

The Association continues to press the government to develop a national senior’s strategy and a Safe Long-Term Care Act, investing in and implementing pharmacare, supporting caregivers, enacting equitable outcomes for veterans, ensuring secure retirement incomes.

### 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, our 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

On March 8, 2022; Deb N and I met for coffee with MP Bachrach (Skeena-Bulkley Valley). Discussions focused on our advocacy for long term and home care priorities. There may be opportunities in 2023 to meet with MPs.

### 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 our national office.

In 2023, there may be opportunities to meet with MLAs.

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

**Member Contact Groups in Various Communities –**

During 2022 general meetings, we were joined by a few members from Smithers via Zoom. Reserve funds were set up to allow for outreach to Smithers and other areas within our branch boundaries within the next couple of years.

**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 -**

- The phone committee is Marilyn Hinton Sutherland and Rose Bowker. If you'd like to be on the reminder phone list, please let us know.

Rose Bowker

March 20, 2023