

# Currently Speaking

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## PRESIDENT'S MESSAGE



Dear membership,

I hope this finds you well. I am still excited about what happened at our Annual Meeting. It began with our Guest speaker, Susan Swackhammer (ETFO First Vice President) delivering a speech on the importance of this fall election. Susan was around during the tough political climate in education under Mike Harris. She recounted some emotional stories that I think touched some of our younger members. She also talked about the importance of getting involved. We need to talk about the ETFO political platform, which I highlighted in our previous newsletter. I will get copies out to you in our September newsletter. We need to get out and vote and encourage family members to do so as well. ETFO supports the Liberal Party. Provincially they stand for better public education. I agree and will be supporting the political effort of the Liberals. Unfortunately, Susan couldn't stay with us for the rest of the evening. She had an important pension meeting in Toronto.

Once the minutes from the previous meeting were read by Donna Henderson, we launched into the election part of the meeting. I was truly impressed with the speeches. The eight members who spoke did so with passion about why they wanted to get involved and why they would be the right person for the job. I loved them all! We only had seven positions for those eight members. We decided that the eighth person would be brought on board as a member at large to attend all the executive meetings for the purpose of being mentored by executive members who stepped down to make room for the newest members.

Here is your executive: Andrew Aloe - President, Marina Howlett - Vice President/Chief Negotiator, Donna Henderson - Secretary, John Ritchie - Treasurer, and Barb Walkey - Collective Bargaining/Executive Liaison. Ted Pritchard and Ralph Rainford both stepped down because they felt they wanted to give our younger members an opportunity for leadership and growth. Sounds to me a lot like what many of our retired teachers have done in the

past. That is one reason we value them on our occasional teacher list. They have provided an opportunity for our younger members to get full-time employment. Your executive at large is Julie Birken, Jacquie Gray, Charlene Martin, Rob Robson, Ruth Tomlins, Carol Waffler and Bea Yeung. Mary-Kathryn Jones has agreed to be mentored by the executive. She really wants to get involved. So there is your new executive for the 2011/2012 school year. I am very excited to work with all of them. Together we look forward to serving you.



After John Ritchie's budget report and Julie Birken's professional learning report, I gave my president's speech. I recognized the guests at our Annual Meeting: Tamara Reso, President of the Upper Grand ETFO Teacher Local; Gundi Barbour, Vice President of the Upper Grand ETFO Teacher Local; Judy Cutts, President of the Waterloo ETFO Occasional Teacher Local; Skip Reeves, President of the Simcoe County ETFO Occasional Teacher Local; Anne Smith, who is responsible for producing our newsletter and other documents; and Jeff Pearce, our Johnson Inc. representative.



Following this, we had our musical talent, Olivia Borkosky, who performed three songs, two of which were her own creations. She had such beautiful depth and imagery in her songs. She also did a Leonard Cohen cover, "Hallelujah." Her voice was incredible and carried easily across

the room. She played her ukulele. I loved it so much I have asked her to come and perform for us again.

There are two articles of importance to read in this newsletter. First, Marina has written about the recent updates by the Pension Partnership regarding your contributions and your pension. Included is the OTF communiqué which we printed off from their website. The other important piece is about LTO postings and some helpful hints on how to apply. Please read those as they are extremely important to you.

Have a well deserved restful summer!

**Andrew Aloe**

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## PROFESSIONAL LEARNING

We had a great turnout for the Smart Board training which was presented by Rob Robson and Toby London. Thirty eight members showed up for the Daily Five Workshop. I have had several members say they couldn't make it. The presenter wants to do three more in the early part of the school year next year. Included will be the café workshop. We will keep you posted. Also look for Tribes training this summer. The date set for the Tribes is August 9<sup>th</sup> till August 12<sup>th</sup>. We are working to finalize that workshop. We will provide details when they are firm. In the meantime mark your calendars. ETFO has on-line AQ courses which are great and affordable. I have completed two of those courses myself. Also offered by ETFO are the summer academy courses. These are affordable and many members tell me they are very worthwhile. I just want to mention the great work Julie Birken has done with Professional Learning this year. She is already enthusiastic about next year. She is planning to get your input via a survey so when that comes out to you take time to fill it out because that will be the basis for what we offer to you next year.

## UGOT WELCOME BBQ

We are planning to have the welcome barbeque at the Marden Centre on the first Day of School. That will be on September 6<sup>th</sup>. It is a chance for you to meet your new executive, have a great meal, relax and enjoy meeting

fellow O.T.s. I think this might be a good opportunity to get some mentoring. More about that later. So come on out and have some fun. I will email everyone to give details.

## VIOLENCE IN THE WORKPLACE

The teacher Local did an anonymous survey with their teachers. For the full report go to their website [www.ugetfo.org](http://www.ugetfo.org). Of the 406 teachers surveyed one fifth indicated that they were physically assaulted, harassed or threatened with physical harm within the last two years. These typically happened within the school. Of those, 99% indicated that a student hit, pushed, physically assaulted, or otherwise physically attacked them and 87% said a student threatened them with physical harm (orally, in writing, or otherwise). This is written with permission from Doug Cook of UGETFO.

A violent incident happened to one of our members. Here is what happened, in her own words. We have kept the names out to insure privacy.

*An altercation between 2 students occurred where one grabbed the collar and throat of another student. After I intervened, and successfully separated the students, one of the students attempted to bite me (unsuccessful), and kicked my legs. I was not injured physically in the incident, but it was upsetting for me, as I have never experienced anything like this before. So many thoughts race through your mind, especially concerns for the safety of all students and myself.*

*For the process - I was given a form to complete (I can't remember the exact title of it, but it was a something like School Violence Incident Form). I had to record the names of the students involved, where the incident occurred, what was happening at the time, and the date and time. I then had to go over a checklist on the form of what did or did not occur (i.e. student under influence of alcohol [no]). Because the form did not actually require a detail of the incident, I also wrote a report detailing everything I remembered from the incident. The incident happened outside within the last 5 minutes of school, so I filled out the paperwork after school, almost immediately after the event. I am not certain on what happened with either student. I was quite upset after the incident, but the staff of the school was very supportive, and the principal was quite helpful. The principal contacted me the next day to go over details of the event again and to offer advice for future incidents.*

As occasional teachers, I feel we are vulnerable to these types of situations because we are not aware of past situations of violence and issues between students. We must be very careful. When something like that happens we must report it to the principal and a violent incident report must be filled out. We are not privy to the follow up, but by law, we are required to report the incident. If an incident occurs and you have reported it ask the principal for the chit so you can keep it in your file as proof that you reported the incident. You have done your due diligence. I would also suggest you write down what you remember for your own records. Please keep this in a safe place for privacy reasons.

## APPLYING FOR LTO POSITIONS IN THE WORKPLACE

In our collective agreement, effective September 1, 2011:  
16.02

b) Provided that three or more Occasional Teachers whose names are on the Occasional Teacher List apply for a Long Term Occasional teaching assignment and are qualified for the position, the following shall apply. Only those Occasional Teachers whose names are on the Occasional Teacher List shall be hired for long term occasional teaching assignments provided that they have the required qualifications for the position and have noted on the application that he or she is currently on the Elementary Occasional Teacher List and is available for work.

What this means is that at least three occasional teachers from the list must apply and be qualified for that position, and those LTO jobs must be hired from the list. Should only two people apply from the list then a principal may hire outside of the list. I encourage you to apply for as many LTO assignments as you are qualified for. If the LTO is filled from someone other than off the list then c) applies:

c) An Occasional Teacher in a long term occasional teaching assignment who was not previously on the Occasional Teacher List shall be added to the list upon conclusion of the assignment. In the event that this would result in the cap on the List being exceeded, the List shall be allowed to remain above the cap until it is reduced through attrition.



# ELEMENTARY LONG TERM OCCASIONAL TEACHER HIRING PROCESS

**Effective June 30, 2011**

Elementary Long Term Occasional Teaching Assignments will be posted on:

- First Class
- UGDSB-Website

Indicating that only those who are on the current Elementary Occasional Teachers` List may apply.

Only those who are on the current Elementary Occasional Teachers` and qualified for the position will be considered.

Ad is posted for (3) school days or four (4) calendar days in the summer.

Candidates must indicate in their covering letter that they are a current member of the Elementary Occasional Teachers` List.

Resumes must be sent by fax or hand delivered to the school.

## TIPS

Please note the time frame for applying and the instructions on the posting.

Indicate on your covering letter, on the first line, that you are on the Occasional Teachers` List and that you are qualified for the position.

Example: If it is a Special Education position, you need to indicate in your covering letter that you have Spec. Ed. Part 1 qualifications as recorded on your OCT certification of qualifications.

Be sure to include your OCT certificate with your application!

Good luck!

## PENSION CONCERNS



I attended the Annual Meeting of the Ontario Teachers' Pension Plan Thursday, April 7, 2011. The investment fund performed well beyond expectations in 2010 earning an impressive 14.3% rate of return (4.5% above the standard market benchmarks). Net assets rose from 96.4 billion in 2009 to 107.5 billion in 2010. Despite strong investment returns, the plan has a \$17.2 billion funding shortfall (a slight increase from \$17.1 billion in 2009). The pension payout was \$1.8 billion more than the amount members and the employer contributed last year.

A funding valuation for the Ontario Teachers' Pension Plan must be filed with the Financial Services Commission of Ontario (FSCO) every three years. The next mandatory filing for the OTPP will be January 1, 2012, but the partnership (OTF and the Ontario government) may determine to file this year's valuation prior to the 2012 deadline. The filing process will be completed only if the Partners determine it is in the best interest of Plan members. Further information will be provided as decisions are made.

Funding challenges will continue and the Partners must take steps to remove the funding shortfalls no later than 2012 in order to file a balanced funding valuation with the pension regulator (FSCO).

To resolve funding shortfalls, the OTF and Ontario government can:

- increase contribution rates;
- invoke conditional inflation protection for pension credit earned after 2009;
- reduce pension benefits that members will earn in future years; or
- adopt a combination of these options.

The Sustainability Work Group is working with the Partners to find the right balance of pension benefits, contributions and investment expectations to keep the plan financially healthy for all generations of plan members. A guiding principle of pension plan stewardship is that each generation should contribute the right amount to pay for the benefits they receive. However, given the increase in longevity over the past 25 years, this balance has become impossible to achieve.

When interest rates remain low, it takes an increasingly larger investment in the pension fund to generate the

amount required in the plan for future retirees. In 2000 the amount required to generate a \$40 000 pension was approximately \$650 000; in 2011 the amount has increased to approximately \$975 000. There is a limit to how much working teachers and the government can be expected to contribute; therefore other solutions must be found. The pension partners must make difficult but important decisions that are fair to current and future generations of teachers.

The partners must make informed decisions and develop a long-term perspective to bring the fund into balance to ensure the pension guarantee to all future retirees.

OTF hosted a Pension Meeting for all teacher affiliates (ETFO, OECTA, OSSTF and AEFO) on June 3, 2011. The following information was provided:

- OTF and the government which sponsors the Teachers' Pension Plan have agreed to some changes to the plan to address the \$17.2 billion funding shortfall. These changes include:
- A 1.1% contribution rate increase for working members phased in over the next three years.
- Slightly smaller annual cost of living increases for teachers who retired after 2009.
- Recognizing the current contribution rate as the permanent base rate.

The Teachers' Pension Plan Board also agreed to increase the rate of return assumption in the 2011 funding valuation to 3.25% from 3.15%. This move will reduce the size of the shortfall.

These proposals are subject to the final approval by OTF and the government later this month, June 2011.

A more complete report will be provided in the September newsletter when all the proposed changes are finalized.

Marina Howlett

### U. G. ETFO Occasional Teachers' Local

President:	Andrew Aloe
Vice President:	Marina Howlett
Treasurer:	John Ritchie
Secretary:	Donna Henderson
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# COMMUNIQUÉ



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# PENSION UPDATE

## 2011 Valuation Discussions

### THE ONTARIO TEACHERS' PENSION PLAN HAS LOTS OF MONEY IN THE FUND, BUT...



Each year, an independent actuary prepares a financial assessment of the Ontario Teachers' Pension Plan based on best-estimate assumptions. This "valuation" examines Plan assets and liabilities, projecting 70 years into the future. The Partners—the Ontario Teachers' Federation (OTF) and the Ontario Government—must then decide whether to "file" that valuation with the regulators. To file the valuation, the Plan must be fully funded, that is, without a deficit. Legally, public pension plans must file a valuation at least every three years showing that they are fully funded. Filing can occur sooner, if the Partners decide it is in the best interest of the members.

valuation for January 1, 2011 has been presented to the Partners, showing a \$17.2 billion deficit. In determining whether we should file this year's valuation with the regulators or wait until next year, the Partners are considering projections for next year's valuation and the measures that would have to be implemented in order to file a valuation this year.

The future security of the jointly sponsored Ontario Teachers' Pension Plan (OTPP) is not in doubt. Featuring matching contributions from the Ontario Government, it is a well-run plan with net assets totalling \$107.5 billion as of January 1, 2011. Because it is a defined benefit plan, the OTPP promises a certain level of income for as long as pensioners (or their eligible survivors) live. A complex actuarial process is necessary to determine whether today's contributions and investment income will fund tomorrow's pension promise for current contributors.



The Partners last filed the 2009 Valuation. They have the option to file early for January 2011, or to wait until the mandatory filing required for January 2012. The preliminary

### THE ROLE OF THE SUSTAINABILITY WORKING GROUP (SWG)...

This tri-partite working group, consisting of representatives from OTF, the Government, and Plan management, was formed in 2009 to study



# COMMUNIQUÉ



May 19, 2011 Volume 16, No. 3  
Page 2

ways to keep the Teachers' plan secure and affordable well into the future. The SWG agreed to employ a series of processes to encourage transparency, accountability, and improved communications. These include:

- a review of the rate of return assumption, used to estimate the future cost of teachers' pensions;
- formalized annual consultations among the parties; and
- a review of all options, including possible changes to contribution and benefit levels, should a valuation show a projected funding shortfall.

In the filing of the 2008 Valuation, the Partners agreed that, as an option to deal with potential future shortfalls, contribution increases could be used up to a maximum of 15%. As a second option, conditional inflation protection for pension credit earned after 2009 was introduced. In a deficit situation, the Partners can also decide to make changes to other pension benefits that members will earn in the future, or adopt a combination of these measures to bring the Plan into balance.

## WHAT IS HAPPENING NOW?

The Partners and Plan management are attempting to reach consensus concerning the risk assumptions (longevity, interest rates, investment returns, etc). These assumptions determine the Plan's future liabilities and assets. The assets must at least equal the liabilities to ensure its viability for current and future contributors. The Partners and Plan



are considering whether prudent adjustments to these assumptions can mitigate the \$17.2B deficit reported by Plan management in its Annual Report released on April 5, 2011. Ultimately, the Partners will decide whether it is in the best interest of plan members to file a 2011 Valuation. However, should the Partners decide not to address the deficit and file the 2011 Valuation, it may be more difficult to balance the Plan for a required filing in 2012.

## WHAT MAY HAPPEN?

If the Partners and Plan agree to file a balanced valuation this year, you will be informed of the possible changes to your pension, how these changes resolve any funding shortfall, and how they will be implemented.



**We will continue to keep you informed as discussions continue.**

**For further information visit [fundingyourpension.com](http://fundingyourpension.com) or contact OTF's Director of Pension & Economic Affairs at (416) 966-3424 or 1-800-268-7061**

