

CAERA (now CURAC) Conference May 31, 2002  
Victoria College  
University of Toronto  
In Association with Congress 2002, Humanities and Social Sciences  
Federation of Canada

PROCEEDINGS

Despite a severe early-morning summer thunderstorm, the Conference opened on schedule with a well-organized team of volunteers efficiently handling registration and other preparations. Dr. John Dirks, conference chair, initiated the proceedings promptly at 9am.



Noting that some 85 registrants from more than 15 different universities were in attendance [updated data shows 19 universities were represented], Dr. Dirks began by acknowledging the generous financial support received from the Association of Retired Faculty at York University, Cassels Brock and Blackwell, Eckler Partners, the Office of the Provost University of Toronto, RALUT (Retired Academics and Librarians of the University of Toronto), Ryerson University, Victoria University, the York University Retirees Association, and the University of Toronto Alumni Association.



After giving Germaine Warkentin, Local Arrangements Coordinator, time to review the logistics of the day's activities, Dr. Dirks went on to outline the various elements of the program, emphasizing the importance of the key

objective of the conference which was to determine whether there was indeed a need for a national retirement organization and, if there was, to set in motion a process which would lead to a revitalization, possible renaming, and restructuring of the existing "virtual" body, CAERA. He then introduced Professor Peter Russell who proceeded to chair a panel discussion devoted to this key topic.

In his opening remarks Professor Russell thanked those who had helped organize and those who had come to participate in what he predicted would prove to be "a very memorable day". To provide some background he read from a letter he had just received from Professor Bramwell who had chaired the founding meeting of CAERA in Calgary in 1994 and who had attended subsequent annual meetings at the University of Quebec, Ottawa, Carleton, Brock, Memorial and most recently at the University of Alberta in 2000 in an effort to promote the development of a functioning national organization of academic retiree groups. Professor Bramwell in his letter had expressed regret that he was unable to attend the present gathering but sent his enthusiastic support for what it was attempting to achieve. The "one thing that is absolutely clear", Professor Bramwell assured Peter, is that you need a real organization, not just a virtual presence in cyberspace, but a real organization to generate and implement the programs and policies of academic retiree groups nationally.

Introducing his panel, comprising Tarun Ghose (Dalhousie University), John Mundie (University of Manitoba), and Don Russell (University of British Columbia), to discuss "The Need for a National Retirement Organization," Professor Russell acknowledged that it was "biased" since all those participating shared his belief that such an organization was needed. However, he assured those present that as in any good academic forum, expressions of alternative views, of which he knew there were some, would be welcomed. Academics, he noted, were very good at articulating negative views, at saying what should not be done — not spending a lot of money, not having a lot of meetings and so on. However, he urged, it was also important to get some positive views as well and he hoped that by the end of the day, these would prevail in respect of the matters at hand. He also acknowledged that members of most retirees groups, including the one he headed at the University of Toronto, were and would continue to be primarily concerned with local issues and that some members would question the value of being associated with a national body, and certainly with an international organization such as the Association of Retirement Organizations in Higher Education (AROHE) which will hold its founding convention at Indiana University in Bloomington, Indiana, next October. Even so, he remained convinced, as a long-time federalist, that broader associations yielded benefits, often of a rather intangible nature, and often only over a period of time, and he believed that many retirees, especially in leadership positions in local organizations, would recognize the benefits for their own members of reaching out and being in touch with other groups of people who are trying to accomplish similar objectives.

Dr. Tarun Ghose, president of the Dalhousie retirees organization, then spoke, outlining briefly the nature of the local association at Dalhousie which, he emphasized, had a broadly inclusive membership comprising both academic but other retirees, before going on to set out his views as to why he supported the development of an effective national association of college and university retirees organizations.

He summarized what he saw as the appropriate objectives and functions of such a national body under three main headings: 1) Facilitating communication for keeping in touch with sister organizations, learning from one another's experience, creating and maintaining a central depository of information; 2) Assuming a "watch-dog" role for maintaining "best practices", informing constituent associations when and where "best practices" are ignored and supporting groups in their efforts institute "best practices"; 3) Research and discussion for identifying issues which concern college and university retirees nationally, providing a forum for discussing such issues, and supporting research to study such issues; 4) Interaction with other retirees' or senior citizens' organizations locally and nationally to identify issues which deserve our support by joint actions such as petitioning, lobbying, etc.; 5) Augmentation of fringe benefits by exploring and negotiating advantageous insurance plans for travel health insurance, dental care, extended prescription drug coverage, etc., noting that the size of our membership may facilitate such negotiations, negotiate the availability of reasonable accommodation for our members by accommodation exchange or through colleges or universities, negotiate access to college or university clubs and physical activity facilities at reasonable fees, negotiate the principles and general terms of post-retirement employment of retirees.

Dr. Ghose noted that while the two primary concerns of retirees from academic institutions relate to pensions and benefits and that institutional arrangements affecting such issues vary from province to province, and even from institution to institution, nevertheless there are some common themes (such as setting up standards of "best practices", extended coverage for prescription drugs, travel insurance and the like) which recur. Furthermore, while problems may differ, the best approach to solving them may be the same. He suggested that a national organization could act as a resource of information and could provide other types of help to local groups, for example by drawing the public's attention to such problems and informing other college or university associations about developing situations.

In the course of his presentation Dr. Ghose emphasized that a national organization had to be an association of associations, that its structure should be "real" rather than "virtual", and that it should have a small central committee acting for a larger national council of some kind as provided for by a formal constitution.

John Mundie explained that he had come to establish and lead what was still

a largely informal retirees organization at the University of Manitoba by way of raising support from retirees for the United Appeal campaign there. In tracing the subsequent development of the group he emphasized the importance of integrating all members of the university— faculty and staff alike — into the organization in order to get things done. He demonstrated how in their own case it was by drawing upon people, especially those about to retire, from the administration, the library, the athletic, computing and other divisions of the university that they had been able to acquire access to the facilities and benefits of use to their members. As for a national organization, Professor Mundie said he thought it was critical to have such a body and he used the example of their own efforts to find a carrier for travel (mainly travel health) insurance for their members. He also thought it important to know what is going on in different institutions so that in discussions with the local administration it would be possible to use such information in efforts to improve local arrangements. A national body, he suggested could also be helpful to groups such as his own which lacked a formal structure in moving on to develop one.

Another function of a national organization, Professor Mundie suggested, could be building bridges among retirees who had relocated. Noting that many retirees from the University of Manitoba now lived in places like Victoria and the Okanogan Valley, he suggested that arrangements might be made for them to have contact with local retiree organizations, such as those based at the University of Victoria, or Simon Fraser. Reciprocal relationships such as those enjoyed by members of faculty clubs might be facilitated through a national organization of retirees.

Don Russell of the University of British Columbia spoke of the growth of their organization and its close ties with the alumni association there. In this and other respects, such as their lack of involvement in local advocacy activities, the UBC group differs from most others, reinforcing the point made by other speakers about the diversity of retiree groups nationally. Nevertheless, one important role for a national organization, he suggested, would be in establishing a system of communications through which local groups such as his could keep abreast of developments elsewhere.

During the discussion which followed, a variety of issues were raised by speakers, some relating to particular local problems such as obtaining information from university administrations which, Peter Russell pointed out, showed how a national organization could be useful in helping local groups deal with such problems. While some expressed concern about various difficulties a national body would face, such as possible problems the great diversity of local groups might pose (differences in interest, inclusivity, degree of activism, differing relations with local faculty associations and so on). Plurality and inclusiveness, however, Peter Russell reminded the gathering, would be necessary principles without which it would be impossible to even imagine creating a national association. As for defining terms such as "college" which would be critical in determining eligibility for

membership in such a body, it was understood this would be beyond what was possible during a one-day conference and would have to be undertaken at a later stage in its organization.

Following a busy mid-morning coffee break at which much vigorous discussion among participants continued, John Dirks reconvened the meeting by asking University of Toronto Vice-President (Human Resources) Angela Hildyard to introduce Dr. Paul Davenport, President of the University of Western Ontario, who spoke on the topic, "Retiree-University Relationships at Canadian Universities: A President's Perspective". Dr. Davenport focused his presentation on the role retirees could play as a resource upon which universities could draw as they attempted to cope with the growing demands being made on them, particularly in the case of Ontario where such difficulties are particularly severe due to higher than average national rates of underfunding, especially in relation to universities in the US, and the enrollment pressures being generated by the "double cohort", the simultaneous arrival at university of two graduating classes of high-school students due to the phasing out of Grade 13 in the Ontario secondary school system. However, he also noted that there were trade-offs involved in utilizing retirees, what he referred to as the "balancing act" needed to both retain the asset of productive faculty while at the same time making room for a new generation and achieving an efficient allocation of scarce space and other resources. He noted a number of ways retired faculty could continue to work on behalf of the university by mentoring new faculty members, counseling students, working with international or exchange students, volunteering as ambassadors to the community and providing fund-raising and financial support. The formation of retiree groups across the country, often in response to pension and benefit issues, provided opportunities for academic retirees to preserve social and intellectual links which could also serve to support collegiality and continuing intellectual stimulation. They could also help promote the development of innovative programs such as computer education for seniors, the conduct of surveys to collect information on pension plan issues, and the creation of Web and other communications networks involving retiree groups and other organizations. He went on to provide some examples of personal contributions by some outstanding retired academics at Western Ontario to support his view that Canada's retired academics did constitute a valuable resource for their universities. He concluded by summarizing the ways other retirees could play an important role in the future development of all Canadian universities and could have a significant effect, through the development of national advocacy links on national policy toward higher education in this country.

Following Dr. Davenport's presentation Professor Michael Creal, a retiree from York University in Toronto, provided a lively and incisive commentary on Paul Davenport's presidential perspective by way of opening up a general discussion of the state of university-retiree relationships in Canada. Noting that his own post-retirement experience had been a very happy one due to the various benefits and amenities provided retirees at York University, and

his success in maintaining extensive collegial relationships there, he nevertheless had several points of concern to draw attention to: the many instances which had come to his attention of retirees feeling that once they became retired, they "dropped off the university radar screen," and were no longer regarded as being real members of the university community; that while the "official rhetoric was filled with warm phrases" the response by university administrations to retiree needs on practical issues was often at best "evasive". He also instanced some alarming examples of specific proposed changes in benefits and pension arrangements made by administrators at his own university which, if they had not been vigorously opposed, could have been seriously damaging to retiree interests. He concluded his remarks by observing that the relationship between retirees and their university really had to be a two-way street, asserting that, "what retirees can do for the university is evident, what universities are obligated to do for retired members of their own communities is an issue that cannot be avoided".

Angela Hildyard spoke briefly noting that since taking office last year she had been seeking ways to integrate retirees more fully into the active life of the university, for example by participating in a series of open forums on the pension plan initiated in response to RALUT's representations to the Business Board concerning the university's past failure to talk about the pension plan in general terms with the university community. She also noted that while the concerns of many non-faculty groups seemed to focus on fringe benefits and early retirement plans, apparently because they "wanted out of here", the concerns of faculty members tended to be different, since many wanted to continue their ongoing relationship with the university, as she herself expected to do when she reached retirement age. Recognizing this, she felt that university administrations like hers were getting the message and trying to find new, more effective ways to work with faculty retiree groups, even while acknowledging the existence of great tensions and difficulties involved in meeting sometimes conflicting objectives and the needs of different groups.

In the lively thirty minutes of open discussion following, participants provided a number of examples of bad treatment afforded retirees by university administrations, many involving pension and benefit issues, to which Paul Davenport and Angela Hildyard responded collegially and with good humour, maintaining an atmosphere which prevailed throughout the day. While many of the issues raised related to situations at specific universities, it became clear that there was a general concern with finding ways to clarify and assert retiree rights and thereby effect necessary and desirable changes in those situations. In this connection Peter Russell explained how one of the first actions taken by the newly-formed retiree group at Toronto, RALUT, had been to obtain at considerable expense a legal opinion clarifying the rights of pensioners with respect to the resolution of certain pension and pension surplus issues. On the strength of this, Peter asserted, retirees should not assume that they are "right-less" and that the sharing of such valuable

information would be one of the benefits of having a national retirees organization.



John Fraser, Master of Massey College, Speaking on, "The Value of Older Blood"

During the lunch break participants assembled in the venerable Alumni Hall of Victoria College enjoyed a witty, sensitively-crafted talk by John Fraser, well-known journalist and Master of Massey College at the University of Toronto, on the topic, "The Value of Older Blood". In his talk he explained the rationale underlying Massey College's inclusion of a number of very senior retired academics in the college's daily life and illustrated their role by referring to a number of outstanding examples of their continuing contribution to its intellectual and social activities.

Following lunch John Dirks reconvened the conference and introduced the first of three panels charged with examining specific retirement issues. Professor Ralph Winter of Acadia University chaired a panel discussion on pensions featuring a presentation by Professor Les Robb who outlined the steps through which, over a period of more than four years, a distribution of the pension surplus at McMaster University had been successfully negotiated. He was followed by Professor W.E. Glassman, who commented on the McMaster experience, noting how, while it was in many respects unique, it also reflected more universal issues common to situations in which defined benefit plans and surplus distribution conflicts were involved. He went on to review other experiences including that of his own university, Ryerson, where retirees had been successfully included in a surplus distribution scheme. His recommendation to retirees based on such experience was to become actively involved in advocacy efforts along with other employee groups, such as faculty associations, which were more likely than retirees themselves to have a place at the bargaining table, rather than pursue the alternative course of legal action to accomplish improvements in their pension arrangements, although in certain circumstances the latter, he conceded, while costly, might be the preferred alternative. During the ensuing discussion attention was given to the proposed changes in the pension distribution legislation in Ontario which RALUT and other retiree groups had been forced to respond to hurriedly last summer and which now, perhaps in part because of such responses, were apparently being reconsidered by the provincial government. Again it was suggested that such occurrences demonstrated the need for vigilance on the part of retirees and the benefits from organization and communication among retiree organizations. One speaker pointed out that while such issues were often, if not usually, of local

interest in substance, the approaches to dealing with them were of more general interest — which again pointed up the beneficial role that could be played by a national retirees organization in disseminating such information.

The second panel discussion of the afternoon, chaired by Alison Scott-Prelorntzos of the University of Alberta focused on benefits issues, the importance of which she emphasized by referring to the situation at her own university where continuing benefits for retirees were largely non-existent and where provincial government policies were promoting the erosion of general health care and other public benefits. Professor Howard Fink of Concordia University provided a broad overview of the kind of issues which arise in connection with institutional benefit schemes: major benefits such as pension benefits and health benefits and minor benefits such as access to library, recreational and internet facilities, parking, etc. Professor Fink emphasized the extent to which the former have been strongly affected by recent changes in federal and provincial government policies and he warned of the threat such changes pose for already retired faculty whose ability to protect themselves from their effects is so limited, as he illustrated by referring to recent experience in Quebec. He also noted that the widely-used consultant William Mercer provides universities with much information about benefits which, he pointed out, could usefully be shared among retirees organizations linked by a national organization.

John Hastings, chair of the benefits committee of RALUT, the retirees organization at the University of Toronto and a well-known authority on community health and health administration, then made a presentation in which he explored four areas of particular importance to retired people: money (pension) issues, with respect to which he emphasized the importance of retirees working with other groups to ensure that there is no further erosion of our existing publicly-funded programs upon which many rely for significant income support; medical benefits which, as is the case at Toronto, are generally good, but primarily designed to meet the needs of active rather than retired employees (he noted, for example, that the U of T plan does not cover chronic care provision in nursing homes nor the supplies associated with such care, hearing aids or eye glasses; preservation of existing statutory social support benefit programs (particularly housing which is a primary source of concern to older people); and voluntary support systems to help especially older retirees to deal with the problems of isolation, loss of opportunities for social interaction, difficulties performing the routine activities of daily life and so on. With respect to all four of these areas Professor Hastings emphasized the need for collective action, the importance of forming coalitions of advocacy groups, and the important role which could be played by a revived national retirees' organization, especially during a period in which a lot of "restructuring" of social policy is going on. He also proposed that a future project for a national retirees association could be the development of a model plan for retiree benefits.

The third panel of the afternoon, chaired by Germaine Warkentin of the



University of Toronto, explored the possibilities of defining certain “best practices” through which university-retiree relationships might be structured. In her introduction Professor Warkentin commented on the parallel between being in the first years of retirement and the first years of an academic career, both being periods of often stressful transition. With respect to the transition from active to retired status she read F.R. Scott’s poem, “On Saying Goodbye to My Room in Chancellor Day Hall”, which concludes with the poet accepting the loss of the accumulated reminders of his past academic life, choosing to see it instead as “I strip for more climbing” as he moves on to another stage in his life. For many academic retirees, Professor Warkentin reminded the meeting, their work of producing and transmitting knowledge does not end when they turn sixty-five, which led her to propose the question, “How can an organization like ours develop a policy that assists faculty retirees to remain active intellectual contributors to our universities? Would it be possible, she asked, to develop a code of best practices with respect to university-retiree relations which our universities would be ashamed not to adopt?”

Professor Warkentin then briefly commented on the kind of relationships observed at the University of Toronto, a large, research-oriented institution with a long history, noting how the practices there varied greatly from one department or college to another, having evolved haphazardly over a long period of time. This situation, she suggested, was often less than satisfactory and called for an effort to try to find ways of defining a more uniform set of standards which would apply to the way such institutions provided for the continuing needs of still active retirees.

She then introduced Eileen Goltz, a retired librarian from Laurentian University in Sudbury, Ontario, who provided a frank assessment of the kind of university-retiree practices she had experienced at quite a different kind of institution, a relatively new medium-sized university in a smaller urban center. The defining feature of such a situation, she suggested, was intimacy arising from the close personal relationships which evolved naturally in such an environment. Despite some important disadvantages, which she illustrated with colorful anecdotes, overall it appeared that being on a first-name basis with one another had proven to be beneficial for university-retiree relations there.

The final hour of the conference was taken up with the critical task of determining what the future of CAERA would be. Led by Peter Russell the discussion returned to the key questions of the opening morning session: Do we need a Canada-wide organization of university and college retiree association? What purpose and function could such a national organization serve? The first of these questions was answered strongly in the affirmative following a brief discussion and review of the day’s proceedings. It was agreed that a national organization was needed and that it should have a much more substantial structure than CAERA — which had relied upon a virtual structure which had proved ineffective. With respect to defining the

purpose and function of such a body, Peter Russell noted that a consensus document posted on the Web had already been extensively discussed and that a good deal of agreement had begun to emerge with respect to the basic structure of a new national organization. Because of this it appeared feasible to try to establish its broad features in the limited time available. The following points were then briefly discussed and agreed:

1. Membership: It was agreed that the revived national organization should be an "association of associations", with membership open to college and university retiree groups whose own membership is limited to retired faculty, as well as those whose membership included retired non-academic staff and to those affiliated with unions or some other associations, such as alumni organizations. Further definition of terms such as "college" which could affect the scope of membership would be a responsibility of the steering committee, although it was agreed that membership would be restricted to groups associated with post-secondary institutions. It was noted that a number of university retiree associations in Quebec were in the process of forming a confederation of their own and that while individual groups in Quebec would be welcome to join the new national body, there was also a strong desire to maintain a cordial relationship with whatever new Quebec organization came into being. It was also suggested that the new national body should attempt to be as bilingual as possible with membership open to retiree associations from French language and bilingual institutions anywhere in Canada.
2. Name: It was agreed after some discussion and a straw vote that the name of the revived national organization would be College and University Retiree Associations of Canada, CURAC, so as to reflect the inclusiveness of the new body.
3. Purposes: It was agreed that establishing a national communications network would be of primary immediate importance. Advocacy, consensus-building, and research were also discussed as possible purposes to be incorporated into the new organization's constitution.
4. Executive: Rather than attempt to set up a formal executive at this time it was agreed to establish a steering committee made up of volunteers who would undertake such tasks as chairing a planning committee for next year's meeting, maintaining the membership network and the web-site, designing a constitution, serving as treasurer, building regional networks, conducting a national survey of university retiree associations, liaising with other organizations (such as CAUT, the Quebec retirees association currently being formed, seniors' organizations), soliciting news or think items for the web-site, developing a policy position on a matter of local or national concern, etc. John Dirks had agreed to be interim chair of the steering committee, with Peter Russell serving in his place during absences if necessary. A preliminary meeting of those willing to serve on the steering committee was scheduled for the following morning at 9am at Massey College.

5. Governing Body: It was agreed that the nature of the council or other general body to which the CURAC executive would be responsible was a matter to be determined in the course of designing the constitution.
6. Secretariat: It was agreed that some administrative assistance would be required to support the work of the executive and that funds would be required to make this possible. It had been suggested that a membership fee of \$50 or \$100 per association might provide sufficient funds for these purposes. Margaret Knittl of York offered to draft a suggestion paper on the subject in which she would consider the possibility of a fee arrangement which would take into account the number of members in an organization among other options.
7. Annual Meeting: It was agreed that the next annual meeting of CURAC would be held in conjunction with Congress 2003 in Halifax, but that subsequent meetings would not necessarily be associated with the Congress. Dr. Ghose, President of the Dalhousie Pensioners Association and Professor Alisdair Sinclair agreed to head a conference organizing committee for the 2003 meeting and indicated they would work to involve other Atlantic region retiree associations in its planning.
8. Communication: It was agreed that in the absence of a central administration the steering committee would send draft material for consideration by local organizations or other information by e-mail to a designated person associated with each organization who would be responsible for distributing it as hard copy or by whatever means were most suitable to the local membership.
9. Constitution: It was agreed that drafting a constitution would be function of the steering committee and that it would be presented for ratification at next year's meeting. It was also agreed that the matter of incorporation should be looked into.

After a brief summary of the day's accomplishments, John Dirks adjourned the meeting and participants proceeded to a lively and well-attended reception at Massey College.