



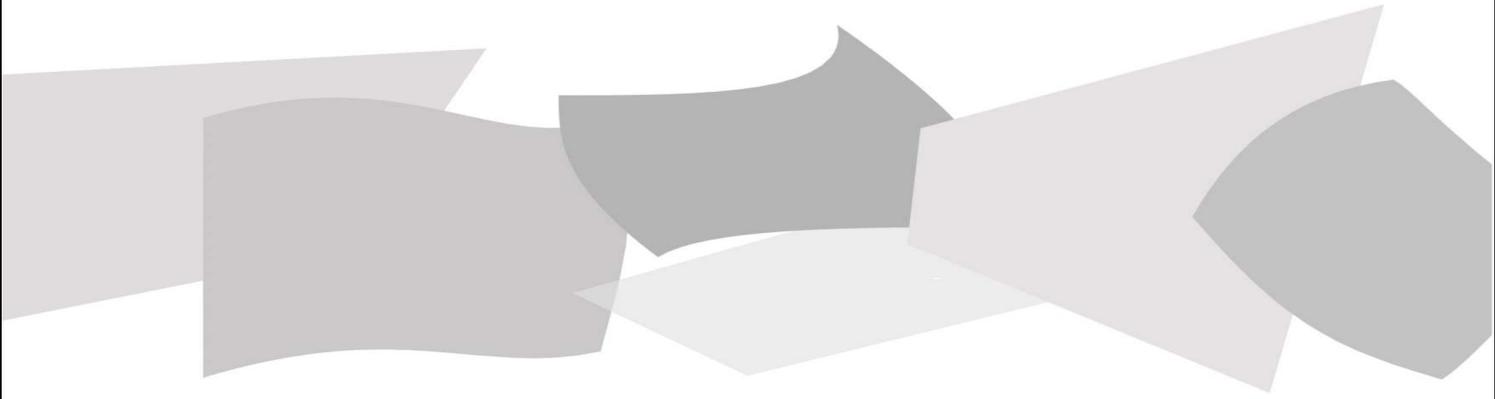
National Association of Federal Retirees Association nationale des retraités fédéraux

OTTAWA VALLEY

**National Association of Federal Retirees
Ottawa Valley Branch**

Annual Report

For the year ending December 31, 2018



2018

April 17, 2019



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**NATIONAL ASSOCIATION OF FEDERAL RETIREES
ASSOCIATION NATIONALE DES RETRAITÉS FÉDÉRAUX
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Notes:



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President's Report

Welcome to the 2019 Annual General Meeting for the Ottawa Valley Branch. The National Association of Federal Retirees continues to be strong because of the excellent guidance of our National Board of Directors, the work of the Branches across the country, and all the volunteers who help to guide the Association at the local, regional and national levels. Of course our real strength comes from the membership, who support us with their membership dues. The Preferred Partner program continues to be a very successful feature of the Association by offering discounted services to our members, and supporting the Association at the national level.

This year was a difficult one for the Branch. As most of you know, we lost our Branch Treasurer Ed Chenard in October. He is missed as an active volunteer not only by the Branch, but by a number of other organizations that he was active in. Our thoughts and condolences go out to Muriel and the rest of Ed's family.

I was slowed down during the summer by a growing heart problem, resulting in a heart procedure in August to insert stents. While the procedure is "minimally invasive", it took me a while to really feel back to normal.

We also lost our Branch Services Coordinator Steve Troy, in November. Steve had been the President of the Ottawa Branch prior to stepping down and taking on the BSC job. Steve attended our AGM last April. We thank Bill Turner from the Algonquin Valley Branch for taking over the BSC role.

As some of you may know, we had planned to have a Fall social event last October, however there was a low response to it and we decided we would have to cancel the event. There are probably a few reasons why it fell through, and we are going to re-group and try again this year. We have not finalized the plans yet, and would appreciate any suggestions you may have regarding a format, or type of entertainment or presentation. New ideas are always a big help!

One of the big tasks the organization needs to do is be active in advocacy, to support our efforts to protect and enhance benefits to retirees and seniors in general. This is performed on a National level by the National Board of Directors, assisted by staff at the National Office. Branches are also encouraged to participate in this effort locally, to advocate directly with local politicians and political parties. Our job is to advocate for seniors, on a non-partisan basis, looking at the issues that are important to our community and our members. The Branch would like to strengthen our advocacy role, as it is important to the well-being of both current and future members. If you are interested in this kind of activity, have some confidence speaking



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with local politicians, or would just like to learn more about how you could help in the future, please let us know.

Every year, the Branch lays wreaths at the various Remembrance Day ceremonies within our Branch territory. This includes Perth, Smiths Falls, Lanark, Carleton Place, Almonte and Arnprior. We don't always have someone from the Branch to lay every wreath, and have to ask the local Legion to do that for us. If you would be interested in volunteering for one of these ceremonies, please let us know.

I'd like to thank the other members of your Branch Executive for all their work and help over the last year, to keep the Branch running. I temporarily took over as Treasurer after we lost Ed, and want to thank Roy O'Halloran for agreeing to assume the Treasurer role going forward.

Steve Fahie
President, Ottawa Valley Branch
National Association of Federal Retirees



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**STATEMENT OF MEMBERS EQUITY
AS AT DECEMBER 31, 2018**

	Dec. 31 2017	Dec.31 2018
ASSETS		
Cash in Bank – Current Funds	\$ 16,107.92	\$ 13,306.19
Reserve Funds		
Emergency Defense of Benefits Fund	\$ 3,000.00	\$ 3,000.00
Building and Support Fund	\$ 4,000.00	\$ 4,000.00
Volunteer Training Fund	\$ 2,000.00	\$ 2,000.00
Special Events Fund	\$ 3,000.00	\$ 3,000.00
Total Reserve Funds	\$ 12,000.00	\$ 12,000.00
Other Assets		
2018 Q4 DDS Dues Receivable		\$ 2,996.19
TOTAL ASSETS	\$ 28,107.92	\$ 28,302.38
LIABILITIES		
Payable to National Office	\$ 2,320.16	
Future Years Dues Received		\$ 938.26
Other Expenses Payable		\$ 399.45
TOTAL LIABILITIES	\$ 2,320.16	\$ 1,337.71
Members Equity - Beginning of Year	\$ 24,465.33	\$ 25,787.76
Excess Revenue over Expenses	\$ 1,322.43	\$ 1,176.91
Members Equity, End of Year	\$ 25,787.76	\$ 26,964.67
TOTAL LIABILITIES AND MEMBERS EQUITY	\$ 28,107.92	\$ 28,302.38



**INCOME AND EXPENSE STATEMENT
FOR THE YEAR ENDED DECEMBER 31, 2018**

	2017	2018	Budget 2019
INCOME			
DDS* Membership Dues	\$ 10,045.38	\$ 9,126.03	\$ 10,000.00
Non-DDS* Membership Dues	\$ 2,321.89	\$ 4,308.42	\$ 2,500.00
Total Dues Received	\$ 12,367.27	\$ 13,434.45	\$ 12,500.00
Fall Luncheon Event	\$ 928.00		\$ 900.00
Other Income - Interest	\$ 46.61	\$ 101.46	\$ 100.00
Misc Income			
Total Income	\$ 13,341.88	\$ 13,535.91	\$ 13,500.00
EXPENDITURES			
Administration	\$ 1,407.08	\$ 695.26	\$ 1,000.00
Travel	\$ 152.38	\$ 126.50	\$ 200.00
AGM Costs	\$ 5,138.58	\$ 5,102.81	\$ 5,200.00
Monthly Meeting Costs	\$ 1,530.43	\$ 1,642.79	\$ 1,600.00
High Speed Internet	\$ 748.60	\$ 848.60	\$ 850.00
Public Relations	\$ 457.49	\$ 826.95	\$ 600.00
National Annual Members Meeting	\$ 500.00	\$ 1,821.55	\$ 1,800.00
Bank Charges	\$ 63.40	\$ 46.26	\$ 50.00
Fall Luncheon Event	\$ 2,021.49	\$ 200.00	\$ 2,200.00
Office Equipment		\$ 1,048.28	
Total Expenses	\$ 12,019.45	\$ 12,359.00	\$ 13,500.00
Total Revenue over Expenses	\$ 1,322.43	\$ 1,176.91	\$ -

* DDS = "Dues Deducted at Source"



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Auditor's Report

**To: Members of the Board
National Association of Federal Retirees
Ottawa Valley Branch**

**Subject: Annual Audit of Financial Records and Statements
for the Year 2018**

In accordance with my mandate I have examined the financial records and statements for the year ended December 31, 2018.

In my opinion, the records and financial statements have been prepared using generally accepted accounting principles and properly reflect the financial position of the branch.

The signing authority on both the Tangerine and Royal Bank accounts should be reviewed to ensure that two signatures are required for all transfers.

R.M. McClean

Apr 13, 2019



Membership Director Report – Steve Fahie

Total membership numbers are down a little bit again this year, however the numbers are still quite healthy. The National Office has been more aggressive in the last couple of years at finding old membership records that should have been cancelled, and removing them if they cannot be renewed. This provides a more realistic view of the Association's true membership numbers. The issue of membership recruitment and how to make more retirees aware of the Association, its role and its benefits still exists, since we do not have access to non-members information. You can help by making friends aware of our Association. If they are former public servants, members of our armed forces, RCMP or Federal judges, tell them about the Federal Retirees Association and how we are working to protect their benefits. Cost of membership is affordable for most, and can be spread out over the year by having dues deducted at source.

In February of this year, the Branch subscribed to the Branch Admin Program offered by our National Office. This program passes the task of billing membership annual dues to the National Office, for those people who pay annually. The National Office is well positioned to perform this task in an efficient and consistent manner for all branches. Most branches across the country are now part of this program. This will free up time for us to take on other tasks that we may not have been able to perform effectively in the past.

Ottawa Valley Branch Membership Statistics

	AGM 2018	AGM 2019
Double Households	550	545
Single Households	569	555
Total Households	1119	1100
Total Membership	1669	1645
Non-DDS Households	206	209
DDS Households	913	891
Unpaid Memberships	27	20



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Health Benefits Officer Report – Ed Rockburne

You have probably seen the recent increase to your PSHCP premiums, starting in March 2019. This increase was to compensate for increases in current and projected plan costs, and maintains the cost-sharing ratio of 50:50. The four-year phase-in to reach a 50:50 ratio was completed in 2018.

We make efforts to help you when you have questions regarding your health benefits coverage, however we are not a benefits authority for the PSHCP or the PDSP. We can only provide guidance and lead you in the right direction to get the answers you need.

A very important reminder, for those whose spouse dies and he or she was the one paying the health premiums. The surviving spouse must make reapplication to have the premiums paid by them, otherwise they could face a three month qualifying period before receiving coverage.

Members are reminded that if they have any questions regarding their PSHCP or Dental Plan, to give me a call at, (613) 320-0147. Since I am now living in Maitland ON, there may be a small long-distance charge.

Ed. Rockburne, Health Benefits Officer, NAFR, Ottawa Valley Branch.

Webmaster Report – Steve Fahie

We continue to place some items on our website, including our Board of Directors list, general contact information, and Branch events. You can also find a page dedicated to retirees Benefits and Entitlements, and a “Links of Interest” page that points you to information for seniors, health specific websites and various entertainment, recreation and sports websites in the Ottawa Valley.

The future of our Branch website will probably be determined once the new National website has been announced.

The Branch website is at www.fsnaottawavalley.ca.



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Your Executive

Here is the list of current members of your Board of Directors. You may notice that both here and on our website, the email address of Directors is no longer listed. We found that these email addresses were being used by spammers to attempt to defraud the Association in various ways.

If you want to contact one of the Directors by email, you can send a note to "info@fsnaottawavalley.ca", and we will forward your note to the appropriate person.

<i>Office</i>	<i>Name</i>	<i>Phone</i>
President	Steve Fahie	343 341-2687
Vice President	Sandra Dormer	613 253-1774
Past President	Chuck Parent	613 692-0537
Secretary	Lynda Smith	613 267-8221
Treasurer	Roy O'Halloran	613 264-2648
Health Benefits Officer	Ed Rockburne	613 320-0147
Director	Jim Piché	613 267-9669
Director	Bill Irwin	613 267-9972
Director	Vivien Tylor	613 267-3376
Director	Larry Palmer	613 267-5410

Email queries sent to "info@fsnaottawavalley.ca" will be forwarded to the Director who can best respond to your question.



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Preferred Partners

National Preferred Partners can be found in any issue of Sage magazine, or on the National website at federalretirees.ca.

Here are our local Branch Preferred Partners.

NAFR Days at Classic Theatre Festival in Perth 10th Anniversary Performances

Matinee or Evening performances of:

John Van Druten's "The Voice of the Turtle" – June 21 to July 14

George Bernard Shaw's "Pygmalion" – July 19 – August 11

Ira Levin's "Death Trap" – August 16 – September 8

The nice folks at Classic Theatre Festival are offering NAFR members
opportunities to save 20%
on the ticket prices for these Broadway and London hits!

For more details on the shows, visit the Classic Theatre website at classictheatre.ca.

Great entertainment for a summer's afternoon or evening!

Tickets available by phone: 1-877-283-1283

Or in person: Tickets Please, Perth (11 Gore St. E.) or at the theatre (54 Beckwith St. E.)