



National Association of Federal Retirees Association nationale des retraités fédéraux

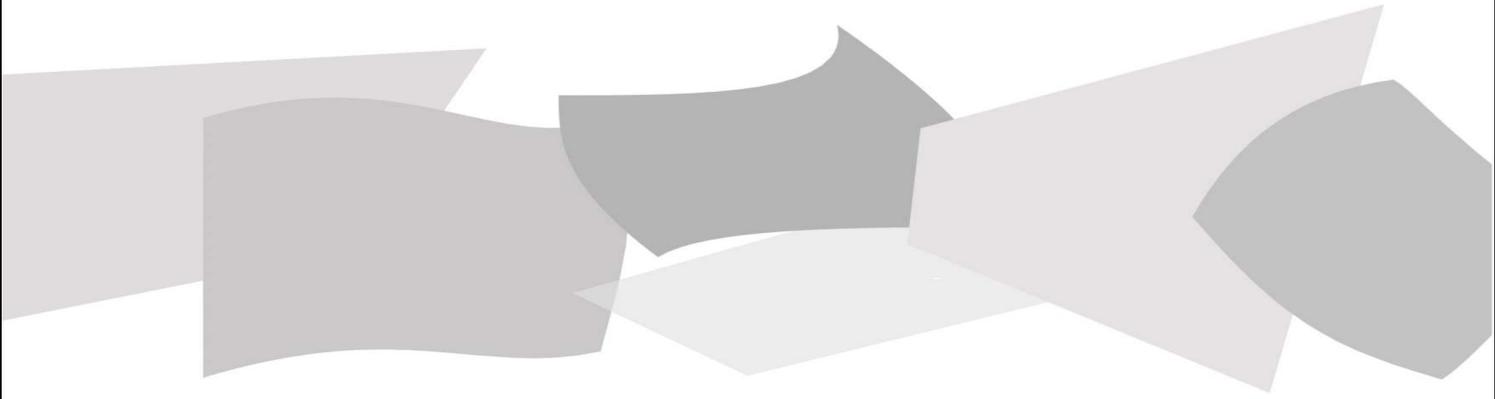
OTTAWA VALLEY

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

# **Annual Report**

**For the year ending December 31, 2017**



**2017**

April 18, 2018



National Association of Federal Retirees Association nationale des retraités fédéraux

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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 2018 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 dollars. 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.

You may be aware of some of the initiatives the Association has been working on through articles in Sage magazine, and occasional email notices from the National Executive through President Jean-Guy Soulière or CEO Simon Coakeley. Our current advocacy initiatives with the Government of Canada include the abandonment of plans to introduce Target Benefit pension plans (Bill C-27), implementation of a National Seniors Strategy, improved support for Canada's veterans, and better income security for retirees by fixing the Phoenix system.

You may have seen information regarding the long-term aims of our Association. President Jean-Guy Soulière has published a document called "Moving Forward" that outlines possible initiatives for maintaining and enhancing our long-term goals so we can remain relevant to member's needs, and enhance our role in the overall area of Federal pensioner's representation with the government. I encourage you to read this document and respond to it with your own opinions and suggestions. You can find information about it in the current Sage magazine under "Federal Retirees News" on page 32.

Last year I mentioned that we are still maintaining a Branch website at *fnaottawavalley.ca*, but that a decision will need to be made regarding its continuance. That decision has not yet been made, and is further complicated because the name still refers to the organization's previous acronym. Because technical knowledge is required to manage a website we may have to rely on the National website down the road, or at a minimum we need to update our own website's name. Those decisions will be made in the near future.

I want to take this opportunity to thank the volunteers on your Board of Directors for all their contributions that keep the Branch running. Without these volunteers the Branch would cease to exist and would have to be absorbed into other neighbouring branches. This possibility is not remote, as within the last couple of years there have been two branches that had to cease local activities due to a lack of volunteers.



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In particular, I want thank Judy Buehler for her many years of service to the Branch as our Report Editor. If our records are correct, Judy has been volunteering since 2004. Judy decided to step down a few months ago and concentrate on her other activities, and her contributions are very much missed.

In addition, thanks to Ed Chenard who has also decided to retire from the Board after being active since 2011. Ed has served as Vice-President, Membership Director and Treasurer.

These resignations, of course, mean we are in search of volunteers to help out the Branch as members of our Board of Directors. With Judy Buehler and Ed Chenard stepping down, the need is more specific this year, as we will need a new Treasurer and a Report Editor. I am distributing a document that details the responsibilities for these positions, and the skills required. The tasks are not extensive, so please do not let the list of skills deter you. The skills list is simply a guideline, and even if you are not strong in some areas it would likely not be a big problem. The Board meets about eight times a year, and usually holds two major membership events per year, which are the Annual General Meeting and a Fall Social meeting.

Another position we are looking to fill is the role of Branch Advocacy Liaison officer. Over the last few years, our Branch has not been very active in the area of advocacy and has relied on the National Office to fulfill this role. Now, the Branches are being asked to be more active in the field of advocacy. The description of this role has been provided by the National Office and may appear to be a little daunting at first glance, however since we are new at this responsibility, we are just looking for someone to learn what it is all about and try to advise the Board of Directors on possible approaches. If you think you might have some interest in this type of role please don't let the description scare you off. Any help will be appreciated.

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



**STATEMENT OF MEMBERS EQUITY  
AS AT DECEMBER 31, 2017**

	<b>Dec. 31 2016</b>	<b>Dec. 31 2017</b>
<b>ASSETS</b>		
<b>Cash in Bank – Current Funds</b>	<b>\$ 17,450.42</b>	<b>\$ 16,107.92</b>
<b>Reserve Funds</b>		
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
<b>Total Reserve Funds</b>	<b>\$ 12,000.00</b>	<b>\$ 12,000.00</b>
<b>TOTAL ASSETS</b>	<b>\$ 29,450.42</b>	<b>\$ 28,107.92</b>
<b>LIABILITIES</b>		
Payable to National Office	\$ 3,835.92	\$ 2,320.16
Surplus Repatriation Payable	\$ 646.67	
Other Expenses Payable	\$ 502.50	
<b>TOTAL LIABILITIES</b>	<b>\$ 4,985.09</b>	<b>\$ 2,320.16</b>
Members Equity - Beginning of Year	\$ 21,844.60	\$ 24,465.33
Excess Revenue over Expenses	\$ 2,620.73	\$ 1,322.43
<b>Members Equity, End of Year</b>	<b>\$ 24,465.33</b>	<b>\$ 25,787.76</b>
<b>TOTAL LIABILITIES AND MEMBERS EQUITY</b>	<b>\$ 29,450.42</b>	<b>\$ 28,107.92</b>



**INCOME AND EXPENSE STATEMENT  
FOR THE YEAR ENDED DECEMBER 31, 2016**

	2016	2017	Budget 2018
<b>INCOME</b>			
DDS Membership Dues	\$ 10,351.63	\$ 10,045.38	\$ 11,000.00
Single Membership Dues - Regular	\$ 2,108.56	\$ 4,441.91	\$ 2,000.00
Double Membership Dues - Regular	\$ 1,499.88	\$ 2,262.60	\$ 1,500.00
Dues Paid By Credit Card	\$ 576.76	\$ 1,066.50	\$ 600.00
Less: National portion of dues collected	\$ (2,732.88)	\$ (5,449.12)	\$ (2,800.00)
Less: Dues Repatriation	\$ (646.67)		
<b>Total Dues Received</b>	<b>\$ 11,157.28</b>	<b>\$ 12,367.27</b>	<b>\$ 12,300.00</b>
Fall Luncheon Event		\$ 928.00	\$ 860.00
Other Income - Interest	\$ 53.84	\$ 46.61	\$ 60.00
Misc Income			
<b>Total Income</b>	<b>\$ 11,211.12</b>	<b>\$ 13,341.88</b>	<b>\$ 13,220.00</b>
<b>EXPENDITURES</b>			
Administration	\$ 1,151.93	\$ 1,407.08	\$ 1,200.00
Travel	\$ 112.13	\$ 152.38	\$ 500.00
AGM Costs	\$ 4,247.39	\$ 5,138.58	\$ 4,700.00
Monthly Meeting Costs	\$ 1,158.62	\$ 1,530.43	\$ 1,400.00
High Speed Internet	\$ 748.60	\$ 748.60	\$ 850.00
Public Relations	\$ 295.00	\$ 457.49	\$ 800.00
National Annual Members Meeting	\$ 825.00	\$ 500.00	\$ 1,500.00
Bank Charges	\$ 51.72	\$ 63.40	\$ 70.00
Fall Luncheon Event		\$ 2,021.49	\$ 2,200.00
<b>Total Expenses</b>	<b>\$ 8,590.39</b>	<b>\$ 12,019.45</b>	<b>\$ 13,220.00</b>
<b>Operating Revenue over Expenses</b>	<b>\$ 2,620.73</b>	<b>\$ 1,322.43</b>	<b>\$ -</b>
<b>Total Revenue Over Expenses</b>	<b>\$ 2,620.73</b>	<b>\$ 1,322.43</b>	<b>\$ -</b>



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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 2017**

**In accordance with my mandate I have examined the financial records and statements for the year ended December 31, 2017.**

**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.**

  
R.M. McClean

4/4/2018



## **Membership Director Report – Steve Fahie**

Total membership numbers are down a little bit again this year, however the numbers are still quite healthy. The difficulty of getting Association announcements out to retirees who are not already members is still problematic and the National Office is actively pursuing methods of finding recent retirees and making them more aware of the Association, its purpose and benefits of membership.

You, as members of your local Branch can help. If you know of any former public servants, or retired members of the armed forces or RCMP please let them know that our Association is here to protect their retirement benefits, and we'd love to have them help too by joining also. Don't forget to tell them about the Preferred Partners program that offers discounts to a wide range of services for members.

	<b>AGM 2017</b>	<b>AGM 2018</b>
Double Households	547	550
Single Households	599	569
<b>Total Households</b>	<b>1146</b>	<b>1119</b>
Non-DDS Households	212	206
DDS Households	934	913
Unpaid at End of Year	56	27
<b>Total Membership</b>	<b>1683</b>	<b>1669</b>



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## **Health Benefits Officer Report – Ed Rockburne**

We have recently seen an increase in our share of the PSHCP premiums, which is part of the decision by the government to increase retiree's share of premiums to 50%. As you are aware, the Association is appealing this to the Supreme Court of Canada, as we believe there were errors in the previous ruling.

A couple of reminders are worth repeating here: There has been a service available to the residents of Eastern Ontario since May of 2011, offered by the Community Information Centre of Ottawa, where people who don't know where to go for information concerning non-emergency community, Social, Government and Health Services, can dial 211, and you will be assisted in up to 150 languages.

And a very important one 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**

As stated in the President's Report, there are some decisions to be made regarding the Branch website. In the meantime, we continue to place items of interest on a few pages. In addition to Branch events, you can find a page dedicated to retirees Benefits and Entitlements, linking you to appropriate websites regarding pensions and health care. The Links of Interest page will point you to information for seniors, health specific websites and various entertainment, recreation and sports websites in the Ottawa Valley. There is also a page dedicated to Tax Tips, from CRA.

The Branch website is at [www.fsnaottawavalley.ca](http://www.fsnaottawavalley.ca).



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## Your Executive

Office	Name	Phone	Email
President	Steve Fahie	(343) 341-2687	info@fsnaottawavalley.ca
Past President	Chuck Parent	(613) 692-0537	bcparent@hotmail.com
Vice-President	Sandra Dormer	(613)253-1774	sandra.dormer@gmail.com
Secretary	Lynda Smith	(613)267-8221	smithl@superaje.com
Health Benefits Officer	Ed Rockburne	(613) 320-0147	erockburne@cogeco.ca
Report Editor	Vacant		
Treasurer	Ed Chenard	(613)264-0678	mechen@bell.net
Membership	Steve Fahie	(343) 341-2687	info@fsnaottawavalley.ca
Webmaster	Steve Fahie	(343) 341-2687	info@fsnaottawavalley.ca
Bylaws&Resolutions	Chuck Parent	(613 )692-0537	bcparent@hotmail.com
Director-at-large	James L. Piché	(613) 267-9669	campic@storm.ca
Director-at-large	Bill Irwin	(613) 267-9972	billisyboosy@yahoo.ca
Director-at-large	Roy O'Halloran	(613) 264-2648	joanandroy@ohalloran.ca
Director-at-large	Joe Zarb	(613) 623-5982	genealogyjoez@hotmail.com



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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](http://federalretirees.ca).

Here are our local Branch Preferred Partners.

### **NAFR Days at Classic Theatre Festival in Perth**

**Matinee or Evening performances of:**

**John Van Druten's "There's Always Juliet" – June 22 to July 15**  
**George Bernard Shaw's "Mrs. Warren's Profession" – July 20 – August 12**  
**Patrick Hamilton's "Angel Street (Gaslight)" – August 17 – September 9**

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](http://classictheatre.ca)  
or visit their booth at our AGM.

**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.)