

# RALUT REPORTER

RETIRED ACADEMICS AND LIBRARIANS OF THE UNIVERSITY OF TORONTO

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## President's Letter

### *Pensions Are Still The Main Issue*

By Peter H. Russell

As RALUT begins its second year, the key question on most members' minds is – are we getting anywhere on pensions? Certainly that is the question I am most often asked when I meet any of you.

So far, I am afraid I can only reply that we have made very little progress on substance, and perhaps a little more on process. The little bit of substance is the extra payment many of us received early this year, and which I believe, at least in part, was prompted by the action initiated by a group of our distinguished women colleagues. This so called "Finlayson top-up" means that *for six months* those of us who retired on or before June 30, 1996 receive an increase in the lower part of our pensions which those who have retired since then or are still active are entitled to on a permanent basis.

Whether we can make more substantial gains depends on the "negotiating" process now under way between the University and UTFA. I use quotation marks because I have found that the University of Toronto really does not believe in negotiating with the faculty and librarians. This year I am serving on UTFA's negotiating team, ably led by George Luste.

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UTFA's Salary, Benefits and Pension Committee carefully worked out proposals for salary, benefit and pension improvements for active and retired members. The proposals, slightly modified, were approved by UTFA's Council. But because the University will not disclose what it is prepared to offer, our negotiating team decided to break with tradition and not disclose UTFA's proposals unilaterally. Good faith bargaining requires that both sides come to the table with opening positions.

This means that the next step – which is really the first step – will be mediation followed by arbitration if the mediation fails. UTFA and the University have agreed that both sides will be bound by the arbitration. They have also agreed that Martin Teplitsky will serve as both mediator and arbitrator. The mediation/arbitration is scheduled for late spring.

Because of our decision not to disclose UTFA's proposals in a context where the University has

no offer on the table, I am not at liberty to give you the details of UTFA's proposals for improvements in our pensions and benefits. I can only assure you that they are substantial – as they should be, given the size of the pension surplus even with a decline in market values.

Whatever improvements in pensions these current "negotiations" produce, I know that they will not be enough – particularly for those retirees and survivors whose pensions are grossly inadequate. That is why the questionnaire prepared by our Pension Committee is being sent to you with this issue of *The REPORTER*. Please fill it out and return it to the Committee as it will provide the data we need to demonstrate the unsatisfactory post-retirement income of so many of those who devoted their professional careers to the service of Canada's leading university.

I hope you will not feel besieged by questionnaires when you receive another prepared by our Benefits Committee asking about your continuing university-related activities. The aim of this questionnaire is to back-up RALUT's request to the University for enhancing the accessibility of retirees to University programs and services – everything from eligibility for research funding to use of campus mail. Members have brought to our attention inconsistencies in these areas among Departments and Faculties as well as

some serious general gaps. Requests that the University do more for its retirees will be strengthened by showing what retirees continue to do for the University.

So lots of worthwhile work lies ahead for RALUT – and we have not really begun to develop the more pleasurable side of what we might get up to! So do come to the Annual General Meeting on March 25<sup>th</sup> and let your Executive know how we are doing.

One other RALUT date I would suggest you put on your calendar is the national meeting of university retiree associations RALUT is hosting with its counterparts at York and Ryerson on May 31<sup>st</sup> at Victoria College. This is part of Congress 2002 (aka "The Learned's"). But to attend this meeting, you don't have to register for the Congress. We will send you details later. The meeting will provide an exceptional opportunity to see our own retirement situation in a national context and to discuss what might be done by a Canada-wide network of university retirees.

## Progress Report: Review of UTFA's Constitution

by George Milbrandt

For the last several months there has been an UTFA committee at work on restructuring the UTFA Constitution. Why? Last April, the AGM passed a motion calling for a review of UTFA's Constitution "which, among other things, will address the status and representation of retirees in UTFA, its Council, and its Salary,

Benefits and Pensions Committee."

There were two main reasons for reviewing the role of retirees in UTFA: First, representation on Council. Retirees constitute about one quarter of UTFA's membership, yet we have only two voting representatives on a Council of 64. Second, there was a strong sense among retirees that they needed to be more effectively represented in UTFA on pension and benefit matters.

The Constitution Review Committee has seven members, four retirees, three of whom are on RALUT's Executive (Peter Russell, Harvey Kerpneck and George Milbrandt), and three active members. The UTFA President, Rhonda Love, is also a member of the committee and has maintained an advisory role.

Debates on the committee were pointed. The group divided between those wanting to give retirees more voice, and another faction wanting to lessen our voice and even reduce us to the role of associate members with no vote for UTFA President or for motions at the AGM and general meetings. It is interesting that the leader of the faction wanting to reduce us to associate membership has been James Estes, an UTFA Council member elected by the retired members constituency.

Other contested issues regarding retirees were largely resolved by compromise and consensus. Agreement was reached to bring to UTFA Council two plans, A and B. At least one of these plans, or some modified version, has to be brought to UTFA's AGM, or special general meeting, because amendments are required for any

changes to the constitution. The provisions of plans A and B are summarized at the end of this article.

There are six points to each plan, five of them being essentially the same. The first, and only contested issue, was whether retirees should remain as full voting (and fee-paying) members of UTFA. Plan A says yes. Plan B says no – we must become associate members who are to have "voice but no vote." We would be able to serve on and even chair a committee of UTFA Council, and serve as at-large members of its Executive Committee but *not* vote for president, any future constitutional changes, new fees, etc.

At the UTFA Council meeting of February 12th, the plans were to be considered item-by-item but only one got as far as a vote. That was on the question of membership for retirees. Council voted by a three to one margin in favor of retired members retaining full membership.

The other points were not voted on for lack of time. It appeared there would be no dissension of the remaining items, since the two plans are essentially the same on these issues. So, we won Council's endorsement of retaining full membership for retirees and retirees probably assured of improved representation on the Salary, Benefits and Pensions Committee.

An issue raised by a number of retiree supporters at the Council meeting concerned fees paid by retired faculty and librarians. One suggestion included the possibility of two different membership levels based on full or partial fees. Several other proposals regarding retiree fees have recently been

suggested for Constitution Review Committee consideration.

When UTFA's Constitution was amended in 1980 to include retirees as full members, it was agreed that fees paid be sufficient to cover the cost of newsletters and mailings for retired members. A few years ago, the fee of \$20 for three years was increased to \$50 for three years. As part of its review, the Constitution Review Committee examined several possibilities with respect to a fee structure for retirees and decided to recommend that their fees should continue to be sufficient to pay for the cost of newsletters and mailing materials. In light of the comments at the February 12th Council meeting, it appears the committee will have to re-visit the retiree fee structure along with many other matters still to be resolved.

Remember, UTFA has an *obligation* as well as the legal right to represent us in benefit and pension matters with the University of Toronto. The faculty association is the only legal bargaining agent for retirees that is recognized by the University administration. This UTFA relationship issue, then, is critically important to all retired members and survivors. UTFA Council will meet once a gain in March, before the April 15th AGM at 4 pm in the Medical Science Auditorium. It looks like UTFA's AGM may be crucial to our continued role in the faculty association, so mark your calendar!

Here are the provisions of the two plans:

1. Plan A says retirees retain full membership in UTFA. Plan B says retirees become associate

members with some rights to serve on committees, but no voting rights for President or at the AGM (where constitutional changes must be brought to a vote).

2. Both plans agree retirees are to have four voting members on UTFA Council.

3. Both plans allow for a RALUT representative as an ex-officio member of the Salary, Benefits and Pensions Committee.

4. Both plans ensure at least one other retired member on the Salary, Benefits and Pensions Committee.

5. Both plans call for the UTFA Negotiating Team, when in negotiations with the University, to report to the Salary, Benefits and Pensions Committee on all tentative agreements that would require approval by Council.

6. Both plans agree that the annual fee for UTFA members of the retired faculty and librarians constituency should pay for the cost of newsletters and mailing material to retirees.

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## Breaking National Boundaries For Faculty Retirees

by Germaine Warkentin

University retirees will be front and centre at a conference of associations from all across Canada on May 31. From May 25 to June 1 the Congress of the Social Sciences and Humanities (formerly the "Learneds") will be meeting in Toronto. Ryerson and RALUT will be playing host to the annual meeting of CAERA – the Canadian Association of Emeriti and

Retired Academics. Started at Calgary in 1994, CAERA has met several times over the past eight years, and the May 31 gathering may be its biggest meeting yet. Because RALUT is a new group, we have been searching for fellow organizations we can learn from. This has led us to many new contacts and given us the opportunity to renew valuable links between over-65s with strong common interests.

The overarching theme of Congress 2002 is "Boundaries, with the sub-themes of Geographies, Genders, and Genres." The CAERA meeting is certainly about transcending boundaries between provinces, between faculty and staff, and between retirees and administrations. As well, in attending to the problems faced by disadvantaged retirees, the meeting will undoubtedly be looking at "genders" as well.

Since the late fall, an organizing committee led by Dr. John Dirks, former Dean of Medicine and now at Massey College, has been at work on contacts, programme, and local arrangements. The committee draws on members of the RALUT executive as well as groups at York University and Ryerson. The plans currently being firmed up involve a day-long meeting, to take place at Victoria College, with a closing reception at Massey College. The plenary speaker (at about 11:00 am) will be Dr. Paul Davenport, President of the University of Western Ontario, talking about the relations between universities and their retirees. His speech will be followed by open discussion. But to begin the day, we plan a panel on revitalizing (and possibly

re-naming) CAERA. After Dr. Davenport's plenary speech and the ensuing discussion, there will be a lunch, at which the speaker will be John Fraser, the Master of Massey College, where there is very active retiree participation in the college's life. Following lunch, there will be a session called "Agenda for Action." Included are presentations and discussions on Pensions and Benefits issues and the reciprocal rights and obligations of retirees and universities. If we had to describe what the ideal relationship between a university and its retirees ought to be, what would we want that to be? What in fact are the "best practices" for such a relationship? Finally, there will be a concluding discussion on a permanent organizing structure for CAERA, a budget, and how to lobby for our goals. It's possible a new name will be selected for the organization; one suggestion is "Colleges and Universities' Retirees Associations of Canada / Association des retirées des universités et collèges canadiens" or CURAC / ARUCC.

The conference will end with wine and hors d'oeuvres reception, for which we will move a block or so west to Massey College. The meeting is listed in the Congress 2002 programme (for those attending other Congress meetings) but we are also accepting individual registrations (\$20.00, plus \$20.00 for the reception). Details of how to register will be widely circulated to all those who have shown an interest once the programme is finalized. Information about CAERA and the ongoing planning for the programme is made available, as we learn it ourselves, on the RALUT web site,

<http://www.ralut.ca> That web-site also has a button to the CAERA web-site, which is on the CAUT server: <http://caera.caut.ca>

We extend a particular – indeed, urgent – invitation to all RALUT members to attend, to participate, and if possible to volunteer assistance for the day itself. You will be warmly welcomed.

## Hildyard Planning Group

By Harvey Kerpneck

I am the lone faculty member on the University's Planning Group, looking into the conditions which retirees enjoy/lament. Its mandate is to examine particularly the benefits, so-called, which retirees need, and may lack. It is charged with both a narrow focus on life after retirement and with a general perspective on that life.

I take more than a little pride in the fact that this Group came into being after I had spoken to Bob Birgeneau about how mistaken it is to suddenly cast retirees adrift the day they retire and to give the impression, as this is done, that the University is through with them. The first effect of what I said was the restoration of the Joint Plan for retirees; the second, I think, was the establishment of this planning group.

The Planning Group's greatest asset is the new U of T Vice-President, Angela Hildyard. She is a woman not only of goodwill, as I have seen, but of remarkably sharp intelligence, and I think the combination of such qualities bodes well – but only in the long term. And since retirees have an alarm-

ing tendency to die, the long term is really not good enough.

The Group has met twice so far and its discussions are in the preliminary stages – at the stage of undertaking to send out questionnaires to retirees about their circumstances, and seeking information from UT departments and Divisions and from other universities on how retirements are treated in those jurisdictions. I feel hampered by the fact that the overwhelming weight of the Group is non-faculty, non-librarians – in keeping with Birgeneau's "democratic" ideal of treating everyone equally. As far as our retirees are concerned, this is not very practical, since the retired faculty and librarians have both special needs *and special capabilities*. These capabilities will, I hope, lead in the direction of what I have been calling an Alumni College, where retired faculty and librarians could deliver lectures in their areas of special competence, tutor students, help with media queries, etc. It pleases me that Angela is gung-ho for this. At any rate, given the composition of the Group – which also contains people like the Warden of Hart House, who direct or control facilities that should be important to retirees – I have had several profitable private meetings with Angela, where I was similarly impressed by her attitudes and willingness to take up our case.

I have an advantage in also being the Chairman of RALUT's Pension Committee, as well as an *ex officio* member of the Benefits Committee. This gives me a chance to transmit ideas among these three groups.

I will keep in touch with you

about the progress and activities of the Planning Group. But it is a long haul, and mainly uphill. But, as I said to Bob Birgeneau and have repeated more than once to Angela and the Planning Group, I want the iron curtain that has until now clanged down harshly when we retire to be replaced by a silken curtain so sheer that you can hardly hear it whisper as it descends. And how soon such a condition comes about depends not only on the intelligence and goodwill of Bob Birgeneau and Angela Hildyard *but also on the persistence with which RALUT makes its positions known and felt.*

If we pussyfoot about our anxieties and the matters that distress us about the conditions in which retired faculty and librarians live, our progress will be glacial – so nearly invisible that it will be imperceptible. And that is not my cup of tea – if I may conclude with a mixed metaphor.

## Pension Committee

by Harvey Kerpneck

Both George Luste and Peter Russell are members of the Negotiating Team that has been meeting with the University negotiators about salaries, benefits and pensions. They are working hard on our behalf. Our Pension Committee, insofar as one can rationally separate it from UTFA's SBP Committee (which will be meeting again shortly to receive an update on "negotiations") is currently engaged in working on that questionnaire I promised you in the last REPORTER. This will be sent out soon in order to survey your (our) retirement circumstances.

The questions are not unduly intrusive, but are designed to elicit the information we require in order to work more effectively and powerfully on your behalf. The University needs to know the reality of our circumstances.

The questionnaire has been vetted by RALUT's Executive and Benefits Committees. While no questionnaire can be perfect – especially when the questions asked venture onto sensitive ground – I believe you will not have any objections to it. In any case, it is optional and your name need not be given.

Aware that E. M. Forster's advice "only connect" fails to be heeded throughout the University, at a recent private meeting I had with Angela Hildyard I passed on and briefly discussed with her our previously-devised *Position on Pension Surplus*. I have since written to her about this, and so far I am pleased by her response. It was hardly a revelation to me that Michael Finlayson had not given her a copy of that paper, nor of our letter in response to his letter to the retirees of last April, which I also passed on to her. (The Finlayson letter was discussed and our response printed in the REPORTER, v. 1, n. 2.) I wonder how much of what we take to be ignorance and malice is sometimes only the result of failing to connect.

## Information Bites from the Benefits Committee

by John Hastings

We are pleased to learn that Professor Angela Hildyard, Vice-President, Human Resources, encourages retirees with special pension and/or other benefit problems to write directly to her. A copy of correspondence sent to RALUT will help us keep up-to-date on special situations and their resolution. The information may be helpful to other retirees with similar problems in the future.

We have learned that Human Resources will be mailing out Green Shield Canada brochures the near future, describing Plan provisions in detail. You may recall that a letter was sent out by Human Resources in mid-2001, noting that, in moving from Liberty Health to Green Shield Canada as the carrier, there has been no change in coverage. We understand that the information will also be posted on the U of T website, along with questions and answers to help Plan members better understand the provisions of the Plan. See <http://www.utoronto.ca/hrhome/gssummar.htm>.

## ***New: OP Ed Page***

With this issue we start something new, a page devoted to reader opinion pieces. To start with, both are written by members of your Executive Committee; but the page is open to any member, associate member or survivor. A few simple rules: Try to keep the item brief. Understand that we may have to edit slightly for length. Understand that there are always some things one cannot say in print. And, be willing to sign your name. Both readers and authors should be aware that these items do not represent RALUT official positions. Opinions expressed are entirely those of the individual authors. Come on, readers. This is your newsletter.

Send items to me at the RALUT mailing address or via e-mail to [ra.ult@utoronto.ca](mailto:ra.ult@utoronto.ca). In the subject line say "REPORTER OpEd."

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## ***Opinion*** **Strange Doings at UTFA**

by Charles T. Meadow

In the fall of 2000 then-UTFA-Vice-President Gerson brought to Council his proposed points for negotiating with the University on salary, benefits and pensions. The list did not include distribution of the pension surplus nor was there any discussion of reasons that these particular points were selected and not others. That led to considerable debating, in general led by retirees objecting to the lack of an attempt to gain distribution of the surplus. The very notion of

surplus distribution was described in debate, not exactly in proper parliamentary language, as "loony." In the course of discussions, retired UTFA members were described as "not real members," the basis for that being that we did not pay as much for membership as did active employees. (The UTFA Constitution makes no provision for classes of member.)

What the UTFA Constitution does provide is for proportional representation of the various constituencies on Council. On this basis we should have had the 15 or 16 members of Council mentioned earlier by George Milbrandt (p. 2), not just the two we do have. The UTFA Executive Committee appointed a committee to investigate and make recommendations. Their report was duly brought in, recommending several possible adjustments but it was not accepted. At the 2001 AGM UTFA undertook to form a committee to consider the whole issue of constitutional change, based on this representation problem. One member, appointed by UTFA's president was Prof. James Estes, an elected representative of the Retired Members Constituency and, strangely, one of the leaders in Council debates *against* the interests of retirees.

The committee has been meeting all this academic year, and the meetings were often raucous. They split into two factions; one proposed that retirees would continue full membership and the other faction proposed to deny full membership. Estes led the second faction, wanting retirees to become associate members with no vote at an AGM or for President.

On other points the factions managed to come to compromise positions. Details, again, are on p. 2

Prof. Estes is not finished. He has since proposed that, if retirees are to remain as members, they must have the full right of representation on Council and, at present membership levels, that would be the 15 or 16 seats, mentioned earlier, for retirees. Our members of the Restructuring Committee had agreed to accept only four seats because they felt it would not be right for retirees to be in an almost dominant position on the Council. In suggesting that we *should* have this level of representation, Estes is reversing his previous stand and seems to be asking for something he knows the general membership would not like and probably would not accept. It might seem to them that retirees were grasping for control of UTFA and that could squelch the attempt to improve our standing in UTFA and possibly cause chaos in the AGM voting. He also proposes that retired members pay higher dues. Combined with the rumored attempt to raise all UTFA members dues (See Marvin Gold's article below.) this could drive many retirees out of the Association. It appears to me that, for some reason, this is the goal Prof. Estes is aiming for.

MPs sometimes cross the aisle in Parliament but it's unique in my experience to see a member trying to drive his own constituency out of existence.

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## Opinion

### UTFA Dues

by Marvin Gold

Is UTFA about to raise dues again? As you will have read in this issue, there are those on UTFA council who are trying very hard to get a lot more money from us, the retired constituency. However, you should also be aware that there are strong hints that even the dues of active members may have to be substantially hiked, and that the new fees may be in excess of 1% of salary! UTFA needs all of this money because it is nearly bankrupt. Legal fees to external lawyers are going to cost nearly \$1 million or more and nobody really knows when the bleeding will stop. This money is being spent on what many think is a completely frivolous cause. Fees were raised at last year's UTFA AGM over the objections of even the then vice-president of salaries, benefits, and pensions. A rumour has been circulated by our chief enemies that it was actually the retired members who cast the majority vote. This is not true, and I hope that our members will not support this at the upcoming AGM.

For many years as a member of council I fought in vain against a policy which I predicted would lead to UTFA's ruin. You may not know that UTFA will take on grievances from faculty and librarians who are *not* members! All they have to do is show up at the office, sign a membership card, start paying dues, and the entire legal machinery of UTFA goes into action immediately. Some of them even quickly resign their memberships once their problems

are solved! There are many of our colleagues who refuse to join UTFA because of ideological opposition to the concept of a "union" and because they have a deep admiration for the university administration; others don't want to spend the money or strongly believe that they will never have any need of UTFA's services. I have always made motions to have colleagues who have been at the university for a long time and have never joined UTFA pay at least 5 to 10 years back dues before their cases are taken, especially if it looks as if it will be expensive. These suggestions have never been accepted.

In the most recent and disastrous case, several status only faculty whose professional incomes probably run into several hundreds of thousand dollars per year and who never joined UTFA came with their grievances. Despite warnings from knowledgeable members, the past executive took on the case and the current executive has never looked back. These activities are ongoing and higher and higher revenues will be required in future years. I hope any motion to increase fees will be defeated not because I want UTFA to fail; on the contrary I devoted 10 years of my active years to the organization and several of its committees and subcommittees. I would like to see UTFA survive, but that will take serious financial management and policy renewal. An empty bank account will help to ensure that survival.

## Annual Financial Report: 19 Feb. - 31 Dec. 2001

by Ann Schabas, Treasurer

Revenues:	
Fees	\$27,200.00
Interest	<u>4.49</u>
TOTAL	\$27,204.49

Expenditures:	
Legal	12,709.29
Administration	6,392.77
RALUT Reporter	1,731.84
UT Bulletin Ad	695.40
Catering	554.58
Internet (Web site)	248.40
AROHE Membership	165.20
Research Assistant	<u>50.00</u>
TOTAL	\$22,547.48
Balance:	\$4,657.01

Approved by the Executive Committee, 19 February 2002

### 2001 Membership Count

Regular	531
Spousal	45
Associate	<u>7</u>
	583

## Beate Lowenberg Is New REPORTER editor

by Charles Meadow

I am pleased to announce that Dr. Beate Lowenberg has agreed to become associate editor of the **REPORTER**. She was a dental surgeon and orthodontist in England before coming to Canada in 1978. At the U of T she worked in research on periodontal physiology and dental implantology.

If this issue has fewer misprints than previous ones, it is due to her careful eye.

Please look for the questionnaire about pensions enclosed with this issue.

Please also note the announcement of the RALUT 2002 Annual General Meeting, also enclosed with this issue.

### Publication Notice

The RALUT Reporter is published by RALUT, Retired Academics and Librarians of the University of Toronto, a non-profit association of retirees, near retirees and surviving spouses of the faculty and libraries of the University.

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