

RALUT REPORTER

RETIRED ACADEMICS AND LIBRARIANS OF THE UNIVERSITY OF TORONTO

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President's Letter

by Peter H. Russell



Well summer's over – and wasn't it a warm one? I hope that coping with the heat did not prevent you from having a pleasant vacation. Now back to business, and for RALUT that means all kinds of business.

First, let me tell you about recent changes in our Executive Committee. As noted in our June issue, George Luste was elected president of UTFA and left the RALUT Executive to concentrate on his new duties. We look forward to working with him as President of UTFA.

Charles Meadow, the editor of the Reporter, will also be leaving the Executive. Charlie and Mary Louise will be moving to Victoria early this fall so that they can be closer to their family. Charlie is truly a founding father of RALUT. From the beginning, he was a colleague who was willing to contrib-

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ute his time and talent to organizing RALUT and then to editing its newsletter. For all of us on the Executive he was a superb colleague who will be much missed. But don't be surprised if one of these days you hear that Charlie has founded a west-coast branch of RALUT.

Our Nominating Committee (Ralph Garber, John Gittins, Ken Rea and Joan Winnearls) was pressed into action to find replacements. They have been very successful. Helen Rosenthal, recently retired from Mathematics at Scarborough, will fill one position. Helen has had a great deal of experience in UTFA on benefits and pension issues and is currently serving with me on UTFA's negotiating team. We are sure to benefit from her experience and energy. We are also fortunate in securing Fred Wilson's agreement to be the new Editor of the Reporter and to fill Charlie Meadow's place on the Executive. Fred, too, has a great deal of UTFA experience, including a stint as its President. His philosophical writings have won

international acclaim. We much look forward to his editorship of the Reporter – which will begin with the next issue.

On the UTFA/University Administration negotiating front, I am sorry that there is so little to report. The current negotiations, with Martin Teplitsky now acting as arbitrator, are still ongoing. The delay has been caused by the difficulty in arranging meetings during the summer. The earliest we can expect a settlement or award is mid- to late-November. Very soon you will be hearing from George Luste (or RALUT) about UTFA's and the University's positions as we approach the arbitration stages of negotiation.

The delay in negotiations means that we must also delay a fall RALUT members' meeting. When we meet, we will want to discuss and appraise the results of these negotiations on matters that relate to pensions and benefits for retirees. We will send the results to you as soon as we have them, and arrange for a meeting to follow about two weeks later. This is likely to be in late November or early December.

Another long, protracted process is the Committee to Review the UTFA Constitution. Over the summer, our Committee's package of proposals were vetted by UTFA's lawyers. The Committee recently met (with Marvin Gold replacing Jim Estes as the second retiree Council member on the committee) and revised its proposed constitu-

tional amendments in the light of the legal advice. It will soon do the same with by-law changes. The Committee aims to have the whole package considered by UTFA Council in two or three weeks. Council will then place the proposals before a special meeting of UTFA members which is likely to take place at the end of October or in early November. The Committee's proposals do not entail a radical restructuring of UTFA but aim to make its existing structure more coherent, efficient and accountable. The part that is of most concern to retirees is well known to you and includes proposals raising retiree representation on Council from two to four and securing retiree and RALUT representation on UTFA's Salaries, Benefits and Pension Committee. Fees are not part of this package of proposed changes to UTFA's constitution and by-laws.

Remember those Ontario Government proposals for new regulations on the distribution of pension surplus that discriminated against pensioners? Well, in August along with other employee representatives I attended a meeting called by the Ministry of Finance to discuss changes they are planning to make in the proposals. I am happy to report that the government has gone some way to meeting our insistence that retirees have the same rights as active employees in decision-making on the distribution of pension surplus (ie consent of two-thirds of each group). But they haven't gone all the way. I strenuously argued that they must. I will keep you posted on the results of my submission.

RALUT has been successful in its two applications for student-assistants to be funded by the Uni-

versity's Work-Study Program. We will soon be interviewing applicants for these 200 hours-a-year positions. Their work will include analysing the data we have collected from nearly 400 questionnaire on retirees' continuing university-related activities. I do thank those of you who took the time to fill out this questionnaire. I believe the results will demonstrate how much "retirement" for our members is not retirement from engagement in scholarly life.

Another task would be to research and analyze alternatives to mandatory retirement at age 65. A third is layout and production of the Reporter

To support all of this activity it will be wonderful to have an on-campus office and meeting place. We have been told that at least temporarily this space will be near the corner of College and McCall Streets. We hope that RALUT will be able to move in sometime during the fall term. Once we are installed, I hope many of you will drop in for a visit - though I warn you that if you do someone might put you to work!

Where did that Big 1/2% Pension Raise Come from?

by George Luste

Several retirees have called me with this question and thus this note to you.

The short answer is that the total annual inflation number in Canada took a dip last December and was only 0.7%. Since UofT pensions are indexed at 75% of

	Total CPI % change over prior 12 months
July 2002	2.1
June 2002	1.3
May 2002	1.0
April 2002	1.7
March 2002	1.8
February 2002	1.5
January 2002	1.3
December 2001	0.7
November 2001	0.7
October 2001	1.9
September 2001	2.6
August 2001	2.8
July 2001	2.6
June 2001	3.3
May 2001	3.9
April 2001	3.6
March 2001	2.5
February 2001	2.9
January 2001	3.0
December 2000	3.2

inflation, 75% of the 0.7% inflation number leads to the approximate 0.5% pension increase.

The longer answer notes that UofT uses the "all-items" Consumer Price Index (CPI) for Canada in the preceding calendar year (measured from December 2000 to December 2001 -- see table above). It does not use the July to July CPI data. It does not use the Toronto CPI data. And it does not use the "core CPI" number, which excludes the eight most volatile components. The different choices available for "CPI inflation" can lead to confusion.

The Bank of Canada web site at <http://www.bank-banque-canada.ca/en/cpi.htm> has a month-by-month summary of the annual Consumer Price Index from 1995 to the present. Here is a shortened version of some of that data.

The point of listing the last 20 months is to impress on you how volatile the annual inflation number can be. For example, energy price fluctuations for gasoline and natural gas can cause substantial swings in the total CPI. The bad news is that the December 2001 number was unusually low. The good news

is that this will probably result in a corresponding upside increase in the December 2002 number – and thus next summer your July 2003 pension increase should be higher than your recent experience.

Best Practices – for Retirees

(Condensed from a talk at the May 2002 CAERA meeting)

by Eileen Goltz
Laurentian University

Best practices are relative and involve, from our perspective, the University Administration giving to retired faculty everything we wish to obtain. It doesn't happen, of course. The better practices at Laurentian have resulted from the lines of communication which exist between retirees and the Administration and the continuing faculty. Much of this communication has evolved due to the size of the university and the size of the City of Sudbury.

There is a uniqueness about our situation. We are small and somewhat isolated. It is possible to know almost everyone on faculty and in the administration. For retirees, the positive aspects of this situation far outweigh the negative. Probably the most valuable is the possibility of forming social relationships with members of the administration. We are often on a first name basis with our administrative members, including the President. Moreover, Sudbury is not a huge city, so faculty members (pre-retirees) and administrators are thrown together in a variety of sports, cultural or church-oriented events. We have found

this familiarity often paves the way to persuading an Administrator to regard our requests in a kinder manner. Besides, when we call the office of the President or the Vice-Presidents, they know who is on the other end of the line.

The beginning, and the continued existence, of our retirees group owes much to these lines of communication. In the early 1990s a political science professor sought support to create a retirees' association from individual members of the Board of Directors of the Laurentian University Faculty Association (LUFA), members of the administration, and several retired and soon to be retired faculty members. LUFA is accredited by the Ontario Labour Relations Board to represent the Faculty in negotiations with the administration. It is a union and has an abiding interest in most of what happens to faculty at Laurentian.

The Laurentian University Faculty Association-Retirees (LUFA-R) was formed in 1993 and was officially recognized by the University in January, 1994. It is part of LUFA, and the membership must reflect this. We have three levels of membership: full members who must have been members of LUFA prior to retirement; widows, widowers, or partners of LUFA-R members; and "friends," including all other Laurentian retirees who wish to join. Most of the "friends" have come from the lower administrative ranks. All levels of membership have voting rights at the AGM, but only full members may hold office.

The lines of communication between LUFA-R and non-retired

faculty usually pass through LUFA. Although retirees are not, and cannot be, full members of the union, we have representation on its Board of Directors. Our representative is the LUFA-R president or designate, and he or she is allowed to speak on all matters. As well, we provide members for ad hoc committees. The presence of retirees on the LUFA Board and on its committees is important because we are a constant reminder to other Board members that LUFA-R does indeed exist and has concerns that are best addressed by the Union, although they are often different from those which would normally interest regular LUFA members. As well, we present a different perspective. To date, LUFA has treated our representatives with respect and friendship, and intervention from that group on our behalf has been beneficial.

Assistance from LUFA was the key factor which led to the University providing a modicum of Health Care assistance for retirees, and the present LUFA Collective Agreement contains a clause which states that overload courses must first be offered to retirees before they are offered to part-time faculty. These are, for the most part, courses regular faculty does not wish to teach. With collective bargaining underway for a new agreement, LUFA-R may lose this small advantage due to opposition from part-time faculty, who are represented by LUFA. However, we expect the Department Chairs will be permitted to hire a retiree to teach courses if they choose. The remuneration for such teaching is on an overload basis, that is \$6636 for a full course and half that for a half course. The stipend is the same for active faculty, part-timers or retirees.

LUFA-R is represented on the University pension, fringe benefits, and emeritus committees. We are prepared to provide further representation when sub-committees must be formed. LUFA-R is also working towards having a representative on the University's Board of Governors. Very often the decisions of the BoG impinge on retirees, and we hope our representative can help this body understand how their decisions affect us. We regard representation on committees and boards as being among the best of practices. There is nothing like having a voice.

Communications with the Administration are generally informal, often on a one-to-one basis, with a member of LUFA-R discussing a practice with an Administration member. However, from time to time we do resort to formal, written requests, followed by appointments with the target administrator. From the beginning of LUFA-R, the administration has provided the association with a small budget, a furnished office and computer support. Slight though this support may be, it is essential for the health and welfare of the association. Through the efforts of those who were involved with the organization of LUFA-R, retired faculty have the same access as has regular faculty to the library, parking and the Physical Education Centre. Parking fees are halved for retirees. Also, exemptions from tuition fees for retirees, spouses, and dependents are the same as those for regular members of faculty. Retirees have their name, rank, and title listed in a special section of the University Calendar, for life. Unhappily, there is no provision for office space for retirees, although some depart-

ments try to accommodate them. Obviously, the few perks provided for retirees will not contribute to the University deficit, if indeed, such exists.

Unfortunately, the University does not usually provide resources and support to retirees for research or for attendance at conferences. We have requested that LUFA, during the present collective bargaining exercise, exhort the administration to extend this support to us. We are under no illusions that LUFA will jettison any of its demands in favour of benefits solely for retirees. Hence we continue to negotiate for financial assistance for research purposes and/or attendance at conferences, essential if retired faculty are to engage in scholarly pursuits.

In 1995, the University Senate instituted a policy of awarding Professor/Librarian Emeritus and Distinguished Professor/Librarian Emeritus designations. Regular emeriti did not receive any privileges other than those enjoyed by all faculty retirees. The case for Distinguished Emeriti was to be different, but the University had never designated any Distinguished Emeriti. In 1999 the University Senate abolished the designation. By 2002, the benefits, which had formerly applied only to the Distinguished Emeriti were bestowed on all emeriti.

These extra benefits include:

- o Names, ranks, and titles listed in the Univ. Calendar under the department or school section for life, instead of at the end of the calendar.
- o Formal awarding of their certificate and a high rank in academic processions.
- o Free photo-identification

card.

- o Eligibility to compete for research dollars with regular faculty. This is a most important benefit.

- o Eligibility for thesis supervision at the discretion of Graduate Studies.

- o Inclusion of their work within the Bibliography of Faculty Publications and Research.

- o Access to mainframe computing facilities by modem on the same basis as regular Faculty.

- o Free parking and free business cards.

Before we get carried away by the generosity of the Administration, please be aware that we have fewer than 35 emeritus designations. More than half of these do not live near Sudbury, so cannot avail themselves of these privileges. Obviously this is not costing a great deal of money. LUFA-R believes these same benefits should be extended to all retirees, and is energetically working toward that goal. Actually, there are only about 100 faculty retirees, and few of these live in the Sudbury area. Laurentian has never shown any great interest in the knowledge and expertise of retirees, although occasionally the Administration has asked a retiree to undertake a specific task e.g., acting President of the University or Chair of the School of Social Work.

I believe that one of the greatest annoyances we retirees face at Laurentian is the refusal of the University to use our knowledge, expertise, and experience. We were founded in 1960, so are still quite young and the scope and extent of the expertise of our retirees should be a welcome resource. But we may have the wrong perspective. Certainly, at Laurentian, and per-

haps elsewhere, much of the utilization of retirees is initiated at the Department or School level. That is, a Department or School Chair will seek to employ a retiree to teach a particular course, or to engage in particular research. He or she then applies to the Dean for the proper authority, and the Dean then presents the situation and the solution to the Vice President Academic, who is usually delighted to have a problem solved before it reaches his office. In one Laurentian case, an economics professor has taught almost full time since his retirement six or seven years ago.

A very large hurdle retired faculty face in Ontario is if they seek re-employment in an academic capacity. That is the mandatory retirement age of 65. Would an Ontario university be able to employ faculty over the age of 65? There is another hurdle faced by those of us who come from universities where the faculty is unionized: Once having retired, whether by government fiat, or voluntarily, we are no longer members of the union, and have, therefore, no rights of employment other than those the union permits. It is unlikely the university would hire any of us without first gaining some understanding with the union, and I suspect the University is none too eager to re-hire any of us, on any basis.

In conclusion: To save this from becoming a Jeremiad, I suggest that we use our associations as consulting services, to provide the expertise the University doesn't appear to believe it requires. Consultants are self-employed and therefore are able to ignore both government retirement rules and the problems of union

membership. Simplistic? Sure it is, but has anything else been effective to date?

Profile: George Luste

by Charles T. Meadow



Prof. Luste, a few years ago

The new president of UTFA is a former member of the RALUT Executive Committee who has been active for years in advocating a better U of T pension plan. Other than that, who is he?

George was born in Latvia in the early days of World War II, after the Russians had invaded Latvia but before the Germans began their war with Russia. "I was fortunate," he says, "being so young at that dreadful time I was spared awareness of the tragedy and suffering my parents had to endure during the war and post-war years."

The family arrived in Canada in the mining-town of Wawa in 1948. There, young George began his formal education in grade 3 of a two-room school house, without any initial understanding of English. Later, the Lustes moved to Sault Ste. Marie and then to Montréal where George completed high school.

On, then, to Mt. Allison University, doing math and physics, playing football and tutoring other members of the football team whose interests were more on the game than on physics and math. He must have done well because he next appears at Johns Hopkins University in Baltimore, where he won a PhD in high energy physics and his charming wife, Linda (who, by the way, has contributed untold hours to RALUT activities).

A post-doc appointment brought our hero to Stanford University's Linear Accelerator Center in 1968. From there he came to the U of T in 1971.

How, we asked, did he get involved in UTFA and, particularly, in pension issues? He came to Toronto from California in the days when moving expenses were reimbursed only sparingly, so the Lustes made the tiring trip in a U-Haul truck. Upon arrival he went wearily directly to the personnel office. (This was before the invention of Human Resources.) He was told that joining the pension plan was a condition of employment, got few satisfactory answers about the plan and refused to sign the pension forms, but was hired anyway.

In 1987, he ran as Physics Dept. representative to UTFA Council and won by acclamation. That year he was invited by Michael Finlayson to be a member of the negotiating team for salaries-benefits-pensions. It was, he feels, a fateful year because UTFA gave over control of the pension plan to the University without fully understanding what that entailed, e.g. pension holidays for the University but not for the working faculty for many years. He tried to get Council to reject the settlement but it carried by a wide margin. And we're

all still suffering. In 2001 he ran for and was elected to the position of UTFA Vice-President, Salaries, Benefits and Pensions. In 2002 he became President.

So George has been through the wars in more than one sense. His life is not limited to physics and pensions. He is an avid wilderness canoeist, frequently making long trips (sometimes alone) in the arctic or northern Labrador. He collects antiquarian books about the North and has a related family mail-order book business.

Before RALUT was officially formed, we used to meet informally, most often in George's house or his office. And so, although not retired, he became an associate member and served on the RALUT Executive Committee until his election to the UTFA presidency.

What, does he see as the key issues facing UTFA? The first is to try and make UTFA a more effective association. Another very important one is long term pension reform. That is not synonymous with surplus distribution. George and his predecessor as VP, Lloyd Gerson, have been pursuing reform for years, as yet to no avail because of Administration resistance. When asked about health care benefits, the picture is murkier. Costs keep rising, especially for us retirees. That's inevitable and it is all of use -- the University, the active working faculty, librarians and staff, and we retirees who pay. There are no easy solutions.

UTFA has been in tight financial straits for the past couple of years, mostly due to high legal costs for supporting some grievances. Some money has come from CAUT (to help with the

Olivieri case), several staff members have left, lessening the payroll, and there has been a limited-time surcharge on membership fees for active members, so there is some hope this might work itself out.

How about running for re-election, we asked. He expects to, at least once.

(Author's note: I've known George since about 1999 or 2000 when we began the discussions that led to RALUT. I have rarely met a more dedicated, hard working, and effective man.)

Transitions

A Note from the new editor and Executive Committee Member

by Fred Wilson

It has been some time since I have done work on behalf of ordinary faculty members and librarians. I have served on the Academic Board, but UTFA and CAUT are long behind me. I was somewhat surprised when Peter Russell asked, on behalf of the RALUT nominating committee, that I serve on the RALUT Executive Committee and take on the duties of editing the quarterly newsletter. After talking it over with several colleagues and with my family, I decided to accept: if people thought enough of me to nominate me, then I could probably make a useful contribution. I'm not quite sure exactly what I have now let myself get into, but as I have enjoyed doing these things in the past, and have in fact found it very worthwhile, I

am looking forward to this new role. Academic staff and librarians who have retired are not terribly well done by at this university, in spite of their being the most underused resource. I look forward to the coming year, and working on their behalf.

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Feel free to get in touch with me about your concerns.



Fred Wilson

And Another Note, from the Retiring Editor

by Charles Meadow

It's been a challenge and a pleasure to serve as editor of this publication for nearly a year and a half. (The first issue was put out by Sue Russell, wife of the president, hence the First Lady of RALUT

I thank the many of you who have expressed appreciation for the work. I thank Beate Lowenberg, who has a fine touch with the electronic version of the blue pencil, all those who have



Meadow and Friend

) contributed articles, and Hickson Butler at the UT Press who gets the printing and mailing done quite effectively.

Best of luck to Fred Wilson. Please give him your support and let him know what you are thinking.

Op Ed

The Coming UTFA Constitutional Vote

by Charles Meadow

As we have reported from time to time, an UTFA committee is at work on revisions to the Constitution. The committee's work is still not complete. October 28 had been mentioned as the date of a special general meeting (SGM) for the membership to vote on any proposed changes. At one time some members of the committee had proposed that retirees have a choice of being full or associate members. Associates would pay lower dues but have no vote at a

general meeting or for president. What will be brought forward at the SGM has not yet been finally decided. But, bear in mind: becoming an associate means you lose your vote in UTFA which represents us in benefit and pension negotiations with the University. Don't give up this right easily. When you are informed by UTFA of when the SGM will be held and what the issues are, GO! VOTE!

Thoughts about Pensions

by Harvey Kerpneck

Near the beginning of our existence, a year and a half ago, we enunciated a series of Pension Surplus principles. They dealt with all the needy and disadvantaged persons among our members and made it seem that we were intent in having the University use the surplus in our pension fund - then estimated *by us* at over \$500 million - to alleviate their distress and give them more equitable and just pensions.

Now, according to the Administration's latest figures, as a result of the stock market crashing, the surplus has shrunk to under \$100 million.

Had we made a more vigorous effort to pressure the administration to make use of the surplus according to our principles, something might have been achieved. Now, at least for this year, redress is out of the question.

If we are going to achieve our goals, we will have to wait until next year or even later.

My friend, Charlie Meadow, a Brooklyn Dodger baseball fan from 'way back, grew up with the

slogan "Wait til next year." Eventually, it happened. The beloved Dodgers won the World Series.

Publication Notice

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Coming Events

UTFA Special General Meeting to consider constitutional changes – sometime this fall, date TBA

Completion of UTFA - U of T salary and benefit arbitration – November?

RALUT General Meeting – will discuss UTFA - U of T negotiations, UTFA Constitutional changes, etc.

Breaking news can be found on our web site: www.ralut.ca.