

Open to Learning

35th AGM & Convention
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Kelowna, BC

Supporting Documents



Federation of
Post-Secondary Educators
of BC



2015 AGM & Convention

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Federation of
Post-Secondary Educators
of BC



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Post-Secondary Educators
of BC

Opening Doors, Building Confidence 2.0

Proposals to Strengthen Adult Basic Education
in British Columbia

Draft Discussion Paper

March 2015

Introduction

The provincial government recently tabled its 2015 budget, a document that held little promise for post-secondary education. In fact, overall operating grants for post-secondary institutions will decline slightly (by about \$14 million) between 2015 and 2016 before returning to the level they were in 2014. Hardly the kind of investment you would expect to see from a government that continues to stress the importance of education and skills.

The trend in funding in 2015 is at least consistent with the broader trend-line in post-secondary investments over the last decade and a half. Since 2001 real per-student operating grants have dropped by 20 percent. What new money has been put into post-secondary education has come from students who have seen tuition fees skyrocket over the same period. In many of our institutions tuition fee revenues now account for more than half of the total operating revenue of the institutions, a development that raises serious questions about the “publicness” of our public post-secondary institutions.

Amidst this chronic under-funding many program areas have been particularly hard hit. In 2014, for example, the government announced its intention to discontinue provincial funding to support English Language Training programs delivered by public post-secondary institutions. The funding shortfall for ESL programs was close to \$22 million and resulted in significant layoffs across the system as well as regressive new fees for ESL students hoping to improve their language skills.

More recently, the latest target for funding cuts has been Adult Basic Education programs. Since 2008 programs delivered by public post-secondary institutions have been tuition free. However, beginning in 2015 the BC government is lifting that tuition free requirement and is allowing institutions to now charge substantial tuition fees for ABE programs. This discussion paper draws upon a number of sources of information to make the case for continuing the policy of making ABE tuition free. It revises much of the work done by an ad hoc working group of FPSE which had drafted a proposal to various Ministries of the provincial government in 2006 to identify ways to make ABE programs more accessible and affordable to students. The purpose of this paper is to highlight both the current problems that the change to tuition policy will have on ABE students and a number of alternative arrangements and funding policies that could once again “open the doors” for adult who want to complete their high school graduation or upgrade their qualifications as part of a broader career strategy.

ABE: Setting the context

In 2006, when the provincial government was first considering the issue of making ABE programs tuition free, the Select Standing Committee on Finance and Government Services, in its report on pre-budget consultations, highlighted the issue of ABE program funding support. The Committee report recommended that the government consider “*investing in variety of*

social programs to support individuals and communities. The Committee believes that the government should review the per-student funding allocations for BC's colleges and universities to ensure the new post-secondary education spaces are sufficiently funded and consider removing adult basic education tuition fees" (Report on the 2006 Budget Consultation Process, page 54).

The Committee's report highlighted what was then an emerging view within government and the community that the cumulative impact of policy and funding changes in the public post-secondary system between 2001 and 2006 had a disproportionately negative impact on developmental education programs and students. In particular, the return to tuition fees for ABE programs as well as the hefty increase in associated fees that ABE students often paid, along with the loss of various student support services and funding, played a major role in discouraging ABE students from continuing in the public post-secondary education system. These students were already marginalized and had a fragile attachment to the post-secondary education system. The policy and funding changes only added to those barriers

The problems facing ABE students have always been significant. Many of these students have often struggled to simply survive academically in the K-12 system. Now, as adult learners, they are working in most instances to obtain literacy skills, upgrade in general or specific areas or complete their grade 12, or upgrade in subject areas that will allow them to access new career options.

No matter what the circumstances, these adult learners have faced a number of barriers. Our proposal to the three ministries highlights some of these barriers and recommends either funding and/or policy changes that the province needs to implement in order to remove these barriers.

Declining enrolments

The clearest evidence that the tuition fee increases to ABE between 2001 and 2007 had a negative impact was the decline in enrolments across all developmental education program areas. An internal report by Laurie Duncan for the Ministry of Advanced Education confirmed the problem of declining enrolments.

Unfortunately, Duncan's report misinterpreted the factors behind those enrolment declines, leading some within government to conclude that enrolment declines were more the result of changing economic conditions than increased tuition costs and the dramatic loss of student support and funding. In particular, the preliminary report suggested that a strong labour market, especially the record low levels of unemployment at the time, had been a major factor behind the decision of many ABE students to opt for work instead of post-secondary education.

There were several problems with that analysis. The most troubling was that it lulled government and policy makers into inaction on what should have been a major concern: declining productivity. Many of the jobs that ABE students were taking were low wage and low skill. Their prospects for improvement were limited by their own inability to improve their skill sets through better training and education. In effect, these students are caught in a low wage trap in which they are unable to secure the resources (i.e., post-secondary education) necessary to advance in the labour market. It is this low wage trap that contributes to declining productivity.

The second problem was that the declines in enrolment began before the unemployment rate reached its current record low levels. BC's unemployment rate averaged 7.7% in 2001. By 2004, the average had dropped slightly to 7.2%, having risen briefly during the intervening two years. It wasn't until late in 2004 and throughout 2005 that BC's unemployment rate dropped below 6.7%, a rate not seen in this province for twenty years.

By contrast, enrolment declines were first noticed following the significant policy and funding changes to the public post-secondary system which were implemented in mid-2002. By 2003, many students in developmental education had little choice but to abandon their education, as the combination of skyrocketing costs (e.g. associated fees and tuition) and loss of student support services made it increasingly difficult to continue. For many of these students, who already were multi-barriered learners, the implicit message in these funding and policy changes was that the public post-secondary education system wasn't interested in accommodating their needs.

Impact of current changes to ABE

In December 2014, when the BC government announced its intention to change the tuition policy for ABE, a number of educators, researchers and student organizations expressed their concern that the change in policy was as equally flawed in 2015 as it was in the 2001-2006 period when it was first introduced. Two researcher who had devoted considerable time and attention to this issue were Susanne Smythe from the Department of Education at SFU and Shauna Butterwick from the Department of Education at UBC. The two drafted a number of key points that highlight again what is misguided about the current decision to impose tuition fees on ABE program. Their argument against the fees included the following points:

Government Claim One

Graduated adults have already benefited from public K-12 education. If they choose to return to school to upgrade their qualifications they should be expected to pay tuition, and can probably afford it.

REALITY: The vast majority of basic education students are low income earners who enroll because their high school marks or courses do not qualify them for entry into trades or other college and university programs. John* was laid off from his job near Quesnel last year, after 25 years of steady employment. Now in his mid-40s, assessments place his reading level at Grade 9 and his math skills at Grade 10. To gain access to a trades program and to employment, John will need at least one and a half years of basic education courses to pass the English 12 and Math 11 requirements: and he cannot afford tuition.

The new tuition policy will be particularly hard on Aboriginal British Columbians, because many Aboriginal communities are served by school districts that do not offer basic education. Aboriginal people are also less likely to have Internet access for online learning. Charging tuition seems counter to the spirit of the government's 2012 commitment to improving access for Aboriginal students.

Government Claim Two

The new Adult Upgrading Grant will address the concerns of low-income students.

REALITY: Many students who can't afford the tuition will not qualify for the grant. The grant starts getting clawed back at pre-tax income of \$23,647 for a single adult and \$29,439 for a single parent with one child, thresholds that are below Statistics Canada's Low Income Cut-Off before tax for Vancouver.

For example, consider the plight of a single parent who earns \$33,000 per year as a homecare worker. She hopes to become a nurse practitioner but needs to take the chemistry, math and biology classes she did not take when she was in high school five years ago. She will not qualify for the government grant. Thousands of basic education students are in the same situation.

Government Claim Three:

We can't afford to continue providing tuition-free basic education for adults.

REALITY: The funding cuts announced in December will save the province \$15.9 million per year. To say that \$15.9 million cannot be found for basic education is simply not credible with a surplus of \$900 million for 2014 and large surpluses for the next three years. The one-time reinstatement of \$6.9 million as transition funding for 2015/16 is a short-term fix.

When the government introduced free tuition under the Education Guarantee in 2008, it was in recognition of its vital social and economic role. Enrolment increased dramatically, revealing strong demand. In a province with some of the highest levels of poverty and inequality in Canada, slamming the door on access to basic education is exactly the opposite of what we should be doing. If the government is serious about better aligning 'skills for jobs' in the province, it must start by making basic education tuition-free for all British Columbians who want to a better life.

ABE: Recognizing a basic right

The public policy debate that underlies the entire discussion of strengthening ABE programs must never lose sight of the fact that the skills acquired through these programs are the skills needed to fully participate in society. Certainly that participation has an economic dimension (e.g. higher skills lead to higher productivity), but just as important is the fact that a democratic society is strengthened when every citizen is provided the opportunities and skills to fully participate in all aspects of that society. That concern lies at the heart of FPSE's efforts to see ABE programs properly funded and tuition free.

Often lost in the debate about funding of ABE are the major inequities that most ABE students face. In particular, many ABE students, because of their age, have to pay for programs that would otherwise be provided for free in the public K-12 system. This is not to suggest that these adult learners should look to that system for program support. Far from it, adult learners should learn in an adult environment and the public post-secondary system provides the appropriate learning environment for these students.

It is an accepted tenet of public policy that primary and secondary education is a basic right that is fully funded by the provincial treasury. However, those rights and benefits begin to blur for many older students who return to our public colleges and institutes to complete high school. Depending on their age and specific criteria within their post-secondary institution, these older students are being forced to pay for virtually all of their secondary school education. If primary and secondary school education are basic rights, the age at which a

person completes their secondary school education should not be a factor in determining who pays and who doesn't. Unfortunately, that's exactly what will happen in BC with the advent of tuition fees for ABE programs. At the very least, the government needs to correct this inequity by ensuring ABE programs are tuition free.

Adult Learners need an adult learning environment

There are some within government who would argue that the most appropriate mechanism for delivering ABE programs is through the secondary school system. However, the reality for the vast majority of adult learners is that they need the supports and flexibility of an adult learning environment to achieve their full potential as a learner. Many of these adults were unable to succeed in the curriculum-based system that characterizes learning in the K-12 system. Because the post-secondary education system is articulation-based, instructors are able to develop content, learning materials and teaching strategies that incorporate the needs and experience of adult learners and, in so doing, allow those learners to build the interest and confidence necessary to achieve their educational goals.

Government must act now

The provincial government continues to advance its Jobs Plan as central to its economic strategy for the province. In that Plan, the government acknowledges that the confluence of a number of factors, everything from resources development plans to significant demographic changes, will create tremendous pressures in BC's labour market. It is an issue on which our Federation, the broader labour movement and those in the province's business community all agree: BC needs to support a broad based plan of education and skills development.

The demographic pressures are by far the most significant. An aging "baby-boom" generation will begin to retire from the labour force in this decade. That shift will create one of the most significant changes ever seen in BC's labour market. By 2020, for example, more people will leave the labour force as a result of retirement than will enter the labour force. The gap between entrants and retirees is expected to be very significant: various estimates place the gap between 100,000 and 300,000 workers at the peak of this change.

Adding to this situation is the fact that BC's economic profile is shifting. The knowledge sectors of our economy will play a more significant role. With that shift will come demands for new skills as well as a growing need to replace those skills lost through retirements. The shifts will also be affected by the on-going pace of technological change which will constantly transform existing jobs in the economy. Against this backdrop of change within the labour market the need to both replace existing skills and adapt to the demands of a changing economy and changing technology, the role of post-secondary education and training will become even more critical.

BC's business community already acknowledges that the skill shortage threatens every sector and region of the province. As well, those shortages are expected to affect every occupational group, whether they are white collar or blue collar. More importantly the looming shortages are expected to have serious economic consequences on the BC economy. In fact, the government's own Economic Forecast Council has identified the pending skills shortage as the one risk to BC's future economic growth over which the provincial government has direct control.

The Council's statement is yet another indication that we cannot afford to ignore the impact of this problem. Given the nature of our economy, its dependence on trade and exports for growth and its vulnerability to cyclical swings in growth, it is critical that we take every step available to guard against economic problems over which we have a significant amount of control. BC has the fiscal capacity to increase its education and training effort in the public post-secondary system and the government needs to use its fiscal capacity to begin addressing these problems.

Provincial policies contribute to skills gap

In numerous submissions to the provincial government, FPSE has stressed that chronic underfunding of the public post-secondary education system since 2001 has created "perfect storm" conditions. Rather than adopt policies that encourage citizens to access post-secondary education and training (and thereby help strengthen skills and knowledge development), BC government has done almost the exact opposite. Tuition fees were de-regulated in 2002 and quickly skyrocketed, forcing thousands of students deeper into debt or simply "pricing" lower income students and families out of the public post-secondary education system.

It is important to remember that even if BC did not face a looming skills shortage, it has a major skills gap that must be closed. Currently only 60% of BC's labour force has some sort of post-secondary education, whether a degree, diploma or certificate. However, a number of reports confirm that 75% of all new jobs require some form of post-secondary education, whether a degree, diploma, or certificate.

Challenge for ABE students is more than tuition fees

The changes that have made life difficult for ABE students are not restricted to those of the Ministry of Advanced Education. In fact, many of the program, funding and policy changes in the income assistant for low income individuals and families have been just as detrimental to ABE students. FPSE believes that there needs to be more collaboration between Ministries and the restoration of tuition free ABE so that students will have more secure access to programs and opportunities. For example, allowing ABE students to receive income assistance and child care are critical factors in their ability to return to school at all, let alone to complete specific courses. When child care supports were lost in 2001, so too was their opportunity to advance

in any meaningful way in the post-secondary system. As well, single parents were told that they had to look for work once their child(ren) reached 2 years of age. Low-paying, unskilled jobs do not serve parents trying to raise children; in fact, these jobs only hinder them. Similar problems emerged for other groups as well. For many immigrants, for example, the changes that provided tuition-free courses at only a basic level meant most simply could not afford to move beyond those basic skills. They then were prevented from accessing post-secondary programs.

Measures to improve ABE

The problems created by moving to tuition fees for ABE programs need to be addressed. The Finance Minister's 2015 budget acknowledges that there is the fiscal capacity to address these issues. More importantly, the glaring inequities that ABE students face need to be corrected now to ensure that their basic rights are respected. Moreover, the province would be well-served by ensuring better access to post-secondary education because economic and demographic pressures will put even greater demands on our current and future skills.

In light of the problems created by the proposed tuition fees on ABE, our Federation asks that the following initiatives be incorporated into the provincial government's plans for the coming fiscal year:

Ministry of Advanced Education

- Eliminate tuition fees for all Adult Basic Education courses
- Use targeted funding mechanisms to ensure that every college, institute and university college is able to provide adequate ABE programs in their communities
- Increase ABESAP funding to ensure that students have sufficient support to pay for associated fees, books, childcare and transportation while enrolled in ABE programs.
- Maximize the use of our public colleges, institutes and special purpose teaching universities to deliver any publicly funded training program for adults.
- Establish separate funding targets to overcome the systemic barriers that women, single parents and First Nations face in completing ABE programs.
- Give post-secondary institutions sufficient funding to allow greater flexibility in establishing realistic timelines for ABE students trying to complete their programs.

Ministry of Social Development

- Raise the age of the youngest child to 8 years old when a parent on welfare must begin looking for employment.
- Allow those receiving Income Assistance to be enrolled in ABE and post-secondary education programs.
- Provide additional funding to ensure that income assistance is sufficient to cover extra costs associated with returning to school.
- Recognize literacy as a barrier to employment and support literacy upgrading in the public post-secondary system as part of their employment plans.

Ministry of Education

- Acknowledge and support the work that the public post-secondary institutions do to deliver the vast majority of adult literacy programs in the province.
- Use the public post-secondary education system to deliver any new programs in adult literacy.
- Respect the needs of adult learners to learn in an adult environment.
- Ensure that federal literacy programs are delivered by the public post-secondary education system.

In summary, our Federation believes the February 2015 provincial budget could provide an important opportunity for the government to renew and strengthen a variety of developmental education programs in the public post-secondary system. These programs have suffered badly over the last four years as a result of both funding and policy changes. The students in these programs are some of the most vulnerable in our public post-secondary system. They deserve the opportunity to develop skills that will help them more fully participate in the economic and social future of our province.

FPSE POLICY & PROCEDURES MANUAL – SEPTEMBER 2014**1.6 DEFENCE FUND INVESTMENT POLICY (pp. 62-69)**

Section 1: Purpose

1.1 This statement of investment policy ("the Policy") applies to the assets held in the Defence Fund (the "Fund") for members of the Federation of Post-Secondary Educators ("FPSE"), pursuant to Article 2.8 of the FPSE Constitution and Articles ~~5.3 and~~ 9.4 of the FPSE By-Laws.

1.2 *No changes.*

1.3 This policy may be changed or modified at any time by FPSE's Presidents' Council, with such changes to be presented to the next Annual General Meeting for disposition. Any investment manager (the "Manager" or "Fund Manager") or other agent or advisor providing services in connection with the investment of the Fund shall accept and adhere to this policy.

Reporting: **Investment reports shall include a detailed schedule of investments, as well as the portfolio value and performance information. The audited financial statements shall include a summary of year-to-year changes, investment income and contributions, and deductions (if any).**

The audited financial statements shall include a summary of, and the investment reports shall include a detailed schedule of investments, showing the amounts of holdings, costs and market value.

No changes:

Section 2: Executive Responsibilities

Section 3: Nature of the Fund

Section 4: Fund Objectives

4.1 *No changes.*

4.2 ~~The objective of the Fund is to achieve over four-year moving average periods, an average, long term rate of return including capital gains, dividends, interest and other income, but net of all investment management and custodial expenses,~~ **To fulfill FPSE's objectives over the long term, the Fund should achieve over a rolling five year average total rate of return as follows:**

- (a) ~~a rate of return, net of investment manager expenses, which exceeds the annual change in the Consumer Price Index for Canada, plus 3.5% per annum,~~ **a net (after deduction of investment management fees) return of annual CPI (Canada), plus 2.0% per annum; and**
- (b) ~~a rate of return, net of investment manager expenses, which should be at least equal to 8%~~ **a net (after deduction of investment management fees) return of 4% per annum.**

Section 5: Permitted Categories of Investment

5.1 *No changes.*

- ~~5.2 Subject to the following rules, futures, options, share purchase warrants, share rights and other derivatives of otherwise permissible securities may be used only when they are regularly traded upon a recognized public exchange and issued by a recognized financial institution.~~
- ~~5.3 The value of warrants and share rights may not exceed 5% of the market value of the applicable portfolio unless cash or highly liquid, high quality short term securities equal to the value of an equivalent common share position is held as a matching hedge offset.~~
- ~~5.4 Future contracts and options and other derivatives may only be used to:

 - ~~(a) create an asset mix position that does not leverage the fund;~~
 - ~~(b) replicate the performance of a capital market index;~~
 - ~~(c) generate covered call income;~~
 - ~~(d) reduce risk as part of a hedging strategy.~~~~
- ~~5.5 The use of futures contracts and options and other derivatives may not be used to create asset mix positions contrary to the asset mix ranges set out in this policy.~~

RENUMBER

5.6-5.8 *No changes.*

Section 6: Degree of Risk and Diversification

- 6.1 The investment objectives for the Fund have been reviewed with regard to the risk **tolerance of Presidents' Council and characteristics of the Fund. The primary** observations are:
 - (a) The Defence Fund has been in existence since 1986 and ~~to date~~ it has been drawn on **five several** times during work stoppages, none of which were system-wide. The future likelihood of further strikes or lockouts cannot be predicted, but AGMs have regularly authorized expenditures from the Defence Fund for system bargaining, or campaigns in defence of the post-secondary education system.
 - (b) *No changes.*

6.2-6.3 *No changes.*

Section 7: Asset Allocation Guidelines

- 7.1 In view of the foregoing considerations, the allocation of assets between **debt fixed income** and equity securities shall be maintained within the following structure, exclusive of the occurrence of a strike or lockout:

Low risk income	20%
Medium risk income.....	35%
High risk income	5%
Medium risk growth.....	35%
High risk growth	4%
Very high risk growth	1%

Asset Class	Range	Neutral Allocation
Cash and equivalents	0%-20%*	10%
Fixed income	40%-80%	60%
Common equities	0%-50%	30%

* In times when significant withdrawals are anticipated, cash and equivalents may rise to 100%.

7.2 Within each asset class, there will be a prudent level of diversification subject to the following limits, based on market value. Foreign content for equities and bonds will be capped at 40% of the total value of the portfolio.

7.3 *No changes.*

7.4 **Debt Fixed income** (bonds): In respect of the total content of the Fund, the quality standards for bond investments shall be as follows:

~~(a) Not more than 10% shall be invested in the debt issues of any issuer, except for securities of or fully guaranteed by the Government of Canada or a Province of Canada having at least an AA rating.~~

~~(b) Quality standards for bond investments shall be as follows:-~~

<u>Quality Standards for Bond Investments</u>	
Debt Rating	Maximum % of Total Portfolio
<u>Lower than A or lower</u>	<u>25</u> 40%
A or higher	No limit

The above limits will be applied with some temporary latitude in the event of a down-rating of security.

~~The duration of the bond portfolio shall be maintained within a range of 50% to 150% of the duration of the SM Universe. Not more than 20% of the bond portfolios shall be of a duration greater than 20 years.~~

7.5 Short Term Paper:

(a) Any short term portion of the Fund (or of an equity or debt portfolio) shall be invested in readily liquidated securities with a term to maturity (or in the case of floating rate securities, to interest rate re-establishment) of not more than one year, or held in cash; ~~but not more than \$60,000 will normally be held in cash.~~

~~(b) All short term investments shall be rated DBRS (Dominion Bond Rating Service) R-1 or better.~~

7.6 *No changes.*

All other sections of the policy remain the same.

1.11 OPERATING RESERVE INVESTMENT POLICY (pp. 72-75)

Purpose

1.11.1-1.11.3 *No changes.*

1.11.4 **Investment reports shall include a detailed schedule of investments, as well as the portfolio value and performance information. The audited financial statements shall include a summary of year-to-year changes, investment income and contributions, and deductions (if any).**

No changes to:

- Executive Responsibilities
- Nature of the Fund
- Fund Objectives
- Permitted Categories of Investment
- Degree of Risk and Diversification

Asset Allocation Guidelines

~~1.11.13 The allocation of assets will be 100% low risk fixed income.~~

Asset Allocation:

<u>Asset Class</u>	<u>Range</u>	<u>Neutral Allocation</u>
Cash and equivalents	5%-30%*	10%
Fixed income	40%-95%	65%
Common equities	0%-30%	25%

* In times when significant withdrawals are anticipated, cash and equivalents may rise to 100%.

~~1.11.14 There will be a prudent level of diversification subject to the above.~~

All other sections of the policy remain the same.

2015-2016 ACTION PLAN

Open to Learning:

Policies and
Perspectives on
Post-Secondary
Education in BC



Federation of
Post-Secondary Educators
of BC

Open to Learning:

Policies and Perspectives on Post-Secondary Education in BC

The 2015 provincial budget **raises serious doubts about the current government's** commitment to properly fund post-secondary education in BC. Whether it is the steady downward shift in real per student operating grants which will have dropped by more than 20% over the period 2001 to 2016, or the increasing reliance on tuition fee revenue from both international and domestic students, post-secondary education in BC has undergone major changes over the last decade and a half. Despite those changes, we know that the public looks to our institutions as the place where students have the opportunities to transform their lives in ways that will have lasting and positive impacts on our province. The challenge we face as educators and as union activists is to ensure that the public **understands the disconnect that exists between the government's current support for post-secondary education and the broader aspiration of BC citizens for accessible and affordable post-secondary education.**

Through our colleges, institutes and universities, BC could have the capacity to provide opportunities for students to learn while also providing communities with a hub for **innovation and civic engagement. Unfortunately, achieving the true potential of BC's post-secondary education system has not been supported by policies and funding choices at either the provincial or federal level.**

At our 2014 convention, delegates supported a call to mobilize and engage our members and their communities on key issues that undermine our institutions and adversely affect our members who work and teach in those institutions. One of the goals of this campaign effort is to support and advance policies which ensure access to high quality post-secondary learning opportunities for every citizen in BC. We recognize that to achieve this goal FPSE needs to press governments—mostly the provincial government, but also the federal government—to implement policy and funding choices that strengthen both the opportunities for access as well as the quality and diversity of program offerings at our public institutions.

FPSE also recognizes that the rights of our members need to be respected and enhanced. Achieving that goal can move in tandem with our broader public campaign efforts, but it also needs to be addressed directly through coordinated bargaining strategies and ongoing support for labour relations and contract oversight at both the local and provincial level. Part of that effort needs to focus on how FPSE supports contract negotiations. It also needs to focus on our capacity to provide grievance and arbitration oversight during the term of

2015-2016 FPSE ACTION PLAN

Local agreements. And finally, it needs to strengthen our longstanding commitment to organize the unorganized in both the public and private sectors of post-secondary education.

Over the next twelve months, FPSE is proposing an Action Plan that will mobilize its members, staff, resources, organizational capacity, and alliances with the broader labour movement and progressive community partners to advance our interests in five major areas. Those areas include:

1. Strengthening the rights and benefits of all members by:

- Supporting the conclusion of the current round of contract bargaining by providing Labour Relations Staff support for Local bargaining committees and ensuring that this support coordinates research, Local strategy development and communications to achieve settlements that have the support of Local members.
- Ensuring that our bargaining priorities address issues that are critical to all of our members to ensure equity and good working conditions.
- Spearheading efforts to improve the employment security of all members by mobilizing against plans to cut programs and course offerings across the public post-secondary education system.
- **Joining with the broader labour movement's campaign to overhaul BC's labour laws and employment standards**, a campaign that will make it easier for workers to form or join a union.
- Mobilizing members to secure stronger contract language and related provisions for non-regular faculty to address the needs of those members for greater job security as well as equitable treatment.
- Continuing to support the efforts of every local to organize the unorganized at their institutions.
- **Making strategic and effective use of FPSE's capacity to service and fund the grievances and arbitrations advanced through the Grievance and Arbitration Review Committee.**
- Providing needed support and advocacy to Locals as they implement new OH&S rules dealing with bullying and harassment and advance the rights of workers affected by workplace harassment.

2. Building our capacity to improve the post-secondary education system by:

- **Starting with the launch of FPSE's *Open the Doors* campaign**, continue to target key issues of funding and program prioritization as part of a broader **effort to increase the public's understanding of post-secondary education** and the disconnect that exists between what the public wants from post-

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secondary institutions and what the BC government is failing to provide because of chronic under-funding of our institutions.

- Expanding the specific campaign efforts that have targeted the provincial **government's cut** to English Language Training programs delivered by public post-secondary institutions as well as the recent decision to re-institute tuition fees for Adult Basic Education (ABE) provided to post-secondary students.
- Working with our allies in the Canadian Federation of Students to improve affordability and access by pressing governments and our institutions to strengthen student grant programs, increase student financial aid and lower overall cost of tuition. As well, continue to expand on work done with CFS and others to stop the exploitation of international students.
- Supporting efforts of community allies, students and the broader labour movement in opposing the relentless privatization of post-secondary education in BC.
- Coordinating with the broader labour movement to ensure that post-secondary educators are active and mobilized for the 2015 federal election
- Calling on the Ministry of Advanced Education to undertake a thorough review of the provincial funding formula for post-secondary institutions to ensure fair and sustainable funding provisions are in place.
- Advocating for an **overhaul of the province's trades training and** apprenticeship system to ensure greater input from educators and workers as well as greater utilization of our public institutions for delivering that training.
- Emphasizing the value and importance of the policies and funding that support the delivery of developmental education within our post-secondary institutions.
- Spearheading efforts to not only re-regulate private post-secondary institutions but also strengthen the capacity of faculty in those institutions to have more direct and effective input into the oversight of private institutions.
- Working to revitalize Liberal Arts programs and expand the number of Arts and Science offerings to ensure that these programs play an integral role in the learning opportunities available to every student and the pathways they take to complete their post-secondary education.
- Continuing to press governments for better scholarly activity funding support as well as more equitable access to that support for all post-secondary institutions.

3. Supporting the efforts of private post-secondary faculty to unionize and fully access their right to bargain collectively by:

- Funding the organizing efforts of locals who have identified opportunities for unionization.

2015-2016 FPSE ACTION PLAN

- Providing labour relations staff support at the Labour Relations Board and at the bargaining table.
- Including advocacy on public policy issues that affect private colleges and institutes as part of the support that FPSE will provide to existing and newly organized private college faculty members.
- Continuing to support the sponsorship of activists who are interested in **participating in the BC Federation of Labour's Organizing Institute.**

4. Democratizing post-secondary governance structures by:

- Increasing the capacity of activists within our ranks to participate on Councils, Senates and Boards of their local institutions and do so in ways that are supportive of the faculty who have elected them to those positions.
- Creating greater awareness among faculty members of the importance of participation in governance by providing workshops and educational material on this issue to every local.
- Reinstating the right of faculty to choose their own representatives to Boards of Governors.

5. Making full restoration of ESL and ABE funding a priority focus by:

- Utilizing our internal expertise and capacity on both ESL and ABE to develop comprehensive policy proposals that would form the basis of our lobby effort with governments.
- **Ensuring that FPSE's ESL and ABE Caucuses are fully engaged in the drafting of these policy proposals.**
- Working with unions, community allies and student organizations who share our concerns about the funding cuts that have taken place in both ESL and ABE program areas.
- Using our collective agreements and advocacy roles within our institutions to resist efforts by local administrators to implement program prioritization plans that adversely impact ABE and ESL programs.
- Analyzing any government efforts to address financial support for vulnerable and poor students with an eye on ensuring that proposed changes fully support ESL and ABE students to successful completion of their studies not only in ESL and ABE, but through to certificate, diploma, or degree completion.

Standing Committee Resolutions



Federation of
Post-Secondary Educators
of BC



Summary Report on DMRC’s Manulife Satisfaction Survey

The Disability Management and Rehabilitation Committee received approval from Presidents’ Council to distribute an electronic survey to member locals to gauge members’ satisfaction with the current provider of disability benefits, Manulife. The survey had been designed by the DMRC as an instrument whereby we could hear from the members about their concerns regarding Manulife in a confidential manner. Only members who had ever applied for short or long term disability benefits were invited to respond to the survey questions.

The survey respondents numbered 152, but they didn’t all respond to all of the questions. Of note is that 75% of the respondents were female. Fifty percent had their disability claim in their fifties, with only 11% in their sixties. The largest number of respondents who identified their employer was from Local 5, Kwantlen Faculty Association.

Of the respondents who identified the nature of their disability, the biggest group was “bones, joints and muscles“, making up 22%. Only 6% identified as having a mental health issue, but this seems rather low given the DMRC’s experience with members. It has been estimated in published work that 30% of disability claims are due to mental health diagnoses. It is possible that members with mental health issues would be less likely to respond to the survey for reasons related to their disability. It is also possible that they would be less likely to self-identify than members with different types of disabilities.

The most important questions in the survey were the three which directly asked about satisfaction with Manulife.

“How helpful are the employees at Manulife?”		“How satisfied are you with the communication from Manulife?”		“Overall how satisfied are you with Manulife?”	
Extremely helpful	13%	Extremely satisfied	27%	Extremely satisfied	19%
Very helpful	29%	Moderately satisfied	31%	Moderately satisfied	37%
Moderately helpful	29%	Slightly satisfied	5%	Slightly satisfied	7%
Slightly helpful	16%	Neither satisfied nor dissatisfied	7%	Neither satisfied nor dissatisfied	5%
Not at all helpful	13%	Slightly dissatisfied	7%	Slightly dissatisfied	5%
		Moderately dissatisfied	9%	Moderately dissatisfied	8%
		Extremely dissatisfied	14%	Extremely dissatisfied	19%

Although the majority (63%) of members are satisfied with Manulife, the number of respondents who are extremely dissatisfied with Manulife overall is almost one in five. This is of grave concern to the DMRC.

The survey questions had space for comments so that we could gather feedback on what types of problems members were having with Manulife. The DMRC sees that they fall into four themes:

1. Poor or inadequate communications

Members commented on confusing or contradictory information from Manulife, as well as long delays in receiving answers to queries.

2. Lack of continuity of case managers

Members commented on how difficult it was for them to have to re-explain their situations and form workable relationships with Manulife case managers when their file was transferred to new people in Manulife. For some members this has happened more than once.

3. Manulife's challenges of the physician's diagnosis

Members reported incidents where Manulife did not accept the information provided by the treating physician. This is much more likely to occur with mental health conditions, and causes serious stress to members who are already ill.

4. Denial of claim

Members reported initial denials of claims, some of which were overturned upon appeal. Again, this is much more likely to occur with mental health conditions. Other members reported that their benefits were cut off prematurely when Manulife thought they should have recovered in a shorter time frame.

Due to the extremely personal nature of the information in the comments and our commitment to confidentiality, the DMRC chose to identify these themes without providing specific quotes or details.

Although the number of respondents was not as high as we had hoped for, the DMRC believes that the survey has provided useful information to FPSE. We know where there are areas that we need to push the insurer to improve, and things we will be looking for when a new contract is up for tender.

In solidarity,

The Disability Management and Rehabilitation Committee

Reboot: Making education technology work for faculty and students

A discussion paper by the Education Policy Committee of FPSE

Introduction

It would be an understatement to say that post-secondary education has been transformed by changing technology. Whether it is the increasing use of web-based programs that mediate interactions between students and instructors or the emergence of more complicated questions about copyright and intellectual property in a world of “big data” and Massive Open Online Courses (MOOC), technological changes in post-secondary institutions are having profound impacts on the methods, process and faculty-student interface when it comes to learning, research and scholarship at colleges, universities and institutes across British Columbia.

For post-secondary educators, the pace and direction of technological change in their institutions has been a long-standing concern. For many, simply being provided with the necessary support and training services by their institutions to better utilize the available technology is a major priority and one that gets too easily overlooked by administrators focused on ever tightening funding levels from the provincial government. For others, the steady increase in technology raises more fundamental questions about the quality of learning as options move away from face-to-face contact with students to online courses and programs. Add to all of that the fact that technology has also changed the degree and intensity of contact time with students as many of them rely on email to reach instructors, and with that reliance comes an expectation that their instructor is readily available outside of normal contact hours.

At the November 2014 meeting of the Education Policy Committee, members discussed some of the wide ranging impacts of technology in post-secondary institutions. Many of the examples cited related to the frustrations that faculty have with the choices made by administrators when it comes to changing technology and the extent to which faculty input into those choices is either ignored or marginalized.

To help focus both our understanding of technological change in our institutions and ensure that FPSE Locals have strategies in place to respond to those changes in ways that protect the quality of learning and scholarship that takes place in their institution, the EPC decided to draft a discussion paper that begins to address some of these important questions. The paper summarizes some of that major trends in post-secondary education technology. It also assesses some of the impacts that are felt by both students, faculty and staff. And finally, it examines some of the various contract provisions in Local agreements that have been used to deal with changing technology and ensure that those changes have a positive impact on learning, scholarship and research. This paper is not designed to be the last word on technology and post-secondary education. Instead, it is being put forward as a catalyst for an on-going conversation within our ranks about the pace, direction and impact that technology is having in the post-secondary education workplace.

Changing technology: Defining its scope

For Committee members, one of the significant early challenges in drafting the discussion paper was defining the scope of changing technology. The obvious examples of changing technology referred to the use of computer and online systems to both develop new courses and programs and deliver those programs. However, many on the Committee noted that, at least from a labour relations and contract language perspective, technological change often included “systems” changes. Examples of this would include efforts by administrators to develop new organizational structures or functions designed to improve either utilization rates within the institution as a whole or specific departments. As well, these system changes might also be motivated by efforts to reduce operating costs within an institution in reaction to under-funding pressures from the provincial government.

This broader definition, one that includes both the use of new instructional devices, systems and platforms as well as organizational changes designed to improve institutions efficiency metrics, has the most relevance for our members and their institutional workplaces. It also helps set the context for understanding educational technology as more than just an issue of “tools” for faculty. Understanding education technology also means understanding the work that faculty does, the scholarship associated with that work and the advocacy that Locals and their members need to strengthen to ensure that workplace conditions are not under threat because of changes in educational technology.

Education technology and pedagogy: Is it a zero-sum game?

In the initial discussion of education technology, Committee members invariably raised a number of questions, many of them focusing on the utility and purpose of education technology. Many on the Committee probed the deeper issues of learning, the role that faculty play in that process and the extent to which a particular tool or system change was improving the learning opportunity and experience of students.

The debate on this point is wide-ranging to say the least. For some, education technology, especially the proliferation of computers and, more recently, the expansion into web-based teaching platforms, is seen as a way to further enhance access. In an article on the impact that computer-based technologies have on students¹, J. M. Roschelle and colleagues identified four fundamental characteristics of how technology enhances both what and how students learn. The characteristics identified included:

- 1) Active engagement
- 2) Participation in groups
- 3) Frequent interaction and feedback
- 4) Connections to real world contexts

Roschelle’s article concluded that “computer technology can help support learning and is especially useful in developing the higher-order skills of critical thinking, analysis, and scientific inquiry”.

¹ J. Roschelle, R. D. Pea, C. M. Hoadley, D. N. Gordin, B. Means.
Changing How and What Children Learn in School with Computer-Based Technologies, The Future of Children, Princeton University, 2001, 10(2), pp.76-101.

Similar research was undertaken by the Ontario Online Learning Portal for Faculty & Instructors, a provincially funded consortium designed as a resource for post-secondary educators in Ontario that allows participants to find the latest information on new technology and new developments in online learning, as well as practical tips and tools to help them integrate technology in their teaching in a way that improves the learning experience for their students². In their assessment of education technology the consortium maintained that while online learning is becoming more commonplace, the real issue is how developments in technology are enabling changes in pedagogy, which in turn may affect the way in which colleges and universities operate.

Their research identified five changes occurring in pedagogy as a result of the prevalence of technology that are having a significant impact on post-secondary education. They included:

1. ACCESS TO IDEAS, KNOWLEDGE AND INFORMATION

Whether it's through digital textbooks, search engines, Wikipedia or online learning objects, teachers and students have significant access to knowledge in a way that is new in this century. We have the ability to track developments in a discipline using RSS feeds or apps that offer instant and continuous access to information and literature. This changes, not only what the student can know and learn, but also who is the gatekeeper to what the student can know and learn.

2. COMMUNITY OF LEARNERS

It used to be that learners worked in largely isolated ways, gathering only for class and coffee (or something stronger). Now, learners can be part of peer networks - institutional, local, regional, and global - and receive support, exchange ideas, review assignments and explore project ideas together. In one PhD class there are 24 students in eight countries engaged in powerful conversations as a class. But each student is also using their LinkedIn networks to support their learning. This gives the class access to some six million potential people sources.

3. MOBILE MENTORING

Students can connect to their instructors online from anywhere at any time. In a single week, an instructor supported four learners through email (threaded conversation online), Skyped another who was having real difficulty, and recorded a short video to post to two who still could not understand a particular statistical technique. The instructor could have been anywhere, as could her students.

4. ADAPTIVE CURRICULUM

New technologies, which use machine learning, have the potential to adjust what the student is being asked to study according to their learning style and performance on assessments. Rather than having a single text-based course which is the same for all students, the course material is adaptive - different material (video, audio, text, simulation) for different students in the same course according to ability. While this is

² Contact North, *Evolving Pedagogy*, contactnorth.ca/trends-directions

"new" (and is more commonplace in the K-12 system), it is quickly gaining traction in the post-secondary world.

5. DIFFERENTIATED TEACHING

The technology now makes it possible for instructors to focus on the needs of individual learners rather than the group of learners. A combination of self-study materials, peer networks for support, anytime mentoring and adaptive curriculum is making differentiated instruction a more realistic proposition than it has been in the past. While this was something always done by instructors, the request usually came from the student in office hours. This still takes place, but it can now also be driven by analytics that suggest who in a class needs help and for what.

Moreover, their research concluded that these five developments in the changing external environment for students and institutions are leading to three kinds of changes in the design of college and university programs and their delivery. These are:

1. MORE JUST-IN-TIME AND ON DEMAND LEARNING

More colleges and universities are increasing the number of start dates and are looking to more flexible program designs. Shorter courses, courses which are .5, 1 or 1.5 credit weights, condensed 3 credit courses taught in four or six weeks or monthly start dates. What students look for, especially those who study part time and/or are working, is flexibility.

2. MORE CREDIT TRANSFER AND CREDIT RECOGNITION

Students want all of their learning to count and not to have to study again what they already know. In many European countries there have been substantial developments in fast track prior learning assessment, new models for integrating work-based learning into credit programs and more block transfer and credit recognition (two year associate college degrees transferring into three and four year degrees at universities, for example. This too is part of the new flexibility students seek.

3. MORE USE OF ADJUNCT FACULTY AND PEER NETWORKS

More use of adjunct faculty and peer networks and less reliance on the business model of a single instructor teaching a single class - the move to scale. Institutions which have moved away from the 1 professor = 1 class model to 1 course = many instructors can achieve growth in scale at a lower unit cost. A Massive Open Online Course (MOOC) which has 50,000 students is demonstrating this in action, especially now that several universities and some colleges have agreed to award credit for such courses.

Certainly the concepts of "just in time" as well the increased reliance on non-regular or adjunct faculty, are troubling outcomes and are recurring themes for many critics of education technology. As many EPC members noted, the rapid expansion of online learning often raises more fundamental questions about who is delivering the course or program, what the conditions of employment are for those faculty and the degree to which this online delivery system is integrated with existing standards in terms of workload or contact hours.

Just as important, however, is the concern that education technology often reflects a bias in how those who control an institution see learning. In a recent collection of lectures titled **Monsters of Education Technology**, Audrey Watters questions the value of educational technology. Watters observes that too often this technology is designed to “put the student through their paces, provide exercises of an appropriate level of difficulty, provide feedback and constantly monitor progress”³. She notes that:

Education technology has become about control, surveillance, and data extraction, an outcome that runs counter to the narrative of computer technologies as liberators. It runs counter to the narrative that they will open access to information. It runs counter to the narrative that they will simplify sharing. It runs counter to the narrative that they will flatten hierarchies, flatten the world.

Watters’ critique of educational technology is harsh, but it does highlight the question of how is the choice of technology and the control of its use being directed in ways that support real learning. Is technology in our institutions used to help students explore and create in ways that were previously unavailable? Or is the choice of technology in our institutions driven more by the priority of administrators who are trying to maximize student enrolments, minimize faculty costs and shift the infrastructure of the institution from “bricks to clicks”.

Watters is certainly not alone in questioning the underpinnings of these choices. Paulo Freire, for example, in his book **Pedagogy of the Oppressed**, raised many of these concerns in the 1960s. Freire argued against what he called the banking model in which education becomes an act of depositing, in which the students are the depositories and the teacher is the depositor. For Freire this model was one-sided: instructors were the content experts and students were the receivers of that content. However, for Freire, “knowledge emerges only through invention and re-invention, through the restless, impatient, continuing, hopeful inquiry human beings pursue in the world, with the world, and with each other”⁴.

From that perspective, it’s easy to see that regardless of the tools or system change we see in post-secondary education, our over-arching concern as educators is to ask how these changes facilitate learning, knowledge creation and active engagement by our students. From a policy perspective, having those objectives lead any discussion of changes in the operation or design of our institutions needs to be part of our strategy to deal with pending changes across our system.

Nuts and bolts: Ensuring education technology improves working conditions

While the issue of pedagogy and its intersection with education technology is important, so too are the impacts that technology has on the working conditions of those who use it. Based on Committee member comments, there is no fundamental opposition to education technology in their institutions. Instead, there is caution and concern about who makes what choices when it comes to either developing or implementing education technology and what measures are put in place to deal with the impacts of the proposed changes.

Both questions speak to some of the initial points raised in this discussion paper: defining what is included in technological change and identifying either the policy or contractual mechanisms that

³ A. Watters, **Monsters of Education**, *Convivial Tools in an Age of Surveillance*, Hybrid Pedagogy, <http://www.hybridpedagogy.com/articles/journal/>

⁴ P. Freire, **Pedagogy of the Oppressed**, Bloomsbury Academics, September, 2000, p. 53

are in place to ensure that faculty input into the choices made and the measures developed to deal with anticipated impacts are understood by both faculty and administrators.

In terms of contractual provisions, several Locals have contract language provisions that provide faculty with varying degrees of control over the process of changing technology at their institution. Local 1 (Capilano Faculty Association) has one of the most comprehensive articles dealing with technological change (See Appendix for details on Article 14 of the CFA-Capilano University Collective Agreement). Under the provisions of Article 14 the faculty association has established a strong platform by starting with a comprehensive definition that says technological change means changes in “the manner in which the [University] carries out educational operations and services where such changes affect the terms and conditions or security of employment of members of the bargaining unit”. The significant feature of this article is that it identifies both “tools” and “changes in work process, organization and operations” as part of a technological change that is subject to the provisions of the collective agreement.

Similarly strong language exists in another contract, the one at Northwest Community College. In that agreement, the provisions that address the impacts of technological change are included in two places within the contract. Article 13 covers the broad topic of workload and sets out specifics on class size and workload, two issues that are closely associated with changing technology. The contract also includes a Letter of Understanding which establishes the principle of mutual agreement between the union and the employer when it comes to implementing changes as a result of educational technology and distributed learning.

While it is critical for collective agreement provisions to set the parameters for faculty to engage with their employer when there are changes in education technology, an often overlooked issue is the extent to which institutions provide initial and on-going support for faculty and students when education technologies are first introduced or when there are subsequent upgrades or modifications. Some agreements have scope for this support in the form of professional development, but the view of many Committee members was that the application of this was uneven at best and raised questions about whether PD funding should be used to provide support in this area. In this instance, the view was that education technology training and support should be in addition to regular PD support, not a substitute for PD.

Technology and governance: Another forum for determining choices

Despite the frustrations that many have expressed about the problems with institutional governance, Education Councils and Senates have responsibility for overseeing program development within their institutions. Faculty input on those governing bodies, while restricted in many ways, provides an important forum for ensuring not only the right choices are made when educational technologies are being considered, but also that the quality of program offerings is not undermined by the shift to new modes of delivery.

In 2011 the BC government amended legislation to limit the ability of faculty association executive committee members from standing for the faculty elected representative on their Board of Governors. The legislative amendments highlighted the on-going debate within many faculty associations about the role and importance of governance in either securing or achieving better conditions within an institution. In a presentation to an FPSE conference on governance made by Jim Turk, the former Executive Director of the Canadian Association of University Teachers (CAUT), Turk stressed that while governance of an institution establishes important policies that, in turn, have impacts on the working conditions of faculty, the most effective way to improve

conditions is to negotiate those improvements through collective bargaining. As he noted in his summary to the conference, “policy is not subject to a grievance, but violations of a collective agreement are”.

In that context, faculty input through various governance bodies should be seen as part of a multi-strategy approach by faculty, a strategy designed to achieve better choices and direction within an institution. As well, the governance process provides an opportunity for the input of students to be considered in the choices made for changing technologies. Like faculty, students need and deserve support services that allow them to fully utilize the technologies available to them. Ensuring that those supports are in place and properly resourced by the institution are necessary preconditions to the effective implementation of educational technologies.

Conclusion

Educational technologies in post-secondary institutions represent both a challenge and an opportunity for our members. To effectively take on the challenge of this changing technology, FPSE Locals need to ensure that they have the capacity in their collective agreements, capacity in the form of comprehensive definitions that give the Local the scope to talk about the impacts of changing technology from a labour relations perspective. Locals also need to consider how best to use existing governance structures like Education Councils and Senates to raise questions about the choice and purpose of educational technologies as well as the needed support and training for both faculty and students. And finally, as activists and advocates for post-secondary education we need to continue to broaden the public discourse on learning by probing the pedagogical issues associated with changing technologies and in so doing reframe the discussion technology from one of operating efficiency to one of enhancing the opportunity to learn, explore and create.

Appendix 1

Capilano Faculty Association Collective Agreement

Article 14 TECHNOLOGICAL CHANGE

14.1 DEFINITION

14.1.1 For the purposes of this Agreement the term “technological change” shall be understood to mean changes introduced by the College in the manner in which it carries out educational operations and services where such change or changes significantly affects the terms and conditions or security of employment of members of the bargaining unit or alters significantly the basis on which this Agreement was negotiated.

14.1.2 Such changes as anticipated above shall include the following where such change or changes significantly affects the terms and conditions or security or employment or members of the bargaining unit or alters significantly the basis on which this Agreement was negotiated:

14.1.2.1 The introduction, because of technological change or development, of equipment, material or processes different in nature, type or quantity from that previously utilized.

14.1.2.2 A change, related to the introduction of this equipment, material or process, in the manner in which the College carries out its educational objectives and operations.

14.1.2.3 Any change in work methods, organization, operations, or processes which affects one or more employees.

14.1.2.4 Any change in location at which the College operates.

14.2 NOTICE

When the College intends to introduce a technological change:

14.2.1 The College agrees to notify the Union as far as possible in advance of its intention and to update the information provided as new developments arise and modifications are made.

14.2.2 The foregoing notwithstanding, the College shall provide the Union, at least ninety (90) days before the term in which an introduction of a technological change is intended, with a detailed description of the change it intends to carry out, disclosing all foreseeable effects and repercussions on employees.

14.3 DATA TO BE PROVIDED

The notice mentioned in 14.2 shall be given in writing and shall contain pertinent data, including:

- The nature of the change.
- The date on which the College proposes to effect the change.
- The approximate number, type and location of employees likely to be affected by the change.

- The effects the change may be expected to have on the employees' working conditions and terms of employment.
- All other pertinent data relating to the anticipated effects on employees.
- Draft changes and additions to the Collective Agreement (see 14.6).

14.4 NOTICE TO FUNCTIONAL AREAS

The notice mentioned in 14.2 and 14.3 shall also be given to the functional/subject area to be affected.

14.5 CONSULTATIONS

Where the College has notified the Union of its intention of introducing a technological change, the parties undertake to meet within the next thirty (30) days and to hold constructive and meaningful consultations in an effort to reach agreement on solutions to the problems arising from this intended change and on measures to be taken by the College to protect the employees from any adverse effects. The College and Union agree to bargain in good faith on all aspects of the intended change.

14.6 RESULTING AGREEMENTS

Where the parties agree to appropriate solutions to the problems arising out of intended technological changes, the solutions shall be prepared as a Letter of Agreement between the parties and such Letters of Agreement shall have the same effect as the provisions of the existing Collective Agreement and shall be subject to the grievance procedure, up to and including arbitration.

14.7 FAILURE TO AGREE

Where the parties do not reach agreement within sixty (60) days after the date on which the Union has received notification from the College of its intention of introduction of a technological change, and various matters, including compensation in the event of reduction, remain unresolved, the parties shall refer such matters to arbitration within twenty-one (21) calendar days of failure to agree.

14.8 EFFECT OF DISPUTE RESOLUTION ON INTRODUCTION OF TECHNOLOGICAL CHANGE

Technological change shall not be introduced by the College until the matter is resolved by agreement or arbitration.

14.9 REDUCTION IN NUMBER OF REGULAR EMPLOYEES AS A RESULT OF TECHNOLOGICAL CHANGE

14.9.1 In the event of a reduction in the number of regular employees in consequence of technological change, such reduction shall be governed by the reduction sequence provisions of this Agreement contained in 11.8.

14.9.2 During the period of employment between notice or reduction and reduction taking effect (as provided for 11.8), an employee shall retain his/her placement on the salary scale and level of earnings regardless of any transfer or reduction by the employee.

14.10 RELOCATION OR REASSIGNMENT

An employee cannot be relocated or reassigned within the College as a result of technological change without the written consent of the employee.

Academic Workers' Union (AWU) Collective Agreement

Northwest Community College

ARTICLE 13 -WORKLOAD

13.1 Duties of Employees

The duties of employees may include any of the following: teaching, course preparation and development, counselling, librarianship, workshops, special program development and administration of programs, development and administration of continuing education programs, advising students, evaluation of student work, other functions related to instruction, professional development, student registration, school visitations, participation on College Committees, attendance at professional meetings, representation of the College at other functions, administrative duties, and other duties that may from time to time be necessary for the proper operation of the College.

***13.2 Annual Workloads for Instructional Employees**

A full-time annual workload shall consist of ten (10) sections. A full-time annual workload shall be not more than eighteen (18) hours of scheduled class contact per week or not more than thirty-five (35) hours of practicum supervision per week including travel time.

The full-time annual workload for an instructor shall be approved in writing by May 1. The College shall make every reasonable effort to have workloads approved by April 15. Any sections approved by May 1 will be advertised to the students and made available for their registration from that date onward. Any subsequent changes shall be discussed between the Academic / Associate / Assistant Academic Head and the Dean. Any change in workload requires the written consent of the Union, which shall not be unreasonably withheld.

***13.2.1 Teaching Workloads**

13.2.1.1 Instructors in Academic Programs

A full-time annual workload shall not exceed fifteen (15) hours per week of scheduled class contact (which shall include the lecture, laboratory, field, or other related components of courses) averaged over two (2) fifteen (15) week semesters and may with the consent of the Union, which shall not be unreasonably withheld, exceed fifteen (15) but shall not be more than eighteen (18) hours per week in any semester.

An instructor's workload may be increased from fifteen (15) to eighteen (18) hours per week in a given semester of scheduled class contact if it consists of two (2) sections of the same course comprising Science lectures, laboratories, and/or field component which are directly associated with the lectures.

13.2.1.2 Instructors in Career-Technical Programs

A full-time annual workload shall not exceed fifteen (15) hours per week of scheduled class contact, which shall include lectures and related class components, or 35 hours per week of practicum supervision, including travel time, or prorated combination of the above averaged over a period not exceeding forty (40) weeks. Workloads shall be averaged over two (2) semesters.

13.2.1.3 Assignment of courses

At any given time an instructor shall not be assigned more than three (3) different courses, except, if an instructor's workload is not more than twelve (12) hours per week in a semester (subject to the averaging conditions established above) and upon written consent of the Union, which shall not be unreasonably withheld, an instructor may be assigned four different courses.

The workload for an instructor, the combination of courses to be taught (including practical) shall be initiated on the departmental level and shall be determined by a process of consultation between the Academic Head / Associate / Assistant Academic Head and the instructional departments on the basis of the provisions contained in this Article and shall then be submitted to the Dean for consideration and approval which shall not be unreasonably withheld.

An instructor's daily workload shall not exceed seven (7) class contact hours per day.

13.2.1.4 The following additional factors shall be used when determining an employee's workload:

13.2.1.4.1 a distance education course without teleconferencing shall count as 1 1/2 hours of class contact per week;

13.2.1.4.2 the initial development of a distance education package shall count as 1 1/2 hours of class contact per week;

13.2.1.4.3 instructional travel to a College centre other than Kitimat shall count as 1 1/2 hours of class contact per week;

13.2.1.4.4 Regular instructors new to the College shall have a workload reduction of three (3) hours during each of the first two semesters of employment if they are assigned more than two (2) different courses.

- 13.2.1.5 The maximum class size shall be no more than thirty-six (36) students based on the actual enrolment at the end of the second week of classes, except that this maximum will be reduced according to the following conditions:

Composition and language courses: 25 students
Experimental Psychology and Anthropology 101: 28 students
Science lab in Terrace: 18 students
Computer lab in Prince Rupert: 18 students
Computer lab in Terrace: 16 students
Science lab in Prince Rupert: 12 students

(To become identical to the Terrace laboratory section maximum number of students at that time when the Prince Rupert laboratory facilities reach the dimensions and level of the Terrace laboratory facilities.)

Career programme regular sections: 24 students
Career programme practical: 16 students
Career programme intensive sections: 30 students

- 13.2.1.6 The parties agree that programme development initiated on the departmental level in consultation with the Academic Head / Dean may be used in place of class contact (as established above).

- 13.2.1.7 It is understood and agreed that the workload provisions will be pro-rated where a regular employee's workload is for less than 100% of a full-time workload and where this situation is the result of a contractual agreement including this Agreement.

- 13.2.1.8 Telecourses

A teleconferencing course is a course where a student communicates with the instructor through audio teleconferencing technology. The following provisions shall apply:

- 13.2.1.8.1 Teleconferencing courses originating in Terrace shall only be offered by regular employees, with a maximum of one teleconferencing course per individual employee.

- 13.2.1.8.2 A teleconferencing course shall be defined as consisting of three hours, as per Article 13.2.1.1.

- 13.2.1.8.3 Class size shall be as set out in Article 13.2.1.5 with a maximum of eight (8) students at each participating centre.

- 13.2.1.8.4 Provisions shall be made for adequate familiarization and training of instructors with teleconferencing during the non-teaching months.

13.2.1.8.5 Preparation of a teleconferencing course shall count as one course preparation.

13.2.1.8.6 All of the University Transfer, S.S.W., and E.C.E. programming offered in Terrace shall consist exclusively of live conventional instruction except as under **Article 13.2.1.8.7** below.

13.2.1.8.7 For teleconferencing courses, the number of students who are enrolled directly from high school and who wish to be admitted to such a course at the Terrace campus will be limited to five. No teleconferencing courses will have students in the studio.

13.2.1.8.8 Technical operation of the system shall not be the responsibility of the instructor.

13.2.1.9

13.2.1.9.1 An instructor's schedule will not include more than two (2) evening classes per week. For the purposes of this section, evening classes shall refer to classes where scheduled instruction takes place after 1900 hours except with the Union's written consent.

13.2.1.9.2 An instructor's schedule will include a twelve (12) hour period free from instruction between the end of the last class one day to the beginning of the first class of the next day, except with the Union's written consent.

13.2.1.9.3 An employee shall not be required to teach on a Saturday or Sunday. In the event that an employee agrees to teach on a Saturday or a Sunday, he/she shall be assured of at least two consecutive calendar days per week free from any instructional obligations.

13.2.1.10 Videoconferencing

A videoconference course is a course where a student communicates with the instructor through videoconferencing technology.

13.2.1.11 Prior Learning Assessment

Where Prior Learning Assessment work is to be undertaken by a faculty member, the College and the Union will mutually determine the amount of the faculty member's workload to be attributed to Prior Learning Assessment, in accordance with **Article 13**. This determination will be concluded before commencement of the Prior Learning Assessment work.

- *13.2.2 The annual non-teaching workloads for instructors shall comprise an appropriate combination of non-teaching activities outlined in Article 13.1 which shall reflect a workload of 35 work hours per week during non-teaching periods, except during scheduled vacation time. A detailed list of such proposed activities shall be subject to approval by the appropriate program administrator and ratification by the appropriate Dean by March 31 of each year. The employee shall submit a written report of his/her activities by September 30 of each year.
- *13.2.3 The actual annual workload for each academic programme instructor shall be determined through consultation between the instructor and the Academic / Associate/Assistant Head on the basis of the above guidelines and shall be averaged out over a period of two (2) years, provided there is Union consent (which shall not be unreasonably withheld) to the averaging. This shall then be submitted to the Dean for consideration and eventual approval.
- 13.2.4 In the event of employee resignation or termination there shall be no compensation adjustment, either plus or minus, to reflect variations from the annual normal maximum that may have accumulated at the time of resignation or termination.
- 13.2.5 During the winter semester of each academic year, all regular university credit instructional employees shall have a five (5) consecutive working day mid-term reading break as determined by the Registrar.
- 13.3 Teaching Workload Reduction for Academic, Associate Academic & Assistant Academic Head and Programme Coordinators
- 13.3.1 The teaching workload for the Academic Head shall be as set out in Article 13.2.1 except that it shall be reduced by a margin of sixty percent (60%) to compensate for the additional administrative and related duties necessary to fulfill the functions of the Academic Head. Article 13.2.2, Article 13.2.3, and Article 13.2.4, shall apply to the Academic Head.
- 13.3.2 The teaching workload for the Associate Academic Head shall be as set out in Article 13.2.1 except that it shall be reduced by a margin of forty (40%) percent to compensate for the additional administrative and related duties necessary to fulfill the functions of the Associate Academic Head. Article 13.2.2, Article 13.2.3, and Article 13.2.4, shall apply to the Associate Academic Head.
- 13.3.3 The teaching workload for the Assistant Academic Head shall be as set out in Article 13.2.1 except that it shall be reduced by a margin of twenty (20%) percent to compensate for the additional administrative and related duties necessary to fulfill the functions of the Assistant Academic Head. Article 13.2.2, Article 13.2.3, and Article 13.2.4, shall apply to the Assistant Academic Head.

13.3.4 The teaching workload for the Terrace campus ECE programme coordinator and the Terrace campus Social Service Worker programme coordinator shall be as set out in Article 13.2.1 except that it shall be reduced by a margin of twenty percent (20%) to compensate for the additional administrative and related duties necessary to fulfill the functions of the programme coordinator.

13.3.5 Programme coordinators in any College location shall have a workload reduction of a minimum of twenty percent (20%). **Article 13.2.2** shall apply to programme coordinators.

***13.4 Workload for Non-Instructional Employees**

Preamble:

On the basis of thirty-five (35) per week, the workload for non-instructional employees shall be initiated on the departmental level and shall be determined by a process of consultation between the Academic Head / Associate / Assistant Academic Head and the departments on the basis of the provisions contained in this Article and shall then be submitted to the Dean for consideration and approval which shall not be unreasonably withheld.

Subject to funds being available and operational requirements the College will provide substitutes for librarians during vacation and professional development periods.

13.5 Low Enrollment Courses

The Employer reserves the right to cancel any low enrolment course and require the Academic Head, in consultation with the employee affected, to reassign workload to bring the employee up to the annual workload for the year.

***13.6 Other Work Conditions**

13.6.1 The College shall make every reasonable effort to provide faculty with adequate support and resources for instruction; office space and classroom furnishings; and support staff.

13.6.1.1 There shall be instructional support.

*13.6.2 Timetables shall be initiated at the departmental / program level and shall be determined by a process of consultation between the Academic / Associate / Assistant Academic Head and instructional departments. Timetables shall be submitted to the Dean for consideration and approval, which shall not be unreasonably denied. Timetables will be available to the students within two weeks of the workloads being approved.

13.6.3 The College will provide appropriate signage on its facilities. Faculty members will be provided with name plates with their credentials.

13.6.4 Ventilation shall be provided in all College facilities in accordance with federal and provincial standards on air quality.

13.6.5 The College will support the participation of faculty members on provincial articulation committees to the fullest extent as funding permits.

13.6.6 The College will support the participation of the Academic Head at any provincial meetings as appropriate.

13.6.7 The College will support the participation of faculty members on provincial committees as appropriate and as funding permits.

13.6.8 Any changes in parking regulations and policies shall be made by written consultation with the Union.

13.6.9 The Academic / Associate / Assistant Academic Head and Program Coordinators will be consulted during the preparation of the calendar.

13.6.10 In consultation with the Academic Head the College agrees to advertise sections courses/programs to students/communities throughout the entire College region.

13.6.11 Where the College has a Science Laboratory Technician at a Centre where University Transfer courses are offered, the Technician will take functional direction from the appropriate Science faculty member(s).

13.6.12 The College will provide Internet and e-mail access on campus to all employees.

13.6.13 Working conditions for part-time faculty include, but are not limited to, orientation, office, keys, e-mail account, computer access, phone, and mailbox.



Federation of
Post-Secondary Educators
 of BC

Interim Report

SRI Sub-Committee
of the
FPSE Pension Advisory Committee

April 29, 2015

Introduction

Last spring, The Pension Advisory Committee created the SRI sub-committee in order to carry out part of PAC's mandate under Section 5.12.2 of the FPSE Policy and Procedures Manual. That Policy states,

FPSE's Pension Advisory Committee shall review the College Pension Plan's socially responsible investing practices and triennially report on its findings to Presidents' Council.
(Revised: 2013 AGM)
(1990 AGM)

The members of the SRI Sub-Committee are:

- Ken Shaw, Local 11 and Chair of the Sub-Committee
- Derek Knox, Local 17
- Raphael Lagoutin, Local 05
- Robert Pepper-Smith, Local 08
- Penny Heaslip as Chair of PAC
- Weldon Cowan as staff support

This is the first time that PAC has undertaken a review of the bcIMC's SRI practices under Policy 5.12.2. Consequently, in September 2014, Presidents' Council refined the mandate of the sub-committee as follows:

In its triennial review of the bcIMC's SRI practices, PAC shall:

- 1) Target the spring 2016 PAC meeting for its first report
- 2) Compare and Contrast bcIMC's SRI screens and actions to FPSE's SRI screens and actions
- 3) For each year 2013-2015, inclusive, identify the major SRI initiatives the bcIMC has taken
- 4) To the extent practicable and possible, identify exemplary SRI international practices
- 5) Of the major bcIMC investments, attempt to identify the "worst" SRI offenders
- 6) List other ideas for consideration

This report is an interim report in preparation for the first triennial report. The purpose of this report is to establish a base level of understanding about socially responsible investing and the approach currently

used by the bclMC. The report provides an overview of the general principles of socially responsible investing and a comparison of the approaches used by FPSE’s defense fund and the College Pension Plan through bclMC. The report has several appendices. The appendices contain significant amounts of information about the various policies and procedures that govern both the Pension Plan and the Defense Fund.

Overview of Responsible Investment

Socially Responsible Investment goes by many names; SRI, Ethical Investing, Responsible Investing, and ESG investing. In all cases, the term refers to the practice of integrating non-financial criteria into the traditional investment decision-making process. Usually, the non-financial criteria reflect the ethics and values of the investor. Although various forms of socially responsible investing have existed for well over a hundred years, SRI has evolved dramatically over the last two decades. A wide spectrum of investment behaviours and philosophies now fit under this banner. These include practices such as investment screening, shareholder engagement, ESG analysis, community economic development, social venture capital and economically targeted investing.

The diagram below lays out the various approaches to responsible investing and their relationship to each other.



What is ESG Investing?

ESG is short hand for Environmental, Social and Governance. ESG is a specific approach to responsible investing often used by institutional investors. In this model, investors assess the performance of assets against the three broad categories of environment, social and governance factors. Based on the assessment of the asset against ESG factors, the investor will then engage with the company or the asset

in order to improve performance under the appropriate criteria. For example, an investor may choose to upgrade a real estate holding to be more environmentally efficient or the investor may engage with a company to change labour practices. Often, institutional investors will work together to ensure change in corporate behaviour. The underlying assumption is that assets will outperform financially over time when investors control risks and improve performance related to environmental, social, and governance factors.

The chart below demonstrates the more common factors accounted for in ESG investing.



Comparison of Investment Policies for the FPSE Defense Fund and the College Pension Plan

SRI Policy for the FPSE Defense Fund

The FPSE Defense Fund currently holds about \$9 Million. The Federation invests the funds through Richardson GMP/ Worth Allaye-Chan Investment Counsel. The FPSE Defense Fund has an extensive investment policy found at pages 63 through 68 of the Policy Manual. Section 5.8 of the defense fund investment policy contains the SRI policies of the fund. That section is reproduced at Appendix B of this report.

FPSE SRI Investment Policy for the Defense Fund is markedly different than policy related to the College Pension Plan. The defense fund’s investment policy consists of negative and best-of-class screens. The screens are applied by the asset manager.

The asset manager reports regularly to Presidents’ Council. Reports include a list of all assets held by the fund. Presidents have the opportunity clarify with the asset manager whether any specific assets run afoul of the fund’s investment policy.

The screens used by the Defense Fund include the more common negative screens such as tobacco, nuclear power, and armaments. However, the fund also uses screens which are more permissive. For example, the Environment and Labour Relations screens are “best of class” screens. Companies are measured against their peers rather than against absolute criteria.

SRI Policies affecting the College Pension Plan

The College Pension Plan's investment decisions are affected directly and indirectly by the policies of the FPSE, the Plan itself, and bcIMC. A brief description of each of those policies follows. The actual policies are attached as appendices for reference.

The policies adopted by FPSE, bcIMC, and the Plan itself, are clearly designed to align with the legislated fiduciary duties of the trustees as expressed in both the *Pension Benefits Standards Act* and the Partners' Trust Agreement. Excerpts from both can be found at Appendix C.

A. FPSE SRI Policies related to the College Pension Plan

The FPSE's position on socially responsible investing for the College Pension Plan can be found in Section 5.12.1 of the policy manual's section on pensions. The policy states:

Within the primacy of keeping the pension promise and delivering an acceptable rate of return, FPSE and its appointed trustees shall advocate for pension board investments that are characterized by diversity, transparency, and flexibility. Serious reflection on the social, environmental and ethical consequences of investments shall be a feature of pension board investment decisions that FPSE-appointed trustees support. Furthermore, FPSE-appointed trustees shall support strategies such as share-holder activism in support of these principles.

(Revised: 2013 AGM)
(1992 AGM)

Policy 5.12.1 requires FPSE appointed trustees to do three things. FPSE trustees are expected to:

- advocate for investments that are diverse, transparent and flexible;
- engage in serious reflection about the social, environmental and ethical consequences of investment decisions that they support, and;
- support strategies such as shareholder activism.

There is a high degree of congruence between the FPSE's RI policies concerning the College Pension Plan, the Plan's SIPP and bcIMC's own RI policies. This congruence is not accidental. FPSE's policies were developed over the same period of time as the Plan's and bcIMC's policies. It appears that early on, FPSE effectively endorsed the active engagement approach used by the College Pension Plan and chose to reflect that in its own policies.

B. College Pension Plan SRI Policies

The College Pension Plan's SRI policies are found in the Plan's Statement of Investment Policies and Procedures (SIPP). The relevant sections of the SIPP can be found at Appendix A of this report. The *Pension Benefits Standards Act* and the Joint Trust Agreement (Appendix C) both require the Plan to invest in the best financial interests of plan members. The Plan's socially responsible investment policies are structured in a manner that is consistent with the legislative and contractual requirements imposed on the plan.

The SIPP lays out core beliefs of the Plan provides bcIMC with high level guidance on SRI investing.

Key elements of the SIPP include:

- A belief that engagement is more effective than divestment
- A belief that ESG issues affect the long term performance of companies.
- Support for the UN Principles of Responsible Investment
- A requirement that bclMC to advocate for good corporate governance and address ESG issues to the extent those issues influence risk and return for the pension fund.

The SIPP does contain one negative screen; companies whose principle source of revenue is related to armaments. (The Plan also does not invest in companies which manufacture land mines and cluster bombs. However, that rule is a requirement of Federal legislation rather than a specifically articulated screen.)

C. bclMC Principles and Policies related to RI

bclMC is a universal investor, meaning that, given its size, it cannot help but be invested in most things. Consequently, IMC has adopted a fairly aggressive policy of engagement with companies in which it invests combined with an internationally recognised leadership role in collaborative organizations designed to advance shareholder rights and promote sound ESG investment approaches. In order to assist its investment personnel, bclMC has extensive policy related to responsible investing. These policies are consistent with the Plan's SIPP. They provide bclMC and its managers with more detailed guidance on responsible investment decisions and strategies. bclMC documents consistently refer to responsible investing (RI) rather than socially responsible investing. This appears to be a consistent practice with large institutional investors.

bclMC's RI strategies vary by type of investment. These are described below.

Public Equities

- Direct engagement with directors, senior executives, regulators, and industry groups.
- Collaboration with like-minded investors
- Proxy voting based on detailed guidelines
- Engagement focused on shareholder rights, climate change, and human rights.

Private Equities and Infrastructure

- Due diligence procedures which incorporate ESG issues. Use of detailed reports on environmental, legal, and social issues
- Focus on governance model
- Companies required to focus on long term value creation through addressing ESG issues.

Real Estate

- Strong focus on environmental factors for investments and developments.

Mortgages

- Focus on providing financing to companies with good social and environmental records and approaches.

Fixed Income

- Focus on good governance

As part of its overall strategy, bcIMC works with other institutional investors to advance responsible investment principles. bcIMC is a member of the Canadian Coalition on Good Governance, the UNPRI, the Carbon Disclosure Project, Extractive Industries Transparency Initiative and many other organizations dedicated to ESG investing principles.

Observations and Analysis

The Defense Fund and the College Pension Plan have very different approaches to socially responsible investing. The differences are expected given the nature and purpose of the respective funds.

The defense fund is a creation of FPSE, funded by member dues, and intended to serve FPSE's interests. Consequently, FPSE is free to administer and invest the fund in any manner it wishes. The various negative and best-of-class screens delineated in policy reflect the progressive values of the organization. The policy is a product of the FPSE AGM. Consequently, it is, by definition, the expressed will of the membership. Furthermore, the purpose of the defense fund is to serve the collective interests of FPSE members as expressed through presidents Council and the FPSE AGM. The Pension fund as invested through bcIMC is markedly different.

The College Pension Plan trustees have a fiduciary duty, defined in statute (Appendix C), to all members of the plan. Plan members come from a variety of employee groups and organizations. Unlike the defense fund, the pension plan serves the individual interests of each plan member rather than any collective interests of those members. This makes it very difficult to establish a definitive set of values that can be applied to investment choices. This is further complicated by the fact that the Plan investments are really invested as shares in pooled funds created by bcIMC. This provides the Plan with a very efficient investment mechanism but makes it virtually impossible to control investments at the level of specific assets.

One should note that there are certain limitations with the FPSE defense fund investment policy. For example, there are no detailed guidelines for executing the policy. The investment manager is expected to act in compliance with the policy. However, several elements of the policy require the investment manager to make subjective determinations about whether particular investments are acceptable under the policy. This can lead to an uneven application of the policy.

Oversight of the defense fund investment policy ultimately occurs through Presidents' Council. Presidents receive regular reports listing all assets held by the fund. Presidents can question specific assets which may not comply with the policy. Compliance with the policy is dependent on both the asset manager and the members of Presidents' Council having sufficient knowledge of the assets and investments to allow them to compare the assets against the various policy requirements.

In contrast, bcIMC has almost no screens on investments. With over one hundred billion dollars in holdings, bcIMC invests broadly, and with little restriction, across all classes of investments. Given legal constraints and the magnitude of the fund, it is virtually impossible for IMC to avoid specific investments in the way that the defense fund can.

The structure of the investment vehicles at bcIMC also create certain constraints on investment choices. The Plans invest by buying shares in pooled investments created by bcIMC. This approach generates significant efficiencies in management costs which is a benefit to the plans. The disadvantage is that bcIMC cannot change a pool just to meet the requirements of a single plan. This essentially eliminates the ability to use screens on investments unless all the plans use the same screen.

As a consequence of the legal and practical constraints imposed on plan investments, bcIMC has developed a sophisticated active engagement approach to responsible investing. Active engagement allows bcIMC to avoid imposing limits on its investment universe yet still take significant action on RI issues. bcIMC is large enough that it can easily apply pressure on companies to change behaviour. bcIMC is also able create coalitions with other institutional investors in order to lobby more effectively to bring about change on a broad spectrum of ESG issues across all categories of investments.

Is bcIMC's approach to active engagement and its focus on ESG issues effective? More importantly, is it effective enough to satisfy our members' concerns regarding socially responsible investing? That is the key question that the first triennial review should be able to answer when this committee submits its final report. In 2016.

Proposed Next Steps

The sub-committee is expected to provide PAC with a full report in the spring of 2016. The committee proposes that the report contain the following:

- A review of the major responsible investing initiatives of the bcIMC for the years 2013 to 2015
- A review of the best responsible investing practices that currently exist internationally
- An analysis of bcIMC investments which could be considered the "worst offenders" of SRI principles.
- A list of recommendations to improve the responsible investment practices of the bcIMC

Appendix A:**Excerpts from the Statement of Investment Policies and Principles of the College Pension Plan****Section 4: Investment Beliefs**

- 4.8 The Board believes that the best performing and most profitable companies in the Canadian and world economies maintain high ethical standards, comply with environmental regulations, have a track record of progressive labour relations, do not have business dealings with countries where human rights are violated, and do not have the production of armaments as their primary activity.

Section 11: Responsible Investing and Voting Rights

- 11.1 At all times, this policy will be conducted within the framework of fiduciary responsibility. It will therefore be implemented in a manner which does not interfere with the efficient investment of the Fund to achieve investment return objectives, which are in the best financial interests of the Plan's current and future beneficiaries.
- 11.2 Pursuant to section 4.8 and subject to section 11.1, favourable consideration is to be given by bcIMC and its investment managers to investment opportunities in corporations which maintain high ethical standards, comply with environmental regulations, have a track record of progressive labour relations, do not have business dealings with countries where human rights are violated, and do not have the production of armaments as their primary activity.
- 11.3 In keeping with the Board's fiduciary responsibilities and framework, the Board believes that environmental, social, and corporate governance ("ESG") issues can affect investment performance to varying degrees across companies, sectors, regions, asset classes and through time. In this regard, the Board supports the UN-led Principles for Responsible Investment, introduced in April 2006 (<http://www.unpri.org/principles/>). By applying these principles, the Board recognizes that effective research, analysis and evaluation of ESG issues is a fundamental part of assessing the value and performance of an investment over the long-term.
- 11.4 The Board delegates its voting rights to bcIMC and instructs bcIMC to act in the best financial interests of the Fund. In addition to proxy voting, bcIMC uses shareholder engagement to encourage companies to focus on long-term value creation by effectively managing ESG risks that may emerge over time and materially affect the valuation of the company and/or asset. The Board believes that engagement is a more effective tool for seeking to initiate change to and influence corporate practices than divesting. As an active and engaged investor, bcIMC expects and encourages the companies within its portfolio to apply good corporate governance practices, effectively manage their business relationships, and be responsible in their operations. bcIMC's engagement activities are based on strategic ESG priorities and, as a result, ESG matters are addressed to the extent that they influence risk and return of the Fund.
- 11.5 bcIMC will provide the Board with copies of its corporate governance guidelines and at least once a year the Board will review bcIMC's voting record and shareholder initiatives.

Section 12: Conflict of Interest and Code of Ethics

- 12.1 These guidelines apply to:
- (i) any Board member (the "Trustee");
 - (ii) Pension Corporation;
 - (iii) bcIMC; and
 - (iv) any other advisor to the Board.

All of the above persons must:

- a) refrain from using their knowledge of the Fund's investments, or of investment decisions made on behalf of the Fund, to benefit anyone other than the Fund; and
- b) make disclosure, in accordance with section 12.2, if they, or any person over whom they have influence, may be reasonably thought to materially benefit by an investment of the Fund or by an investment decision made on behalf of the Fund. An example of such a material benefit would be if a Trustee owned, or had a significant financial interest, in real estate property that was acquired on behalf of the Fund. As bclMC and its investment managers are involved in the ongoing management of the Fund, they are required to have a more comprehensive and thorough conflict of interest policy. These will meet or exceed the standards established for the investment industry by the CFA Institute. bclMC will make disclosure in accordance with section 12.2 if any of its employees or agents materially breach their internal conflict of interest guidelines.

Appendix B:**Excerpt from FPSE Defense Fund Investment Policy**5.8 Exclusionary Screens

(a) MILITARY

For the purposes of FPSE's Defence Fund investment portfolio, companies will be ruled ineligible if they:

- derive 5% or greater of revenues from weapons-related contracting or consulting, including the manufacture of (i) air, land or sea military vehicles; (ii) rifles, missiles, bombs, or other explosive devices; (iii) ammunition; (iv) technology, such as 'smart' weapons or guidance systems; or (v) nuclear weapons or components for nuclear weapons systems.

(b) NUCLEAR POWER

FPSE's Defence Fund investment portfolio will not include companies that:

- generate electricity from nuclear fuels or have an interest in a nuclear power plant that is operating or under construction; or
- mine, process or enrich uranium, or are otherwise involved in the nuclear fuel cycle.

(c) TOBACCO

FPSE's Defence Fund investment portfolio will not include companies that:

- derive revenues from the production of tobacco products or whose involvement in activities closely associated with the production of tobacco products represents 5% or greater of annual revenues.

Tobacco products include cigarettes, cigars, pipes, chewing tobacco, snuff, and cigarette and pipe tobacco. Related activities include (but are not limited to) the manufacture of rolling papers, filters and packaging. Companies involved in the distribution and sale of tobacco and tobacco-related products remain eligible for the Fund.

(d) QUALITATIVE SCREENS

FPSE's Defence Fund investment portfolio's qualitative screens (products, business practices, international/human rights, environment, employee relations, diversity and community) exclude companies whose record on balance are negative in these areas. Accordingly, problems in one of these areas do not necessarily eliminate a company from eligibility. This analysis incorporates the best-of-sector approach, whereby a company's record is measured against those of its industry counterparts. The screen also seeks to include companies whose records in diversity and employee relations are positive.

(e) PRODUCTS

Within the context of its overall structure, FPSE's Defence Fund investment portfolio does not include companies that:

- manufacture products that cause (or allegedly cause) permanent impairment, life-threatening or non-life threatening injuries or illness.

(f) BUSINESS PRACTICES

FPSE's Defence Fund investment portfolio does not include companies:

- that have paid recent fines/penalties as a result of questionable marketing or production practices; or
- that have paid recent fines/penalties relating to price fixing, antitrust violations or consumer frauds.

(g) INTERNATIONAL OPERATIONS/HUMAN RIGHTS

In evaluating eligibility for investment, an analysis is done on the company's international operations based on its own merits. Implicit in this company-specific approach to international/human rights analysis is the realization that investment in less developed economies can have either a positive or negative impact on the citizens of the host country. Investment can provide jobs and raise the standard of living in these countries, but it can also cause significant social and environmental damage. Accordingly, FPSE's Defence Fund investment portfolio does not include companies:

- whose operations in less developed countries have been the subject of significant controversies related to treatment of employees, degradation of the environment or relationships with indigenous peoples; or
- whose major suppliers have been cited for mistreating employees or using child or prison labour; or
- that operate in countries with repressive regimes.

(h) ENVIRONMENT

In measuring eligibility for FPSE's Defence Fund investment portfolio, a company's environmental performance record is measured on balance against those of its industry counterparts. Therefore within this best-of-sector framework (and within the context of its overall performance), companies are not included that:

- have poor environmental compliance records, including a history of fines or civil penalties as a result of transgressing federal or provincial environmental legislation; or
- have recently been involved in major controversies with local environmental or community organizations involving some form of environmental degradation; or
- manufacture or emit significant amounts of ozone-depleting chemicals or give rise to emissions that contribute significantly to global warming or the formation of acid rain; and
- have no corresponding strengths in these areas.

(i) EMPLOYEE RELATIONS

In measuring eligibility for FPSE's Defence Fund investment portfolio, a company's employee relations performance is measured on balance against those of its industry counterparts. Therefore within this best-of-sector framework (and within the context of its overall performance) those not included are companies:

- with poor health and safety records; or
- with records of violations, convictions or fines for unfair labour practices, and/or significant number of work stoppages; or
- that do not provide a level of benefits to their employees that is comparable to industry counterparts (including share ownership opportunities, profit-sharing programs or other participatory initiatives).

In determining eligibility for investment, FPSE also seeks to include companies that demonstrate a strong commitment to progressive employee relations, especially when compared to industry counterparts.

(j) DIVERSITY

A company is excluded from eligibility for FPSE's Defence Fund investment portfolio under the following conditions:

- it has no employment equity policy or programs in place to encourage the hiring and promotion of disadvantaged groups; and
- there are no women within the ranks of senior management and it has 1,000 or more employees;
- it does not include gay and lesbian employees in its employee benefit plans; or
- it recently has been involved in major controversies involving its hiring and promotion record.

In determining eligibility for investment, FPSE also seeks to include companies that demonstrate a strong commitment to diversity in the workplace, especially when compared to industry counterparts.

(k) COMMUNITY

A company is excluded from eligibility for FPSE's Defence Fund investment portfolio under the following conditions:

- it has paid fines or civil penalties, or has been involved in a major controversy, related to a community in which it operates; or
- its relations with a community in which it operates have become strained due to recent plant closings or a general breach of its agreements with the community; or
- it recently has been involved in a major controversy with aboriginal peoples and communities.

Appendix C:

Excerpts from *Pension Benefits Standards Act* and the Joint Trust Agreement of the College Pension Plan

Pension Benefits Standards Act

- 44 (1) Pension plan investments, loans and other pension plan financial decisions must be made in accordance with this *Act* and the regulations and in the best financial interests of plan members, former members and other plan beneficiaries.
- (2) Pension plan assets must be invested in a manner that a reasonable and prudent person would apply in respect of a portfolio of investments made on behalf of another person to whom there is owed a fiduciary duty to make investments without undue risk of loss and with a reasonable expectation of a return on the investments commensurate with the risk.
- (3) Pension plan assets must be held and invested in the name of the plan, or in the name of a custodian or trustee in accordance with a custodial agreement, trust agreement or statute that clearly indicates that the investments are held for the benefit of the plan.

Joint Trust Agreement of the College Pension Plan

Section 4 of Part 5,

(4) The Board must ensure that

- (a) the money of the pension fund is invested or loaned in the best financial interests of the plan members and, in doing that, must
- (i) exercise the care, diligence and skill that a person of ordinary prudence would exercise when dealing with the property of another person, and
 - (ii) make the investments and loans in accordance with the provisions of the *Pension Benefits Standards Act* and other regulatory requirements,

The following appendices are not directly referenced in the report. They are listed below, with the web link, for your further information.

Appendix D:

bcIMC Philosophy, approach and standards for Responsible Investing:

- <http://www.bcimc.com/ResponsibleInvesting/Philosophy.asp>
- <http://www.bcimc.com/ResponsibleInvesting/Approach.asp>
- <http://www.bcimc.com/ResponsibleInvesting/Standards.asp>

Appendix E:

bcIMC Corporate Governance Principles and Proxy Voting Guidelines

- Available on the FPSE Pension Advisory Committee page:
http://fpse.ca/files/attachments/Appendix%20E%20bcIMC%20corporate%20governance%20principles%20and%20proxy%20voting%20guidelines_0.pdf

Appendix F:

UN Principles of Responsible Investing:

- <http://www.unpri.org/about-pri/the-six-principles/>

A Fact Sheet for College Pension Plan Members

The College Pension Plan is Rock Solid

The news is full of defined benefit pension plans that have collapsed or are in trouble (steel, airlines, US cities and states).

The collapse of these poorly designed and underfunded plans has no bearing on the sustainability of defined benefit plans in general.

In fact, BC public sector defined benefit plans are a model of a well-designed plan.

Regular actuarial valuations show the College Pension Plan is fully funded and sustainable over both the short and long term.

Public Sector Plans are an Important Part of the BC Economy

Moody's cites the solid foundation of BC public sector pensions for the BC government's Triple A debt rating.

Investing in BC/Canadian businesses and corporations.

Defined benefit plans protect seniors from living in poverty and relying on the social safety net. The evidence is clear: when participation is optional, most people will fail to save enough for retirement. Retired public sector employees are an essential part of the local economy in many rural and northern BC communities.

* FOR INFORMATION *

How You Can Help Defend Public Sector Pension Plans

The banking sector is lobbying government to erode defined benefit plans and the Canada Pension Plan (CPP), replacing them with defined contribution plans that would earn the banks big retail investment fees.

Defend every Canadian's right to retire with dignity. Speak up for the 11 million Canadians without a workplace pension plan.

Support the Canadian Labour Congress' **Retirement Security for Everyone** campaign: canadianlabour.ca/action-center/retirement-security-for-everyone.

By Pooling Resources, Plan Members Reduce Risk and Lower Fees

Pooled investment gets us a better deal than individual investors: unbiased, professional investment management has out-performed the market for the cost of just 0.5% per year.

Retail investors typically pay 1-2.5% for similar management (and get lower returns historically).

Pooled investment spreads risk and protects everyone's retirements.

Unlike us, defined contribution plan holders...

- Worry about retiring during a downturn
- Need to start shifting to lower-risk, lower-return investments as they approach retirement
- Risk outliving their money
- Bear risk into their retirement years

Defined benefit plans, on the other hand, guarantee a lifelong pension, so you can enjoy a secure retirement.

Public Sector Pensions are Fair for Workers and Taxpayers

Approximately 70% of the funds paid out to retirees come from investment earnings. The other 30% is an even split between employer and employee contributions.

Government does not pay for the public Sector Pension Plans.

Pensions are deferred compensation and a part of a job's collectively negotiated remuneration package – salary, vacation, health benefits, and pension.

Generally, participating in the pension plan means choosing a smaller salary in the short term, for the long term security of a pension.

Far from 'gold-plated', the average BC public sector pension in 2012 was between \$16,000 - \$30,000.

Defined benefit plans are a good deal for taxpayers because less money is being spent on portfolio management fees.

Important terms:

- *Defined benefit plans* (like the College Pension Plan) – members contribute to independently managed retirement pool from which retirees receive guaranteed, lifelong, monthly payments determined by formula (in our case, based on 5 highest earning years and number of years of service).
- *Defined contribution plans* (savings, group RRSPs) – individuals contribute to a plan which is managed by the individual, who receives all the gains or losses from the account without any guarantees.

Annual Reports



Federation of
Post-Secondary Educators
of BC

**FPSE/E TEA ORGANIZING COMMITTEE REPORT (Local 21)
TO THE 2013 ANNUAL GENERAL MEETING**

May 2014 to April 2015

With the help of FPSE, the ETEA Organizing Committee has had another busy year. Similarly with the previous year, ETEA has had many successes and also many challenges in its organizing work. By using the "one mountain, two streams" approach, we have seen vast new areas for outreach and organizing within the private education sector.

Drives and certifications

The certification of Vancouver English Centres in December **2014 was the year's major success in organizing**. VEC's 30 teachers were extremely well-organized and determined in their attempt to **fight back against their employer's unfair treatment**, which included the mandatory eye-scanners for all staff. VEC teachers are now ready to start bargaining; however, **their employer's** continued unfair treatment has resulted in ETEA filing a number of unfair labour practice complaints that were settled at the Labour Relations Board. ETEA re-organized local numbers this year making VEC ETEA Local 9.

ETE A also suffered a major defeat when Vancouver Georgia College voted against joining ETEA 11-8. This was very shocking as the vast majority of teachers had signed cards. The cards had to be resubmitted twice which was enough time for the employer to sway several teachers to vote no. A lesson learned by the organizing committee.

Outreach

ETE A was able to collaborate with other FPSE locals on various campaigns this year. ETEA was happy to support the ESL Matters Campaign to fight the Government cutting important ESL programs in the public sector. ETEA organizers spent three weeks campaigning on the street and getting people to send postcards to the government denouncing the cuts. At the same time, ETEA held its own event which was a successful roundtable discussion event on the direction of the ESL industry in Vancouver held on October 30. ETEA continued reaching out to new sectors of ESL teachers including those teaching LINC and settlement programs in the non-profit sector. This culminated in the event *Standing Up for Standards* on April 2, which

brought together teachers from all sectors of ESL to discuss challenges to working conditions and the ESL industry.

A voice in the industry

ETEA has always said that they wanted to be a voice in any discussions affecting ESL regulations. Continuing with the success in previous years consulting government politicians, ETEA organizers had an important meeting with then-Minister of Advanced Education Amrik Virk. We were also heavily involved with Phases 1 and 2 of the consultations about reforming laws overseeing private training institutions. Spearheaded by President Kevin Drager, ETEA pushed for important protections and oversight for the ESL industry, including oversight of agents. A big part of this lobbying was to show teachers at non-ETEA schools that they are part of a bigger voice in the industry. We developed key allies in this lobbying, like NDP Advanced Education Critic **Kathy Corrigan, who shared ETEA's vision of accountable oversight.** The BC Liberals are currently dissolving PCTIA and rewriting the laws concerning private education in the new *Private Training Act* (PTA).

Bargaining and organizing challenges

ETEA's newly-formed locals Pan Pacific College (PPC), Western Town Business College (WTBC) and PGIC were all struggling to initiate bargaining because of **Loyalist Group's** continual delay tactics and organizational changes. PGIC bargaining stalled when it finally got to finances, but PGIC teachers fought back and voted overwhelmingly to strike and are entering mediation. PPC and WTBC shrunk and were eventually fused into one school. After having one bargaining session, Loyalist decided to close that **school permanently. Loyalist has continually undermined ETEA's attempts to organize schools and achieve fair collective agreements. FPSE has supported ETEA's fight to challenge Loyalists tactics, but Loyalist's shadowy structure makes them able to dodge accountability.** These issues highlight the need for ETEA to continue to organize the other ESL schools currently owned by the Loyalist Group to prevent more unfair changes and closures.

The ETEA Organizing Committee is looking forward to another active year of organizing and outreach in private sector education. ETEA has its sights set not only on the remaining private ESL schools in Vancouver, but on private off-shoots of public institutions and the many other marginalized teachers in BC. ETEA will continue to be a leader in private sector organizing and a voice for ESL teachers and students.

FPSE PENSION TRUSTEES' REPORT TO THE 2015 ANNUAL GENERAL MEETING

This has been a relatively quiet year for the College Pension Plan but it has been a year of significant changes for FPSE trustees. Dominique Roelants stepped down as Trustee on August 31 to assume a position as Executive Officer of the College, Teachers, and Public Service Boards of Trustees. On September 1, Candace Fertile took on official duties as Trustee. She was joined by Doug Birtwistle in December. Both FPSE appointees have quickly assumed their roles and are fully contributing members of the Board. Candace also serves on the Communications Committee while Doug has joined the Interplan Trustee Education Committee and attends the Interplan Investment Committee. Weldon Cowan was appointed Vice Chair of the Board. He will assume the Chair September 1, 2015.

The last year has seen good market performance. The plan achieved a 10.4% return on investments. Total plan assets now sit at just over \$4 billion.

A valuation of the plan is scheduled for August 31, 2015. The valuation report will be complete in spring 2016 and is expected to show a small surplus.

The Board continues to oversee the implementation of the **partners'** agreement. Communication products have been developed and have been shared with the partners. Necessary changes in membership data systems, website upgrades, and member communications are running on schedule. The trustees expect a smooth implementation of the new plan rules on January 1, 2016.

FPSE trustees continue to strongly support initiatives which defend and promote retirement security for all members of society. To that end, the Board has joined the Canadian Public Pension Plan Leadership Council (CPPLC). The CPPLC is using evidence based research to promote informed debate on retirement income issues. The organization has been in existence for about two years and represents several public sector pension plans from across the country.

FPSE trustees have traditionally maintained a high degree of engagement on the various committees that operate within **BC's** public sector plans. This year was no different. During 2014/15, FPSE trustees were active on the following boards and committees:

- BC Pension Corporation Board of Directors* and associated committees
- Benefits Committee*
- College Pension Board of Trustees[†]
- Communications Committee
- Governance Committee[†]

- Interplan Executive Committee
- Interplan Investment Committee
- Interplan Trustee Education Committee*
- Post-Retirement Group Benefits Committee

**Committees marked with an asterisk are currently chaired by an FPSE trustee.*

Committees marked with a † were chaired by an FPSE trustee since the last AGM but not currently.

Respectfully submitted,

Weldon Cowan, Trustee
Candace Fertile, Trustee
Doug Birtwistle, Trustee

Your FPSE International Solidarity Fund AT WORK

2015 Recipients

\$7000	CoDevelopment Canada
\$6000	Migrant Farmworkers Support Network (RAMA) (Okanagan)
\$5000	Enhancing Employability of Youth and Women (Uganda)
\$5000	Rights Action: Community Development and Environmental Justice for Mining-Affected Communities (Guatemala)
\$4500	Leaving Footprints (Guatemala)
\$4000	Equality for Growth (Tanzania)
\$3000	Diyar Academy for Children and Youth Book Writing Workshop (Bethlehem)
\$2500	Weaving for Change (Cambodia)
\$2250	Alianza Prenatal Program (Guatemala)

\$2000	Community-Based Primary Health Care (Nicaragua)
\$1500	Seeds of Peace (Bosnia)
\$1000	Corazón de Oro (Heart of Gold) (Costa Rica)
\$1000	Garment Workers' Rights (WIC) (Cambodia)

CoDevelopment Canada

The NETWORK: the Central American Women's Network in Solidarity with Maquila Workers

The NETWORK is a regional network of six women's organizations in four countries in Central America (Nicaragua, Honduras, El Salvador and Guatemala) working to improve working conditions for women in the maquilas*. The NETWORK's various organizations work together to share best practices, coordinate educational campaigns, and build awareness about labour rights throughout the maquila sector. The



Maquila workers in a factory in Managua, Nicaragua. Photo: Kathryn Janzen, CoDev

goal of the project with the NETWORK is to influence labour policies at the levels of private enterprise and government in order to change labour practices that weaken the human rights of women maquila workers. One ongoing campaign of the NETWORK is their "Jobs, YES! But with dignity" campaign which they will continue to roll out this year. FPSE has been working in partnership with APSIES since 2003.

APSIES: Salvadoran Association for Integrated Health and Social Services, El Salvador

APSIES is a community-based organization working in El Salvador to strengthen community health structures and increase women's participation in leadership and local development. This year's project will focus on training local health committees on topics such as advocacy, gender equality and social determinants of health. These committees are trained to recognize and analyze the problems in their communities, to provide assistance and guidance for community members, and to formulate proposals for change for their local authorities. This year's activities also include carrying out social audits of local health centres, supporting five women's organizations in their work to economically empower their members, training women on political participation and developing and transmitting radio programs. FPSE has been working in partnership with APSIES since 2003.



Surveying community members as part of a social audit of local health centres. Photo: APSIES

*Maquilas refer to factories that import materials on a duty-free and tariff-free basis; the materials are then assembled, processed, and/or manufactured, and prepared for export.

Migrant Farmworkers Support Network (RAMA)

Radical Action with Migrants in Agriculture (RAMA) is an anti-racist, anti-colonial collective operating out of the Okanagan Valley. RAMA members strive alongside the approximately 1500 foreign agricultural workers in the Okanagan in their struggle for migrant justice. Justice for all migrants means an end to displacement, detainment, and deportations, to visas and work permits, and to the criminalization of free movement.

With the support of a grant from FPSE's International Solidarity Fund, RAMA will continue to fight for more radically inclusive and just communities by:

- Organizing opportunities for seasonal agricultural workers to make connections in their local communities and build strong and lasting relationships;
- Engaging in direct support and accompaniment of workers at their request. This work includes transportation and accompaniment to doctors' offices, government facilities, grocery stores, banks, or other businesses;
- Intervening on behalf of workers in crisis situations or conflicts with employers, Canadian government officials, and foreign consular officials.
- Documenting with photos and audio and video interviews, the experiences of workers while in Canada including their housing conditions and treatment by employers;
- Engaging in political advocacy alongside and on behalf of workers who often are restricted in their ability to speak up against abuses.

Rights Action: Justice for Mining-Affected Communities

It is no easy task to engage in acts of real solidarity in a country like Guatemala, where community organizers and human rights activists continue to be threatened, arrested, disappeared, or murdered. Nevertheless, Rights Action has a long-term commitment to the communities in which it works, and values building deep ties of solidarity. And, despite ongoing threats, people in these communities continue to organize, rise up and speak their truth. Rights Action gives ongoing support to local, grassroots organizations which are working for community-controlled development, environmental defense and human rights. More specifically, they are working to remedy harms and violations caused by global (mostly Canadian-based) mining companies. Rights Action provides funds for travel costs for activists, communication systems (e.g. internet access and cell phones, key modes of communication between individual activists and amongst organizations), or food and accommodation costs for human rights and community development meetings. As many organization members in all of the communities live in very remote areas, our ISF funds have had a huge impact on providing the opportunity for rural members to participate more fully in the work of local community organizations.



Angelica Choc (centre-right) and Rosa Elbira (left, back to camera) are two of the plaintiffs in the precedent-setting civil lawsuits in Canadian courts against Hudbay Minerals and CGN. Here, they participate in a Mayan ceremony in Rosa's home community of Lote 8, in the mountains above Lake Izabal. In 2009, Angelica's husband, Adolfo Ich, was murdered by private security guards hired by Hudbay/CGN; in 2007, Rosa, and 10 other women from Lote 8, were gang-raped by Hudbay/CGN security guards, soldiers and police, as part of an illegal forced eviction, so that the mining company could access the nickel ore in the ground under the community of Lote 8.

Leaving Footprints (Dejando Huellas) Women's Leadership Development Project

Dejando Huellas is a local women's group that is working with rural and young women at their request in remote communities characterized by a majority Indigenous population and stark social disparities throughout the Peten, the largest department of Guatemala. The overarching goal is to strengthen the capacities of women leaders in their organizations and communities so that they are able to be protagonists of their own reality who are capable of engaging politically and advancing social changes in their and communities. Upcoming work will focus on facilitating a series of workshops with 160 women and youth on community organization and participation of women, self-esteem, sexual health, identity and empowerment, gender issues, and leadership. Activities also include developing a series of related popular radio programs for the region, and organizing and participating in four major commemorative campaigns that highlight women's rights such as International Women's Day alongside other women's organizations.



Dejando Huellas workshop on self-esteem, La Bacadilla, El Peten

Equality for Growth

Equality for Growth (EfG) was established to empower informal women workers in Tanzania through legal and human rights education, advocacy and capacity building in order to eradicate poverty. The organization's vision is a market place where informal women workers of all levels can operate freely on equal footing with men, and without exploitation. At the heart of EfG's work is the building and strengthening of groups of women so they can effectively influence local and national policy, and claim and exercise their rights for the promotion of sustainable development. This project will work with women market traders in Temeke municipality supporting them to understand their rights, providing support to strengthen women's associations in Temeke–Sterio, and Chamazi markets, providing leadership capacity building training to strengthen women's leadership, and organizing a cross-district learning session to strengthen women traders' solidarity as they struggle to overcome urban poverty and other vulnerabilities.



Women market traders in Dar es Salaam.

Diyar Academy for Children & Youth Book Writing Workshop

The Diyar Academy for Children and Youth is a program of Diyar, an organization based in Bethlehem whose overall goal is to effectively equip the individual and community to achieve abundant living. To meet its goal and with a focus on arts and culture, Diyar and its academy seek to provide opportunities for formal and non-formal education and training to empower its target groups, including children, on different levels, namely academically, professionally, culturally and socially, as well as create spaces for creativity, civic engagement and intercultural exchange. Supporting the Children's Book Writing Workshop ensures that 20 children are empowered citizens and agents of social change as they learn the skills of developing and expressing their own ideas and turning their personal narratives into story books, with the Universal Declaration of Human Rights being the framework. This workshop provides a creative space for children through using the language, techniques and processes of the arts.



Teacher and students participate in the book-writing workshop.

Weaving for Change

Weaving for Change offers a small group of weavers in Prey Veng Province, Cambodia, the opportunity to establish their own community based saving and lending group. Chomnab Ho, who has been working with the weavers for several years on design and pattern development, has seen what happens to communities when they rely on micro finance. They lose their land, farm animals and other forms of collateral when a loan cannot be paid back. The model he uses supports weavers to establish their group, group process, meeting schedule, guidelines and rules. Weavers learn the “culture” of saving within their group, which can have ripple down effects to others in the community. The repayment of a loan is made according to the guidelines and personal circumstances of the weaver. Money grows through interest collected and circulates within the group.



Head weaver who teaches new weavers and negotiates with buyers



Chomnab Ho checking silk warp on loom in background.

Alianza Prenatal Program

Alianza Canada-Comitancillo Alliance for Rural Health is a non-profit organization overseeing health education and health projects in Comitancillo, San Marcos, the poorest department in Guatemala. The funding received will be devoted to Alianza's prenatal program. Guatemala has one of the highest infant and maternal mortality rates in Latin America. The goals of the program include:

- promoting a healthy pregnancy through adequate nutrition (calorie, protein and micronutrient intake) and monitoring for appropriate weight gain for both mother and newborn;
- educating women about reproductive health, family planning, nutrition, risks and complications of pregnancy, and care of the newborn.

Program Outcomes: Newborns weigh on average 500 grams more than the average birth weight for newborns monitored at the local health center. Women report feeling healthier, knowing when to seek emergency obstetric care, and feeling more prepared to space out their subsequent pregnancies.



A graduating class with their infants, with prenatal class topics on the posters behind them.

Community-Based Primary Health Care

Atencion Primera en Salud (APS) is a Nicaraguan NGO established by Nicaraguan health professionals to improve the availability and quality of primary health care in over 195 rural communities and in Managua.

APS:

- trains community health promoters to diagnose, treat and to provide education on a variety of health issues such as hygiene, maternal and infant health, water quality, and disease prevention. Trainings are generally monthly or bi-monthly;
- supplies health promoters with a health kit including an illustrated health manual, used both as a teaching tool and a reference guide. Some, not all, kits currently include stethoscopes, blood pressure cuffs, watches, and thermometers;
- makes affordable medicines available;
- unites all the promoters into a union of health promoters.

Funds will be used to help maintain the current level of core training of promoters, specifically for the trainer, bus transportation and food for participants for training days



Nicaraguan health promoter learning to take blood pressure measurements at an APS training session.

Corazón de Oro/Heart of Gold

The 'Heart of Gold' Project is an international community-university solidarity partnership between the Farm and Agro-tourism Association of Los Santos (FAALS) cooperative in Costa Rica and professors and under-graduate and graduate student interns in Vancouver Island University (VIU) planning and international programs. The FAALS Cooperative was created in 2004 to represent farm families in small farming communities of the Los Santos Region of Costa Rica. Guided by cooperative inquiry workshops, FAALS operates with a well-established governance structure and has elected association board members who lead and direct the association's activities. The 40 families in the five FAALS communities collaborate and share resources to strengthen small scale farming livelihood security and resiliency in Los Santos. With planning support from VIU, FAALS seek to stabilize vulnerable farm economies through innovative farm economic diversification that focuses on agro-tourism and eco-tourism business development, and the creation of sustainable agriculture in their family farms and region.



A crew of Los Santos farmers and student volunteers from Vancouver Island University working on eco-trail development