



National Association of Federal Retirees    Association nationale des retraités fédéraux

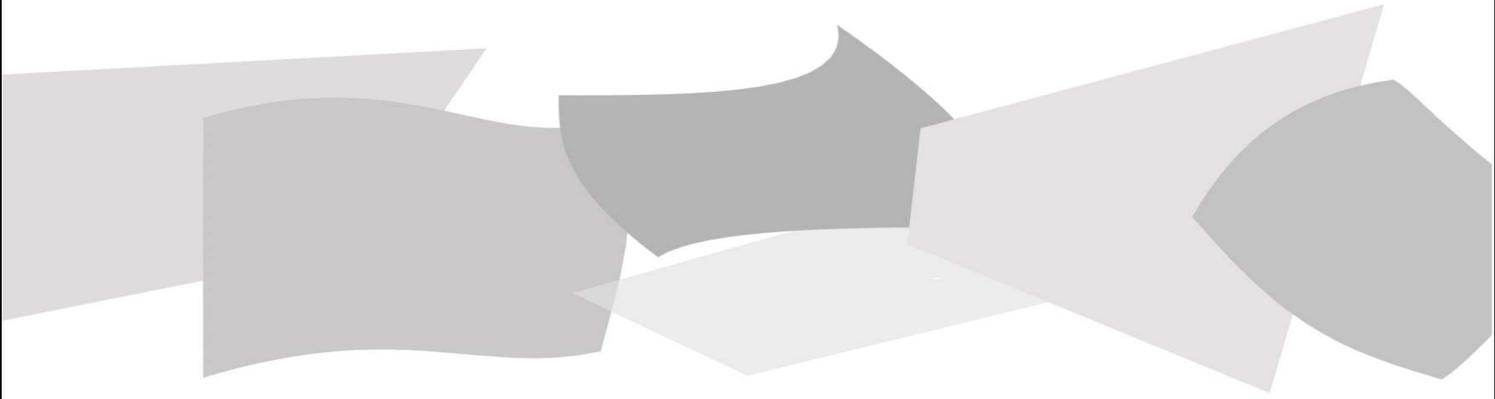
OTTAWA VALLEY

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

# **Annual Report**

**For the year ending December 31, 2016**



**2016**

April 19, 2017



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**Notes:**



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## **President's Report**

Welcome to the 2017 Annual General Meeting for the Ottawa Valley Branch. The National Association of Federal Retirees continues to be strong because of the work of the Branches across the country, and the volunteers who help to guide the Association at the local, regional and national levels. Of course our real strength comes from the membership, who support us with their membership dollars. Total membership nationally is around 185,000. The Preferred Partner program continues to be a very successful feature of the Association by offering discounted services to our members, and supporting the Association at the national level.

There have been a lot of changes in the Association over the last couple of years. We have a new name, and are encouraged to refer to it as "Federal Retirees" instead of "NAFR", thereby making it more obvious to the listener what the Association is all about. The old name was usually shortened to "FSNA" which may have made sense to us, but was not self-explanatory to others. As of April 2016, we have a new CEO with the appointment of Simon Coakley. We have a new National President in Jean-Guy Soulière, who you may remember joined us last year at our AGM when he was a National Director for the Ottawa region. The National Office has moved into a new building in Ottawa, relieving the space crunch they had been experiencing. New IT infrastructure has resulted in a much more vibrant and information-filled national website, along with a new database system to keep track of membership records. Both of these systems continue to be developed with new content and capabilities.

Speaking of the National website, I would encourage any of you who use the internet to visit the new site and discover all of the new information that is available. It is at [www.federalretirees.ca](http://www.federalretirees.ca) and contains recent news as well as sections with information on health, money, travel, lifestyle and advocacy. Also, the "Branches" section contains news for each Branch, a feature we have only started to take advantage of for the Ottawa Valley Branch. You can also get access to member-only content, such as electronic versions of Sage magazine and the "You and Your Survivors" workbook. You can also update your personal information such as address, phone number and email address, and set up your communications preferences. To access the member-only content, you will need a login ID, which is your membership number, and a password that can be set up online if we already have your email address in our database, or by contacting the National Office.

The Branch is still maintaining our own website at [fsnaottawavalley.ca](http://fsnaottawavalley.ca), however we are not expanding the information there, and a decision will need to be made whether to continue this feature in the future.

As you may be aware, in the last couple of years the Branch had started to hold a Fall event for members, that was more social than a business meeting, and was well received by members who attended. Unfortunately we had to cancel our plans for Fall of 2016 when the planned entertainment became unavailable at the last minute, and there was insufficient time to make alternate arrangements. We hope to get this going again this Fall, so check your mail and our



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website for news of an event in October. We will also send you news by email if we have your email address.

At the National level, the court case to oppose the unilateral changes to our health care plan premium share, and the campaign to oppose Bill C-27 which would allow Crown corporations and federally-regulated companies to change the type of pension being offered are ongoing. The rationale and progress for these positions are well documented on the national website and in Sage magazine, so I will not attempt to explain these further.

This section of my report is almost a repeat of last years. Our annual plea for new volunteers to contribute a little of their time and serve on our Branch Board of Directors is especially urgent. Most of your current Board members have been volunteering for many years, and I fully expect some will step down soon, having served the Branch well. You may be aware that Ed Rockburne will not be able to continue in his current role because he is moving out of the area, so immediately we will be without a Health Benefits Officer. Without an executive to continue work of the Branch, the Branch would cease to exist and would be absorbed into other neighboring Branches. The amount of work involved is not extensive, and we meet as an Executive about eight times a year. Executive meetings generally last about 2 hours. We plan for two general meeting a year currently, one being this meeting and the other the Fall social event. Skills involved are varied, and can include a basic knowledge of computer applications such as email, Microsoft Word or Excel. A general interest in federal politics, retiree benefits, senior's health, finance or quality of life issues for an aging population can also be particularly helpful to the Branch. Please consider coming forward as a volunteer to make sure the work of the Branch can continue. Also, if you know of other members who might be interested, please let them know of the current need.

Finally, I want to thank all the current Board members for their ongoing contributions to the Branch and to the membership. Without you the Branch could not be as successful as it has been for many years.

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



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**STATEMENT OF MEMBERS EQUITY  
AS AT DECEMBER 31, 2016**

	<b>Dec. 31 2015</b>	<b>Dec. 31 2016</b>
<b>ASSETS</b>		
<b>Cash in Bank – Current Funds</b>	<b>\$ 14,028.64</b>	<b>\$ 17450.42</b>
<b>Reserve Funds</b>		
Emergency Defense of Benefits Fund	\$ 1,000.00	\$ 3,000.00
Building and Support Fund	\$ 4,000.00	\$ 4,000.00
Benefits to Seniors Donations Fund	\$ 4,000.00	
Volunteer Training Fund		\$ 2,000.00
Special Events Fund		\$ 3,000.00
<b>Total Reserve Funds</b>	<b>\$ 9,000.00</b>	<b>\$ 12,000.00</b>
<b>TOTAL ASSETS</b>	<b>\$ 23,028.64</b>	<b>\$ 29,450.42</b>
<b>LIABILITIES</b>		
Payable to National Office	\$ 1,103.04	\$ 3,835.92
Surplus Repatriation Payable		\$ 646.67
Other Expenses Payable	\$ 81.00	\$ 502.50
<b>TOTAL LIABILITIES</b>	<b>\$ 1,184.04</b>	<b>\$ 4,985.09</b>
Members Equity - Beginning of Year	\$ 24,761.40	\$ 21,844.60
Excess Revenue over Expenses	\$ (2,916.80)	\$ 2,620.73
<b>Members Equity, End of Year</b>	<b>\$ 21,844.60</b>	<b>\$ 24465.33</b>
<b>TOTAL LIABILITIES AND MEMBERS EQUITY</b>	<b>\$ 23,028.64</b>	<b>\$ 29,450.42</b>



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

	2015	2016	Budget 2017
<b>INCOME</b>			
DDS Membership Dues	\$ 10,275.63	\$ 10,351.63	\$ 11,000.00
Single Membership Dues - Regular	\$ 1,033.56	\$ 2,108.56	\$ 2,000.00
Double Membership Dues - Regular	\$ 397.44	\$ 1,499.88	\$ 1,500.00
Dues Paid By Credit Card	\$ 417.28	\$ 576.76	\$ 600.00
Less: National portion of dues collected	\$ (1,002.96)	\$ (2,732.88)	\$ (2,800.00)
Less: Dues Repatriation		\$ (646.67)	\$ (200.00)
<b>Total Dues Received</b>	<b>\$ 11,120.95</b>	<b>\$ 11,157.28</b>	<b>\$ 12,100.00</b>
Fall Luncheon Event	\$ 875.00		\$ 860.00
Other Income - Interest	\$ 81.34	\$ 53.84	\$ 60.00
Misc Income	\$ 1.72		
<b>Total Income</b>	<b>\$ 12,079.01</b>	<b>\$ 11,211.12</b>	<b>\$ 13,020.00</b>
<b>EXPENDITURES</b>			
Administration	\$ 477.68	\$ 1,151.93	\$ 1,200.00
Travel		\$ 112.13	\$ 500.00
AGM Costs	\$ 4,534.94	\$ 4,247.39	\$ 4,500.00
Monthly Meeting Costs	\$ 1,382.89	\$ 1,158.62	\$ 1,400.00
High Speed Internet	\$ 798.60	\$ 748.60	\$ 850.00
Public Relations	\$ 673.08	\$ 295.00	\$ 800.00
National Annual Members Meeting	\$ 409.00	\$ 825.00	\$ 1,500.00
Bank Charges	\$ 61.94	\$ 51.72	\$ 70.00
Fall Luncheon Event	\$ 1,657.68		\$ 2,200.00
<b>Total Expenses</b>	<b>\$ 9,995.81</b>	<b>\$ 8,590.39</b>	<b>\$ 13,020.00</b>
<b>Operating Revenue over Expenses</b>	<b>\$ 2,083.20</b>	<b>\$ 2,620.73</b>	<b>\$ -</b>
Defence of Benefits Contribution to National Office	\$ 5,000.00		
<b>Total Revenue Over Expenses</b>	<b>\$ (2,916.80)</b>	<b>\$ 2,620.73</b>	<b>\$ -</b>



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## **Auditor's Report**

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

Subject: Annual Audit of Financial Records and Statements  
for the Year 2016

In accordance with my mandate I have examined the financial records and statements for the year ended December 31, 2016.

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

R.M. McClean



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

Total membership numbers are down a little bit this year, however the numbers are still quite healthy. Some of the losses in numbers are due to a general cleanup of the membership database when the new system was installed. Also, the difficulty of getting Association announcements out to retirees who are not already members may be reducing new member signups. The National Office is actively pursuing methods of finding recent retirees and making them more aware of the Association, its purpose and benefits of membership.

	<b>AGM 2016</b>	<b>AGM 2017</b>
Double Households	549	547
Single Households	610	599
<b>Total Households</b>	<b>1159</b>	<b>1146</b>
Non-DDS Households	176	212
DDS Households	983	934
Unpaid at End of Year	47	56
<b>Total Membership</b>	<b>1708</b>	<b>1683</b>



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

This year has been representative of most years with a blend of inquiries regarding the Public Service Health Care Plan (PSHCP). We have recently seen an increase in our share of the premiums, and there will be further increases until the retiree's share equals 50%.

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

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

Members are reminded that if they have any questions regarding their PSHCP or Dental Plan, to give me a call at, (613) 264-8372

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



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## Webmaster Report – Steve Fahie

### Your Executive

Office	Name	Phone	Email
President	Steve Fahie	(613)839-1359	info@fsnaottawavalley.ca
Past President	Chuck Parent	(613)692-0537	bcparent@hotmail.com
Vice-President	Ed Chenard	(613)264-0678	mechen@bell.net
Secretary	Lynda Smith	(613)267-8221	smithl@superaje.com
Health Benefits Officer	Ed Rockburne	(613)264-8372	erockburne@bell.net
Report Editor	Judy Buehler	(613)264-8856	goodlife@myhighspeed.ca
Treasurer	Ed Chenard	(613)264-0678	mechen@bell.net
Membership	Steve Fahie	(613)839-1359	info@fsnaottawavalley.ca
Webmaster	Steve Fahie	(613)839-1359	info@fsnaottawavalley.ca
Bylaws&Resolutions	Chuck Parent	(613)692-0537	bcparent@hotmail.com
Director-at-large	James L. Piché	(613)267-9669	campic@storm.ca
Director-at-large	Bill Irwin	(613)267-9972	billsyboosy@yahoo.ca
Director-at-large	Roy O'Halloran	(613) 264-2648	joanandroy@ohalloran.ca



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## Preferred Partners

National Preferred Partners can be found in any issue of Sage magazine, or on the National website at [federalretirees.ca](http://federalretirees.ca).

Here are our local Branch Preferred Partners.

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

**Friday, June 23—Bernard Slade’s ‘Same Time Next Year’**

**Friday, July 21—George Bernard Shaw’s ‘Candida’**

**Friday, August 18—Peter Colley’s ‘I’ll Be Back Before Midnight’**

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

**or in person: Tickets Please, Perth  
or on-line: at [www.ticketsplease.ca](http://www.ticketsplease.ca)**



Almonte in Concert is offering a 20% discount to Association members for their upcoming season.

Watch for the 2017-2018 concert lineup at

**[www.almonteinconcert.com](http://www.almonteinconcert.com).**

To purchase discounted tickets, please call 613 256-4554.

Ottawa Valley Branch  
Preferred Partner



North & East Ontario  
Kimberly Baker  
1-800-267-8713 Ext. 6394