

Bulletin to Branches – July 2019

President's corner

Thank you for making the 2019 Annual Members Meeting a resounding success. All delegates came to the AMM in Gatineau with a positive attitude, culminating in positive results. The preparations for the meeting, from branches to the board of directors to the national office ensured the AMM would be a successful event. So, thank you all for your commitment and unity.

The implementation of our five-year strategic plan has already begun, and members will be receiving periodic and timely progress reports on the objectives. The plan is a living document and can be adjusted as we progress in its implementation.

You have all heard about the Federal Court of Appeal decision related to the Public Service Health Care Plan (PSHCP) cost-sharing formula. Some of our members bring up the subject that we should never have appealed the government's actions in the first place. Hindsight is 20/20 as the saying goes. You should recall that we were successful in protecting low income pensioners who still pay 25 per cent; that annual deductibles were removed for the PSHCP; and that the move to 50:50 cost-sharing was gradually phased in over four years.

There are a lot of positives in the court's decision, especially recognition of our right to represent all federal public service retirees. For those of you who have followed this file from the outset, you know how careful and deliberate the board of directors was in deciding to appeal the Federal Court's decision. All factors were considered including our responsibility to protect our benefits (our *raison d'être*); the advice from our lawyers; the fact our members come from numerous and varied backgrounds; and the board's fiduciary and due diligence responsibilities. Given all these factors, the board of directors decided on the actions to be taken. This was not done lightly. It took days of discussions and considerations to arrive at the decision.

Everyone has a right to his or her opinion, but rest assured the decisions made by the board of directors in this case were very carefully considered and made in the best interests of all our members. We perhaps have lost the battle but [if you read the court's](#)

[decision in its entirety](#), we may have won the war. No one should question our resolve, our ability to protect our benefits or our willingness to try to protect our members and keep unwanted action by the government in check.

As I mentioned in my remarks at the AMM, we have several immediate priorities to deal with, including the renewal of the PSHCP negotiations, the coming federal elections, our recruitment initiatives, and the implementation of the strategic plan. I will update you on these various priorities in upcoming Bulletin to Branches. I look forward to visiting some of you later this fall.

Jean-Guy Soulière
President



National Association
of Federal Retirees Association nationale
des retraités fédéraux

Bulletin to Branches – July 2019

July 31, 2019

IN THIS EDITION

CEO's comments

Corporate services

- 2019 supplementary branch funding initiative – Phase II
- Lottery and gaming regulations
- Scam and fraud prevention

Human resources and volunteers

- 2019 volunteer recognition awards – Celebrating our volunteers
- The power of local recognition
- Volunteer roles in CRM
- National office closure

Advocacy

- Election 2019 – What your branch needs to know

Governance

- A message from the 2019 presidents' forum co-chairs

Communications, marketing and recruitment

- New branch report template for Sage
- Shorten your branch's URL
- Note on CASL and internal communications
- Get your copy of Collette's group preview
- HearingLife's AMM gift basket winner
- 2019 Sage deadlines
- Sign your prospective members up for *Fred*

- Requesting branch e-blasts

Attachments

- [Minutes of the April board of directors meeting](#)
- [Add or edit a volunteer's role in CRM](#)
- [Fred sign-up sheet](#)
- [Email newsletter template](#)
- [Sage branch listing template](#)
- [Sage memoriam notice template](#)
- [Sage branch report template](#)

CEO'S COMMENTS

Thank you to everyone, both staff and participants, for a very successful AMM. It seems that every year we can improve over the previous one which is both good and scary at the same time!

Back at the office some of us are taking some well-earned summer breaks while others are very busy. My senior team and I are all focusing on taking the strategic plan that you have approved unanimously and turning that into a solid operational plan at the national level. This will be presented to the board of directors at its meeting in September.

I should point out that Sayward and her team are very busy getting us ready for the upcoming election campaign. We all know it's coming; we just don't know when it will officially start. One of the things that they are working with the advocacy committee on is understanding the rules that are being issued by Elections Canada regarding who is and is not going to be allowed to do what during the election campaign and what sort of reporting requirements may be imposed. Please check the advocacy section of this bulletin to see how this is panning out. As a non-partisan participant in the election process, it is very important that the Association not only follow the rules but be seen by all parties to be following the rules. Our credibility depends on it!

As some of you are aware, this year we live-streamed the Tuesday and Thursday sessions of AMM on the web. I know that several of you were able to watch some, or all of the live stream and I would like to thank those of you who have replied to our survey about the live streaming. Your feedback and comments are very helpful.

For those of you who couldn't attend AMM and weren't able to watch all the live stream, worry pas, as my father-in-law says. [We recorded the live-stream and you can check out the recordings here.](#) You can watch all the proceedings if you like, or you can simply watch the presentations made by David Coletto and Denis Desautels or the two advocacy panels.

The volunteer recognition dinner at this year's AMM was a big hit and we hope the awards show how much we appreciate the dedication, passion and generosity of our volunteers. But sometimes the best way to say thank you is the old-fashioned way – a thank-you letter.

Recruitment was a hot-button issue during the 2019 AMM as it should be; we all value this Association and we want to see its positive influence grow. Something that many branches have used to help in this regard is the prospective member newsletter, which we affectionately call *Fred*.

Not only does *Fred* serve to spread the word about all the great work we do as an association, but it also allows us to remind past members why they should rejoin. Since we sent the first *Fred* newsletter in October 2017, its subscriber list has increased to 9,146 recipients and has led to 409 new memberships (including 141 rejoins). The growing success we've seen with this newsletter would not be possible without the incredible support of the branches.

I'd like to take this opportunity to sincerely thank all volunteers and branches who have incorporated this newsletter into their recruitment efforts and who have helped raise awareness of it and extend its reach.

When it comes to *Fred*, helping is easy. If your branch is hosting a booth, organizing an event or planning any sort of activity where you might encounter non-members, just be sure to have the sign-up form ready.

If you have a laptop or tablet that you can set up at your booth or meeting, interested parties can sign up for our e-newsletter through our online form:

federalretirees.ca/sign-me-up.

If that isn't a possibility, you can use [the paper sign-up sheet](#) and input the email addresses yourself after the fact. Anyone who provides an email address will receive a confirmation email before being officially added to the mailing list so it's very safe and secure.

I'd like to once again thank those who have made *Fred* a part of their recruitment strategies and encourage those who haven't yet to give it a try. If you have any questions about how to get started, please do not hesitate to contact Alex Charette by email at acharette@federalretirees.ca.

Lastly, and still with the AMM theme, any of you who have attended an annual meeting of members know how much of our success rides on the shoulders of Melanie Hudson. We knew that Melanie was planning to take a couple of weeks off for some much-deserved rest and relaxation after the AMM this year. What we didn't know was that she was planning to elope! Melanie and her long-time partner, Pierre, got married on July 11 on Mt. Norquay while they were vacationing in Banff. From all of us at the national office, congratulations, Melanie!



Simon Coakeley
CEO

CORPORATE SERVICES

2019 SUPPLEMENTARY BRANCH FUNDING INITIATIVE – PHASE II

During the finance committee's presentation at the 2018 AMM, a solution to the perennial "small branch" funding problem was promised. Since then, it has become apparent that the issue is not limited strictly to "small branches."

The national board discussed the issue during its September 2018 meeting. Although progress was made, the solution remained elusive. Fortunately, subsequent discussions between directors and branch presidents at regional meetings, and between finance committee members, has resulted in a solution that should go a long way to resolving the challenge of adequate branch funding. This solution was approved by the board in December 2018.

The 2019 budget included \$77,000 that could be accessed by any branch that did not have sufficient finances to undertake an activity benefitting the Association. Phase I of the initiative was successful in attracting 12 applications for funding of which 10 (see below) were approved. Given that only roughly \$44,000 of the funds available were committed, the board has determined that Phase II applications would be accepted for funding up to a maximum total of \$33,000. The activity must be completed by Dec. 31, 2019.

Now that the resolution to create this fund for the 2019 to 2024 time frame has been approved by the AMM, we will communicate the necessary information and timelines to presidents and treasurers as the relevant program dates approach.

The submission and review process for accessing Phase II funds, for an unfunded branch activity is as follows:

- The branch submits their request to the finance committee through the chief financial officer (ndignard@federalretirees.ca) by **Aug. 31, 2019**;
- The branch will send a copy of the rationale (request) to the appropriate district directors;
- The rationale must clearly state what the branch wants to do, how much it will cost, and how it benefits the Association and its members and explain why the branch cannot fund the activity from existing resources. Funds may not be used for the acquisition of assets (equipment, furniture, etc.);
- If they have not already been provided, the branch's Dec. 31, 2018, financial statements and banking institution statement(s) must accompany the submission;

- In addition, a detailed listing of all reserves, amounts and the purpose for which each was established must be provided;
- The finance committee will consider the application and submit its recommendations to the board; and
- The board expects to communicate its' decisions following the September 2019 meeting.
- If not all of the funds are committed, the board will determine the appropriate reallocation of any unused funds.

Following the event or once the process has been completed the branch will submit a report to the finance committee, through the CFO (ndignard@federalretirees.ca), accounting for the event or process and the costs associated as well as the results achieved.

If you have any queries or comments please forward them to Nikki Dignard at ndignard@federalretirees.ca

Summary of approved applications

Branch	Requested/approved amount (max)	Purpose
AB21	\$2,000	Additional 2019 AMM observer (national office arrangement)
AB92	\$5,000	Financial management initiative
	\$2,000	Additional 2019 AMM observer (national office arrangement)
BC01	\$2,000	Additional 2019 AMM observer (national office arrangement)
BC04	\$3,000	Additional 2019 AMM observer (national office arrangement)
NL86	\$2,500	Additional 2019 AMM observer (national office arrangement)
	\$1,400	Branch outreach activity at Clarendville
NS80	\$2,000	Additional 2019 AMM observer (national office arrangement)
ON43	\$9,000	Financial literacy initiative
QC57	\$15,000	Member recruitment initiative

LOTTERY AND GAMING REGULATIONS

At it's June meeting, the audit and risk management committee discussed the topic of branches undertaking activities that fall under the jurisdiction of municipal and/or

provincial lottery and gaming regulations. We take this opportunity to remind you that it is the branch's responsibility to ensure that it is in compliance with all relevant legislation, regulations, by-laws and rules and that they must apply for, and comply with, any relevant licensing requirements.

Where branches choose to continue undertaking activities of this nature, they are asked to provide copies of all compliance documents (applications, licenses and financial reconciliations, as prescribed) to the national office so they are available, if requested, in the event of an audit.

In situations where branches choose instead to cease these activities, a letter indicating this course of action should be sent to the national office.

As always, should you require additional information, please do not hesitate to contact finance@federalretirees.ca.

SCAM AND FRAUD PREVENTION

What would you do if you received this email?

*From: Your Branch President's Name Here <presidentemail234@gmail.com>
Sent: July-6-19 9:12 AM
To: Your Name Here <BranchTreasurer@federalretirees.ca>
Subject: Payment Request – Urgent!*

I need you to send an e-transfer so that I can pay our contractor. Get back to me ASAP so that i will send you the details

Bill

We often get reports of email scam attempts targeted at branch volunteers and national office staff – one example of many is listed above. Often, these are socially engineered to appear to come from people we know or whose names are familiar – many cases have an email address that has been engineered to look very similar to their target source's email address. One example would be an email sent to a branch treasurer that is made to appear as coming from the president of the branch.

Unfortunately, email scams, "phishing" and fraud attempts are all common occurrences that we need to be aware of and take the time to educate ourselves about in today's world of online communications. If you remain vigilant, we're confident that you and your branch will not fall prey to crimes of online fraud and personal data theft.

It is also important that your bank signing authorities are set up to require two signatories on all transactions (including wire transfers). This will help minimize the possibility of succumbing to this type of fraud.

[The RCMP has a terrific website](#) that gives solid advice about recognizing an attempt at email fraud as well as prevention tips. As a branch representative, it's important to remember the following:

- a) Be suspicious of any email or text message containing urgent requests for personal or financial information (financial institutions and credit card companies normally will not use email or text to confirm an existing client's information). Be skeptical and don't hesitate to call your financial institution directly and confirm with a customer service representative.
- b) Email addresses are public on our website. Criminals can access that information, so double-check addresses to ensure that they are from people you know. If you receive an email that is suspicious, even if it is from a familiar email address, take steps to ask for further clarity or confirmation.
- c) Personal information that is resident in our Customer Relationship Management (CRM) is secure and cannot be accessed by the general public.

HUMAN RESOURCES AND VOLUNTEERS

2019 VOLUNTEER RECOGNITION AWARDS – CELEBRATING OUR VOLUNTEERS

The volunteer recognition committee is pleased to announce the recipients of the 2019 Branch Awards, who were honoured at the volunteer recognition dinner on June 19 in Gatineau.

The **Fredericton & District Branch** received the **Advocacy Award**. In 2018, the Fredericton & District Branch held an all candidates Q&A session for the New Brunswick provincial election, focusing on health and seniors' issues. The major outcome for the branch was an improvement to branch image and recognition for both local politicians and prospective members. A second important accomplishment is that by planning and delivering this successful event, the branch now has a volunteer core that can provide leadership for future public events, such as the federal town hall to take place in the fall of 2019.

The **Ottawa Branch** received the **Membership Recruitment and Engagement Award**. The Ottawa Branch mounted its largest, most professional and successful members' meeting on Oct. 15, 2018. What made this meeting unique was that it was a combined financial literacy event for members and a recruitment initiative. The event was sold

out. The branch promoted the concept of inviting non-member guests rigorously via email and at other events as well as the branch phone answering service. The branch is pushing the recruitment message at all their events, including their many financial literacy workshops, as well as the Association's pre-retirement seminars and the Second Career Assistance Network (SCAN) seminars that the branch attends.

There was a tie this year for the **Branch Excellence, Large Branch Award**: the **Quebec Branch** and the **Hamilton & Area Branch**. In the summer of 2018, the **Quebec Branch** president assigned a vice president as the champion of excellence and a second vice president as the champion of recruitment, retention and recognition. Both leaders and their team of volunteers took on programs and activities to promote recruitment, retention and recognition and to advocate on behalf of their members. Those initiatives included sponsoring social and cultural activities, staffing booths at pre-retirements sessions, establishing selection criteria to recognize and honour volunteers, and attending public hearings of the House of Commons Standing Committee on Finance.

In 2018, the **Hamilton & Area Branch** conducted a successful "Members Recruiting New Members" campaign to engage current members in recruiting new members for the branch. Through all the extensive outreach efforts to prospective members, the branch has succeeded in maintaining a strong membership base and, more importantly, is recognized as a strong supporter of seniors' rights and a provider of senior benefits by the local community well beyond the federal public service institutions.

The **Colchester East-Hants Branch** took home the **Branch Excellence Award, Small Branch**. In March 2018, the branch developed a strategy to reengage its members. Several activities were put in place, such as ensuring CRM was kept up to date; providing training opportunities focussing on retention, recruitment, communications and marketing; developing a membership engagement survey that was sent to its members; elevating its visibility at key venues and creating a Facebook page for members to keep up to date on branch activities.

As previously announced in the April bulletin to branches, the 2019 Individual Awards recipients were **Yves Bouchard** and **Stephen Troy** (posthumously) who received the **Claude Edwards Leadership Award**. **Daniel Morin** was awarded the **Collaboration Award** and **Clifford Poirier** was the **Volunteerism Award** recipient.

Please join us in congratulating the 2019 Volunteer Recognition Awards recipients and nominees. We thank you for all that you do for your fellow volunteers, our branches, our Association, our communities and our members!

THE POWER OF LOCAL RECOGNITION

Branch presidents' certificates of commendation and appreciation, service pins and branded gifts are available to you from the national office. For details, please contact Gail Curran at gcurran@federalretirees.ca or 613-745-2559 ext 235. Stay tuned for additional information in the August bulletin to branches.

VOLUNTEER ROLES IN CRM

Since most branch have conducted (or will soon be conducting) their annual general meeting, we ask that you ensure that your volunteer role information (including volunteer names, roles, level and start and end dates) are kept up to date in CRM.

This is important for a variety of reasons:

- It ensures that the volunteer data in CRM is accurate, so that branches and the national office can better identify, support and communicate with volunteers;
- Since the volunteer directory resides in CRM, its report will always be up-to-date. Updates made by individual volunteers, branches and staff in CRM will automatically update the directory;
- The information helps to support our volunteer service awards program (i.e. long service pins); and
- It assists the national office in managing CRM access permissions for volunteers in order to protect member privacy.

Please refer to the [Add or edit a volunteer's role in CRM](#) document for assistance in updating your branch volunteer information. If you require more assistance or have questions, please contact Ysabel Anderson at 613-745-2559 ext. 229 or yanderson@federalretirees.ca.

NATIONAL OFFICE CLOSURE

The national office will be closed for Civic Holiday, Monday, August 5.

ADVOCACY

ELECTION 2019 – WHAT YOUR BRANCH NEEDS TO KNOW

Following a productive workshop at the 2019 AMM, branch volunteers have returned home and are working hard to bring their advocacy election activity plans into reality.

Our APOs from coast-to-coast (including Lucie Tremblay, new APO for Quebec) are connecting with branches to check in and provide support.

As we head into what will be a very busy stretch, the advocacy team is focused on providing support and advice to branches to ensure that everyone is able to realize success. Below you will find key information that will be helpful for your branch as you continue to plan for the fall.

Elections Canada rules – What we can and cannot do this election season

To ensure the Association remains consistent in this approach, and to ensure that the Association is not seen as engaging in “partisan” political activities, the advocacy committee has endorsed the following “principles of engagement” (see below) for branch advocacy activities throughout this election.

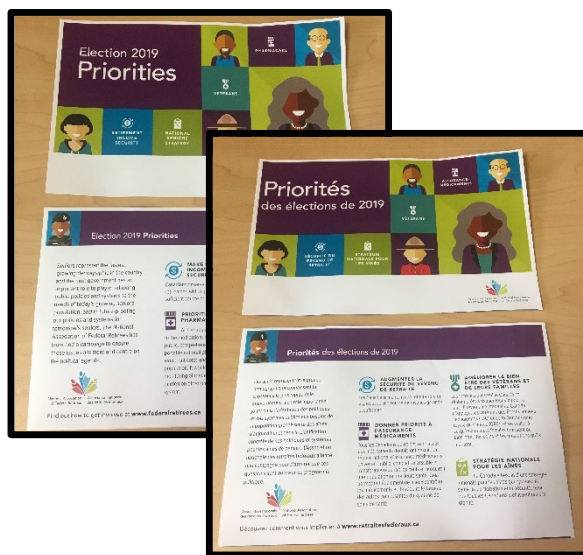
It is extremely important that all branches follow these principles closely. Branches that choose to run activities and events that do not follow these principles could be creating significant risks for the Association – from the national office staff to our volunteers across the country. **Consequences for contravening Elections Act rules can result in significant cost (in terms of fines, additional staff resources and potentially legal costs) and/or jail time.**

The national office advocacy team is happy to support branches in navigating these principles. If your branch has an event planned that you think **might** be problematic or if you need to know how our legal opinion addresses a proposed activity, please contact Sayward Montague (smontague@federalretirees.ca).

- All-candidates meetings (debates, town halls, meet and greets, etc.) are completely acceptable and can proceed as planned, **because they include all candidates** and do not endorse (or appear to endorse) any single party or candidate. Advertising for these events is also completely acceptable.
- Organizing all-candidates meetings with other groups and splitting costs is also completely acceptable. Again, this is **because they include all candidates**.
- **Events that include only one candidate or party are not acceptable** because they could appear to endorse or support one candidate or another. This includes a series of events (even if held on the same day) that include only one-candidate at a time.
- One-on-one meetings with candidates (for example, where a branch president or small number of volunteers meets with a candidate about our priorities) are acceptable, as they are not events open to members or the public. One-on-one meetings should include a maximum of only 2-3 Association volunteers, and

branches should make best efforts to meet with candidates from most political parties.

- **Issue-specific events during the writ period (once election is officially called¹ until election day) could be problematic.** Please consult with the national office before any decision is made to organize such an event. Similarly, care will have to be taken that an all-candidates meeting (which is entirely acceptable) does not appear to become an issue-specific event. During the election or writ period, issue-specific campaigns are regulated by Elections Canada and could be construed as indirect endorsement of a party or candidate.
- **Be sure to use the postcard, pictured below, only during the pre-writ or pre-election period (from June 30, 2019, until the day before the writ is announced).**



Postcards should only be distributed to members and others in the pre-writ or pre-election period.

registration if a third-party conducts certain activity (and some activities are outright banned). Elections Canada's goal in doing this is to level the influence that entities can have on elections.

On reviewing the advice we have received, and the Association's election plans, we have determined that the Association is unlikely to have to register as a third-party with Elections Canada, as we are not planning (at this time) to undertake any activities that are regulated by Elections Canada. This is a good result because generally the sorts of activities that require registration are partisan-type activities that are designed to

Why we're doing this

With the next federal election, a matter of months away, the national office has reviewed the new rules issued by Elections Canada and sought legal advice to ensure the Association remains compliant with the *Canada Elections Act*. (A "third party" is any person or group that is involved with an election that is not a candidate or political party.)

Elections Canada regulates how third parties can participate in and influence the outcome of federal elections. This regulation is mainly done by establishing limits on spending on certain activities, and by requiring

¹ Even though we all know exactly when the election will be held (with a degree of certainty), there is still a requirement under the *Elections Act* for the Governor General to make a proclamation directing the Chief Electoral Officer to issue writs officially setting the election date.

influence the outcome of the election. As a rigidly non-partisan organization, the last thing we want to appear to be doing is attempting to **influence** the outcome of the next election.

Again, the national office advocacy team is happy to support branches in navigating these principles. If your branch has an event planned that you think might be problematic or if you need to know how our legal opinion addresses a proposed activity, please contact Sayward Montague directly at smontague@federalretirees.ca.

What you need and what we need – Sharing information and tools

As discussed at the AMM, this election season is all about empowering branches to deliver advocacy in the way that works best for their local team. While there are some specific rules and regulations from Elections Canada that branches **must** follow, we are letting our branches take the lead – and seeing amazing results!

And while this model means that your APO and the national office aren't looking to tell you what to do, there are still a few pieces of information that do need to be shared so that we can effectively support your branch and your region.

What the national office needs:

- **Confirmed event dates, times, locations, etc.:** It is essential that we know what is happening right across the country. We will be providing Eventbrite registration links to each branch, as well as promoting them on our website. Without an Eventbrite link, your event will not be listed on our website and you could be missing out on crucial data to help make this and future events more successful.
- **Format:** Due to the changes to election legislation (see "Elections Canada Rules" above), branches must share their event or activity format with the national office. This is to protect you and the Association to ensure we are not breaking any rules and putting anyone at risk.
- **Support:** The national office is happy to support branches in making their election advocacy plans a reality. Each branch has its own strengths and challenges to overcome, so, we are happy to discuss requests for support.

What branches need:

- **Materials:** Orders placed by June 25 are shipping out from national office soon. Additionally, all digital materials and toolkits are available through the portal. These materials include:
 - **Postcards and leaflets:** These documents provide a brief overview of our four priorities.

- **One-pagers:** These documents provide an in-depth overview of each of our four priorities, as well as key questions to ask candidates. These questions can be used one-on-one at meet and greets, or as part of your formal town hall meeting.
- **“Add your name” sheets:** These sheets will help you gather names in support of our campaign. Once complete, don’t forget to scan and email these to advocacyteam@federalretirees.ca or to mail them to 865 Shefford Road, Ottawa Ont. K1J 1H9
- **Toolkits and templates:** These toolkits and templates have been developed to support you and your team this fall. These include:
 - ***Meet the Candidates:*** Helpful guide to finding and meeting with candidates
 - ***Building Momentum:*** Helpful guide to data and privacy
 - ***Building for Success:*** Key workbook for developing your branch’s plan (completed in advance of AMM workshop)
 - ***New – All-Candidate Event toolkit:*** This guide provides a step-by-step overview to planning your local all-candidates event, as well as some helpful templates for invitations and debriefing after your event
 - **Template letter to candidates:** An introductory letter from your branch to your local candidates
 - **Posters (available upon request):** The national office is happy to provide posters to branches to promote their events. Files can be provided in letter-size or tabloid-size format.

***Sage* fall edition – What to expect**

Like the last election, the fall edition of *Sage* magazine will contain a lot of election content. For branches, this will help to lighten the load for distributing some information to members who do not receive email from us. Here is a brief overview of what to expect in the fall edition of *Sage*:

- **An election toolkit:** This will be the centerfold of the magazine, essentially a 4-page pull-out. It will include an overview of our four key priorities along with questions that folks can ask candidates (an abbreviation of the one-pagers), an “advocacy profile” where folks can share their own priority and plans for the election, and an “add your name” sheet where they can collect names of friends and family who support our campaign.
- **An overview of our four priorities:** Our regular *Health Check*, *Pension Desk* and *Veterans Corner* articles will provide additional information and context on the four key issues.

- **Political vs Partisan:** Our regular *Advocacy in Action* will delve into the difference between political action and partisan action, and how our campaign fits into the political (not partisan) side of things.
- **Interviews and questions with party leaders or their designates:** While still in development, it is our intention that there will be a piece with interviews with party leaders on our key priorities, like the piece from the 2015 election.

Key contacts

Your advocacy program officer (APO) is there to support you and your branch in your activities and should be your main contact. In the absence of your APO, please do not hesitate to contact the advocacy team at the national office for additional support.

APO team:

- **Alberta:** Brian Emdin – bemdin@gmail.com
- **British Columbia:** Leslie Gaudette – lgaudette@gmail.com
- **Manitoba:** Gerry Jennings – gerryjenningsass@mymts.net
- **New Brunswick:** Dorma Grant – dormagrants@hotmail.com
- **Newfoundland and Labrador:** Winston Fiander – wfiander@nl.rogers.com
- **Nova Scotia:** Michelle Langille – mtlangille.ml@gmail.com
- **Ontario:** Nancy Gleason – ntggleason@gmail.com
- **Prince Edward Island:** Shirley Pierce – shirley.m.pierce15@gmail.com
- **Saskatchewan:** Brian Harris – bharris@sasktel.net
- **Quebec :** Lucie Tremblay – lhtremblay435@gmail.com

Advocacy team, national office:

- **Atlantic and Quebec:** Patrick Imbeau and Shedly Jolibois
pimbeau@federalretirees.ca; sjolibois@federalretirees.ca
- **Ontario, Prairies and British Columbia:** Candace Jazvac and Jessica Searson
cjazvac@federalretirees.ca; jsearson@federalretirees.ca
- **Director:** Sayward Montague – smontague@federalretirees.ca

GOVERNANCE

A MESSAGE FROM THE 2019 PRESIDENTS' FORUM CO-CHAIRS

Thank you to all who participated in another successful Presidents' Forum at the AMM this year.

Forum participants will be receiving a survey shortly and asked to prioritize the great ideas and recommendations produced by the forum. The results will then be shared

with the board, the national office and the branches in the next few months. It is our hope that the suggestions provided will be incorporated into national and branch operational plans, as we all work to implement our unanimously approved 2019 to 2024 strategic plan.

We were honoured to work with such a committed group of volunteers, but this was our last year as co-chairs. We are pleased to announce that as a result of our appeal at the AMM, branch presidents Lorraine Scott (Fundy Shores) and Richard Chevrier (Southern Alberta) have stepped forward and agreed to serve as co-chairs for the 2020 presidents' forum. Anyone who wishes to offer support and assistance to Lorraine and Richard is encouraged to reach out to them.

Kathy Lye and Daniel Morin
2019 Presidents' Forum Co-chairs

COMMUNICATIONS, MARKETING AND RECRUITMENT

NEW BRANCH REPORT TEMPLATE FOR *SAGE*

We'd like to give a big thanks to all branches that used the recently shared new template for their fall Sage branch reports. We're so impressed with how great your reports look and grateful for the compliments and positive feedback on the new template. Thank you to everyone for your participation in this project and making the new template a real winner. As usual, all branch reports will be uploaded to the volunteer information portal for your perusal.

While the submission deadline for the fall edition of Sage has passed, branches that would like to get started on using the new template for the winter edition of Sage can get in touch with Alex Charette by email at acharette@federalretirees.ca for support.

[Download the new Sage report template here.](#)

The deadline for the winter submissions is October 15.

Please keep in mind that you will not be able to edit or work on the template if using a phone or tablet. The template can only be edited using a desktop or laptop computer, or something similarly capable (e.g. a Microsoft Surface Pro device).

SHORTEN YOUR BRANCH'S URL

Now that the Association's website is managed by the Drupal content management system, we are pleased to be able to offer shorter redirect links to your branch homepage.

Shortened web addresses (or, shortened URLs) are great for use on business cards, in Sage magazine, or anywhere else you would like to promote your branch where printing space is at a premium.

For example, if this is the current address to your branch homepage:

<https://www.federalretirees.ca/en/branches/ontario/peterborough-area-branch>

We can create a shorter redirect link that would look something like this:

[federalretirees.ca/peterborough](https://www.federalretirees.ca/peterborough)

The shortened URLs are being created on an as-requested basis. Any branch that would like a shortened version of their branch URL can contact Greg Lister by email at glister@federalretirees.ca to make a request.

NOTE ON CASL AND INTERNAL COMMUNICATIONS

We're sometimes asked whether communications among volunteers and communications between volunteers and the national office are restricted by Canada's Anti-Spam Legislation (CASL). This is a great question so we would like to clarify how CASL does not actually affect us as colleagues.

The legislation is meant to protect Canadians from spam—receiving commercial electronic messages (CEMs) without consent. Messages sent between employees or colleagues does not fall under this definition. So, where our own internal communication is concerned, CASL has no bearing over electronic messages sent between volunteers or between volunteers and the national office. As employees and volunteers of the association, communication is essential between us and CASL does not prevent us from such internal electronic communication.

If you have any questions or concerns about Canada's Anti-Spam Legislation, please do not hesitate to get in touch with Alex Charette by email at acharette@federalretirees.ca.

GET YOUR COPY OF COLLETTE'S GROUP PREVIEW

Have you thought about organizing a group from your branch to travel together somewhere with our exclusive travel partner Collette? For every 15 persons you book, your branch gets one free spot!

The 2020-2021 Collette group preview is now available to order. It's your exclusive first look at what Collette has in store for tours in 2020-2021, as well as new tours you can book now. We encourage you to take a peek and see if any of these hot spots are on your travel bucket list.

Call 866-510-8915 to order a copy for your branch today and see if your members may be interested in joining in on a branch cruise or tour.

HEARINGLIFE'S AMM GIFT BASKET WINNER

HearingLife is pleased to announce that LaReata Workman was the winner of its \$75 Visa card and Go Bananas summer-themed gift basket at the 2019 AMM in Gatineau, held June 18 to 20.

The gift basket contained a \$75 Visa gift card, beach blanket, pool float, canvas drawstring backpack and tumbler.

Congratulations, LaReata!

2019 *SAGE* DEADLINES

We are pleased to confirm the Sage submission deadlines for branches as well as the date ranges for delivery to our members' homes for the remainder of 2019.

Winter 2019	Copy due	In members' homes	Date range for events
Branch reports	Oct. 15	Dec. 11-24	Dec. 11 to March 10
In memoriam	Oct. 15		
Branch listings	Oct. 15		

Please send your submissions to sagesubmissions@federalretirees.ca. You can also reach Alex Charette with any questions or concerns at 1-855-304-4700, ext. 248.

Your reports and listings should cover events that will occur within the date range for events, indicated in the table above (under "Date range for events").

SIGN YOUR PROSPECTIVE MEMBERS UP FOR *FRED*

Currently released bimonthly, the Federal Retirees prospective members' newsletter (affectionately nicknamed *Fred*) promotes the work that we do as an Association and gives prospective members a taste of what full membership has to offer. [Here's an example of what you can expect from Fred.](#)

If you have a laptop or tablet, you can leave the following page open at your next member recruitment event so visitors can sign up to receive our prospective members' newsletter: federalretirees.ca/sign-me-up.

If you can't bring a laptop or tablet with you, [use the printable sign-up sheet](#) to collect names, email addresses and postal codes and then manually enter them into the page above once your event is over.

Note: Association members and volunteers will not receive Fred automatically even after entering their information into the form above. If you would like to receive the prospective members' newsletter as a volunteer, please email Alex Charette at acharette@federalretirees.ca and ask to be added to the list.

REQUESTING BRANCH E-BLASTS

Please send all e-blast requests to emailrequests@federalretirees.ca and follow these steps when preparing an email message to be sent by a member of the CSO team:

1. Draft and proofread your message and ensure it has been approved by your branch board, if required.
2. Try to keep your message under 300 words to avoid losing the reader's interest. For longer messages, consider creating a downloadable newsletter instead and include the highlights in the body of your email. You'll find a newsletter template attached to this bulletin.
3. Provide the anticipated send date of your message, allowing at least five working days notice for preparation, scheduling and testing.
4. Review the test message provided to you and notify the CSO of any necessary edits.
5. Ensure that no other branch e-blast has been sent out within the last 30 days. To avoid overcommunication, please limit your e-blasts to one per month except in urgent or extreme cases. If additional messages are required during this period, consider using a newsletter format as mentioned above.

If you have any questions or concerns, please contact Alex Charette at acharette@federalretirees.ca or 1-855-304-4700, ext. 248.

ATTACHMENTS

- [Minutes of the April board of directors meeting](#)
- [Add or edit a volunteer's role in CRM](#)
- [Fred sign-up sheet](#)
- [Email newsletter template](#)
- [Sage branch listing template](#)
- [Sage memoriam notice template](#)
- [Sage branch report template](#)