

ARFL NEWSLETTER

Association of Retired Faculty and Librarians of York University

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DUES 2009/10

If a dues notice is enclosed with this Newsletter, then you are past due for 2009/10 dues and are requested to pay up by return in order to continue your membership of ARFL. You can also pay for 2010/2011 if you wish to.

1. Meetings

General Meeting 2 June

The Spring General Meeting of ARFL will be held from 12-3 on 2 June 2010 in the Harry Crowe Room in Atkinson College. The room is located on the main floor at the South end of Atkinson. Lunch with, a glass of wine, will be provided. Any proposed agenda items should be sent to Alex Murray amurray@yorku.ca and Gene Denzel lezned@yorku.ca by 22 May.

CURAC

The 2010 Conference and Annual General Meeting of The College and University Retirees Association is meeting on the York campus, 18, 19, 20 May, hosted jointly by ARFL and YURA. There will be sessions on ageism in colleges and universities, pensions and benefits, retirees' activities in teaching, research, mentoring, advising, and community outreach. ARFL members are welcome to attend the full conference or for one day. Check out the program on either the CURAC or the ARFL website, www.yuarfl.org.

2. President's Message Alex Murray

I look forward to meeting all ARFL members at our Spring Membership Meeting, Wednesday 2 June. We will be discussing all the usual items but if you have special issues you want to ensure are discussed, please write me now so we can prepare materials. Reports of officers and on various topics will be emailed before the meeting on 2 June.

3. Personal Expenses Reimbursement (PER) accounts by Al Stauffer with file from Alex Murray

Retirees were recently notified of new conditions on the use of PER funds. ARFL considered this new policy to be excessively restrictive and some members of the ARFL executive met with the Vice-President Academic, Patrick Monahan, to request a review of the PER policy. The Vice-President was sympathetic to our concerns and initiated a review of the new policy. We are pleased to inform you that the use of PER funds to attend conferences is now the same as for pre-retirees provided the retiree is a Senior Scholar who is teaching or is engaged in appropriate scholarly activity. See the details at

www.yorku.ca/finance/documents/Reimbursement_Senior_Scholars.pdf

Another significant change is that the expense reports are now approved by a Dean or Principal instead of the Vice-President Research. At the moment PER funds cannot be used for professional dues and membership in learned societies. To clarify this matter the following letter was sent to the Vice President Academic and Provost almost three months ago but we have not received any response. In mid-April, I wrote to him again but there has been no response.

To: Patrick Monahan, Vice President Academic & Provost
 From: Alex Murray, President, Association of Retired Faculty and Librarians
 Re: Changes to Senior Scholar PER
 Date: 31 January, 2010

The Executive and members of ARFL deeply appreciate your intervention regarding the issue of reimbursement of conference travel expenses under the Senior Scholar PER program. We are particularly reassured and pleased that the revision is based on the principle that the Senior Scholar must be “engaged in one or more of the same relevant activities as expected of a full-time faculty member,…”.

However, we are concerned that the undated document received by YUFA from the Division of Finance and Administration, **Professional Expense Reimbursement for Senior Scholars** contains some phrases that clash and are inconsistent with the tenor and meaning of both the revision to section **Eligible Reimbursable Expenditures iii** and your letter of 15 January, 2010 to ARFL.

These phrases are:

“Ineligible Expenditures

- ii. Professional dues and membership fees in learned societies.
- vi. Conference-related expenses in cases where the Senior Scholar is not participating in the conference

program in an official capacity (see iii above under Eligible Expenses)”

ARFL is concerned that professional membership is normally a prerequisite to both conference attendance and subscription to a professional journal.

Also, the requirement of “substantiating official participation” and “participating in the conference program in an official capacity” appears to clash with the intent of **Eligible Reimbursable Expenditures iii**. What is meant by “official”?

It seems almost as if the amendment to **Eligible Reimbursable Expenditures iii** was added to the existing document without checking whether or not it clashed with any of the clauses elsewhere.

We urge you to ensure that these inconsistencies are eliminated by the Division of Finance and Administration and thank you for your successful efforts in this matter.

4. FSCO Hearing by Al Stauffer

On Feb. 23 there was a hearing before the Financial Services Commission of Ontario regarding the implementation of the ‘shadow pension’ by the University administration. Although four days were scheduled for the hearing, it was completed in one day since arguments were limited to whether the language of the York Pension Plan supported the administration’s position. No witnesses were called and the lawyers’ arguments were based solely on the interpretation of the wording of the Plan text.

There will likely be further hearings after the tribunal’s decision is known, whatever that decision may be. If the ‘shadow pension’ is ruled invalid there will be the question of remedy. If it is ruled valid there will be the question as to whether retiring members were properly informed of the existence and effects of the ‘shadow pension’.

At this point there is no indication as to when the decision will be made available.

5. Actuarial Valuation for the Pension Fund 2008 by Al Stauffer

There was a meeting of the All University Committee on Pensions (AUCP) on Sept. 24 at which we received a report on the Actuarial Valuation of the Pension Fund for 2008 from the actuaries for the fund.

First of all, a bit of background: An Actuarial Valuation is an estimate of future liabilities of the fund in order to pay pensions based on the terms of our pension plan. It is calculated on the balances of the fund at the end of a calendar year, in this case 2008. It does not concern the present condition of the fund which has plenty of money to pay our current pensions.

The Actuarial Valuation report has to be filed with the provincial government at least every three years and is the basis of any payments the University is obliged to make in addition to matching monthly contribution of pre-retired members of the plan. These extra payments are to make up for any deficits for future pension payouts that the plan may have.

As we are all too well aware, 2008 saw a devastating crash in financial markets so that our pension fund now has large deficits. However, since the University filed a report based on the 2007 valuation, it is not obliged to file another until after the returns for 2010 are known. The results for 2009 are quite positive (we will know the actual numbers shortly) so the deficits will not be as bad as those based on the 2008 numbers. However, the latest results will not make up for the substantial declines seen in 2008.

This valuation is also based on the assumption that the 'shadow pension' will continue. This is the subject of hearings near the end of February. If the shadow pension is ruled invalid as YUFA contends, these liabilities will increase.

Now for the numbers: The deficit to the plan at the end of 2008 based on the assumptions made by the actuaries is \$265.6 million. The deficit at the end of 2007 was \$44.1 million. If these latest numbers were used as the basis of the University's contribution to the pension fund, it would have to pay \$96.6 million per year rather than the current level of \$32.8 million. However, the University is unlikely to have to pay such a large amount since the 2009 returns are positive and the Ontario government will allow the payments to be spread over 10 years (subject to plan members approval) rather than the 5 years at present. There may be further changes to pension legislation by the provincial government which would alter these numbers. But, of course, there is always the question of the 'shadow pension'.

There are two consequences to the current financial situation. Because of the negative returns, it will be many years before current pensioners see any increase to their pensions unless the 'shadow pension' is ruled invalid. For pre-retirees, it means that most will have pensions based on the minimum guarantee. If this is the case, there will be no incentive to time retirements based on the returns to the pension fund because their pensions will be based on years of service and final average salaries.

Copies of the Actuarial Valuation Report may be obtained by sending and email to stauffer@yorku.ca.

6. BIRDS: Your brain and your body

by Gene Denzel

It is said that, at any age but especially as you age, exercise and fresh air are good for the body. It is also frequently said that learning new things is a good way to help keep your brain working.

Certainly, most people who have worked at a university have been immersed in a culture all about learning 'new things'. Thus, there is a lot to be said for an activity combining fresh air, exercise, and learning some new things. Which brings me to the subject of birding. If you are not an ornithologist, but do have some interest in the natural world, birding is a great way to hit all three of these goals. (I'm guessing that most ornithologists wouldn't be 'learning something new' from this form of birding!)

The first thing to consider is what you need to get started. The answer is, really, not much more than a decision to do so. Next time you are outdoors, and not in a hurry, just start paying attention to any birds that are around. Actually look at them, and listen to them. Even the common friends such as Robins, Doves, Cardinals, Goldfinches, etc will repay with interest some time spent observing their behaviour. Of course, once you start looking and listening, you will likely want to see more closely. Thus, most birders do purchase a set of binoculars. These days there is a wide range of possibilities. Most birders find an 8x42 size to be a good balance of viewing power, ease of 'finding the bird', and weight. You can pay from a few hundred dollars on up, and while it is true that more money generally buys more quality, you can do quite well for \$500 or so, and this is a purchase that will last a lifetime. Beyond the basics there are more powerful telescopes made for birding as well, and even technology such as image stabilization.

Once you have started looking, you will want to extend your walks to one or more of the dozens of good sites around the Toronto area. The waterfront parks, including the Leslie Street Spit (a.k.a. Tommy Thompson Park), the Toronto Islands, Humber Bay, and so on are relatively easily accessible and offer interesting birds year round.

High Park is also a good site. A good place to start looking for resources is the web site maintained by the Toronto Ornithological Club (TOC), but there are many other sites as well. (Google will be very helpful here.) When you start going outside your back yard, you will likely run into birds that are not familiar. Now you will need to get yourself a 'field guide' to help you i.d. these new finds. There are many available these days, as well as helpful reviews of the various offerings. Generally beginners find it helpful to go with the Peterson guide, but as you gain experience you will likely find that you want to add to your library. After all, across North America there are more than 800 different species that can be found. Beyond the field guides there are audio resources to help you learn the songs of the birds. (It is estimated that experienced birders actually do 90% of their bird locating through their ears, hopefully followed by a view through binoculars.) And of course, in this modern era, there are 'apps' for such tools as the iPhone that can be tremendously helpful.

So far I've addressed birding as if it were a solitary activity, which it certainly can be. However, it can also be a very social activity, whether with family, or in groups of 2 or more like-minded people. Most birders are happy to help newcomers, and the various clubs in the Toronto area offer a variety of outings throughout the year, usually welcoming members of the public.

Beyond birding for its own sake, many people have also worked at getting pictures of the birds. This is another whole area where one can start with a small, inexpensive, digital zoom camera, and work up (if desired) to expensive high-end DSLR cameras with fast long zoom lenses. Another direction pursued by many is 'digiscoping', where a small camera can be used with a telescope or binoculars to get some potentially great pictures.

One of the really neat things about birding is that it is a great excuse for travelling. Basically, different habitats tend to have different species showing up. So you might want to go in down to Point Pelee

National Park in May where a great variety of species tend to show up in a fairly small area during migration. Over time you might find that you have managed to see most of the roughly 800 North American species. This doesn't mean there is nothing new to be found. There are around 10,000 species to be found across the world! Travel to Costa Rica, Panama, Mexico etc. can be very rewarding to those who go beyond the beach resorts. If you are attending an academic conference anywhere in the world, there will be places to bird not too far away. And there will usually be field guides available for the area as well, and even local guides who for a fee will be happy to take you out to find the local specialties, if you can't pair up with someone else at the conference who knows the area.

I hope that I have at least sparked a little bit of interest in the possibilities of birding for the reader who has not considered it before. It is an activity which allows for people who only just add looking and listening to their neighbourhood walks, right on up to those who travel to exotic parts of the world primarily to find new species to add their lists. Along the way there is plenty of room to exercise the research skills which faculty have developed in their own fields.

7. In memory: Anne Cannon by Vivienne Monty

Anne Cannon, former Head of the Government Documents/Administrative Studies Library, died suddenly in Pompano Beach Florida on January 22, 2010. She and her husband Don had spent winters there since her retirement in 1992.

Anne came to York in 1969 in its early days and worked first at the only library on the Keele campus, the Steacie Library, now the Steacie Science Library. She later moved to the newly opened Scott Library and worked in the Government Documents eventually becoming Head in 1973. She became Head of the combined Government Documents/Administrative Studies Library in early 1974, a position she held for a number of years. She

then became Head of the Reference Department at Scott Library until her early retirement. The above describes a career at York of 22 years but does not really speak to the person behind that career. Anne was actually a very shy person who often seemed scary to many because when she did find her voice, it tended to be a powerful one. She had very strong principles about what was right or wrong and believed strongly that librarians had more to offer the York community than just processing books and leading people to the appropriate area in the stacks. She felt that librarians should be doing research, be recognized for their building of strong collections and could effectively teach research methods.

In 1974/5, Anne was elected to the Stewart Committee that was studying the role of librarians at York. She, together with that committee worked for a whole year meeting almost every week to bring about a report that recommended the changes to librarians' positions that she felt so strongly about. The report led to librarians joining YUFA and the rest is, as they say, history.

Over the years, Anne worked hard to bring the reality of librarians' position to its current state. She was also dearly loved by her YUSA staff that she supported with equal vigour. Although she did not like to teach many classes herself or deal directly too often with people because she was so shy, she was unfailingly supportive of all around her whether it was staff or librarians. She, for example, let a young librarian like me try every wing position I could think of. She never had a bad word and never asked me to stop; she merely gave good advice and support along the way. The only thing she ever said to me was that she wished to "know what I was doing so she was not caught off guard when asked." Otherwise she just told me to go to it.

Anne also served on many YUFA committees over the years. Her particular interest was pensions even before retirement. She became counsel and advisor to many of us on various aspects of the plan. Anne suffered a heart attack in 1989. She decided to take early retirement after major surgery. She later had a stroke and had numerous mobility issues. Nonetheless she continued to enjoy life, was a

voracious reader and loved Florida for the heat it offered over the winter months where she and her husband Don bought a townhouse some 14 years ago. Otherwise, she and Don enjoyed their farm in Orton, Ontario for the rest of the year.

Anne will be sorely missed by her family, friends and those who knew her.

She is survived by her husband Don, four children (David, Susan, Carl and Carolyn who works at York) and her 8 grandchildren.

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Please address comments on the contents of this issue to the editors.

THE END