

# COLLEGE ADMINISTRATOR

OCASA  
APACO

The professional journal for Ontario college administrators

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## Facility management:

*How colleges are creative, resourceful, and inventive*

- INSIDE:
- Innovators & Leaders:  
Meeting the Challenges of Tomorrow's Colleges
  - Succession planning



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OCASA  
 Box 410, 157 Adelaide Street West  
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 Phone: 1-866-742-5429 Fax: 1-866-742-5430  
 Email: info@ocasa.on.ca www.ocasa.on.ca

**Executive 2009/10**

**PRESIDENT**

**Chris Fliesser**  
 Dean, Faculty of Technology and  
 Regional Campus Operations  
 Fanshawe College  
 519-633-2030 ext. 227  
 cfliesser@fanshawec.on.ca

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**Sheryl Furlonger**  
 Project Manager  
 Confederation College Foundation  
 807-475-6201  
 sheryl.furlonger@confederationc.on.ca

**SECRETARY**

**Mary-Lou Rainville**  
 Dean of Access, General Studies &  
 Human Services  
 Canadore College  
 705-474-7600 ext. 5244  
 rainvilm@canadorec.on.ca

**TREASURER**

**Rick Helman**  
 Director, Financial Planning  
 Loyalist College  
 613-969-1913 ext. 2460  
 rhelman@loyalistic.on.ca

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**Jim Whiteway**  
 Chair, Schools of Business and  
 Management Studies, Bioscience,  
 Centre for Justice Studies  
 Loyalist College  
 613-969-1913 ext. 2329  
 Jwhitewa@loyalistic.on.ca

**REGIONAL DIRECTORS**

**EAST**

**Judy Spring**  
 Dean, School of Business, School of  
 Information Technology, School of  
 Integrated Studies  
 Durham College  
 905-721-3111 ext. 2150  
 Judith.Spring@durhamcollege.ca

**CENTRAL**

**Alan Hare**  
 Manager of School Operations  
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 Centennial College  
 416-289-5000 ext. 8080  
 ahare@centennialcollege.ca

**NORTH**

**Denise Piovesan**  
 Directrice – Projets spéciaux  
 Collège Boréal  
 705-560-6673 ext. 2050  
 denise.piovesan@borealc.on.ca

**WEST**

**Neil Chartrand**  
 Dean, Business & Entrepreneurship Division  
 Niagara College  
 905-641-2252 ext. 4126  
 nchartrand@niagarac.on.ca



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**EXECUTIVE DIRECTOR**

**Diane Posterski**  
 1-866-742-5429 info@ocasa.on.ca

**CONTRIBUTING EDITOR**

**Bill Swan**  
 1-866-742-5429 bill.swan@ocasa.on.ca

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 OCASA  
 P.O. Box 263, Napanee, ON K7R 3M4

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Third Floor - 2020 Portage Avenue  
 Winnipeg, Manitoba R3J 0K4  
 Tel: 866-985-9780 Fax: 866-985-9799  
 www.kelman.ca info@kelman.ca

**MANAGING EDITOR:** Cheryl Parisien, cheryl@kelman.ca

**DESIGN/LAYOUT:** Jackie Magat

**ADVERTISING SALES:** Al Whalen

**ADVERTISING COORDINATOR:** Lauren Campbell

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Chris Fliesser  
OCASA President

“OCASA’s 2010 Annual PD Conference is adding the twist of innovation: Innovators & Leaders: Meeting the Challenges of Tomorrow’s Colleges.”

## Tomorrow's challenges start today

**L**eadership. Who hasn't been to a workshop or read a book about it? Countless programs, tools and theories fill the space as we all find ways to be effective leaders in a very dynamic environment, the college system.

OCASA's 2010 Annual PD Conference is adding the twist of innovation: Innovators & Leaders: Meeting the Challenges of Tomorrow's Colleges. Resources are limited, and so the call to be leaders in this system is going to require more innovative thinking, problem solving and opportunity building. Check out the centre spread of this issue for full information about workshops, the Presidents' Panel and our guest, Jim Harris, management consultant, international speaker and author.

**R**etirement. We all know the impact this is going to have on each of us, personally and professionally. What should you think about as you approach retirement? Gerd Rehding weighs in with his recent experience. And what should colleges be doing to prepare for the predicted exodus over the next several years? Brian Desbrien (Career Corner) offers some suggestions for succession planning. Finally, a report from OCASA's appointee to the CAAT Pension Plan Board of Trustees, Rick Helman, updates us on some key initiatives the plan is engaging to keep the plan sound.

On page 13 of this issue, Past President of OCASA Gwyn Thompson provides a brief salute to two retiring college presidents, Andrée Lortie, President, La Cité collégiale, and Barbara Taylor of Canadore. I would like to add my salute to these professionals and what they've added to the college system.

Enjoy this copy of *College Administrator*. Our hope is that you will find this a valuable read. If you have suggestions for stories, please let the OCASA office know. If you're not yet a member of OCASA, this is a great time to join. [c|A](#)





Chris Fliesser  
Président de l'APACO

« En 2010, la conférence annuelle de PP de l'APACO y ajoutera l'aspect de l'innovation avec son thème « Innovateurs et leaders : relever les défis des collèges de demain ». »

## Les défis de demain se posent dès aujourd'hui

**L e leadership.** Qui n'a pas assisté à un atelier ou lu un livre sur ce sujet? D'innombrables programmes, outils et théories nous sont proposés dans nos efforts pour devenir des leaders efficaces au sein du réseau des collègues, environnement dynamique et exigeant.

En 2010, la conférence annuelle de PP de l'APACO y ajoutera l'aspect de l'innovation avec son thème « Innovateurs et leaders : relever les défis des collèges de demain ». Les ressources étant limitées, l'exercice du leadership dans le réseau des collègues exigera une plus grande innovation sur le plan de la pensée, de la résolution de problèmes et des ouvertures à créer. Consultez les pages centrales du présent numéro pour vous renseigner sur les ateliers, la tribune du président et notre conférencière invitée, Consultez les pages centrales du présent numéro pour vous renseigner sur les ateliers, la tribune du président et notre invité spécial, Jim Harris, consultant en gestion, conférencier et auteur de réputation internationale.

**La retraite.** Nous pressentons tous les répercussions personnelles et professionnelles que la retraite aura sur chacun d'entre nous. Que faut-il penser à l'approche de la retraite? Gerd Rehding nous fait part de son expérience récente. Et que doivent faire les collègues pour se préparer aux nombreux départs à la retraite qu'on prévoit au cours des prochaines années? Brian Desbien (*Le coin des carrières*) y va de quelques propositions pour la planification de la relève. Enfin, un rapport de Rick Helman, représentant de l'APACO au Conseil d'administration du régime de retraite des CAAT, fait le point sur certaines initiatives clés propres à assurer la solidité du régime.

À la page 13 du présent numéro, Gwyn Thompson, ancienne présidente de l'APACO, rend hommage à deux présidentes de collège qui tirent leur révérence : Andrée Lortie de La Cité collégiale et Barbara Taylor du Collège Canadore. Je tiens ajouter mes félicitations à ces professionnelles pour leur magnifique contribution au réseau des collèges.

J'espère que ce numéro d'*Administrateur de collège* vous plaira et que vous y trouverez matière à réflexion. Si vous avez des suggestions d'article, n'hésitez pas à communiquer avec le bureau de l'APACO. Si vous n'êtes pas déjà membre de l'APACO, voici le moment où jamais d'y adhérer. [c!A](#)



# Facilities management:

There's never enough money, enough time, and even new construction is managed by staff too busy with daily routine. And, oh yeah. They deliver.

By Bill Swan, Contributing Editor



Photo courtesy of Durham College and University of Ontario Institute of Technology

On the Friday of his first week into his new job as facilities manager at Fanshawe College, Harry Bakker faced a challenge that still sticks in his memory.

An electrical explosion had put half of the entire campus out of power.

Called to the scene, he had one simple question: "Who's in charge?"

The answer surprised him.

"You are," he was told.

What followed was a whirlwind weekend. Several staff worked around the clock. Diesel generators were brought in from Toronto for emergency power. College staff worked with safety authorities. By Monday morning, the college was safely up and running, although permanent repairs took another two months to plan and implement.

It was a great introduction to the hectic – some say sometimes impossible – job in managing facilities at any one of the 24 Ontario colleges.

As Harry Bakker found, the job of managing plant facilities has a habit of jumping outside of the job description. Managing facilities on a day-to-day basis requires high standards, a tolerance for dealing with complaints – and a dedicated staff well organized to deal with emergencies as they arrive.

And that's the thing about emergencies: they are always unplanned.

Not that facilities managers at Ontario's 24 colleges handle a lot of emergencies. It's just that given the age of the college building, the community demands (many are designated the emergency centres of

their communities), or just plain growth and size that dictate: emergencies will happen.

For everything else, there are day-to-day functions that by themselves could keep the staff fully occupied.

So how do they do it? How do they provide maintenance, security, react to emergencies, and tackle new building projects – and still manage to have things ready by the time classes start in September? *College Administrator* interviewed eight managers to find out.

Angelo Miranda, Director of Facilities Management at Seneca College, stresses the need for planning – for more than just emergencies. Not that Seneca, too, does not have emergencies. Senior Manager Gordon Mickovski talks about the

“hundred-year rainfall” in 2004 that saw a foot of water running through the main building of the main Newnham Campus, just off the 404 Expressway in North York.

“That’s when we found we had an underground stream right under the main building. We had water coming up through the drains.”

Says Miranda, who came to Seneca from the private sector last year: “In the private sector, we did not have storm water problems – water flowing across parking lots, lack of drainage. I even talk to my wife about storm water management.”

He points out the need for a master plan for the whole college in order to anticipate problems and react to them when they do arrive. “The size of the beast makes this a complex job,” he said.

The biggest surprise? “The numerous initiatives, projects and situations that you have to deal with in one day or one week. It is a tremendously interesting and exciting experience.”

Ask facilities managers about their challenges and they’ll all come up with the same three: money, money, and funding, not necessarily in that order.

Take the first item: There is never enough money for maintenance on existing buildings – some of which are now past the 40-year mark. Deferred maintenance increases the risk of emergency situations, whether it be a leaking roof or an electrical malfunction.

“Deferred maintenance is more costly than maintenance properly done,” Blayne Mackey of St. Lawrence College told us. Since operating funds never are enough to provide for maintenance “properly done”, choices are made. “We put things in three categories. Category 1: if the system fails you’re shut down. That is, if something like a boiler goes in winter, you’re closed.

“Category 2: if the system fails, it’s going to cause damage to other areas. For example, if the roof leaks, walls and furniture damage” will multiply the cost.

“Category 3: a system reaches the end of its life and needs to be replaced.”

The trick, of course, is in determining which issues belong in which category. A roof that approaches category 3 – that is, has reached the end of its life – may signal this by failing and becoming a category 2, damaging walls, halls, and equipment in the process.

The problem is not insignificant. Harry Bakker of Fanshawe, and chair of OCFMA (see sidebar), estimates the current budget for renewing infrastructure adversely impacted by deferring maintenance is about “five percent of what is needed on an annual basis.”

Says Mike Rushton, Director, Physical Resources at Algonquin: “It’s difficult when your revenue side is not able to keep up with inflation. It means that continually you make choices and decisions about allocating funds in a way that is optimal. That’s always a challenge.”

The other money problem is tied to construction. Whether the project be



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*Pat Vilella of Niagara College adjusts controls of recently upgraded boilers at the Welland campus.*

SuperBuild or other capital infusions, the life cycle is never long enough. “Nobody turns down money for construction,” said Doug Lucyk, Director of Facilities Operations at Durham College and the University of Ontario Institute of Technology (UOIT). “The province forces accelerated construction,” he said. At UOIT, which shares the parking lots, many buildings, and services with Durham, the site was at one time the largest construction site in the province.

“These buildings were put up in record time,” Lucyk said. “That was tough on our staff.” But the university construction forced some retrofitting. With pride, Lucyk shows off transformed labs and corridors in the original 1971 Durham

College building named after founding president Dr. Gordon Willey.

The rushed construction is nothing new. Mal Woodhouse, Director of Facilities Management Services at Niagara, points out that the plans for Niagara College 40 years ago were never completed (“the province ran out of money”). Today, expansion at the college is finally able to utilize the heating/cooling distribution system creating energy conservation worth about \$200,000 annually.

Most colleges have similar stories, indicating that perhaps some problems – such as the funding of construction – are systemic. Gord Mickovski of Seneca: “When I first started, I thought the buildings all looked like my old high

school. (Then later I found) that this was because the original buildings had to be built in such a hurry that they dusted off the plans for old high schools. Years later, we’re still dealing with some of these problems.”

The problems have to do with two key areas. First, the standards under which buildings were erected in the 1960s were different. Single-glazed windows with no insulation in cinder block walls were normal. (Oil was under \$3 a barrel.) In addition, spraying fireproof asbestos on ceiling areas seemed like a good idea at the time.

Energy conservation now dictates a higher standard of insulation. Doug Lucyk at Durham is still in the process of getting rid of single-glaze windows (“Now just in the corridors,” he sighs.) Paul Mantle, Director of Facilities of Lambton College, is likewise “trying to bring old buildings up to current code, but it’s tough.”

Part of the challenge lies in the elevation of standards – a good thing, really – but which dictate that making substantial changes to old buildings require bringing these up to current standards.

“The challenge has to do with capital and the way it is allocated,” says Rushton. “The capital is allocated by grants for new buildings, but there is no wholistic approach taken. A new facility might be funded (for construction) but when you open it, your operating budget has not increased by enough to cover it.” In other words, adding a new facility (“full almost before they’re open,” says Rushton) may add to the burden, providing more floor space to maintain and clear and secure – with no increase in budget.

But lately, the Ministry has at least asked for a list of deferred maintenance projects. “But it shows courage of the Ministry to ask,” says Rushton. “It’s scary.”

“But I love Canada. I don’t see the cost of education being lower in the United States. What I would like to see is not (to make) life easier for a facilities manager, but that education is more accessible for a student. We should be concentrating on finding a way to make education more affordable for a student.”

– Mike Rushton, Director, Physical Resources at Algonquin College



And the standards keep changing. Looming large for most managers are changes to the accessibility act. Often, such changes are legislated without accompanying funds for implementation, adding one more strain to the operating budget.

Mal Woodhouse of Niagara: “We have ramps that were built in the sixties for actually moving material, skids, things like that. Now they’re used for persons with disability, but these don’t meet the grade requirements under the code. To address this, you have to jackhammer them out and rebuild.” The trouble is, he adds, that code now requires one foot of ramp for every inch of elevation. “If you go up 40 inches, you have to have a 40-foot ramp so someone could safely navigate it in a wheelchair.” The aim, he says, is laudable, but the implementation “is going to cause problems in all colleges and universities.”

By comparison, colleges in the United States average double the money for operational maintenance. While almost all facilities managers cite money as



Photo courtesy of Seneca College

*Facilities management staff at Seneca faced a flooded main building in August of 2005. Lower levels of Newnham Campus were flooded.*

## OCFMA: a forum where facilities managers share expertise, experience, best practices

OCFMA: It’s pronounced by the letters – Oh-SeeF-Ma – and it stands for Ontario College Facilities Management Association.

Officially, OCFMA operates within a framework provided by Colleges Ontario. It reports to the Administrative Services Coordinating Committee (ASCC).

Unofficially, it is the lifeline for facilities managers across the province.

“We have a unique relationship within the system,” says Harry Bakker, Director, Facilities Management at Fanshawe and current chair of OCFMA. “We are very collaborative. If people have a question, or are asking about best practices, they’re prepared to share.”

The association holds annual meetings combined with professional development each fall. On an on-going basis, they share information by email.

“It’s amazing,” says Doug Lucyk of Durham. “You send out one email and you’ll get a dozen responses. Or the managers may refer a question to other managers in the department to answer.”

“I’ve been involved (with OCFMA) for 20 years,” says Mal Woodhouse of Niagara. “OCFMA has been successful in its ability to communicate to all colleges and managers. Our success as a group has been driven by our ability to maintain this association. OCASA is in the same position now to do the same for administrators in all areas. Now, with OCFMA if you don’t participate, your boss wants to know why. It’s because of our collective efforts.”

At Loyalist College in Belleville, Kirk Fleming, Director of Facilities Services, sees the association as the ideal mentoring experience, where “you can find out what was tried, what worked

and what didn’t work.” At a small college with a small staff, he can tap into expertise over a wide range of responsibilities.

Angelo Miranda of Seneca, a relative newcomer to the system: “These are people who are very passionate about what they do.” As an example, he cited a question on the OCFMA website asking about what kind of locks to put on classroom doors to deal with lockdowns. In the corporate sector, he said, he would have never thought of that issue. But someone in the discussion thread noted that careful consideration be given that classroom doors should not be locked from the inside because “you could have other stuff happening in the classroom and someone locking from the inside – you could create more problems. You get a different perspective.”

the biggest challenge of the job, Mike Rushton offers a fresh perspective. “We have tight funding,” he admits. “But I love Canada. I don’t see the cost of education being lower in the United States. What I would like to see is not (to make) life easier for a facilities manager, but that education is more accessible for a student. We should be concentrating on finding a way to make education more affordable for a student.”

And it is those students who are the ultimate clients, a fact that many managers acknowledge in small ways. At Durham, Doug Lucyk remarked on the surprise shown by a journalism student when he returned her phone call request for an interview. “And why wouldn’t I?” he pondered. “They’re why we’re here.”

At Niagara, Mal Woodhouse discovered that the small woodlot on campus contained five Flowering Dogwood trees – a nationally protected species as well as other rare plants. Plans now are to work with horticultural students “to start propagating these plants, taking cuttings, collections seeds, getting students to grow them in the greenhouse and

reestablish them in different elevations. We’re losing so much of the Carolinian forest in the Niagara area. Wouldn’t it be nice if we (Niagara College) became the Central Park of Welland?”

Keeping grounded in this purpose may be the magic that rubs off on facilities staff, helping make project miracles happen. (See Magic sidebar.)

“I always pop in to every set of graduation just to see what’s going on,” said Harry Bakker. “I see the families all abuzz, and students beaming.”

Rushton agrees. “You see these young people getting diplomas. Two or three years at Algonquin and you come out with a diploma and you are employable. It changes your life.”

And a big part of his job he sees as helping make those two or three years comfortable. “Walking down the hall one day,” Rushton said, “I saw wheelchair tipped over in the hallway. There was still



*College facilities include a variety: greenhouses like this at Fanshawe, wineries at Niagara.*

quite a crowd of students. As I got closer, I realized that the person who was in the wheelchair was leaning against the wall. One of my staff, a handyman, was fixing the wheel on the wheelchair. I knew the handyman and knew the person was in good hands.”

It’s all about team-building. **C/A**

## MAGIC: midnight deadlines not unknown by facilities staff

Deadlines are not their friends.

August 31 should give facilities managers night sweats.

Yet time after time (hands up if you recognize this at your college) facilities staff pull it off: construction built to impossible deadlines but delivered and on time. At St. Lawrence College in Kingston on one SuperBuild project, “We got the occupancy permit at 7 a.m. that day as the students were coming through the door,” said Blayne Mackey.

Or at Lambton, where the college bought and renovated an old hotel adjacent to the college for a residence. Said Paul Mantle: “We didn’t get started until mid-June. We got occupancy on August 31, which was running close to the line.”

Kirk Fleming at Loyalist admits it’s magic. “Our facilities team has been able to find those rabbits,” he says.

But he wonders: “How many rabbits can you pull out?”

Each college undoubtedly has examples of such magic, likely to the point where we expect such miracles. Given the processes involved – a budgeting process that often does not approve renovations and changes until April – require a rush of planning both of working drawings and the whole project.

These are the same staff, remember, who are under budget pressure on day-to-day projects. New projects and renovations are often imposed on top of other duties. How does it happen?

Blayne Mackey: “It’s an old team approach. Assemble the right team and it all gets done. There is a clear schedule, an end date, and significant consequences if you don’t make that end date. Forming, Norming, Storming and Performing: A classic example of team work.”

Doug Lucyk of Durham: “Part of this is how you treat staff. I count on their expertise. They all care. They care that things are done right. They care that the clients are all happy.”

Mike Rushton of Algonquin: “Get out of their way. Once they’ve got their marching orders, you’ve got to let them go and do it. My staff have the authority to go about their professional job. Our philosophy is that we hire professionals and my job is to create the atmosphere where they can do their job.”

Paul Mantle of Lambton sums it up: “The facilities staff are unique. The staff make it happen. They’re just an amazing group that I rely on to do the short-term items with impossible time demands. It may come from being in the service sector, with a focus on customer service and setting priorities.”

# Retirement

Travel and watching grandchildren play hockey are attractive, but plan the timing, your income, and benefits coverage with care



*Gerd Rehding retired from his position as Associate Director Human Resources at Humber College in late 2007. Gerd represented OCASA on the Board of Trustees of the CAAT Pension Plan for six years. While Gerd enjoys the pleasures of his retirement, he has returned to Humber on a part-time basis as an HR Consultant specialising in pension and benefits issues.*



*By Gerd Rehding*

As a former administrative employee who retired a couple of years ago, I have had an opportunity to reflect on the decision to retire and assess if all my expectations for retirement have been met.

I have realized some expectations. My wife Christine and I travelled extensively to Europe to visit relatives. We also visited Acapulco again, bringing back old memories. About 40 years ago, on our first trip together, we drove to Acapulco in my 1966 Mustang.

Then there are the five grandchildren we see quite often. We enjoy watching them growing up. In the meantime, I have developed a keen interest in hockey, brought on by watching grandsons Michael and Mathew play.

For me, the decision to retire was the correct one. However, anyone planning to retire may want consider a few practical things and I do have some thoughts to share with future retirees.

## Retirement date

Given that mandatory retirement in Ontario is a thing of the past, deciding when to retire has to be carefully considered. Don't rush into retirement just because of an isolated unpleasant experience at work. Keep in mind that when you retire you give up a regular paycheque and the interaction with your colleagues at work. If you wait too long, you may find it very difficult to adjust to the changed circumstances and may have missed out on interesting activities you could have undertaken as a retiree.

When you do choose a time, your pension income will be maximized by choosing the last day in any given month. This is because your highest earnings are a part of your pension calculation – so, if your last month will be among the 60 months of highest earnings you've had, you will want to count it in.

## Retirement income

Before you actually retire, make sure you get an estimate of your potential net retirement income. For employees with lots of college service, the CAAT Pension Plan is likely to be the major source of income. You can get an estimate of what this will be from your college administrator, on the CAAT Pension Plan website, or directly from the plan's office.

To maximize your CAAT and to make sure you get all the value you can from your pension, you may want to "pick" August 31 as the actual retirement date. By August 31 you have completed another vacation year and, if you are entitled to pay-in-lieu for the maximum 30 vacation days, that extra payment at retirement can be considered pensionable earnings.

However, the pension is driven primarily by service and earnings in the plan. Sometimes the extra service can outweigh the impacts of having the

## Feature

vacation entitlement treated as earnings. These types of issues could be discussed when the member makes an application to retire which would also reflect the provisions in effect at that time.

If you are age 60 or older at retirement you are also eligible to receive the Canada Pension Plan (CPP) pension. If you are under age 65, your CPP pension will be reduced and that

reduction stays with you as long as you live. Nevertheless, many retirees prefer to receive money earlier, rather than waiting until age 65 to receive an unreduced CPP pension.

Once you are age 65, you will be eligible to receive Old Age Security (OAS) benefits. OAS benefits are subject to "claw-back" if your net income exceeds \$66,733.

You may have other sources of retirement income such as a pension from another pension plan or funds withdrawn from your RRSP.

In comparing your total retirement income with your current salary, remember that the statutory deductions from your retirement income will likely be lower than from your current salary and that you are saving on work-related expenses. It helps that some of the larger expenses, such as mortgages and the cost of raising children, are reduced or gone. There is a general rule that states that if your total gross retirement income is 70 per cent of your current salary or better, chances are that your net cash flow will be equal or better after retirement.

Keep in mind that your CAAT Pension Plan continues for your spouse in case of your death. This survivor pension equals 60 per cent of your basic pension or even 75 per cent pension if you choose that option at retirement.

### Group insurance

Retirees are entitled to maintain some or all of their CAAT Group Insurance coverage at their own expense, subject to some limitations.

Current levels of life insurance can be maintained until age 65, subject to a maximum of \$500,000. After age 65, the group plan life insurance is limited to \$10,000. At that time you could convert up to a maximum of \$200,000 without medical evidence, less any amount you may have converted at your date of retirement, but it is costly.

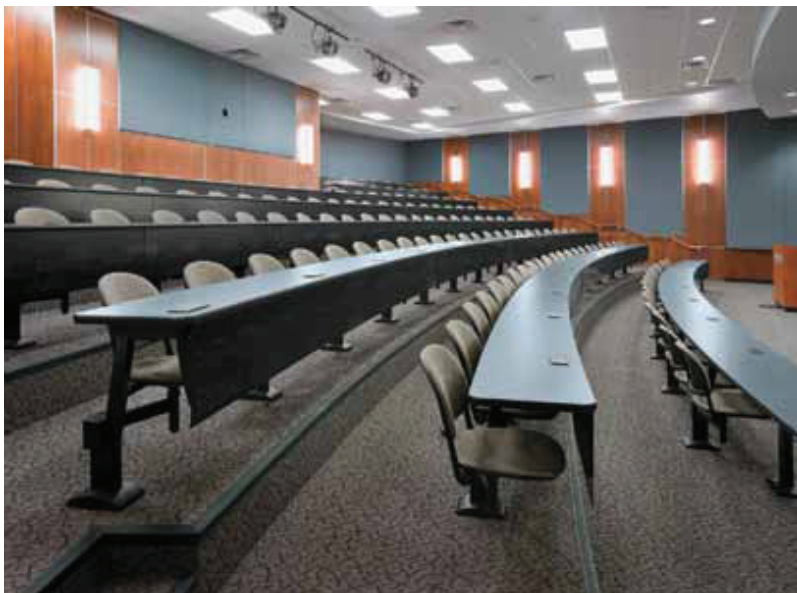
Extended health care coverage is important but also costly. Find out from your benefits department what options are available at retirement (i.e. Plan 1, Plan 2, Plan 3) and what the monthly premiums are.

Dental coverage can be maintained as well. However, you may want to check with your dentist to determine if, in your case, the potential benefits are equal to or greater than the premiums.

Remember: older people usually have greater needs for medical services and cancelled group insurance coverage cannot be re-instated.

However, if at retirement your spouse can cover you under his/her group

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insurance plan, you may place your own entitlement for coverage under Sun Life on hold until such time that your spouse loses complete access to coverage. This does not cancel your entitlement for coverage under Sun Life but saves you money on premiums. Discuss this issue with your human resources representative and be sure to document your decision to put your retiree benefits on hold.

**Financial considerations**

If you can afford to, maximize your RRSP contributions and consider contributing to the new Tax Free Savings Account (TFSA). There are tax advantages to both.

**Final thoughts**

From my experience, the greatest challenge facing a retiree is not financial health but approaching retirement in good physical and spiritual health and maintaining a positive attitude during retirement. [c/a](#)

**Notable retirements**

By Gwyn Thompson  
President, OCASA 2001-2004



Andrée Lortie



Barbara Taylor

Even here in beautiful British Columbia, I could not help but notice the news from Ontario about the retirement of two college presidents.

Andrée Lortie, President, La Cité collégiale is retiring after a very influential career in our college system. Ms. Lortie has also had a special relationship with OCASA. During my time on the OCASA executive, she chaired the Administrative Consultative Committee, offering her wisdom and leadership during significant times of change. This committee provided OCASA's key avenue for advocacy – my networking tells me it still does – meeting with representatives from CoP, HRCC, The Council and Colleges Ontario.

On this same committee was Barbara Taylor, President, Canadore College. Ms Taylor is also retiring after serving the Ontario college system for over 30 years.

During my three terms as president of OCASA, I had the opportunity to work with both of these college presidents. These leaders have been friends of OCASA and supporters of efforts to help individuals build their administrative careers, and to encourage the development of Administrative Staff Associations. They were supportive and helpful, and *listened* to what we had to say. They have proven to be friends of OCASA. I wish for them both that their retirements are as fulfilling as mine.

*Gwyn Thompson was President of OCASA 2001-2004. She retired from Loyalist College in 2006, where she was Director of Financial Services.*

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Due to provincial legislation, our auto insurance program is not offered in British Columbia, Manitoba or Saskatchewan.

<sup>1</sup> Certain conditions and restrictions may apply.

\* No purchase required. Contest ends on January 14, 2011. Total value of each prize is \$30,000 which includes the Honda Insight EX and a \$3,000 gas voucher. Odds of winning depend on the number of eligible entries received.

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# La retraite

Les voyages et les parties de hockey de ses petits-enfants sont parmi les nombreux plaisirs de la retraite, mais il importe de bien planifier le moment de sa retraite ainsi que les revenus et prestations sociales qui la faciliteront.



*Gerd Rehding, ancien directeur adjoint des Ressources humaines au Collège Humber, s'est retiré à la fin de 2007. Il a été représentant de l'APACO au Conseil d'administration du régime de retraite des CAAT pendant six ans. Bien que goûtant pleinement les plaisirs de la retraite, il est revenu au Collège Humber à temps partiel en tant que consultant en ressources humaines, spécialisé dans les questions de pensions et d'avantages sociaux.*

Par Gerd Rehding



**E**n tant qu'ancien employé administratif, retraité depuis quelques années, j'ai eu l'occasion de réfléchir à ma décision de me retirer et de voir dans quelle mesure mes attentes de retraite se sont réalisées.

Certaines de mes attentes ont été comblées. J'ai fait, avec mon épouse Christine, plusieurs voyages en Europe pour visiter des parents. Nous avons visité Acapulco de nouveau, ce qui a ressuscité de vieux souvenirs. Pour

notre premier voyage ensemble, il y a une quarantaine d'années, nous avons conduit jusqu'à Acapulco dans ma Mustang 66.

Puis il y a cinq petits-enfants que nous voyons souvent et que nous regardons grandir avec joie. J'ai fini par m'intéresser vivement au hockey, pour avoir souvent vu jouer mes petits-fils Michael et Mathew.

Dans mon cas, la retraite a été la bonne décision. Cependant, si vous

envisagez de vous retirer, vous auriez intérêt à en examiner certains aspects pratiques. J'ai quelques idées à porter à l'attention des futurs retraités.

## Date de la retraite

Comme la retraite obligatoire n'existe plus en Ontario, il faut décider avec soin le moment de la retraite. Ne vous hâtez pas de prendre votre retraite à cause d'un désagrément isolé au travail. Rappelez-vous qu'en vous retirant, vous

cesserez de toucher une paye régulière et perdrez l'interaction avec vos collègues. Par ailleurs, si vous attendez trop longtemps, vous pourriez éprouver de grandes difficultés à vous adapter à votre situation nouvelle et vous priver d'activités intéressantes auxquelles vous auriez pu vous livrer en tant que retraité.

Quand vient le temps de décider de la date de retraite, choisissez le dernier jour du mois afin de maximiser votre pension de retraite. Ceci parce que le calcul de la pension est basé sur les 60 mois où les gains ont été les plus élevés. Ainsi, si votre dernier mois de travail est parmi ces 60 mois, vous voudrez qu'il entre en ligne de compte.

### Revenu de retraite

Avant de vous retirer effectivement, assurez-vous d'obtenir une estimation de votre revenu net de retraite. Dans le cas d'employés ayant de longues années de service, le régime de retraite des CAAT sera vraisemblablement la principale source de revenu. Vous pouvez obtenir cette estimation de votre administrateur de collègue, sur le site Web du régime de retraite des CAAT ou directement du bureau du régime de retraite des CAAT.

Afin de maximiser votre pension des CAAT, vous pourriez vouloir choisir le 31 août comme date réelle de votre retraite. À cette date, vous aurez terminé une autre année d'acquisition de congés et, si vous avez le droit de monnayer le maximum de 30 jours de congé, ce paiement supplémentaire au moment de la retraite sera considéré comme un gain ouvrant droit à pension.

Toutefois, la pension repose principalement sur les années de service et les gains qui sont comptabilisés dans le régime de retraite. Parfois il est plus profitable de prolonger son temps de service que de se faire payer des congés annuels en tant que gains d'emploi. Ces questions sont à discuter au moment de présenter sa demande de retraite, ce qui permettra également de faire le point sur les dispositions du régime alors en vigueur.

Si vous avez 60 ans ou plus à votre retraite, vous aurez droit à une

pension du Régime de pensions du Canada (RPC). Si non, votre pension du RPC sera réduite, et ce pour le reste de votre vie. Beaucoup de retraités préfèrent néanmoins toucher leur pension sans tarder, plutôt que d'attendre l'âge de 65 ans pour recevoir une pension du RPC non réduite.

Dès l'âge de 65 ans, vous serez admissible aux prestations de la Sécurité de la vieillesse (SV), qui feront cependant l'objet d'une récupération si notre revenu net dépasse 66 733 \$.

Vous avez peut-être d'autres sources de revenu de retraite, telles qu'une pension d'un autre régime de rentes ou d'un REER.

Lorsque vous comparez votre revenu de retraite total à votre salaire actuel, n'oubliez pas que les déductions légales de votre revenu de retraite seront probablement plus basses qu'actuellement et que vous économiserez les dépenses liées à l'emploi. Cela aide également que certaines dépenses importantes, comme l'hypothèque et les frais d'éducation des enfants, ont diminué ou cessé. En règle générale, si votre revenu brut de retraite atteint ou dépasse 70 % de votre salaire actuel, les chances sont que votre flux de trésorerie disponible sera égal ou meilleur après votre retraite.

Il importe de garder présent à l'esprit que votre pension des CAAT sera dévolue à votre conjoint(e) à votre décès. La pension de conjoint(e) survivant(e) est égale à 60 % de la pension de base, ou même à 75 % si vous avez exercé cette option au moment de votre retraite.

### Assurances collectives

Les retraités ont le droit de maintenir, en partie ou en totalité, la couverture des assurances collectives des CAAT à leurs propres frais, sous réserve de certaines restrictions.

Le niveau de l'assurance-vie peut être maintenu jusqu'à 65 ans, jusqu'à un maximum de 500 000 \$. Après l'âge de 65 ans, l'assurance-vie collective est limitée à 10 000 \$. À ce moment-là, vous pouvez opter pour un maximum de 200 000 \$

sans attestation médicale, moins tout montant que vous auriez transformé à la date de votre retraite, mais cette option est coûteuse.

La couverture de l'assurance-maladie complémentaire est importante, mais elle est également coûteuse. Renseignez-vous auprès du Service des avantages sociaux sur vos options au moment de la retraite (c.-à-d. régime 1, régime 2, régime 3) et les primes mensuelles correspondantes.

L'assurance des soins dentaires peut aussi être maintenue. Cependant, vous voudrez peut-être consulter votre dentiste afin de déterminer si, dans votre cas, les prestations que vous pourriez éventuellement obtenir seront égales ou supérieures aux primes que vous aurez à verser.

N'oubliez pas qu'en vieillissant les gens ont ordinairement plus souvent recours à des services médicaux et qu'une couverture d'assurance collective, une fois annulée, ne peut être rétablie.

Toutefois, si à votre retraite, vous pouvez bénéficier de la couverture de l'assurance collective de votre conjoint(e), vous auriez intérêt à suspendre votre droit à la couverture prévue par la police de la Sun Life jusqu'au moment où votre conjoint(e) perdra sa couverture complète. En procédant ainsi, vous n'annulez pas votre droit à couverture par la Sun Life, mais vous épargnez le montant des primes. Discutez-en avec votre représentant des Ressources humaines et assurez-vous de bien documenter votre décision de suspendre vos prestations sociales de retraité.

### Prévoyance financière

Si vous en avez le moyen, maximisez vos cotisations au REER et envisagez de cotiser au nouveau compte d'épargne libre d'impôt (CELI), qui offrent tous deux des avantages fiscaux.

### Pensée de la fin

Selon mon expérience, le principal défi qui se pose à un retraité n'est pas d'assurer sa santé financière, mais d'arriver à la retraite en bonne santé physique et spirituelle et de conserver durant sa retraite une attitude positive. [c/a](#)

# Innovators & Leaders

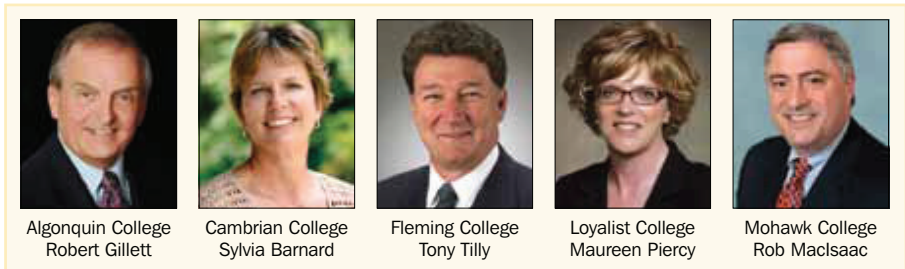
Meeting the challenges of tomorrow's colleges

Blue Mountain Resort, Collingwood | June 21-23, 2010

## PLENARY SESSIONS

### ► Monday, June 21 (Opening Dinner)

#### Presidents' Panel



Algonquin College  
Robert Gillett

Cambrian College  
Sylvia Barnard

Fleming College  
Tony Tilly

Loyalist College  
Maureen Piercy

Mohawk College  
Rob MacIsaac

### ► Tuesday, June 22

#### Jim Harris

Where Innovation and College Reality Meet: New Ways Into New Challenges

Greater challenges. Fewer resources. Changing demographics. Less funding. How do we approach this shifting and changing reality? Doing what we did will not get us to the future we desire. New thinking and different approaches will. Jim Harris will present on best practice approaches and techniques in these demanding and interesting times.



#### JIM HARRIS

Jim Harris is a one of North America's foremost management consultants, authors and thinkers on change and leadership. Association magazine ranked him as one of the nation's top 10 speakers. As a management consultant

Jim speaks internationally and conducts strategic planning sessions with executive teams, focusing on the most pressing issues: *Blindsided!*, *Green is Green!*, *Leadership & Change Management*, *Innovation, Creativity & Change*, *Customer Relationship Management*, *Future Trends & eLearning* and *Creating Learning Organization*.

Jim's new book, *A Crisis is a Terrible Thing to Waste*, to be published in 2010, documents how environmental leadership is the best thing ever for the corporate bottom line.

His prior book, *Blindsided!* is published in 80 countries worldwide. *Blindsided!* is a #1 international bestseller – having hit the top spot on the Financial Times of London's European Edition of Best Business Books.

Mr. Harris was one of the first seven Canadians personally trained by Noble Prize winner Al Gore in Nashville to give his *An Inconvenient Truth* presentation.

Mr. Harris' second book, *The Learning Paradox*, was nominated for the National Business Book Award, and has appeared on numerous bestseller lists. Books for Business ranked it as one of the top 10 business books in all of North America. There are now over 40,000 copies in print. *The Learning Paradox* argues that "job security" as we knew it is gone. Individual and organizational security is now based on learning, changing and coping with uncertainty. Paradoxically these are what we as adults fear most!

Conference sponsor:



### Registration fees

#### Full Conference

Members: \$375 (after May 15, \$425)

Non-Members: \$425 (after May 15, \$475)

#### Day guests (Tuesday only)

Members: \$200

Non-Members: \$250

#### Companion events

(included in full conference fee):

Dinner & Presidents' Panel: \$75

Awards Reception & Banquet: \$75

### Cancellation Policy

Registration fees less a \$50.00 administration fee will be issued for cancellations received by June 1, 2010. **No refunds will be issued after this date.** If you are unable to attend, you may substitute someone in your place. All cancellations and substitutions must be received in writing (email is fine). Refunds will be processed after the conference.



## SCHEDULE

### MONDAY, JUNE 21

12:00-5:00 p.m.	Board of Directors Meeting (Lunch included)
5:00-5:30 p.m.	OCASA Annual General Meeting – All OCASA members are invited.
5:30-6:30 p.m.	Welcome Reception
6:30-9:00 p.m.	Opening Dinner Presidents' Panel
9:00 p.m.	Patio Lights – <i>Networking on the Terrace</i>

### TUESDAY, JUNE 22

8:30-10:00 a.m.	Plenary: Jim Harris
10:00-10:30 a.m.	Networking Break
10:30 a.m.-12:00 p.m.	Concurrent Workshops
12:00-1:00 p.m.	Lunch
1:00-2:30 p.m.	Concurrent Workshops
2:30-2:45 p.m.	Networking Break
2:45-4:15 p.m.	Best Practices Café
4:30-6:00 p.m.	Hospitality
6:00 p.m.	Awards Banquet Reception
7:00-9:00 p.m.	Awards Banquet
9:00 p.m.	Patio Lights – <i>Networking on the Terrace</i>

### WEDNESDAY, JUNE 23

7:45 a.m.	Breakfast
8:30-10:00 a.m.	Concurrent workshops
10:00 a.m.	Conference Closing

## CONCURRENT WORKSHOP DESCRIPTIONS

### Applying Lean Thinking at College

When the lean philosophy is applied correctly clients receive faster service, employees are less stressed, time is freed up and the bottom line improves. This presentation will explain the lean philosophy and how to apply it in a college environment. It will also introduce the value stream map, a lean tool that will enable you to understand your current process and achieve a better future process. Algonquin will share its experience and results from their ongoing lean implementation.

#### Facilitator(s):

Duane McNair, Director, Financial Services, Algonquin College  
Chuck Doyle, Manager, Business Process Review, Algonquin College

**Registration Code: A1 B1**

**Timeslot: Tuesday, June 22**

**A1 10:30 a.m.-12:00 p.m.** and  
**B1 1:15-2:45 p.m.**

This workshop is being offered twice. Just select one timeslot.

### Chaotic Leadership – Leadership in Times of Continuous Change

This session will provide an environmental scan of the current context of academic leadership and the impact of these trends on academic leadership. The presentation also identifies leadership behaviours that maximize success in this dynamic context.

#### Facilitator(s):

Dr. Nandini Daljit, Dean, Faculty of Health Sciences, Mohawk College

**Registration Code: A2 B2**

**Timeslot: Tuesday, June 22**

**A2 10:30 a.m.-12:00 p.m.** and  
**B2 1:15-2:45 p.m.**

This workshop is being offered twice. Just select one timeslot.

### Generational and Demographic Influences on Ontario Colleges

The presentation explores the characteristics of the significant generational subgroups and predicted demographic trends and the impact on college operations. Geographical subdivisions of demographic influences include Canada, Ontario and other

provinces, major regions within Ontario and major trends in international markets. The presentation highlights how other employers are reacting to these trends and how colleges might respond.

#### Facilitator(s):

Brian Burns, Director, Institutional Research and Planning, Algonquin College

**Registration Code: A3 B3**

**Timeslot: Tuesday, June 22**

**A3 10:30 a.m.-12:00 p.m.** and  
**B3 1:15-2:45 p.m.**

This workshop is being offered twice. Just select one timeslot.

### Legislative Compliance: How to Protect Yourself

Administrators are increasingly expected to be accountable for legislated items on the college campus including safety, emergency, and health problems, discrimination, bullying, and harassment. In many instances, the onus is on the administrator to ensure that the work environment is free of these problems and we are held accountable. Lately, we are also accountable for compliance

with the **Accessibility for Ontarians with Disabilities Act**, standards for customer service – soon to be added are three more sets of standards for employment, information & communications and the built environment. This session aims to provide some tips and tools to ensure we are providing and showing evidence of that provision to comply with these legislations. Bring your best practices and ideas as well.

#### Facilitator(s):

Susan Alcorn-MacKay, Cambrian College  
Other panel presenters TBA

**Registration Code: A4**

**Timeslot: Tuesday, June 22**

**A4 10:30 a.m. -12:00 p.m.**

#### Planning for Retirement

A secure retirement is a goal for many, yet few have a plan or a good understanding of what is needed to be ready. Being prepared for retirement requires a personal review of financial and non-financial needs. In this session, we will explore the key areas of retirement planning. The session will also describe how your CAAT Pension Plan, government programs, and personal savings interact to make your retirement more financially secure.

#### Facilitator(s):

Derek Dobson, CEO & Plan Manager,  
CAAT Pension Plan

**Registration Code: A5**

**Timeslot: Tuesday, June 22**

**A5 10:30 a.m. -12:00 p.m.**

#### Your Rights & Responsibilities in the Employment Relationship

Workshop description coming soon.

#### Facilitator(s):

Ella Forbes-Chillibeck, Lawyer, Nelligan  
O'Brien Payne

**Registration Code: B4**

**Timeslot: Tuesday, June 22**

**B4 1:15-2:45 p.m.**

#### Renewable Energy for You and Your College

Want to know what the buzz is about the **Green Energy Act** and the Feed-in-Tariff program in Ontario? Are there opportunities for you and your college? Don Young, Dean, Faculty of Applied Science at St. Lawrence College will introduce you to the new technologies and opportunities. St. Lawrence College is a leader in Renewable Energy Programming with Energy Systems Engineering and Wind Turbine Technician programs. It is also leading a national solar curriculum development project through the Association of Canadian Community Colleges. Locally, Don is the President of SWITCH, a Kingston community group working to position Kingston as a leading centre for renewable energy ([www.switchontario.ca](http://www.switchontario.ca)).

#### Facilitator(s):

Don Young, Dean, Faculty of Applied  
Science, St. Lawrence College

**Registration Code: B5**

**Timeslot: Tuesday, June 22**

**B5 1:15-2:45 p.m.**

#### How a BlackBerry can Enhance Your Work and Casual Life

Are you using your BlackBerry to its full potential? Do you only use it to make and receive email and phone calls? If so then this workshop can show you some tips and tricks to be more efficient with these actions. However, if you want to learn more about what your BlackBerry is capable of doing, then this workshop will show you how to get more out of your phone. Make sure to bring your BlackBerry to this event so that you can put these tips and tricks to work for you immediately.

#### Facilitator(s):

Steve MacKinnon, Sales Manager, T.A.S.  
Communications

**Registration Code: C1**

**Timeslot: Wednesday, June 23**

**C1 8:30 a.m. -10:00 a.m.**

#### How We Manage the Learning Environment

Participants in this workshop will learn about difficult academic and behavioural challenges and cases in education which have relevance to their role in colleges, including the impact of case law on rulings that affect how we manage the learning environment, what we are expected to do as faculty and administrators and what consequences can occur as a result of our action or inaction. Participants will also learn about the standards and expectations of the college contract learning environment, and the differences between college and secondary school rules and expectations. As more and more difficult student behavioural issues and challenges unfold in our colleges, we will be expected to react and know what to do in such cases. Managing the learning environment in our colleges has long been something we have believed we know – until difficulties appear, we can often only assume what our duties and liabilities might be. Being informed is being prepared. This session is active and engaging as we compare our findings to those of the experts in such cases. This is a fun session which will engage you in difficult scenarios and cases: come, learn and enjoy the process.

## Leisure Activities

The Blue Mountain Resort offers a variety of leisure activities on and off-site. Come early, stay late (bring your family) to take advantage of these activities.

#### Summer activities at Blue Mountain:

check out the Le Scandine Spa, hiking, caving, rock climbing and more!

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Call for further information about activities: 1-800-955-6561

**Le Scandine Spa** – no reservations required, great value. Come early Monday and relax before the conference begins. <http://www.scandineblue.com/>

**Monterra Golf Course Rates** (includes green fees, motorized cart and all taxes)  
Saturday-Noon Sunday: \$90.00      Noon Sunday-Friday: \$85.00

TEE TIMES AND INFO: 705-445-0231 or 877-445-0231

Two tee times are pre-booked: Monday 11:00 a.m. and Wednesday 11:00 a.m.

**Facilitator(s):**

Jim Drennan, PhD., Dean, School of Business, Computing and Hospitality, Fleming College  
 Ann Drennan, Dean, School of General Arts and Sciences, Fleming College  
**Registration Code: C2**  
**Timeslot: Wednesday, June 23**  
**C2 8:30-10:00 a.m.**

**Ecological Literacy: Keystone for Environmentally Sensitive and Sustainable Education**

Community colleges are a diverse collection of people, services and processes, and in many ways are mirror-communities that reflect the interests of the larger community they serve. Unfortunately, there does not appear to be a clear mandate for Ontario community colleges to fulfill these preceding obligations within the context of environmentally responsible and sustainable education.

This seminar will examine what is meant by ecological literacy and what factors differentiate its meaning. The presentation supports ecological literacy as a tenet of mainstream systematized education in post-secondary vocational institutes in Ontario. It will outline the potential barriers and provide discussion regarding opportunities we have to incorporate ecologically sustainable education into our current strategic visions.

**Facilitator(s):**

Eric Bauer, Professor, Biosciences Department, Loyalist College  
**Registration Code: C3**  
**Timeslot: Wednesday, June 23**  
**C3 8:30-10:00 a.m.**

**CMU-OCASA Research Award Recipient:**

A workshop format will be delivered presenting the findings of the research, and its application to the college environment. This is a brief synopsis from the paper abstract:

The purpose of this study is to identify the students' perception of the ways faculty honour a student's identity in the diverse classroom that includes but is not limited to the following issues of diversity: race, ancestry, age, culture, creed (religion, faith), life

experience, work experience, marital status, family status, socio-economic status, world view, sexual orientation, gender, language, disabilities/abilities, citizenship, receipt of public assistance or record of offence.

College faculty and staff may benefit from the findings of this study. Results may provide insights that perpetuate and reflect the college's statement of diversity, mission, vision and strategic

direction. Results may enhance student development, success and their learning experience and more generally, improve the education and learning process.

**Facilitator(s):**

Linda Croall, Professor, General Education And Access, George Brown College  
**Registration Code: C4**  
**Timeslot: Wednesday, June 23**  
**C4 8:30-10:00 a.m.**

**Accommodation**

All registrants must book their own accommodation through Blue Mountain Resort. Reservations: **1-877-445-0231**  
 Conference Code for special rates: **326170**

**For full information about guest rooms, visit [www.bluemountain.ca](http://www.bluemountain.ca)**

Rooms are available on a first-come, first-served basis with availability guaranteed until **May 21**. For further upgrade options inquire with Blue Mountain reservations.

**Village at Blue Suites:**

Studio: \$140.00 (\$157.08/unit/night taxes included)  
 Bachelor: \$165.00 (\$185.13/unit/night taxes included)

**Blue Mountain Inn** (these are located a short drive/walk from the village, and are in the older facility):

Resort Double or Queen Handicap: \$119.00 (\$133.52/night taxes included)

*Blue Mountain cancellation policy:* all changes to reservations require 7 days' notice (including early departure, change in dates or cancellation). Additional fees may apply.



# CAAT Pension Plan report

Advocacy focuses on legislative change that will help ensure stability, equity



I welcome this opportunity to update our members on what the CAAT Pension Plan is doing to attain legislative change that will help ensure the security of the pension promise.

Chief among these efforts is advocating for an exemption from a legislated requirement to prepare and file valuations on a so-called “solvency” basis, and to develop funding policies and set contribution rates to fund to that artificial measurement. This type of valuation – which assumes plan wind-up – is an artificial and inappropriate measure for jointly sponsored pension plans such as ours, which is managed for long-term stability and viability. Solvency valuations were designed to protect members of single employer plans from underfunding by the sponsor or employer bankruptcy. The governance structure of jointly sponsored pension plans protects members from underfunding because member representatives share in decisions about plan funding. In the case of our plan, OCASA appoints representatives to both the plan’s Sponsors’ Committee and its Board of Trustees.

Without the exemption the plan will be forced to increase contribution rates in the short term to levels far higher than what are required to fund the plan on an ongoing basis. These increases are unnecessary. In fact, for large plans such as ours funding for solvency can have the unintended effect of producing



*Rick Helman began his second three-year term as the OCASA-appointed representative on the CAAT Pension Plan’s Sponsors’ Committee in January. Rick is Director of Financial Planning at Loyalist College and OCASA Treasurer.*

*By Rick Helman*

cycles of large deficits followed by large surpluses. Federal tax law limits pension plan surpluses, requiring them to be used through contribution rate subsidies, benefit improvements, or a combination of the two. Along this roller coaster ride between provincial and federal laws different generations of members can be treated inequitably in terms of the contributions they pay and the benefits they receive. Exemption from solvency funding would help stop the roller coaster ride. The plan would be better able to keep contribution rates stable and ensure fair value for all members.

## Coalition advocates for change to outdated legislation

The CAAT Pension Plan is part of a coalition of five jointly sponsored pension plans that is asking the provincial government to enact a recommendation of the Ontario Expert Commission on Pensions to exempt the plans from an outdated regulation that requires them to fund for unrealistic solvency, or windup, scenarios.

In discussions with the government, the plans in the coalition have indicated they would consider accepting a number of alternative measures to improve disclosure and the security of accrued benefits for their one million members. The CAAT Pension Plan already follows most of these practices as part of good governance.



## We're listening and working for you

By Derek Dobson  
Chief Executive Officer and Plan Manager, CAAT Pension Plan

Since assuming my role almost a year ago, I have made open communication with all of our stakeholders a key operating principle. This commitment means keeping you informed and listening to your feedback to ensure we understand and are responsive to your needs. In meetings with our members, the organizations such as OCASA that represent them, and the colleges, I have heard that security of the plan is paramount. I assure you that the sponsors, trustees and staff share that view.

Our efforts advocating for an exemption from solvency funding are aimed squarely at ensuring the plan's stability and viability over the long term. I am meeting

with government representatives on the issue as well as influential organizations.

I encourage you to stay informed on this issue and about your pension generally. Reading the newsletters available on our website is a great place to start. We are reviewing all of the ways we interact with our members, administrators and the colleges to determine how we can improve our service, information sharing and education.

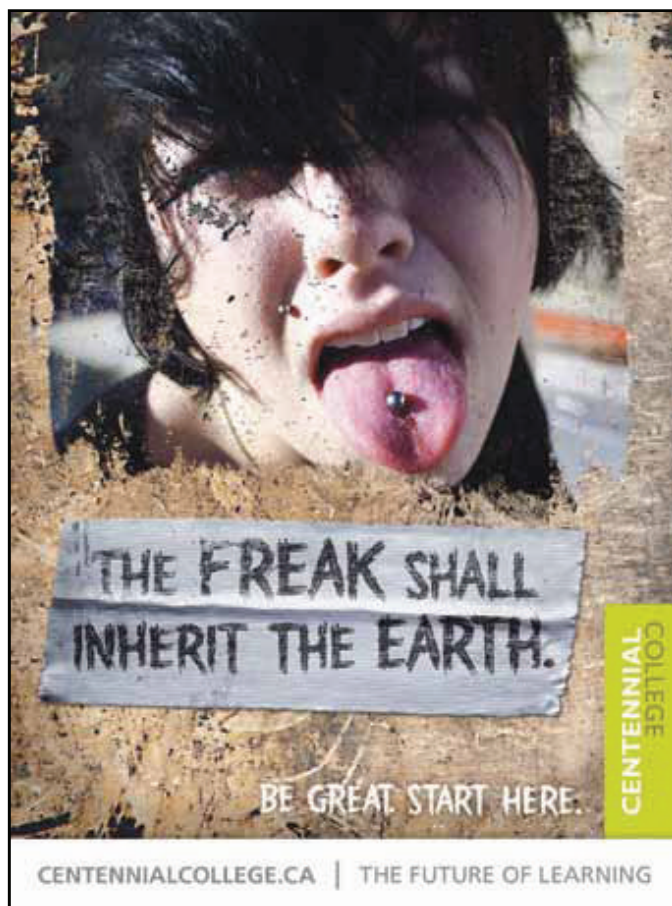
I welcome your feedback and suggestions. I will be presenting at the OCASA June conference and look forward to meeting many of you then. You can also reach me at [ddobson@caatpension.on.ca](mailto:ddobson@caatpension.on.ca).

The Ontario Expert Commission on Pensions agreed that solvency valuations are inappropriate for jointly sponsored pension plans with their risk sharing agreements. It recommended that plans such as ours be exempt from the outdated legislation. Yet, the province has still not enacted the commission's recommendation. Together with a coalition of jointly sponsored pension plans our plan has been working to convince the government to make the change. Derek Dobson, Chief Executive Officer and Plan Manager (see sidebar), is representing our plan in coalition efforts and has also been meeting individually with both elected officials and senior government staff to press for the change.

If we are successful in obtaining the exemption, the change will build on the plan's earlier steps to secure the pension promise. Those steps included the already phased-in increases to contribution rates, creation of a formal funding policy to manage through market cycles, aligning investment strategy with funding policy objectives, and making inflation protection on post-2007 service conditional on the plan's financial status.

We will keep you informed of our progress on this vital issue through CAAT Pension Plan and OCASA publications. You can read more about the case for exemption from solvency funding in the plan's newsletters which are available on CAAT Pension Plan website. The member newsletter is also supplied in paper format for distribution by the colleges.

In governing your plan, the sponsors and the trustees remain focused on its long-term stability and viability and are convinced that a solvency funding exemption is critically important to achieving those goals. [CIA](#)



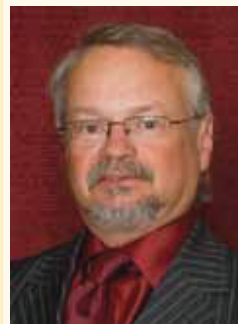
# Les activités de défense d'intérêts du Régime portent surtout sur les modifications législatives qui permettraient d'assurer la stabilité des cotisations et une plus grande équité



Je suis heureux de pouvoir informer les participants sur les activités que mène actuellement le Régime des CAAT pour favoriser l'adoption de modifications législatives qui viendraient accroître la sûreté des pensions promises.

Nous revendiquons en tout premier lieu une dispense de l'exigence prévue par la loi qui consiste à préparer et à produire des évaluations que l'on désigne communément « évaluations de solvabilité » et à adopter une politique de capitalisation et des taux de cotisation qui permettent de financer cette mesure artificielle. Ce type d'évaluation, qui suppose la liquidation du régime, constitue une mesure artificielle et inappropriée dans le cas des régimes à financement conjoint comme le nôtre, dont les gestionnaires se concentrent sur la viabilité et la stabilité à long terme. Les évaluations de solvabilité ont pour but de protéger les participants de régimes à employeur unique contre la sous-capitalisation en cas de faillite du promoteur ou de l'employeur. Or, la structure de gouvernance des régimes à financement conjoint protège les participants d'une éventuelle sous-capitalisation, car les représentants des participants prennent part aux décisions de capitalisation. En ce qui concerne notre régime, l'APACO désigne des représentants au Comité de parrainage ainsi qu'au Conseil des fiduciaires.

En l'absence d'une dispense, le Régime sera forcé à court terme d'augmenter les taux de cotisation à des niveaux beaucoup plus élevés qu'il n'est nécessaire pour financer le Régime sur une base de continuité. Ces augmentations n'ont pas lieu d'être. De fait, dans le cas des régimes de grande taille comme le nôtre, l'évaluation sur base de solvabilité peut avoir pour effet indésirable de produire un cycle de grands déficits



En janvier dernier, Rick Helman a entamé son deuxième mandat de trois ans à titre de représentant de l'APACO auprès du Comité de parrainage du Régime des CAAT. Rick est directeur de la planification financière au Loyalist College.

Par Rick Helman

suivis d'excédents importants. La loi fédérale sur l'impôt impose des restrictions relatives aux excédents, obligeant les régimes à appliquer ces derniers en réduction des taux de cotisation, en bonification des prestations ou en une combinaison des deux. En raison des grandes différences existant entre les lois provinciales et fédérales, les diverses générations de participants pourraient ne pas faire l'objet d'un traitement équitable sur le plan des cotisations qu'elles doivent verser et des prestations qu'elles reçoivent. Une dispense de l'obligation de capitalisation sur base de solvabilité permettrait de mettre fin à cette iniquité. Le Régime serait ainsi mieux en mesure d'assurer la stabilité des taux de cotisation et l'équité intergénérationnelle.

La Commission ontarienne d'experts en régimes de retraite s'accorde pour dire que les évaluations de solvabilité ne conviennent pas dans le cas des régimes à financement conjoint qui prévoient un partage des risques. Elle a recommandé que les régimes comme le nôtre soient exclus du champ

## La coalition prône une modification de la loi désuète

Le Régime des CAAT fait partie d'une coalition de cinq régimes de retraite à financement conjoint qui demande au gouvernement de donner suite à la recommandation de la Commission ontarienne d'experts en régimes de retraite, qui préconise l'exclusion des régimes du champ d'application de cette loi désuète qui les oblige à respecter des critères de capitalisation fondés sur des scénarios irréalistes de solvabilité ou de liquidation.

Lors de leurs entretiens avec les fonctionnaires, les régimes de la coalition ont indiqué qu'ils seraient prêts à envisager l'adoption d'un certain nombre d'autres mesures afin d'améliorer l'information et la sûreté des droits à retraite de leur million de participants. Le Régime des CAAT applique déjà la plupart de ces mesures dans le cadre de son plan de saine gouvernance.



## Nous sommes toujours à l'écoute et nous travaillons pour vous

Derek Dobson est le chef de la direction et gestionnaire du Régime des CAAT

Lorsque j'ai accepté ce poste, il y a presque un an, je me suis donné comme principe essentiel d'assurer des communications franches avec tous nos interlocuteurs. Je tiens donc à vous tenir informés et être à l'écoute de vos commentaires afin que nous connaissions vos besoins et puissions y répondre. Lors de mes rencontres avec les participants, avec les organismes tels que l'APACO et avec les collèges, on m'a fait remarquer que la sûreté du Régime revêtait une importance capitale. Je puis vous assurer que le Comité de parrainage, le Conseil des fiduciaires et le personnel du Régime partagent ce point de vue.

Nos activités de revendication en faveur d'une exemption des évaluations de solvabilité visent carrément à assurer la stabilité et la viabilité à long terme du Régime. J'ai des rencontres prévues sur cette question avec des

représentants du gouvernement et avec des organismes d'influence.

Je vous invite à vous tenir au courant de la question et des pensions en général. Le fait de lire les bulletins qui figurent sur notre site Web constitue un bon point de départ. Nous sommes en passe de revoir tous nos moyens de communication avec les participants, les administrateurs et les collèges afin de déterminer la façon d'améliorer nos services, notre information et nos activités de sensibilisation.

Je vous engage à me faire part de vos commentaires et observations. Je ferai un exposé à l'occasion de la conférence de juin de l'APACO et j'espère pouvoir y rencontrer en grand nombre.

Vous pouvez également me joindre à l'adresse [ddobson@caatpension.on.ca](mailto:ddobson@caatpension.on.ca).

d'application de cette loi désuète. Or, la province n'a pas encore donné suite à la recommandation de la Commission. De concert avec une coalition de régimes à financement conjoint, nous nous sommes employés à convaincre le gouvernement d'apporter des changements. Derek Dobson, chef de la direction et gestionnaire du Régime (voir l'encadré) représente le Régime auprès de la coalition; il a également rencontré en personne des élus et des hauts fonctionnaires afin de les inciter à procéder à des changements.

Si nous réussissons à obtenir une dispense, ce changement viendra s'ajouter aux mesures déjà prises pour accroître la sûreté des pensions promises et qui consistaient en la hausse progressive des taux de cotisation, l'instauration d'une politique officielle de financement pour faire face aux cycles financiers, l'harmonisation de la stratégie de placement et des objectifs de la politique de financement, de même qu'une mesure visant à rendre l'indexation conditionnelle à la situation financière du Régime en ce qui concerne le service postérieur à 2007.

Nous vous tiendrons informés des progrès accomplis sur cette question par le biais des publications du Régime des CAAT et de l'APACO. Vous pouvez en apprendre davantage sur les arguments en faveur de l'exemption des évaluations de solvabilité en consultant les bulletins du Régime figurant sur notre site Web (ici). Le bulletin des participants est également disponible dans les collèges en format papier.

Lorsqu'il s'agit de gérer votre régime, le Comité de parrainage et le Conseil des fiduciaires demeurent focalisés sur la stabilité et la viabilité à long terme et ils sont convaincus qu'une dispense des règles de capitalisation du déficit de solvabilité est une condition essentielle à la réalisation de ces objectifs. **CA**

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# SUCCESSION PLANNING:

If succession planning is always in crisis mode, it may indicate need for a long-term plan of talent development

As a search and educational consultant I have been fortunate to work with some organizations that are addressing the succession planning challenge.

Unfortunately, I've also worked with those who simply react to the needs of the day and wonder why things are always so stressful.

As educators, we don't just teach students; we teach staff as well. How are your organizational learning strategies? Colleges are by definition learning organizations. Talent development has to be the most critical element.

In my years in Ontario colleges at several administrative levels, I have had the opportunity to look at the issue of succession planning from a variety of perspectives.

First, as a person contemplating retiring I had to think of how I was going to get myself ready for it.

Second, I had to wonder, as a college president, if anyone was ready for my position when I did retire.

Third, I had to consider how I was getting the organization ready not only for my leaving but for the leaving of others.

Fourth, as a board member of different organizations, I have had to ask if the board had in place the proper talent development or acquisition strategies. Only with an overall plan for succession could the board fulfill the mission and sustain strategic direction.

So where are you in this mix? If you are contemplating retirement, you have to get *yourself* ready. This means not only financial planning but identity planning. After a lifetime of work, we often define ourselves by virtue of what we do. What is your plan to sustain or replace these relationships?

The trauma can begin before you leave; once you make the announcement, you are a lame duck – so you better have a transition plan in place first. The higher your position in the organization, the greater this effect.

But be careful. I have seen incumbents directly or indirectly imply to a potential replacement that he or she will get the position. So the first rule: never promise anyone your job. Once

“The trauma can begin before you leave; once you make the announcement, you are a lame duck – so you better have a transition plan in place first.”



*Brian Desbiens is Past President of Sir Sandford Fleming College. He is now Associate Partner, Promeus, and an Adjunct Professor OISE.*

*By Brian Desbiens*

you decide to leave, it is over; it is up to others to decide. A president should not be engaged in the process of selection of a successor. Yet many try inordinately to help their boards do so.

This said, it is always very helpful to provide as many people as possible the opportunity to acquire the skills to compete for your position once it is declared open. Preparation, yes – but not competition before you decide to leave. No organization needs people pushing other people out of their roles.

As a board chair I believe my role is to hire the finest leader for the organization, help them develop and display their capabilities, and then retire them in an effective transition that serves not only the person but the organization.

Unfortunately, many organizations focus on only parts of this equation. Just as an organization expects the president to have a long range perspective, the organization expects the same of the board.

The performance review of a president should review not only the tasks accomplished – it must also review the processes utilized. One of these ought to be the talent development. A discussion of the president's plans for succession and talent development at all levels should be held annually.

My son, Jeff Desbiens, works for Economical Insurance Company in their Human Resources Division and has taught at Conestoga College in their HR program. I asked him what he considers the keys to a successful talent management system. He referred me to the Six B's stressed by John Ulrich of the Human Capital Institute. They are:

1. **Build:** developing talent from within the organization.
2. **Buy:** hiring and contracting from outside.
3. **Borrow:** sharing resources from across the organization.
4. **Bind:** solidifying the talent in the organization in the right jobs.
5. **Bounce:** re-skilling, re-deployment, or exiting.
6. **Balancing:** finding the right mix among the strategies.



Talent management is about getting the right people in the right jobs/roles at the right time. Once an organization has an understanding of the strategic roles and the talent available, then a gap analysis is possible. The six B's can then be utilized to fill the gaps.

Recently I have been working with Georgian College – recognized as one of Canada's top employers – on several issues, one of which has been the development of a succession plan.

In early discussions with Georgian, it became clear that a one-off position plan was not sufficient. What was needed was a full talent development plan for the institution.

As result, Georgian now has a plan that includes their planning philosophy/principles and processes. This includes the assessment of strengths and weaknesses of the institution. The college now tracks who and when key positions will potentially be vacated, and identifies mission-critical positions that may be difficult to fill. They have developed strategies to retain and attract talent. They have a performance system that

incorporates career goals and professional development and a complementary record system where this knowledge can be a basis for action. An analysis of this information is presented to senior management and their board on a regular basis.

But it is insufficient for individual colleges alone to plan for the talent needed for the college system. Good system leaders will see the need for a conscious system talent development strategy. Some positions in the college system are very difficult to recruit for because of the unique work experience and skills required. Where, for example, do you go to learn to be a registrar?

It is no accident that recently more leadership roles are being filled from outside the system or from a few colleges. What are we doing as a system for succession planning? On the national stage we have our National Executive Leadership Institute, the VP Neli Institute, and Presidents' Academy. But what do we have in Ontario? The largest college system in Canada should be producing the leaders of tomorrow not only for Ontario but for the country. [CIA](#)

“A discussion of the president’s plans for succession (at all levels) should be held annually.”

The graphic features a large tree on the right side, with a stylized, grid-like structure on the left that curves around the tree. The background is a light green gradient. The text is arranged as follows:

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# Like newlyweds

## Colleges Ontario and The Council snuggle up, share rent in new expanded office space

By Linda Franklin, CEO, Colleges Ontario

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It's time we came clean with everyone: we're moving in together. We've been seeing each other for years and it just doesn't make sense to keep paying two rents, especially in Toronto. So we've taken our relationship to the next step and come July we will be living under one roof.

"We" are Colleges Ontario and the College Compensation and Appointments Council. (The latter will have already undergone one transformation, having become the College Employer Council as of April 1.) In July, we will be sharing office space in a downtown Toronto office tower located at Bay St. and Queen's Quay. The goal of this integration is to save money on leasing, contain other costs and improve efficiencies.

About a year-and-a-half ago, we at Colleges Ontario realized our lease was up for renewal. We are currently on two separate floors, with limited meeting space. We needed new space and realized that the market for office space had changed considerably over the past few years, with a glut of new offices in downtown Toronto. The rental price per square foot had come down considerably, and building managers were busy wooing new tenants. The time was right to look for less expensive premises. Our colleagues at the Council were in the same position and it seemed logical to consider sharing space.

We also considered that there were a multitude of cost-savings that could be accomplished at the same time. Using common vendors for computer equipment and hardware, telecommunications, telephones, audio visual equipment, network and infrastructure services provides cost-savings through larger purchases and reduced training needs. It also improves efficiencies and creates standard best practices, as we will all be working with the same equipment.

The cost-savings also occur in more subtle ways. Advancements in technology mean location simply doesn't matter anymore. Another partner, the Ontario College Application Service, which is located in Guelph, has reached an agreement with Microsoft to extend its college campus agreement to other entities in the network. This agreement provides members with up to 90 per cent savings on the licenses of select Microsoft software products. We will be taking advantage of this agreement so we will be sharing the same IT solutions.

It's often the little things that make big differences. Using common technology to book and manage meetings is easy and efficient. Using the same list of translation service providers ensures consistency and creates smoother timelines, as deadlines can be juggled communally.

The location of the new space was also a critical feature. Both Colleges Ontario and the Council are hubs for meetings for our 24 member colleges. This means people from all over Ontario are often travelling to Toronto and have, in the past, experienced the frustration of arriving in Toronto after hours of driving, only to discover that it will take an additional half-hour to negotiate downtown traffic. Our new space is a stone's throw from the Gardiner Expressway and Lakeshore Blvd., and is a five-minute walk or 30-second ride from the combined subway/GO station. For anyone staying in town overnight, we are across the road from the Westin Harbour Castle hotel.

We know that this transition will provide considerable cost-savings, many built-in efficiencies, and benefits to everyone who used our spaces. We're excited about our upcoming common-law status. House warming presents can be sent to us in July. Please, no toasters. [CIA](#)

“The goal of this integration is to save money on leasing, contain other costs and improve efficiencies.”

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## Certification for college administrators... coming soon

You asked and we've been working on it. OCASA is working with the Centre for Higher Education Research and Development (CHERD), University of Manitoba, to customize their existing program for university and college administrators. CHERD offers two levels of certification for post-secondary administration, mostly through online offering. OCASA is working with their staff to customize the program for Ontario college administration so that each course will be designed specifically for our system, and with the college administrator in mind.

The program will be available exclusively to OCASA members, with the first three-week course beginning in mid-October. Those enrolled in the program will enjoy the benefits of networking with colleagues within the Ontario college system. And at the end, you will receive a certificate in college administration from the University of Manitoba. The colleges will enjoy the benefits of consistently trained administrators in necessary competencies of college administration. It's a win-win!

CHERD brings 27 years of experience providing this training and has a proven record. It has recently provided the training for new, incoming presidents of Canadian universities.

Interested? We would like to hear from you. Contact the OCASA office for further information, and watch the OCASA website for updates this spring. [CIA](#)

## OCASA membership hits new high, recruitment still active

OCASA membership at the end of February set a new record at 730 members. Despite increasing retirements, total membership has continued to increase over the past year. In 2009, 102 new members joined OCASA (representing a net increase of 30), up from 82 new members in 2008.

The Board of Directors has set a lofty goal of reaching 1,000 members over the next three-five years. That would represent more than 50 per cent of all administrative staff, but it would also allow the association to offer much more in member services, including expanded professional development. All members can be active in recruiting their colleagues.

OCASA membership is open to any full-time, part-time or contract administrator in the 24 Ontario community colleges. For more information on membership, or for membership application, visit the OCASA website: [www.ocasa.on.ca](http://www.ocasa.on.ca) [CIA](#)

### CA invites letters to the editor

*College Administrator welcomes feedback and comments on all content in this magazine. If you disagree with any of our writers, or would like to expand on the topic, write a letter to the editor so we can share your thoughts with other readers.*

*Of course, you don't have to disagree with anyone to write a letter. If you agree with a writer, or would like to add to the topic, write to us then, too.*

*Send your comments to [CA@ocasa.on.ca](mailto:CA@ocasa.on.ca).*



## Retirees may join OCASA for life

OCASA membership for life is available for retiring members. For a single one-time payment of \$100, members may continue their membership in OCASA. For more information, contact the OCASA office: [info@ocasa.on.ca](mailto:info@ocasa.on.ca) or call 1-866-742-5429.

Retiree members retain access to all OCASA information to members, including access to the members-only section of the website; all infobulletins; subscription by mail to College Administrator; and opportunities to continue networking and to be involved in mentoring with active members.

OCASA has a direct voice on the CAAT Pension Plan through representatives to both the CAAT Pension Plan Sponsors' Committee and the CAAT Pension Plan Board of Trustees. As well, OCASA appoints an additional representative to the Board of Trustees through rotation with two OPSEU reps. This position is named by OCASA for three years out of every nine, and may be held by a retiree.

Through the Sponsors' Committee membership, OCASA has a veto on some issues concerning the plan. OCASA membership is the only direct voice in the CAAT Pension Plan available to administrators.

## Awards: now easier to nominate

OCASA's two excellence awards – Doug Light Award for Administrative Excellence and Distinguished Administrator Award – will now receive nominations at the same time using the same nomination package. Based on the nomination criteria submitted, the Awards Committee will determine the most appropriate award nomination for all candidates.

Nominations will also be received for the OCASA Volunteer Recognition Award at the same time. The deadline for all three awards is April 16, 2010. All nominees and nominators must be OCASA members.

The Doug Light Award for Administrative Excellence honours an administrator within the college system who best exemplifies professionalism through leadership, excellence of performance, and commitment to others – at a provincial or national level.

The Distinguished Administrator Award honours a similar contribution at the local college or regional level.

OCASA Volunteer Recognition Award pays tribute to administrators within an Ontario College, who have made a significant contribution to the work of OCASA at the local, regional and/or provincial level. The contribution outcome may be complete or in progress. Nominees have volunteered time and energy without expectation for compensation, nominees have represented OCASA's mandate, and nominees have the support of OCASA peers.

For more information on both awards, visit: [www.ocasa.on.ca/ocasa/awards](http://www.ocasa.on.ca/ocasa/awards)

The Volunteer Recognition Award and the Distinguished Administrator Award will be presented the Annual Awards Banquet on June 22. The banquet is held during the Annual PD Conference taking place at the Blue Mountain Resort, June 21-23. The Doug Light Award will be given during the 2010 Colleges Ontario Conference in November. [c|A](#)

## Got a suggestion for a CA article? Let us know

*College Administrator* welcomes queries and suggestions for future articles. If there is a particular topic you believe would be of interest to administrators in Ontario colleges, write us a brief note about the topic. If you have developed some background information on the topic you could share that with us and suggest one or more people who you believe might be best suited to write such an article.

If you're really well versed on an issue and would like to share your knowledge, *College Administrator* welcomes submissions. If you would like to contribute an article send a brief query (200 words or so) outlining the topic. The query helps editors review the suitability for publication before you've committed the work involved in producing the article – and helps avoid duplication of effort.

Send all queries and suggestions to: [CA@ocasa.on.ca](mailto:CA@ocasa.on.ca)

## Student bursaries

Don't forget: if you're enrolled in a formal program of study, you can submit your name to be included in a draw at the conference in June. Four members will receive \$500 towards any course completed in 2010. Full details are available on the OCASA website (under Awards). [c|A](#)

## Members are invited to attend the OCASA AGM

The Annual General Meeting of OCASA will be held June 21 (5:00 p.m.) in Collingwood, immediately prior to the 2010 OCASA Professional Development Conference. The Board of Directors will meet for the afternoon on that day, followed by the meeting of the members.

The OCASA Pension Corporation will also hold its Annual General Meeting at the conclusion of the Board of Directors' meeting. Reports from OCASA's appointees to the CAAT Pension Plan will be received at that time.

Full details about all of these meetings will be posted on the OCASA website. [c|A](#)

# Thank You

We would like to thank all of our dedicated members for their hard work and support, as well as welcome any new or prospective members.

*Administrative Staff Association  
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[www.fanshawec.ca](http://www.fanshawec.ca)

# Rick Helman

His hobby takes financial planning director to the track. No, not that track

Picture the stereotype of a conservative financial expert: pin-striped blue suit; conservative tie; polished shoes: you get the picture.

Or this: black leather jacket, motorcycle riding boots, a helmet with a tinted shield that slides down for protection.

Or this: A leather suit by the race track at Mosport; a motorbike especially designed for racing. Add the roar of racing bikes, the fumes of exhaust, the heat and vocabulary of ... well, you have to call them bikers, don't you?

Now picture Rick Helman: Director of Financial Planning at Loyalist College; treasurer, OCASA; OCASA appointee on the CAAT Pension Plan Sponsors' Committee – someone you could find in either outfit.

In his day job, as a mild-mannered, noon-hour jogging Director of Financial Planning, Rick can be found at times in conservative dress. But he also can be found dressed for the road, riding his Harley, the model of decorum.

Weekends, he may also be found on the racetrack, either as a course marshal, or (several times a year) as a motorcycle racer.

His involvement in this hobby began 10 years ago with the purchase of his first bike. Shortly after, he expanded by volunteering as a race marshal with the Canadian Race Communications Association, where he now is – guess what? – the treasurer. As a race marshal he found himself introduced to bike and motor racing as a “corner marshal” – the eyes and ears of race officials.

“The first instinct at the side of track is to run,” said Rick. “The sound and speed of racing machines is not a natural setting.” As a marshal he has been at track side (and in the pit areas) of many races, including Formula One race in Montreal two years ago. This is the big-time of racing: in the past decade the event drew 300,000 spectators for a racing weekend. The event will return to Montreal June 10-14 this year.

Rick's interest in marshalling led inevitably to sessions with racing pros, and then a race. (“There I was in the mid-pack at the start line of my first race. The flag went down and I stalled,” he admits, sheepishly. “In front of all my friends.”)



The appeal of marshalling and racing? “The adrenaline rush,” he says. Better to get that rush on the track than in the board room over budgets. **CA**

In each issue, *College Administrator* profiles one OCASA member with out-of-the-ordinary hobbies or activities. If you know someone who might qualify, send your suggestion to [info@ocasa.on.ca](mailto:info@ocasa.on.ca)

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