

SWO-ISCEBS

Education Committee Annual Report for 2017

Incumbent: Carol Parsons, Tammy Phelps

The role of the Education Chair is to facilitate the delivery of educational sessions and other chapter events. Education sessions primarily focus on emerging and current issues and trends relating to the Benefits and Pension industry.

Depending on the scope of the event, the preparation of this role varies. The resources available to prepare for such events are vast (e.g. event preparation guideline, flyer preparation, education credits and attendance formats).

2017 Events:

In 2017, our Chapter delivered 4 successful events:

- **“Balancing Proactive Health and Reactive Solutions”** on February 28th. This was a two speaker event, with Sunny J. Khaira from Hicks Morley presenting, *Medical Marijuana: Hashing Out Your Accommodation Obligations* and Lianne Clarke from The Williamson Group presenting, *A Healthy Work Culture – The Link Between Employee Health, Engagement and Productivity*. This was a very successful event with 30 people registered, including 1 sponsor attendee and a net revenue of \$700.00.
- **“When Disability Leads to Dismissal: An Employers Key Concern”** on May 11th with our speaker, Sara Malkin, Partner with Mathews Dinsdale & Clark LLP. This event was well attended with 65 people registered, including 1 sponsor attendee. Although we had a large number of attendees with an income of \$1,990, our expenses were higher than usual given the venue (Deer Ridge) and the time of year. With the expenses totaling \$1,861.73, our overall revenue was only \$128.27.
- **“Fundamentals of Pension and Group Benefits”** on October 3rd. We had a successful event this year with 31 people registered. The overall revenue for this event was \$2,444.99. A big thank-you to Manulife and Cowan/TWG for registering 19 of our 31 attendees.
- **“Victory Lap Retirement – What Does it Mean for your Workforce?”** on November 23rd with Mike Drak, co-author of the book *Victory Lap Retirement* and Simon Chan, a former financial services professional who is currently living his personal victory lap. Our final numbers were 27 registered, with an estimated revenue of \$570. The expenses are greater than the revenue collected at \$850 yielding an overall loss of \$280. There were 3 member guests and 4 sponsor attendees and the event is followed by the annual general meeting.

Feedback:

- The February session was well received and attendees continue to enjoy the two-speaker format.
- Although our May session had one of our highest number of attendees, the venue cost was significant, impacting our overall revenue. We may want to reconsider using a golf club during the golf season.
- Moving Fundamentals from the Spring to the Fall was a great decision – our numbers were higher than they’ve been in a couple years.

Closing Comments:

This role can be quite time consuming. Having 2 people sharing the responsibilities and an engaged Board who steps in to help when required, definitely makes the work more manageable. In addition, the support of the team at ISCEBS Headquarters, was greatly appreciated.

Given the amount of work it takes to plan our education sessions, we may want to consider more web-based sessions – these may increase the participation because people can join remotely.

I enjoyed my role as Education Co-Chair but have decided to retire from the Board to pursue other opportunities.

Respectively submitted,
Carol Parsons, GBA
November 23, 2017