

# SWO-ISCEBS

## Education Committee Annual Report for 2021

The role of the Education Committee 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 requirements vary. The resources available to prepare for such events are vast (e.g. event preparation guideline, flyer preparation, education credits and attendance formats). As a result, the board has taken a shared accountability on delivery of these events leveraging checklists to ensure all requirements have been addressed. With restrictions to in person gatherings, we continued to offer virtual education events. Our chapter will deliver 4 education sessions including 3 webinars and a multi-day webinar series event.

### 2021 Events:

Year to date in 2021, our Chapter has delivered 3 successful events with one final event occurring December 1<sup>st</sup> after the annual general meeting:

- ***“Fundamentals of Pension and Group Benefits”*** was run as a webinar series over the period April 26 to May 6. We had 13 attend the Benefits stream and 4 attend the entire pension stream. After expenses the event produced a net income of just under \$950. Feedback from attendees was very positive.
- ***“Retirement: How ready are your employees for life after work?”***, This event was presented via webex on June 9<sup>th</sup>. Mike Drak, reviewed the 3 stages of life after work, the importance of a lifestyle plan, and 9 principles for designing an ideal post-career lifestyle. Mike was joined by Michelle Oram who discussed how employers can help set employees up for success. 29 registered and 15 attended.
- ***“The Pandemic After the Pandemic – The Future of Mental Health”***, This event was presented via webex by Joe Blomely from Green Shield Canada on Sept 29<sup>th</sup>. Joe shared insights on how technology can help fill gaps in our health care system exposed by the pandemic with a focus on strengthening or launching mental health strategies. 30 registered and 14 attended
- Our final education event is scheduled for December 1<sup>st</sup>. ***“After the Pandemic – Legal, and HR Implications to Consider”***. Sylvia Moretti and Matt Lewis-Strauch from Sun Life Financial will explore the endless questions organizations are beginning to navigate following the global pandemic along with Joel Smith from Williams HR law firm.

The lower costs associated with running these events virtually via webex, has allowed us to lower costs for participation. The webex sessions are offered free to members of ISCEBS chapters to help ensure they continue to gain value from membership within a local chapter.

### Feedback:

- All sessions were well received, and the flexibility and ease of delivering virtual events will continue to make this a viable delivery method in years to come.

## **Closing Comments:**

In addition, to local chapter work, our chapter is supporting the ISCEBS Chapter Webcast Committee and has provided input into the Canadian sub-working group.

The team approach continues to work well for running education events provides greater flexibility allowing board members to participate to varying degrees throughout the year without putting the full weight on any one individual. The support of the team at ISCEBS Headquarters was greatly appreciated especially and helps ensure we are able to run local events smoothly with greater ease.

Respectively submitted,  
Tammy Phelps, CEBS, ISCEBS Fellow  
Vice President, ISCESB Southwestern Ontario Chapter  
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