

Annual General Meeting - President's Report
Southwestern Ontario (SWO) Chapter of ISCEBS – November 23, 2021

2021 was a very positive year for the Southwestern Ontario Chapter. I would like to thank all of our board members for their hard work, time, effort and dedication to supporting our chapter activities.

Chapter Board Meetings

Including today's Annual General Meeting, the Board of Directors met ten times throughout 2021:

- January 8, 2021
- February 12, 2021
- March 12, 2021
- April 23, 2021
- June 4, 2021
- August 19, 2021
- October 8, 2021
- November 12, 2021
- November 23, 2021
- December 16, 2021

Chapter Education Opportunities

We held three education sessions as well as offering our Fundamentals program in 2021.

- "Fundamentals of Pensions and Group Benefits" was presented via Webex over an eight-day period: Benefit sessions took place from April 26th to 29th and Pension sessions were May 3rd to 6th. The change in format from in-person to virtual allowed us the opportunity to provide the program at the 'stream' level as well as the individual 'session' level, which proved to be quite successful.
- 'Retirement: How ready are your employees for life after work' was held on June 9, 2021. Mike Drak and Michelle Oram presented their views on how retirement is shifting and what employers can do to support their employees.
- 'The Pandemic after the Pandemic – The Future of Mental Health' was held September 29, 2021. Joe Bomeley from Green Shield Canada presented insights and considerations that have only become more prevalent in our current environment.
- 'After the Pandemic – Legal and HR Implications to Consider' will be held on December 1, 2021. Joel Smith, Williams HR Law, Sylvia Moretti and Matt Lewis-Stauch from Sun Life will discuss burning questions about implementing new HR policies like vaccine mandates and return to office requirements and more.

Chapter Communications

In 2021, we continued to focus on Chapter communications and public relations to our membership. Our Chapter actively posted on Twitter and LinkedIn, in addition to relying on the ISCEBS Virtual Assistant for public relations activities, as well as website support.

Chapter Membership and Sponsorship

The membership drive for 2021 resulted in our current numbers dipping from 36 members in 2020 to 35 members in 2021. The Board continues its focus on providing benefits to its membership to attract and retain members. The President reviewed the Chapter completers' lists monthly to identify and reach out to potential new members. Members in the Chapter were

also encouraged to participate at all educational sessions. In addition to a reduced member fee for attending, we continued to offer:

- New GBA, RPA or CEBS grads are offered a free education session as a congratulations from the chapter.
- Discount on education sessions offered by the Toronto Chapter of ISCEBS (and vice versa)
- Each member is encouraged to bring a guest to one SWO Chapter education session during the year at no additional charge.

The sponsorship program for 2021 remained unchanged. The Chapter discussed and approved keeping our 2020 sponsors Humania Assurance and Sun Life Financial in place for 2021 without any costs. As 2020 was such an unusual year and as a Chapter we were unable to completely fulfill all of our commitments to our sponsors, we felt it was appropriate to extend the sponsorship agreement for 2021 so that our sponsors could realize the full benefit of their sponsorship dollars.

Other

In 2021 ISCEBS initiated an expansion of the Chapter Webcast Coalition (CWC) to a new national ISCEBS Chapter Webcast Committee. The new committee will work to support virtual education opportunities, topics and speakers for all ISCEBS chapters. The SWO Chapter was happy to join this committee and support this initiative to enhance our member benefits.

Proposed Board of Directors for 2022

The list of officers and board members up for election today are:

President:	Tammy Phelps, CEBS, ISCEBS Fellow
Secretary:	Gail Enever, CEBS
Treasurer:	Carrie Kurtz, CEBS Fellow
Past President:	Trudy Parker, CEBS
Board of Directors:	Michelle Oram, CEBS, ISCEBS Fellow Alicia Hesch, CEBS Heather Cosgrey, CEBS

This year we have two board members who are not returning: George Elliott and Jena Crawley. However, we will have one new board member in 2021: Heather Cosgrey.

I would like to thank everyone again; I am very appreciative of the SWO Chapter Board members' efforts over this past year. Thank you for your dedication and support and I am looking forward to being part of a strong and successful SWO Chapter Board in 2022.

Respectfully submitted,
Trudy Parker, CEBS
President, Southwestern Ontario Chapter of ISCEBS