

Annual General Meeting – President’s Report
Southwestern Ontario (SWO) Chapter of ISCEBS – November 22, 2022

2022 was a successful year for the Southwestern Ontario Chapter. I would like to thank all our board members for their hard work, effort, time and commitment to supporting the chapter activities.

Chapter Board Meetings

Including today's Annual General Meeting, the Board of Directors met 8 times throughout 2022:

January 6, 2022

February 18, 2022

April 21, 2022

May 19, 2022

June 24, 2022

September 16, 2022

October 28, 2022

November 22, 2022

Chapter Education Opportunities

In addition to actively participating in the Chapter Webcast Coalition (CWC) which provides additional virtual education opportunities, topics and speakers for all ISCEBS chapters, our chapter held 3 education sessions and offered our Fundamentals program in 2022.

- “The Great Resignation to the Great Migration” was presented via Zoom February 3rd as part of the Chapter Webcast Committee.
- “After the Pandemic – Legal and HR Implications to Consider” was presented March 31, 2022, as a virtual session. This event was postponed from the original scheduled date of December 1, 2021. The feedback was excellent and 50 out of the 75 registered participants attended live.
- “Embracing the Future” coffee chat was a new virtual meeting format we tested on June 22, 2022. It was a facilitated open discussion amongst attendees. Participants were engaged and actively contributed to the discussion.
- “Fundamentals of Pensions and Group Benefits” was presented via Webex over an eight-day period. Benefit sessions took place September 19 to 22 and Pension sessions were September 26 to 29. We continued the format from 2021 which had shifted to virtual from in person because this format allows us to

provide the program at the 'stream' level as well as individual 'session' level which has been extremely well received by participants.

- "The Future of Retirement – Improving the Member Experience Through Longevity Lifestyle Design" is scheduled for December 8th. Due to the nature of the content, it has been extended to Canada and US chapters.

Chapter Communications

In 2022, we continued to focus on Chapter communications and public relations to our membership. Our Chapter actively posted on LinkedIn and Twitter, in addition to relying on the ISCEBS Virtual Assistant for public relations activities, as well as website support.

Chapter Membership and Sponsorship

We ended the year with 34 members which was down 2.9% from 2021 membership of 35. The board continues to evaluate different ways to add value to help attract and retain members.

Due to the proximity of Symposium, we were able to offer a free registration to Symposium and \$500 Canadian to help with expense for our membership draws for new and returning members. There were no new members, so we drew from 29 returning members excluding board members and offered one prize. Lindsey Tomlin won and attended the Symposium.

We passed a motion to offer free chapter membership to retirees to keep them engaged providing an opportunity for them to share their expertise and stay involved in the Benefits Industry beginning in 2023. In addition, we continue to offer:

- Free education session as a congratulations from the chapter for new GBA, RPA or CEBS grads 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

Sun Life Financial was a corporate sponsor for 2022. With many events running virtually we may want to consider the go forward value proposition for sponsors as the attendees for the 2022 education events were already members and eligible to participate for free.

Other

We had representation on the Canadian Symposium Education Planning committee. With Ontario being the host province, we played an active role in supporting the Symposium in 2022. We arranged and hosted a bus tour from the Sheraton Center to Niagara Falls and Niagara-on-the-Lake on August 6th which was very well attended and received excellent feedback from those who participated. In addition, we hosted a group at Trattoria Mercatto August 7th which we filled the sign-up sheet based on the reservation of 12.

Proposed Board of Directors for 2023

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

President:	Tammy Phelps CEBS, Fellow
Vice President:	Vacant for 2023
Secretary:	Heather Crosgrey, CEBS
Treasurer:	Carrie Kurtz, CEBS
Past President:	Tammy Phelps CEBS, Fellow
Membership and Sponsorship Chair:	Alicia Hesch, CEBS
Education Chair:	By committee
Board of Directors:	Michelle Oram, CEBS, Fellow Robin Cox, CEBS Lindsey Tomlin, CEBS Vic Saini, CEBS Student

Trudy Parker and Gail Enever will not be returning to the board for 2023; however, we have 3 new board members: Robin Cox, Vic Saini, Lindsay Tomlin.

Once again, I would like to thank all board members for giving their time to support CEBS. I am so grateful for your dedication and commitment. We had a solid 2022 and I'm looking forward to continued growth and success for the SWO Chapter Board in 2023.

Respectfully submitted,
Tammy Phelps, CEBS Fellow