# Canadian Public Sector Pensions and Benefits Conference

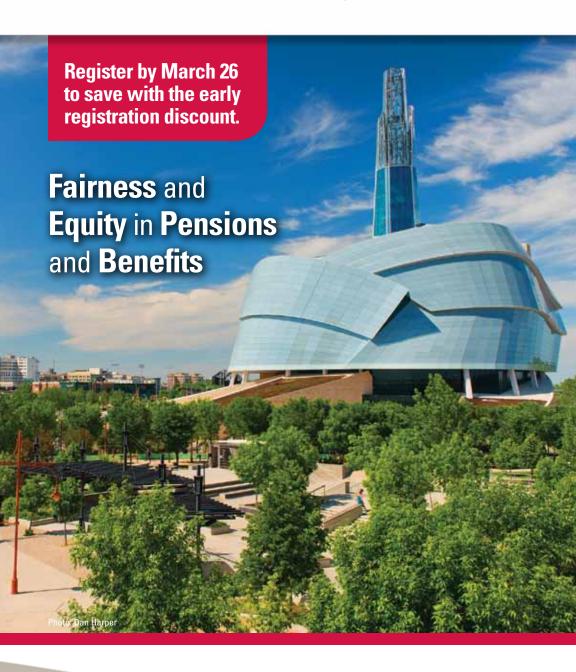


May 5-6, 2015 The Fairmont Winnipeg | Winnipeg, Manitoba

# Canadian Legal and Legislative Update

May 7-8, 2015

The Fairmont Winnipeg | Winnipeg, Manitoba



# Canadian Public Sector Pensions and Benefits Conference

May 5-6, 2015 The Fairmont Winnipeg | Winnipeg, Manitoba

Transformation continues in today's government, and it is more important than ever for those who serve in the public sector to find creative and innovative solutions to manage change in order to ensure the viability of pension and health and welfare funds for their members.

The Canadian Public Sector Pensions and Benefits Conference offers an opportunity to learn firsthand from industry experts who will address the latest issues facing public sector plans today. The program focuses on plan design, cost-containment and communication strategies for both pensions and benefits. Don't miss this opportunity to learn alongside your peers who face similar challenges.

# **Benefits of Attending**

- Learn from leading pension and benefits professionals about the specific issues you face in your role.
- Experience learning from a forum of your peers and discover best practices in other systems.
- Hear about strategies that could save your fund money in the short and long term.
- · Networking opportunities with peers and other professionals
- Registration includes two continental breakfasts, two luncheons, a welcome reception at the Fairmont and a special event at the Canadian Museum for Human Rights.

### Who Should Attend?

This program is designed for trustees, administrators, professional advisors and others in the Canadian public sector, including federal, provincial, municipal, educational, health and community service sectors.

# **Accompanying Educational Program**

Canadian Legal and Legislative Update, May 7-8

### **Program Discount**

Save \$250 when you register for both the Canadian Public Sector Pensions and Benefits Conference and the Canadian Legal and Legislative Update. Use discount code Public15 to save.

Visit www.ifebp.org/canadape for updates.

# Canadian Public Sector Pensions and Benefits Conference

May 5-6, 2015

### **TUESDAY, MAY 5**

7:00 a.m.-4:00 p.m. Registration/Information

7:00-8:00 a.m. Continental Breakfast

### 8:00-9:00 a.m.

# Financial Literacy and Pension Reforms: A View From Italy

Pension reforms have technical and political features and are meant to motivate changes in behavior. Their effectiveness depends on the ability of citizens to recognize and generally approve their necessity and design. Financial literacy has important implications not only for personal wealth formation but also for pension reforms. Without a basic understanding by citizens, reforms risk having little or no effect or even being reversed. This is particularly true of pension reforms because of their profound impact on people's life plans. The 2011 Italian pension reform is a case in point.

### **Keynote Speaker: Elsa Fornero**

Chair of Macroeconomics University of Turin Turin, Italy

#### 9:15-10:15 a.m.

# Alternative Investments: Meeting Your Fiduciary and Social Governance Objectives

- · Strategies for stabilizing funds
- · Meeting ESG goals
- Public plan investments in *public*-private partnerships (P3)

### **Speaker: Tyler Smith**

Consulting Actuary Benchmark Decisions Ltd., The PBAS Group Winnipeg, Manitoba

# TUESDAY, MAY 5 (CONT.)

#### 10:30-11:30 a.m.

# Are Public Pension Plans Fair? Perception vs. Reality

- Portrayal of public pensions in the media
- · Alternate views of public pensions
- Changing nature of pensions in Canadian society
- Preserving public pension plans
- Expanding retirement income for all Canadians

### Speaker: Kevin Skerrett

Senior Research Officer Canadian Union of Public Employees (CUPE) Ottawa, Ontario

11:30 a.m.-12:45 p.m. Luncheon

# 12:45-1:45 p.m. Public Sector DC Plans: Saskatchewan's Experience

- The story of a small public sector pension plan becoming Canada's largest defined contribution pension plan
- Examining the ever-evolving governance of a growing DC plan
- Members and retirement—a focus on building and enhancing services

### Speaker: Ann Mackrill

Executive Director Public Employees Benefits Agency Regina, Saskatchewan

I enjoyed the timely and relevant topics, presenters and opportunities to meet with other attendees.

**Johanna Morrow**Trustee
BC Public Service Pension Plan

# Canadian Public Sector Pensions and Benefits Conference

May 5-6, 2015

# **TUESDAY, MAY 5** (CONT.)

2:00-3:00 p.m.

# When the Consolidation of Public Pension Plans Makes the Most Sense

The merging of pension plans isn't always a good idea but, given the right conditions, the benefits for all concerned are significant and real. A good merger brings efficiencies, reduces costs and manages risks better than the pension plans operating independently. This session will examine a real-life innovative and comprehensive proposal that has been three years in the making and would see interested single-university pension plans exit the pension management business to join an existing multi-employer college plan to create predictable costs and more secure benefits at a lower risk.

### Speaker: Derek Dobson

CEO and Plan Manager Colleges of Applied Arts and Technology (CAAT) Pension Plan Toronto, Ontario

### 3:15-4:15 p.m. Open Forum

This interactive forum continues the discussion from the two previous sessions on public sector pension plans. Get a bird's-eye view from current practitioners who will expand upon their case studies.

#### Panelists:

Derek Dobson Ann Mackrill

Guests welcome

4:30-5:30 p.m. Welcome Reception—Fairmont

# **WEDNESDAY, MAY 6**

7:00 a.m.-4:00 p.m. Registration/Information

7:00-8:00 a.m. Continental Breakfast

### 8:00-9:00 a.m.

### Joint Governance: 25 Years Later

- Is it working? Key aspects
- What are the challenges?
- · Role of government
- Sustainability—What does the future hold?
- Labour vs. management perspectives

### Co-Speakers:

### Mark Gaudet

Assistant Deputy Minister Pensions and Employee Benefits Division Province of New Brunswick Fredericton, New Brunswick

### **Bob Romphf**

Labour Relations Officer Manitoba Nurses Union Winnipeg, Manitoba

### 9:15-10:15 a.m.

### Fraud, Waste and Abuse in Health Care

- Overview of fraud problems in health care
- Tackling the waste and abuse problem in health care
- What can we learn from clinical efforts to "choose wisely" in health care?
- Health care fraud cases

### Speaker: Joel Alleyne

Executive Director Canadian Health Care Anti-fraud Association Toronto, Ontario

Visit www.ifebp.org/canadape for updates.

# Canadian Public Sector Pensions and Benefits Conference

May 5-6, 2015

# **WEDNESDAY, MAY 6 (CONT.)**

10:30-11:30 a.m.

# Disability: Accommodation and Management

- Legislative history
- · Defining the duty to accommodate
- · Disabled employee's responsibility
- Relief from duty to accommodate/ defining undue hardship
- · Keys to successful accommodation
- · Help with managing

### Speaker: Ron Ferguson

Regional Manager, Disability Management Service Office The Great-West Life Assurance Company Winnipeg, Manitoba

### 11:30 a.m.-12:45 p.m. Luncheon

## 12:45-1:45 p.m. EAPs and Employee Wellness in the Digital Age

This interactive, experiential session will examine how innovative online technologies and clinical best practices are being leveraged to support employees today and how they are forming the foundation of the next generation of tech-savvy EAPs and integrative wellness programs. Particular attention will be paid to how to improve employee engagement and productivity in the workplace.

### Co-Speakers:

### **Heather Kaufman**

Vice President, National Partnerships Morneau Shepell Toronto, Ontario

### **Barb Veder**

Vice President Clinical Services and Research Lead Morneau Shepell Ottawa, Ontario

# WEDNESDAY, MAY 6 (CONT.)

2:00-3:00 p.m.

Mental Health, Mental Illness and the Workplace: What Works At Work?

Dr. Cohen will discuss how employers can and do promote the mental health of their workforces as well as best respond to the mental health problems and illnesses some of their employees will inevitably experience. She will talk about the costs of not meeting the mental health needs of workers as well as the cost offsets for employers and society when mental health needs are met early and effectively. Finally, she will address the issues related to policy and culture that can impede and enhance how well Canada manages its mental health.

### Speaker: Karen Cohen

Chief Executive Officer Canadian Psychological Association Ottawa, Ontario

### 3:15-4:15 p.m. Open Forum

The two previous sessions will raise a lot of important issues pertaining to mental health in the workplace and employee engagement in EAPs and wellness programs. Take this opportunity to learn more from all three experts.

### Panelists:

Karen Cohen Heather Kaufman Barb Veder

### 5:00-7:00 p.m. Museum Reception

Canadian Museum for Human Rights

### Speaker: Gail Stephens

Interim President and CEO Canadian Museum for Human Rights (CMHR)

# Museum Reception

The Canadian Museum for Human Rights (CMHR) is the first national museum to be built in nearly half a century and the first outside the National Capital Region.

# Canadian Public Sector Pensions and Benefits Conference and Canadian Legal and Legislative Update Museum Reception

# Wednesday, May 6, 5:00-7:00 p.m.

☐ I will attend (complimentary).

This special event is free to attendees (and guests) of either conference and includes a speech by the Interim President and CEO of the Museum, Gail Stephens, free access to the museum exhibits (until 8:00 p.m.), and hors d'oeuvres and beverages.

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E-mail completed form to edreg@ifebp.org.



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Fax form to (262) 786-8650.



For information, e-mail edreg@ifebp.org, or phone (905) 361-2822 or toll-free (844) 809-2698.

# **About the Location**

The vibrant, cosmopolitan city of Winnipeg, Manitoba is the location for this year's Canadian Legal and Legislative Update and the Canadian Public Sector Pensions and Benefits Conference. Winnipeg offers diversity, culture and history.



# The Fairmont Winnipeg

Fairmont Winnipeg, located in the heart of downtown Winnipeg, Manitoba, provides luxury guest rooms and excellent service and is located just a short distance from the top must-see attraction in Winnipeg—the Canadian Museum for Human Rights.

### **Conference Room Rate:**

C\$239 single/double—Fairmont room category Hotel reservation deadline: April 6, 2015

# Canadian Legal and Legislative Update

May 7-8, 2015 The Fairmont Winnipeg | Winnipeg, Manitoba

The Canadian Legal and Legislative Update is the **preeminent source** for the latest in pensions and benefits legislation. Join us in Winnipeg, Manitoba for the annual update on recently enacted and proposed legislation and regulations, presented in a convenient 1½-day program.

Take this opportunity to get the information you need to better handle the changes taking place in Canada relating to pensions and benefits issues.

# **Benefits of Attending**

- Hear from industry experts, practitioners and government representatives.
- Focus on the critical information you need to know now with fresh and relevant topics.
- Gain a deeper understanding of the issues affecting the pensions and benefits industry and their effect on your funds.
- Networking opportunities at a special welcome
- reception on Thursday evening from 5:00 to 6:00 p.m.

### **Program Discount**

Save \$250 when you register for both the Canadian Public Sector Pensions and Benefits Conference and the Canadian Legal and Legislative Update. Use discount code Public15 to save.

• Registration includes two continental breakfasts, luncheon on Thursday, beverage breaks and a special event at the Canadian Museum for Human Rights on Wednesday, May 6.

### Who Should Attend?

This program is specifically designed for labour and management multi-employer trustees, public service trustees and professional advisors looking to keep up with the latest legal and regulatory developments.

The International Foundation is implementing green initiatives for this meeting to eliminate waste and reduce the amount of paper distributed. Instead of binders of paper handouts, presentation materials will be available online—accessible under password protection by registrants only—three business days before and 45 days after the program. Further details will be provided to registrants before the meeting.

Visit www.ifebp.org/canupdate for updates.

# Canadian Legal and Legislative Update

May 7-8, 2015

## **THURSDAY, MAY 7**

7:30 a.m.-4:45 p.m. Registration/Information

7:30-8:30 a.m. Continental Breakfast

# 8:30-9:15 a.m. Why We Need an Ontario Retirement Pension Plan (ORPP)

- Hear about the Minister's formal consultations with individuals, businesses, labour and other organizations, and communities throughout Ontario.
- Discover the key design issues and implementation details.
- Get the most up-to-date information on this historic legislation.

### **Keynote Speaker:**

### Hon. Mitzie Hunter (invited)

Associate Minister of Finance Ontario Retirement Pension Plan Toronto, Ontario

# 9:30-10:30 a.m. Is There Really a Pension Crisis? Two Expert Views

More than 60% of Canadian workers are without a workplace pension plan, and workplace coverage continues to decline. At the same time, Canadians are living longer. These trends are causing many people to question the adequacy of voluntary savings and the ability of the Canada Pension Plan to meet the retirement needs of the average Canadian worker.

Malcolm Hamilton and Jo-Ann Hannah are two experts with opposing but equally compelling arguments about the need for, and merits of, Ontario's proposed ORPP and CPP expansion. They will also speak to other retirement solutions.

### Co-Speakers:

#### **Malcolm Hamilton**

Senior Fellow C.D. Howe Institute Toronto, Ontario

### Jo-Ann Hannah

Director, Pensions and Benefits Unifor Toronto, Ontario

# **THURSDAY, MAY 7 (CONT.)**

10:45-11:45 a.m. Ask the Experts Panel

Mr. Hamilton and Ms. Hannah will take your questions and comments, which should make for a very lively discussion and debate.

### Panelists:

Malcolm Hamilton Jo-Ann Hannah

11:45 a.m.-1:00 p.m.

# 1:00-2:15 p.m. Socially Responsible Investment— Do I Have to?

- What is socially responsible investment?
- Can nonfinancial criteria be considered when making pension plan investment decisions?
- Must nonfinancial criteria be considered?
- How do you document these considerations in minutes, investment policies and plan documents?

#### Co-Speakers:

### Randy Bauslaugh

National Practice Leader, Pension, Benefits and Executive Compensation McCarthy Tétrault LLP Toronto, Ontario

### Michael Jantzi

Chief Executive Officer Sustainalytics Toronto, Ontario

### 2:30-3:30 p.m. Current Case Law: Relevance for Plan Sponsors and Trustees

A review of important recent developments in the case law across Canada and the impact on pension and benefit plans.

### Speaker: J. J. Burnell

Partner

Aikins, MacAulay & Thorvaldson LLP Winnipeg, Manitoba

# Canadian Legal and Legislative Update

May 7-8, 2015

# THURSDAY, MAY 7 (CONT.)

3:45-4:45 p.m. Legislative Update

It has been a very active year for pension legislation, especially in Western Canada. Further legislative and regulatory changes are in process at both the federal and provincial levels. This session will focus on the most relevant changes to date as well as proposed legislation and what we can expect to see in the coming year.

### Speaker: Murray Gold

Managing Partner Koskie Minsky LLP Toronto, Ontario

5:00-6:00 p.m.
Welcome Reception—Fairmont
Guests welcome

# **FRIDAY, MAY 8**

7:30 a.m.-12:00 noon Registration/Information

7:30-8:30 a.m. Continental Breakfast

8:30-9:30 a.m. Privacy Law: Social Media, CASL and More

This session will provide a practical overview of privacy law and how it applies to trustees and professional advisors of pensions and benefits providers. The legal landscape related to social media and CASL will also be reviewed. Learn more about steps you should (and shouldn't) be taking to stay on the right side of your privacy obligations.

### **Speaker: Andrew Buck**

Associate Pitblado LLP Winnipeg, Manitoba

# FRIDAY, MAY 8 (CONT.)

9:45-10:45 a.m.

EAPs: Recent Developments and Ethical/Legal Considerations

As new technologies emerge in the delivery of mental health services, legal and ethical factors that govern the field need to be revisited. Issues relating to privacy and confidentiality, training and best practices, and access to treatment and accommodation require consideration when using new treatment modalities.

### Speaker: Ian Altman

Executive Director of EAP Services Manitoba Blue Cross Winnipeg, Manitoba

11:00 a.m.-12:00 noon Compensation for Employers of Reservists Program (CERP)

The Compensation for Employers of Reservists Program (CERP) will provide financial support to employers of reservists who deploy on operations and will help minimize the disruptions to employer businesses. This session will focus on the background and structure of the program, including:

- Employer support and engagement history and mandate of the Canadian Forces Liaison Council and its role in delivering employer support programs, including CERP
- Description of program delivery regime—a jointly delivered program by the Department of National Defence (DND) and Employment and Social Development Canada (ESDC)
- Eligibility criteria and thresholds
- · Payment scheme
- Potential implications to multiemployer and public sectors.

### Speaker: Derek Cheff

Chief of Staff, Lieutenant-Colonel Canadian Forces Liaison Council (CFLC) Department of National Defence Ottawa, Ontario

Visit www.ifebp.org/canupdate for updates.

#### CONTINUING EDUCATION CREDIT

Programs sponsored by the International Foundation of Employee Benefit Plans are consistently accepted for credit by agencies governing continuing education for license renewal and professional recertification. Please note that preapproval by the governing agency is sometimes necessary. It is important therefore to register at least 45 days prior to the program taking place.

The Canadian Public Sector Pensions and Benefits Conference as well as the Canadian Legal and Legislative Update have been submitted to the Registered Insurance Brokers of Ontario (RIBO) for continuing education (CE) credit.

Note: Requests made for continuing education credit do not guarantee administration of credit.

For further information on continuing education credit, please call (262) 786-6710, option 2.



Educational sessions at this program may qualify for CEBS continuing professional education (CPE) credit. For CPE inquiries, please contact the CEBS Customer Service Department at (800) 449-2327, option 3, or e-mail cebscpe@ifebp.org.

#### REGISTRATION POLICIES

- See our policies regarding your registration/cancellation/refund/record retention/photo release and privacy at www.ifebp.org/policies.
- · Cancellation/transfer requests must be in writing and are subject to a fee of \$50 per meeting day for cancellations and \$50 for transfers.
- · Administrative fee for cancellation received within 30 days of meeting is 50% of the registration fee.
- · Cancellations received on or after the opening day of a program are subject to forfeiture of all registration fees.

For more information regarding administrative policies such as complaint and refund, please contact Registrations at (262) 786-6710, option 2, or edreg@ifebp.org.

#### SPONSORSHIP INFORMATION

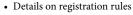
Sponsorship opportunities are available for these conferences. For more information, please contact Sandra Lange at (262) 373-7657 or sandral@ifebp.org.

## RELATED READING

# **Canadian Pensions and Retirement Income Planning**

Towers Watson

A comprehensive look at Canada's tax rules for retirement income programs that covers all types of plans including defined benefit, defined contribution, RRSPs and deferred profit-sharing plans. Appropriate for plan sponsors and those who provide support to pension plans, this book includes:



- Guidance on determining pension adjustments and reversals
- Updated information on Registered Plan Directorate policies
- Updated forms and filing requirements
- Charts of relevant and commonly used reference data including CPP/QPP/YMPE, average wage, interest rates and relevant Income Tax Act limits.

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\$157 (I.F./ISCEBS Members: \$147). (Price includes shipping and handling.) www.ifebp.org/books.asp?8991

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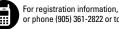


**Canadian Public Sector Pensions and Benefits Conference REGISTRATION/2015 Canadian Legal and Legislative Update** 

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