

# Online Training for Pension Trustees and Advisory Committee Members

May 12, 13, 16, 17, and 18, 2022

CUPE's pension trustee training is invaluable for pension trustees and pension advisory committee members. The workshop will be led by CUPE pension experts and industry professionals, using a participatory approach that includes practical exercises reflecting real world challenges to help you in your role as a trustee.



Participants will get a chance to meet other pension trustees and advisory committee members, and to share knowledge, tips, and strategies.

## Come and learn about:

- Current trends in pension policy and legislation
- Valuations, discount rates and funding relief measures
- Oversight of service providers
- Strong trustee accountability practices that strengthen union power
- Pension plan investing
- How to read technical reports common to trustee work

Designed with experienced trustees in mind, this online workshop will offer a union perspective that is often missing from industry training. It will include five half-day Zoom sessions, as well as online work to be completed between sessions. You will need a computer with a web cam and microphone to participate and complete the work (Some tablets may be OK, but a computer is preferred). **This workshop is in English only.**

## Presenters

1. Emily Niles, CUPE Research
2. Kevin Skerrett, CUPE Research
3. Susan Arab, CUPE Research
4. Murray Gold, Koskie Minsky
5. Lesa MacDonald, Koskie Minsky
6. Nisha Singh, PBI Actuaries & Consultants
7. Jason Campbell, Eckler Investment Consulting

**This is not an introductory workshop.** You must currently be a trustee or advisory committee member to attend. The training is aimed at participants who already have an understanding of fundamental concepts (such as fiduciary duty, going concern valuation, solvency valuation, discount rate, pension plan sponsor) and are looking to further develop their skills and deepen their analysis.

Space is limited. If you would like to take part in this training session, please fill out the online application form [<https://forms.office.com/r/yNskujtupD>] by Friday, April 8, 2022. We will let successful applicants know by April 14 and the deadline to register will be April 25.

**The registration fee for the workshop is \$250.**

The fee covers the workshop and materials. It does **not** cover lost wages or any other expenses.

**We encourage you to ask your pension plan to sponsor your participation in this training. For information, see *"A Guide to Getting Your Pension Fund to Cover the Cost of Pension Trustee Training"* on the next page.**

**For more information, contact:**

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## A Guide to Getting Your Pension Fund to Cover the Cost of Pension Trustee Training

Pension trustees need education and training to carry out their responsibilities. It's common for pension funds to pay for trustee training, including training put on by the union. In fact, pension funds regularly pay for union trustees to attend union-provided pension training.

We encourage you to ask your pension plan to sponsor your participation in CUPE's pension trustee training.

### Top 6 reasons your pension fund should cover your training:

1. **CUPE Education has the expertise and experience** needed to train union members in many areas, including health and safety, human rights legislation, labour law and arbitration preparation. Our speciality is taking difficult, technical information and breaking it down in ways that members can understand.
2. **CUPE Education programs are recognized by employers and used for professional development days across the country.** Examples include anti-bullying, conflict resolution, harassment awareness workshops and training sessions for education assistants.
3. **CUPE's pension trustee training program has been recognized in Canada and the U.S.** by academics and others who study pension education programs, including the Ontario Institute for Studies in Education at the University of Toronto, and Harvard Law School in the U.S.
4. **CUPE surveys trustees about their learning needs and provides training tailored to meet those needs.** The training is delivered by CUPE pension experts and industry specialists who ensure it is high quality, current and relevant.
5. **Union members are often more comfortable learning in a union environment.**
6. **CUPE's trustee training provides excellent value for money.** Even though the quality of the training is high, the cost is much lower than training from industry providers. Your registration fee is used to cover the cost of industry resource people.

*CUPE encourages union trustees to work with their boards and committees to establish training policies. These policies should include funding to ensure union trustees can access the training they require, including training provided by the union.*

Learning objectives and curriculum outlines can be provided, if needed for funding approval. Contact us for this and any other information you need.

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