

THE | PROFESSIONAL

July–August 2019 Volume 45 Issue 3

BC's Union for Professionals

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CONVENTION DELEGATES ELECT NEW LEADERSHIP

Left to Right: Second Vice-President Ronda Field, Secretary-Treasurer Melissa Doyle, President Shawna LaRade, First Vice-President Cherene Palmer.

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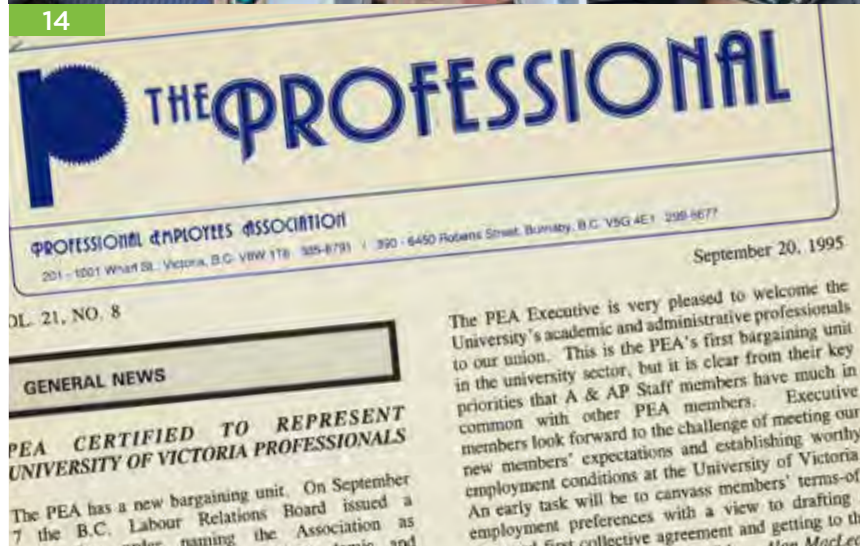
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PRESIDENT'S MESSAGE

DIVERSITY, EQUITY AND INCLUSION

At Convention 2019 on May 3 and 4 in Victoria, I was elected as president to represent members of the Professional Employees Association (PEA). I look forward to working closely with the PEA executive with a focus on organizational and member needs.

At Convention we heard from Natasha Aruliah, a clinical psychologist and interculturalist who works with unions to further social justice, diversity, equity and inclusion. The presentation, available on the PEA website, was powerful and thought provoking.

A key message that resonated with me from Natasha's presentation was the "platinum rule": Treat others how THEY want to be treated. This reflects a paradigm shift that requires us to put aside our own perceptions and seek to understand the values, life experience and beliefs of the people around us. In doing so, we can develop an understanding of how each of us wants to be received. A shared understanding will help us focus our collective efforts to improve individual and societal life experiences.

Natasha's presentation also leads me to reflect on the role of the PEA as a union. The union plays an important role in supporting and showcasing our diverse members and their chapters. The union also works to ensure its members are given equal opportunities, free from bias or favouritism. And the union works diligently to assist its members to contrib-

ute to the health and vision of our organization. The union also has a social responsibility to promote social equity for those who do not have a union to support them.

I would appreciate hearing from you and your perspective:

- What can your union do to help you?
- How do you want to be treated?
- How can we work together to appreciate our differences and develop our shared values?
- What can we do to further our understanding and respect for each other as a community?

For myself, I hold conscious and unconscious attitudes and biases that have developed from my unique life experience. It is this experience that makes me curious to meet and learn from a diversity of people. I want to hear and understand your unique story and how your experiences have helped to sculpt your perceptions and beliefs.

Please feel free to contact me at 250-919-4711 or slarade@pea.org

I wish you and your families all the best throughout the summer season and hope you are able to enjoy some time focused on things that you value the most.



2019 CONVENTION

WORDS BRETT HARPER

PHOTOS LILLIE LOUISE MAJOR

Convention is a time for member delegates elected by the PEA chapters to review the organizational health of the PEA, debate and vote on resolutions, elect table officers to serve on the Association executive and catch up on current trends in the policy environment for labour unions. The 2019 PEA Biennial Convention took place May 3 and 4 in Victoria, BC.

The Convention opened with a performance of the Le La Le Dancers, BCFED President Laird Cronk then addressed the delegates, highlighting the BCFED's recent work on important changes to the BC Labour Code and Employment Standards Act. These changes have been tabled in the legislature.

Delegates heard from lawyer Tony Glavin, of Koskie Glavin Gordon, about the basics of labour law in BC and the impact of cannabis legalization on the workplace. Natasha Aruliah, a psychologist, presented on the shifting demographics of the Canadian and BC workforce. She reinforced the importance of incorporating equity, diversity and inclusion into the PEA to welcome all members to their union.

The second day of Convention was all about the business of the union. Members heard from Paul Siluch, the PEA's investment advisor. He walked delegates through the challenging last quarter of 2018 and provided an overall picture of the





health of PEA investments. Following a substantive dip at the end of 2018, the investments have since recovered their losses.

PEA Secretary-Treasurer Melissa Doyle walked delegates through the overall financial health of the union. She reviewed the expenses in 2018 related to a high level of bargaining, and the increases in membership-service costs related to grievances, arbitrations, and mediations.

Frank Kohlberger and Scott McCannell delivered their respective president and executive director reports. The reports touched on a number of issues, including the PEA's strategic plan, growth, affiliation to the BCFED and more.

RESOLUTIONS

Convention 2019 saw a record number of resolutions submitted. A resolution is a motion or proposal

submitted to the delegates, urging a policy or a course of action that will guide the union in the coming months or years.

The following resolutions were passed by delegates:

Financial

- THEREFORE BE IT RESOLVED that PEA will reevaluate the per diem policy so that the reimbursement rate protects members from being out of pocket while on union/association business whether they are in their home town/office or away from the home/office.
- THEREFORE BE IT RESOLVED that the Executive review the relevant policy and consider a change to that policy, as may be appropriate, to enable Bargaining Committee members to receive fair and reasonable compensation for hours worked above and beyond their regular

working hours, while on Employer-paid travel status, or on PEA union leave, in situations where travel during weekends and evenings is required.

- THEREFORE BE IT RESOLVED that the Executive review the PEA travel expense policy and propose a change to that policy, as may be appropriate, to allow the entitlement of the \$15.00 incidental allowance to PEA members or staff on Association business for each night away from home while on travel status or if they claim at least two meals in a single day (rather than the claim being restricted to lunch and dinner).

Social

- THEREFORE BE IT RESOLVED that the PEA supports clean energy projects and energy alternatives that do not further climate change and lobbies the provincial and federal govern-



ments for the development of clean energy alternatives; and BE IT FURTHER RESOLVED that the PEA reviews its policies and practices and strives in all aspects of its operations to be environmentally responsible.

- THEREFORE BE IT RESOLVED that PEA denounce violence and discrimination based on sexual orientation, gender identity or expression (SOGI); and BE IT FURTHER RESOLVED that PEA educate members about available resources to support acceptance and inclusion of LGBTQ members; and BE IT FURTHER RESOLVED that PEA call upon members to speak out against discrimination in the basis of sexual orientation and gender identity, and take proactive steps to prevent the occurrence of intolerant or discriminatory acts; and BE IT FINALLY RESOLVED that PEA support non-discrimination in both the workplace and in em-

ployment legislation and that PEA support legislative and collective bargaining initiatives that include sexual orientation and gender identity protections to safeguard members from discrimination on the job.

- THEREFORE BE IT RESOLVED that the PEA refers the matter of the PEA supporting federal, provincial, territorial, and municipal governments fully adopting and implementing the United Nations Declaration on the Rights of Indigenous Peoples as the framework for reconciliation in Canada and also supporting continuing implementation of the 94 calls to action by the Truth and Reconciliation Commission to the PEA Equity and Diversity Committee for consideration; and BE IT FURTHER RESOLVED that the PEA will provide information and education to members about Canada's Indigenous

Peoples and their rights, the United Nations Declaration on the Rights of Indigenous Peoples and the Truth and Reconciliation Commission.

- THEREFORE IT BE RESOLVED the PEA will lobby all levels of government in Canada to make, an Indigenous Peoples Day, a paid holiday.

Policy and Constitution

- THEREFORE BE IT RESOLVED that PEA continue its strong defence and representation for all of its constituent groups, regardless of membership size.
- THEREFORE BE IT RESOLVED that the PEA develop an equity and diversity strategy for the union; and that the PEA increase educational opportunities for members that emphasize training in equity and diversity.



- THEREFORE BE IT RESOLVED that the PEA remove references to Convention 2005 procedure (from the Constitution).
- THEREFORE IT BE RESOLVED PEA will develop a policy around levels of support for members who wish to become affiliated with Labour Councils and once developed, encourage all Chapters to affiliate with Labour Councils throughout British Columbia.

Two resolutions were referred back to committee and will be addressed by the PEA Executive.

ELECTION OF PEA TABLE OFFICERS

Elections were held for three of the four table officer positions. Congratulations to the four members who were elected to PEA table officer positions:

- Shawna LaRade (GLP), president (new)
- Cherene Palmer (HESU), first vice-president (new)
- Ronda Field (HSP), second vice-president (new)
- Melissa Doyle (UVic), secretary-treasurer

Thank you to outgoing table officers Frank Kohlberger (president), Sheldon Martell (first vice-president) and Susan Dempsey (second vice-president).

SERVICE AWARD

PEA service awards are presented to members who have demonstrated substantial and continuous service to the union. Sheryl Karras from the UVic chapter was the recipient of this year's award. Sheryl was nominated by the UVic chapter executive.

Her nominators praised her commitment to the union: "Sheryl has committed years of her life and work to supporting the UVic chapter executive as a director-at-large, vice-chair, and chair. She has defended our chapter at the bargaining table on numerous occasions and brought fair agreements back to our members. She brings a cool head and a rational mind to all conversations and is never afraid of voicing a minority viewpoint."

CELEBRATING FRANK KOHLBERGER'S CONTRIBUTIONS AS PRESIDENT

Frank Kohlberger has served as president of the PEA since 2010. He was not re-elected at Convention. His contributions to the PEA have been significant. Frank has been appointed to sit as a GLP member-at-large on the PEA executive.



MESSAGE FROM THE PAST PRESIDENT

At this May's Convention we elected several new table officers, including president, first vice-president and second vice-president. It will be a busy couple of years for the new folks, and as I still sit on the Association Executive, I look forward to helping them in their new roles.

A union is quite simply a group of members working to protect and achieve the best for each other. There is always more to do, and I urge all of you to continue to be active, vocal and involved in the

activities and decisions both in your chapters and at the broader PEA level.

It has been an honour serving you as president for the last nine years. We have achieved much in that time and have grown incredibly as a union. I remain committed to working on behalf of all members and am always open to hearing from you.

In solidarity,

Frank Kohlberger

DATA AND DECISIONS

PEA MEMBERS WORKING AT THE HOSPITAL EMPLOYEES' UNION
USE DATA TO INFORM CRITICAL MEMBER DECISIONS

WORDS JESSICA NATALE WOOLLARD

PHOTOS JOSHUA BERSON

When Aimee Cho tries to recall the year she became a delegate to the New Westminster and District Labour Council (NWDLC), she arrives at the date by associating it with a workplace tragedy: the deaths of two lumber yard workers in New Westminster. The heartbreaking story is emblazoned in her mind forever, to be used as a reference point for events that took place in January 2016.

It's not the only moment of this kind Cho recounts during our conversation. Each troubling incident she recalls, many involving a member of an equity-seeking group, reveals the extent to which Cho is impacted by the plight of others. Her empathy and concern for those around her are top of mind in the work she does for the Hospital Employees' Union to improve safety in the workplace.

"People need to be able to go to work and come home in as good a shape or better," Cho says.

A data administrator in HEU's research department, Cho collects statistics on workplace safety related to the HEU's 49,000 members, all working in the health care system as support employees in areas such as administration, maintenance and hospital units and in occupations that include technicians, clerks and porters. The data she gets is collected from external bodies such as WorkSafeBC, the Province of BC and regional health authorities, and is used to inform HEU decisions that help members stay safe at work.

Cho is a member of the Hospital Employees' Staff Union (HESU) chapter, which joined the PEA in 2017. Having been an HEU member for many years and more recently one of its 150 employees, Cho is passionate about the HEU. "I care about all the things HEU cares about," she says. The connection is reinforced because of family: her sister is an HEU member and her mother and two aunts were too.

"As a union, we have an obligation to support our members and help them," she explains about her work with the HEU. "Without information, we don't know





“Everybody needs to be able to come home safely at the end of the day, mentally and physically”

who needs help; we don't know where the issues are, or what the issues are. With good information, we can target where our resources need to go. We can follow up where our members are complaining violations are happening.”

She gives a practical example to illustrate her role. Care aides are a large component of HEU's membership, but “they are one of the jobs that are at the highest risk for violence in the workplace and musculoskeletal injuries,” Cho says. She explains that care aides provide intimate care, including bathing, to patients, some of whom suffer from dementia and may not be cooperative. Their work is physically demanding and exposes them to violent outbursts, verbal abuse, threats and physical harm, particularly when they go into a patient's home alone. To identify where care aides require support, Cho might examine data on WorkSafeBC claims filed by HEU care aides across the province. The data will inform what changes are needed and where.

“Everybody needs to be able to come home safely at the end of the day, mentally and physically,” she says. “The data helps target specific sites where workers are at greater risk of bullying and harassment, violence or injury, and it also helps identify sites that WorkSafeBC has never inspected.”

Without information, we don't know who needs help; we don't know where the issues are, or what the issues are. With good information, we can target where our resources need to go. We can follow up where our members are complaining violations are happening.

Essentially, Cho's numbers help tell the story of HEU members in the workplace and their day-to-day experience. "Good information and good data analysis make unions more efficient," she adds.

Cho came into the data administrator role in 2017. Previously, she worked with HEU as an administrative assistant, joining the team in 2010. Prior to that she was an inventory tech at Vancouver General Hospital, having shifted from a career in sales, the industry she trained for by earning a marketing management diploma from Kwantlen College in 1989.

As a new HEU member, Cho became involved in union activity, serving as a shop steward, a worker rep on the JOHS committee, a site rep and then secretary-treasurer of the UBC Hospital Local. Now a PEA member, she continues to dedicate her time to improving work life for the membership. She's on several PEA committees, including the Equity and Diversity Committee. She has served on the executive of the small-union caucus of the NWDLC

since 2016 and represents NWDLC on the BC Federation of Labour Human Rights Standing Committee.

Championing equity issues is something Cho makes more and more room for in her life. She says her interest in equity started at a young age, with "Sesame Street." The TV show has long been a trailblazer when it comes to embracing diversity and inclusion, tackling issues like race and disability throughout its 48-year history. The show ignited in Cho, who grew up in the lower mainland, a spark to stand up for those whose voices aren't being heard and to foster an environment where all people are welcome at the table and are part of the conversation.

That spark caught fire in adulthood, thanks in large part to her family: she and her husband, an immigrant from Hong Kong, are the proud parents of a transgender son. Her son's decision to transition medically is what set Cho's commitment to equity ablaze. "I realized I had a lot of attitudes and beliefs that were harmful to our relationship and that

I needed to change," she recounts. "It wasn't good enough for me to just be accepting of trans people, I needed to be loving of trans people, not in spite of them being trans but because they are trans."

In Cho's work and personal life, helping others is the common thread. She doesn't claim to be doing everything right, and she knows that no matter our good intentions, our level of education, or our exposure to equity-seeking groups, we all still have a ways to go to being accepting, supportive, understanding and loving of each other.

Lining up her actions with her heart and values was a good place to start.

Says Cho, "I really believe that we're stronger together."

GENERAL NEWS

PEA CERTIFIED TO REPRESENT UNIVERSITY OF VICTORIA PROFESSIONALS

The PEA has a new bargaining unit. On September 7 the B.C. Labour Relations Board issued a certification order naming the Association as bargaining agent for nearly 400 academic and administrative professionals (A & AP Staff) employed by the University of Victoria. The certification order is the culmination of efforts that commenced two years ago but came to a head only in the past few months.

The PEA in the 1990s

Looking back at some of the events and people that shaped the PEA over the past 45 years

Excerpt from *Duty with Dignity: The Professional Employees Association in British Columbia, 1974–2014*, by Ben Isitt

Above: In the September 20, 1995 issue of *The Professional*, the newest chapter of the PEA, University of Victoria Academic and Administrative Professionals is announced.

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... and after the A & AP Staff group met

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“In the 1990s, the PEA achieved gains for its members in the provincial public service and beyond, reflecting improved relations with the provincial government and a more supportive legislative climate after the New Democrat Party returned to power in the 1991 election. While tensions could be discerned with the employer and compensation levels continued to be constrained, there was greater engagement between professionals and a more respectful tone in collective bargaining and the workplace.”

-Duty with Dignity

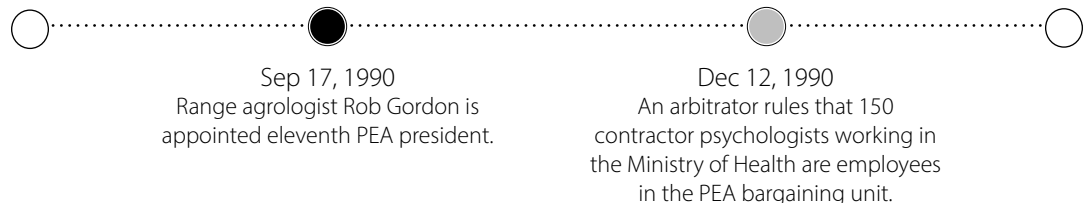
ORGANIZING THE UNIVERSITY OF VICTORIA

In 1995, the PEA organized professionals at the University Victoria, forming the Association's second-largest bargaining unit with 400 new members consisting of academic and administrative professionals. This marked the culmination of an organizing effort that extended back more than a decade. In the winter of 1982-83, PEA organizer Bob Wiseman had embarked on a concerted organizing drive on the campus, endeavouring to extend the benefits of collective bargaining to administrative support staff, graduate students and specialist instructors. While the drive was not successful at the time, it helped

plant the seeds of collective bargaining among employees at the university.

In the 1990s, in the face of budgetary restraint, there was a renewed effort among UVic employees to organize. Over a two-year period beginning in April 1993, an informal staff group coalesced into an organized force composed of administrative officers, systems specialists, program coordinators, academic assistants, laboratory instructors and others. This group canvassed several different labour organizations to assess options for affiliation, and chose to pursue bargaining rights through PEA. An organizing drive was launched in the spring and summer of 1995, with more than 55 per cent of

Memorable Events from the 1990s



professionals in the proposed bargaining unit signing membership cards. On September 7, 1995, the PEA was certified by the BC Labour Relations Board to represent academic and administrative professionals at the University of Victoria.

In the wake of this certification victory, the Association and organizing committee convened a meeting to form a UVic chapter, where a provisional constitution was adopted and a chapter executive elected. Contract proposals were drawn up and negotiations for a first contract opened with the university in January 1996. Progress at the negotiating table was slow and uneven. “The pace won’t be confused with the Indianapolis 500,” *The Professional* quipped. Stumbling blocks were encountered on issues such as hours of work, with the employer resisting contract language defining the 35-hour weekly work schedule, as well as provisions on overtime and salary. UVic offered a maximum 1.75 per cent increase, while the PEA demanded salary progression at a higher rate. One hundred and thirty PEA members who attended a union meeting in June 1996 concluded that the university’s offer was insufficient to reach a first contract “without a confrontation.”

When classes resumed in September 1996, the PEA responded to the university’s intransigence after eight months of negotiations by scheduling a strike vote. This forced the employer’s hand, and on the evening of September 17, 1996, 36 hours before the strike vote was scheduled to occur, the two sides reached a tentative agreement, providing for annual salary progressions of 3 per cent over the life of a three-year agreement. UVic

members ratified the agreement with a vote of 206 to 1, and the contract was signed with the university in October 1996.

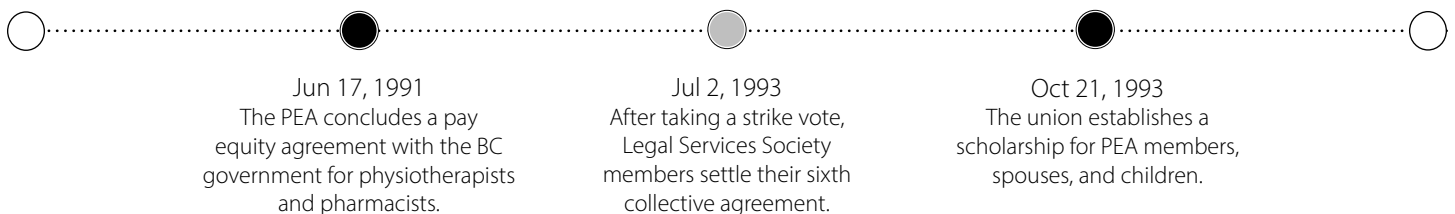
OTHER BARGAINING UNITS IN THE 1990s

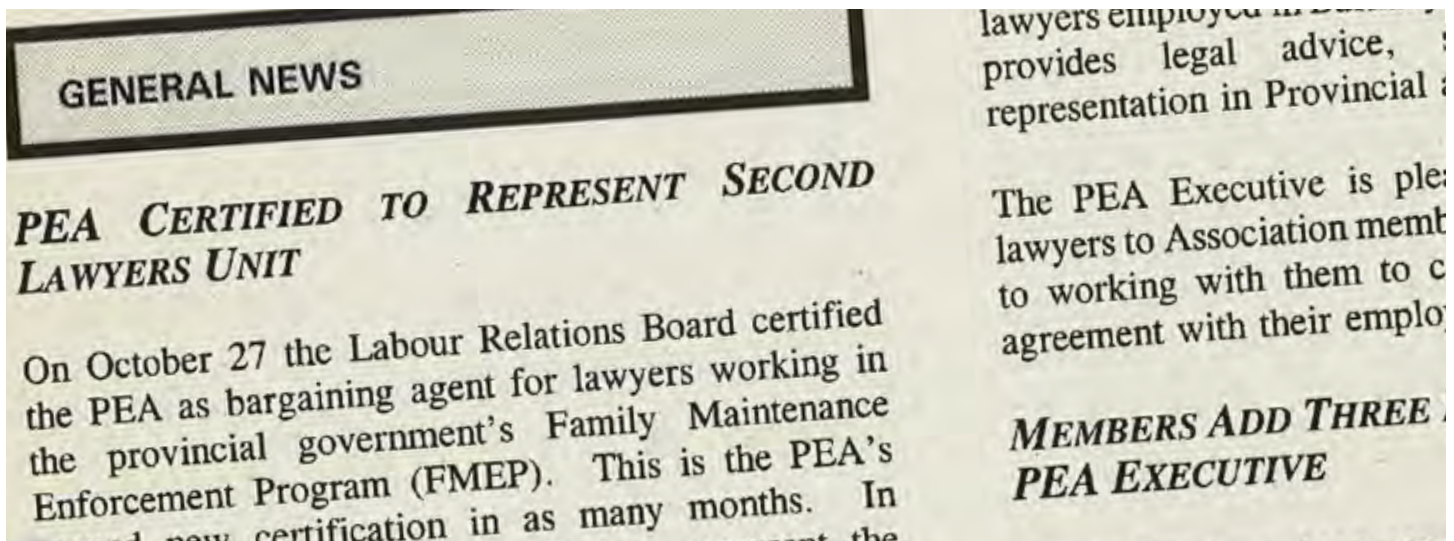
Developments were also afoot in PEA bargaining units outside the provincial public service. In October 1995, a month after the UVic bargaining unit was certified, the PEA received certification from the LRB to represent 15 lawyers working at BC’s Family Maintenance Enforcement Program. The lawyers in the new bargaining unit were employed by a private firm contracted by the government to operate the program, Themis Program Management. In June 1996, the lawyers reached a first contract with Themis.

This certification, as well as the larger certification at the University of Victoria, helped to offset the financial and membership impact of several certification losses in the mid-1990s. In 1994, the PEA voluntarily relinquished its certification for seven physiotherapists and pharmacists at the George Pearson Centre seniors’ care facility in Vancouver to the larger bargaining unit in the Health Sciences Association, as the employer, Western Rehabilitation Society, had merged its operations with other Vancouver-area facilities.

However, another certification loss threatened to have a very substantial financial impact on the PEA’s dues base when, in 1995, the 300-member bargaining unit at the Greater Vancouver Mental Health Services Society

Memorable Events from the 1990s





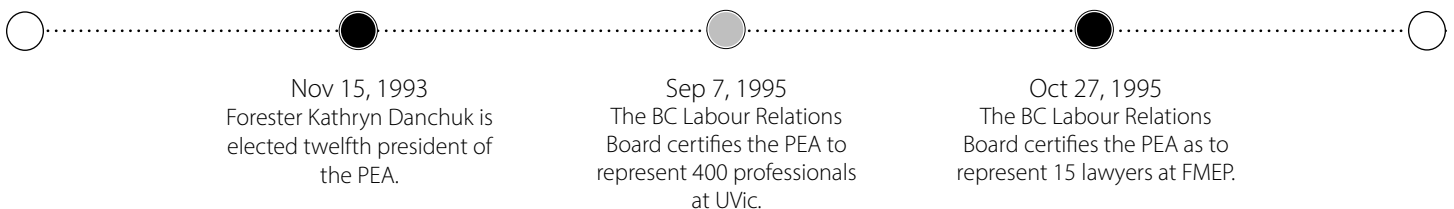
Above: The Family Maintenance Enforcement Program was announced as a new chapter of the union in *The Professional* in 1995.

was divided between the Health Sciences Association and the Hospital Employees Union. The change arose from a reorganization mandated by Bill 48, legislating amendments to the Health Authorities Act to devolve responsibility to regional health authorities. This change was followed by the transfer of a further 180 PEA members from the Ministry of Health to local health authorities.

The PEA expressed anger at “the unilateral removal of health sector members,” which “ripped a quarter of the membership out of our union.” However, for the remainder of the decade, a series of legal and jurisdictional challenges would keep this bargaining unit as well as the group of professionals employed by health authorities within the PEA.

The PEA’s position was buttressed by its substantial cash reserves, which stood at nearly \$4.5 million in 1996. This provided a formidable war chest to finance the organization of new groups of professionals to offset certification losses, and to provide a measure of income security for members in the event of a strike. Professionals had defeated a resolution at the 1992 annual general meeting that would have seen dues reduced by 20 per cent. Speakers at that meeting pointed out that PEA dues, levied at a rate of 1 per cent of base pay, were substantially lower than the 1.5 per cent paid by BCGEU members and the 2 per cent levied in some unions. The PEA’s dues rate had not been adjusted since its inception, with the exception of a brief period in the early 1980s when a special levy was approved to compensate professionals for lost wages arising from their respect for picket lines during a BCGEU strike.

Memorable Events from the 1990s



2018 FINANCIAL REPORT

Below Marc Joly, PEA financial officer, and Melissa Doyle, PEA secretary-treasurer.



MESSAGE FROM THE SECRETARY-TREASURER

I'm humbled to have been re-elected to the role of secretary-treasurer at the PEA's convention in May. This report provides a snapshot of our organization's financial health. It includes the 2018 audited financial statements and the 2019 budget.

Members will notice more "red ink" in the 2018 statements than is normally the case. This is the result of market-driven investment losses in 2018 that dovetailed with a year of higher operating costs related to collective bargaining and member servicing.

Our union funds its operations through union dues and the use of investment income. These revenues allow us to keep our dues rate low and still meet the needs of our membership.

The PEA's investments have been accumulating for decades, as we have not engaged in much job action. The investments are a backstop that allows our union to provide strike or picket-line pay to our members. PEA policy requires us to maintain a reserve large enough to cover two months of strike pay for the PEA's largest chapter. We must also hold enough in investments to take a grievance to the Supreme Court of Canada.

Investment income suffered in 2018, especially in the final quarter. These losses impacted our year-end bottom line, however markets have since recovered, and we're on track to posting normal investment returns. Throughout the PEA's history, our investments have seen steady growth. 2018 was an outlier, rather than the new normal.

2018 was a challenging year for the PEA in terms of increased expenses. In 2018 the PEA negotiated collective agreements for 87 per cent of the membership. The more intensive level of negotiations came with significant operating expense increases. This level of bargaining was not anticipated in 2018. Many of our chapters went to the bargaining table early. Due to the precarious balance of power in the legislature, we believed it to be in the best interest of our members to bargain earlier with the provincial government.

Expenses related to membership services also saw a significant increase. Membership services include all activities related to grievances, arbitration, and mediation. They also encompass new-member materials and chapter grants. Finally, we transitioned several items historically funded from investment income into operating expenses. These increases combined with market-driven losses in investment income led us to a significant operating deficit.

We are pleased with the outlook for 2019. The operating balance in the budget is moving closer to the black and, when combined with projected investment revenue, should leave us with a surplus. I encourage you to review the audited financial statements on our website at [**pea.org/financials**](https://pea.org/financials).

Thank you for the trust you have put in me to steward our union's finances.

Melissa Doyle
Secretary-Treasurer

BALANCE SHEET

The balance sheet is a snapshot of the financial position of the PEA. It incorporates all of the financial assets (what is owned) and liabilities (what is owed), for an overall picture of our financial health.

In 2018, the PEA's net assets decreased by \$430,322. This decrease was driven by investment losses and increased spending in negotiations and membership services. The increased spending was due to heavy bargaining on behalf of 87 per cent of our membership. Bargaining of the new collective agreements occurred earlier than expected.

ASSETS	2018	2017
CURRENT		
Cash	\$161,536	\$227,692
Accounts receivable	\$174,013	\$160,373
Prepaid expenses and supplies	\$39,101	\$32,394
	\$374,650	\$420,359
Capital assets	\$26,966	\$20,619
Investments	\$10,383,012	\$10,773,971
	\$10,784,628	\$11,214,949

LIABILITIES AND NET ASSETS

CURRENT		
Accounts payable and accrued liabilities	\$355,949	\$277,597
Employee benefits payable	\$16,508	\$14,533
	\$372,457	\$292,130
NET ASSETS		
Unrestricted fund	\$10,279,087	\$10,811,643
Invested in capital assets	\$26,966	\$20,621
Internally restricted funds	\$106,118	\$90,555
	\$10,412,171	\$10,922,819
	\$10,784,628	\$11,214,949

MEMBERSHIP GROWTH

237

NEW MEMBERS SINCE 2016

+150

HESU

+34

HSP

+19

GLP

+15

UVic

+11

SMS

+6

LSS

+1

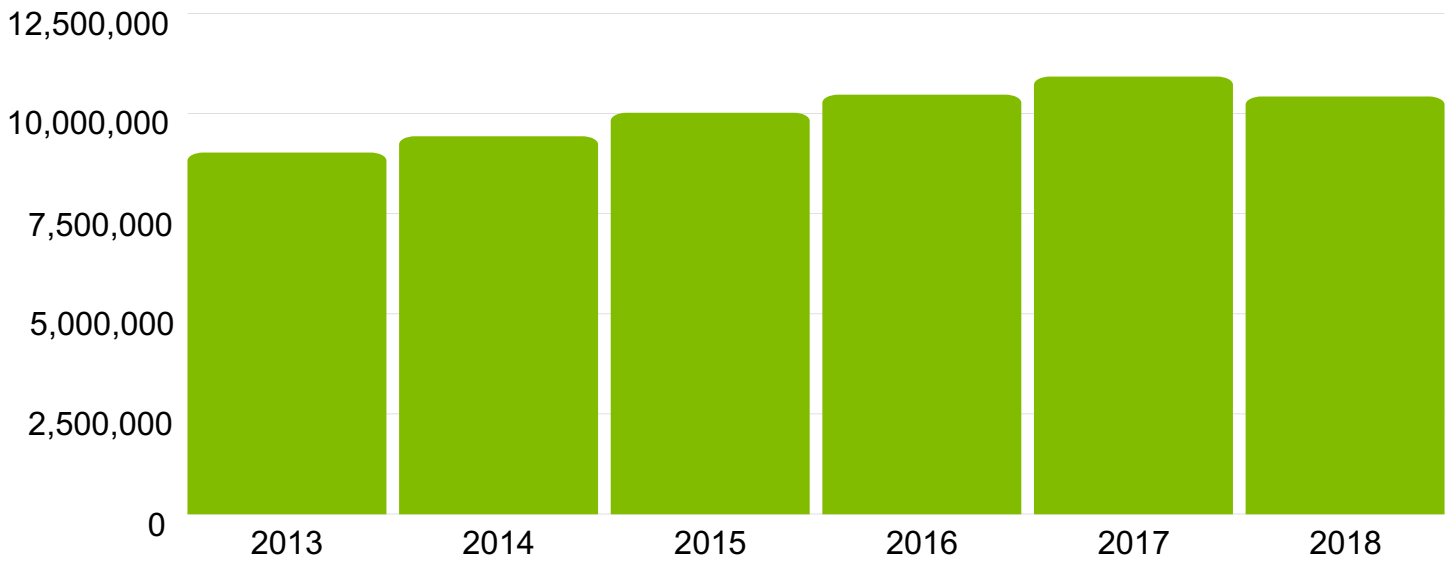
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NO MEMBERSHIP CHANGES IN FMEP

PEA Retained Earnings



The graph above demonstrates the ongoing growth of PEA investments. This money is reserved for use in the event of a strike, in case we need to take an arbitration to the Supreme Court of Canada or to fund initiatives that defend our union or are strategic initiatives.

REVENUE

PEA revenue comes from two sources: membership dues and investment income.

Membership Dues

Dues revenue is used to fund our operational expenditures. The PEA's membership dues are set at 1 per cent of wages. This dues rate was set in 1974 by the founding members of our union. It has not increased since then, except for a special levy assessed in the 1980s to replenish membership coffers after a BC Government and Service Employees' Union (BCGEU) strike. Our low dues are a source of pride with our members and attractive to potential PEA members.

The PEA's dues revenue grew in fiscal 2018 as a result of members' wage increases and the addition of new members into our union.

Investment Income

Through long-term diligence, the PEA has been able to grow its investment fund. Looking back, in recent history

the PEA has only seen two years of negative returns. 2018 was one of those years. In 2018, our portfolio returned -2.72 per cent. Investment revenue for 2018 totalled \$-290,959 after expenses.

The poor investment conditions of Q4 2018 have begun to reverse. The PEA portfolio is up 5.10 per cent to March 18, 2019. Despite the loss in 2018, our investments have a strong history of increasing growth. Prior to the market decline in 2018, we averaged investment returns of 4.26 per cent over the previous 10 years.

We are concerned with how our investments impact the global community. The following policy guides how our investments are managed: "The Committee will minimize, or where practical eliminate, investment in companies that engage in war profiteering, abuse human rights, use exploitative labour practices, contribute to carbon emissions or whose major activity is the production or manufacture of tobacco products." Our investment advisors are all signatories to the United Nations Principles for Responsible Investment (UNPRI) and are mandated to screen for governance and environment considerations. The UNPRI is the world's leading proponent of responsible investment.

EXPENSES

The PEA incurs expenses in two major areas: operational expenses and defence of the union expenses.

Operations

In 2018 the PEA negotiated collective agreements for 87 per cent of the PEA's membership. This flurry of negotiations resulted in operating expense increases. Also, in 2018 we transitioned several items historically charged to defence of the union into our operating expenses, as they had become annual undertakings.

Membership services saw a significant increase over 2017. Membership services include all activities related to grievances, arbitration, and mediation. They also encompass new member materials and chapter grants. Legal costs in a couple of chapters, and actuary expenses of over \$25,000 related to changes to the BC Public Service Pension Plan, were unanticipated. There were additional costs with 150 new HESU members.

Negotiations saw an increase of \$196,252 related to the significant amount of bargaining that occurred and mostly concluded in 2018. Expenses charged to negotiations include union leave for members attending the bargaining table, member and staff travel and member meeting expenses related to bargaining.

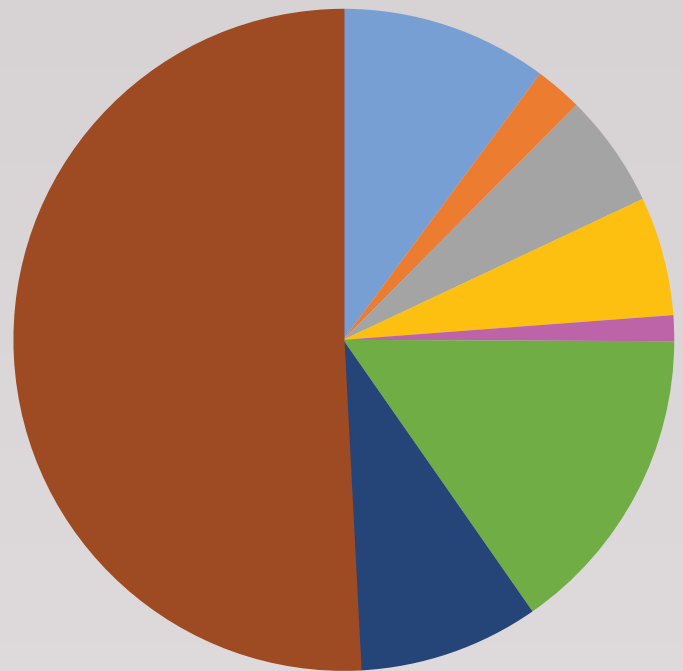
Investments OR Defence of the Union

Our investments are a backstop that allows our union to provide strike or picket-line pay to our members. PEA policy outlines the minimum investment holdings needed. The PEA must be able to sustain strike pay for two months for the PEA's largest chapter, the GLP at the rate of up to \$125 a day; \$125 is considered to be above average in comparison to other unions. The estimated cost for this is \$6,807,000 (which includes strike pay plus lost dues revenue). The PEA must also hold enough in investments to take a grievance to the Supreme Court of Canada. We estimate these costs to be \$175,000, based on experience and a recent review by our financial officer, a chartered professional accountant.

Defence of the union initiatives are activities that go beyond the scope of our regular operations; they are driven by the strategic priorities approved by the Association executive and/or by unforeseen, emergent events that require funds.

Defence of the union expenditures in 2018 were \$86,334, a decrease from 2017. Our main use of defence of the union funds was to fund BCFED and CLC dues, send delegates to the BCFED convention and send six members to the CLC Winter School.

2018 Operating Expenses



ADMINISTRATION
Costs of running operations of the organization (rent, equipment, etc).

COMMUNICATIONS
The publication of *The Professional*, social media, email, graphic design, photography, media relations and the website.

CONVENTION
The PEA's biennial convention is a key component of our democratic structure.

EXECUTIVE
Costs for meetings of the PEA executive and executive committees, which include travel, accommodation and paid union leave.

GRANTS, DONATIONS, SCHOLARSHIPS
This category provides funds to the Giving Back program and our scholarship and bursary program for PEA members and their families.

MEMBERSHIP SERVICES
Expenses in this area include new-member materials, local rep training, legal fees, chapter grants and servicing-related expenses.

NEGOTIATIONS
This includes paid union leave for bargaining committee members as well as meeting costs, travel costs, and legal fees.

STAFF SALARIES AND BENEFITS
This includes costs for staff salaries, training and benefits.

2018 Operating Expenses

ADMINISTRATION	\$209,050
Bank charges and interest and amortization	\$967
Equipment repairs and lease costs	\$29,636
Occupancy costs - rent and utilities	\$120,702
Postage, stationery and publications	\$23,239
Professional fees	\$12,000
Telephone and internet	\$12,523
COMMUNICATIONS	\$47,617
CONVENTION	\$114,653
EXECUTIVE	\$119,888
GRANTS, DONATIONS AND SCHOLARSHIPS	\$25,913
Grants and donations	\$18,913
Scholarships and bursaries	\$7,000
MEMBERSHIP SERVICES	\$314,440
NEGOTIATIONS	\$182,919
STAFF SALARIES AND BENEFITS	\$1,048,489
	\$2,062,969

2018 Defence of the Union Expenses

BCFED membership dues	\$25,634
Canadian Labour Congress dues	\$24,044
BCFED convention	\$8,749
BCFED expenses	\$3,133
CLC Winter School	\$19,735
Professional Reliance Working Group	\$6,570
PEA water bottles	\$3,397
Public Service Union Network	\$2,946
HSP raid by BCNU	\$428
Culture of recognition	\$186
Strategic planning session	\$(2,171)
Executive leadership development	\$(3,371)
	\$89,280

BUDGET 2019

	2019 Budget
OPERATING EXPENDITURES	
Administration	\$208,000
Communications	\$50,250
Convention/Education conference	\$96,000
Executive	\$135,000
Grants, donations and scholarships	\$25,000
Membership services	\$291,100
Negotiations	\$56,000
Staff salaries and benefits	\$1,051,950
TOTAL OPERATING EXPENSES	\$1,913,300
DEFENCE OF UNION EXPENDITURES	
TOTAL DEFENCE OF UNION EXPENSES	\$272,500
CAPITAL EXPENDITURES	
TOTAL CAPITAL EXPENSES	\$27,000

Budget 2019 is a planning tool to help guide the effective use of the PEA's assets.

Budget increases are anticipated in membership services and executive. Membership services increases are due to expected hearings, grievances and arbitrations, increased legal costs, and a one-time increase to membership materials. Executive increases more accurately reflect the actual costs incurred by the PEA. The budget anticipates negotiation expenses related to finalizing collective agreements, as well as negotiating agreements for the Oil and Gas Commission and Legal Services Society chapters.

Decreases are anticipated in a number of areas including convention, negotiations, and staff salaries and benefits. These are regular, cyclical decreases.

Defence of the union is increased due to the creation of a full-time member-development staff position, increased efforts on lobbying, and campaigns.

Capital increases are related to office renovations to accommodate additional staff.

CHAPTER UPDATES

FAMILY MAINTENANCE ENFORCEMENT PROGRAM

TRANSITION TO CROWN CORPORATION

On May 13, the BC government announced that FMEP will be established as a Crown corporation in the fall. All FMEP members will receive job offers at the new Crown corporation, and the PEA will remain your union.

Bargaining will be an important element of the transition to the new Crown corporation. We have been clear with government stakeholders involved in this process—our members' wages are low relative to Crown council and other public sector lawyers. Catching up will be a key bargaining issue. As the dust settles, we will keep you apprised of developments with bargaining.

BARGAINING COMMITTEE

The FMEP bargaining committee has been struck. Jennifer Anderson, Richard Benwell and Brent Hird will serve on the committee. FMEP members had an opportunity to participate in a bargaining survey in May.

GOVERNMENT LICENSED PROFESSIONALS

BC BUDGET CONSULTATION

On June 10, Executive Director Scott McCannell presented to the Select Standing Committee on Finance and Government Services. He presented recommendations on the professional reliance model and the need for more licensed science officers as a critical element of correcting professional reliance in BC.

EDUCATION OPPORTUNITIES

The GLP chapter sponsored two members to attend union education opportunities this summer. Kelly Loch

attended the Summer Institute for Union Women in Vancouver, and Kara Imhof was sponsored to attend Camp Jubilee for Young Workers.

GLP GRANTS AND DONATIONS

GLP members can submit requests for funding of up to \$200 for an activity or event. The GLP supports a wide range of activities, including children's parties and sporting events.

For the full eligibility policy, visit pea.org/chapters/ulp/grant-form. All grant and donation requests shall be submitted via the online GLP Grants and Donations form.

Remember to submit your online request early and before December 2019 for year-end events!

HEALTH SCIENCE PROFESSIONALS

EXECUTIVE

Laura Kuypers has been officially appointed as the new PEA executive member in place of Ronda Field, who is now the PEA's second vice-president.

MEMBER MEETINGS

Labour Relations Officer Rhiannon Bray and chapter chair Ronda Field will be meeting with members at their worksites this fall. Stay tuned for information.

LAW SOCIETY LAWYERS

MEETING AND MIXER

Thank you to all the LSL members who attended the meeting and mixer at Yaletown Brewing in June.

LEGAL SERVICES SOCIETY

SUBMISSION TO BC BUDGET

The PEA and LSS chapter executive have submitted to the BC Budget Consultation. The submission re-



views the history of cuts to legal aid funding and PEA members and calls for increased funding. Find out more at pea.org/lss.

EXECUTIVE

Debby O'Leary, Megan Olson and Jeff Speed have agreed to serve on the chapter executive, while Jeremy Orrego will serve as the chapter chair and LSS rep to the PEA Association Executive. There is still one vacancy on the chapter executive. Contact Sam Montgomery if you are interested in this role.

BARGAINING COMMITTEE

Thanks to everyone who expressed interest in serving on the bargaining team. Judith Kenacan, Debby O'Leary, Jeremy Orrego and Michael Smith have agreed to serve on the bargaining team. Harshada Desphande will be the alternate member.

We were recently served notice to bargain by the employer and are looking at July dates for negotiations.

OIL AND GAS COMMISSION

BARGAINING

The PEA recently completed a bargaining survey with OGC members. Bargaining committee members are

Stu Venables, Michelle Gauthier and Jeff Johnson (alternate). The PEA anticipates going to the table with the employer in July or early September.

UNIVERSITY OF VICTORIA

POND PARTY

The UVic chapter executive is hosting their Annual Summer Pond Party for UVic members on Wednesday, July 17, 4:30 to 7:00 p.m., at the University Club.

This is an opportunity to meet your colleagues in a relaxed and friendly setting on the patio and in the Fireside Lounge at the University Club. A selection of finger foods will be available. The drinks bar will have the usual selection of wines, beers and soft drinks. Six \$30 gift certificates for the UVic Bookstore will be given away as door prizes!

Members may bring one guest and may bring their children too. You and your guest will be offered a ticket for a free drink, but we exclude guests from the draw for the door prizes.

PEA UPDATES

EXECUTIVE CHANGES

The elections at Convention 2019 saw a turnover in our table officers. We welcome these new members to the Association Executive.

- Shawna Larade, GLP, president (new)
- Cherene Palmer, HESU, first vice-president (new)
- Ronda Field, HSP, second vice-president (new)
- Melissa Doyle, UVic, secretary-treasurer

The members-at-large on the executive also changed as a result of the election. Frank Kohlberger has taken Shawna Larade's vacated GLP seat, and Laura Kuypers has taken Ronda Field's vacated HSP seat. There are two seats on the executive that rotate annually among the four smallest chapters. This year, new members Jeremy Orrego, LSS, and Brent Hird, FMEP, replace James Laitinen, ORL, and John Nalleweg, LSL.

COMMITTEE UPDATES

The Equity and Diversity Committee reviewed the 94 calls to action detailed in the report from the Truth and Reconciliation Commission. The committee will be incorporating the calls to action as they work on the equity and diversity strategy mandated by convention delegates.

The PEA executive approved a \$5000 contribution to the BC Federation of Labour's Workers Deserve Better campaign. The campaign was successful in lobbying for improvements to both the Employment Standards Act and the Labour Relations Code.

PROFESSIONAL UNIONS NETWORK OF CANADA

The PEA is a member of the Professional Union Network of Canada (PUNC). The network includes unions representing professionals at the provincial and federal level.

The PEA will host a PUNC Steering Committee meeting in Victoria on August 29.

We also approved funding to support, to a maximum of \$2500, a study of the impact of artificial intelligence on unionized professionals. The study will be headed by PUNC and conducted by a Canadian university.

CONVENTION FOLLOW-UP

The PEA executive discussed Resolution Nine, which was referred by the 2019 Convention. The resolution states as follows:

THEREFORE BE IT RESOLVED that the PEA will refrain from using PEA member dues to fund salary or other forms of remuneration through deficit spending, also known as Defence of the Union, and

BE IT FURTHER RESOLVED that the PEA will limit deficit budgeting to a maximum of two consecutive years.

The executive rejected the resolution as presented.



November 18–19, 2019

ADVANCED LOCAL REP TRAINING

VICTORIA, BC

Over the two days local reps will learn about human rights, duty to accommodate, harassment, and organizing.

This session is open to all local reps and chapter executive members who have previously attended the basic level local rep training course.

Visit pea.org/localreps to register

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PEA MEMBER LUNCH & LEARN

Bring your lunch and dial into a 60-minute webinar where we unpack important issues relating to your collective agreement and the workplace.

September 17, 2019

12:00 - 1:00 p.m. (Pacific Daylight Time)

DUTY TO ACCOMMODATE

Employers have an obligation to adjust rules, policies or practices to enable you to participate fully. The purpose of these arrangements is to prevent or reduce discrimination. This is called the duty to accommodate.

To register visit pea.org/education

P|E|A

BC's Union for Professionals

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