

NEWS FROM UWFA

EDITORS: Gall Loadman and Karen Zoppa

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resident's Report

Perhaps it is just me but we seem to be very busy these days.

The executive has been meeting almost weekly and checking my schedule we have two joint consultative committees currently working, one on the Writing Program instructors and another on workload. Another is to be convened shortly to look at pay equity issues and UWFA is participating with other university constituencies on a committee discussing the recent Senate directive to publish QUIQ results.

On another front, we still have an outstanding policy grievance contesting the manner in which costs for the last early retirement plan were accounted for. Arbitration looms in the new year and so we hope to be back at the table on this issue shortly.

Mr. Axworthy's green paper has inflamed political discussion and we are looking forward to the university's response to Mr. Manness' challenges even as we are preparing one of our own. Looking west, Mr. Klein's white paper stands out as a far more chilling prospect than the winter's first snowfall and PI's (performance indices) provide fuel to warm the hearts of provincial education ministers.

The Manitoba Organization of Faculty Associations (MOFA) has been meeting far more regularly than in the past and is setting up a permanent office. MOFA has taken a clear stand on educational funding through a recent article in the Free Press by Errol Black and Robert Chernomas with input from all of the member faculty associations. Having recently met with CAUT representatives, we are currently preparing to put forward a

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strong motion for more directed action by CAUT at the grass roots and provincial levels.

These activities and events taken separately are important but could be considered business as usual for the association. I don't believe that they are. Our joint committees are right now dealing with wide ranging issues which go beyond local concerns at the University of Winnipeg.

The implications of events external to the university are having very real and immediate consequences on campus today and will have significant impact on the way we teach and the availability of research opportunities well beyond the next round of negotiations or the term of a new contract.

Yes, its that time again. Soon we will be collectively bargaining for our services to the university, but more than that, we have been served notice to come to the table for a much larger round. Mr. Axworthy's proposals, Mr. Manness' challenges and Mr. Klein's financial edicts are an opening position on education and the future of this country's intellectual capital.

If we don't come to the table we won't have a voice in the final contract. We won't be able to ask them for the research that supports their position and we won't be able to question or refute it. We won't be able to offer alternatives drawn from educational imperatives instead of merely fiscal ones.

Nor can we expect the universities to represent our concerns alone. To her credit, Dr. Hanen has formed a joint committee to respond to Mr. Mannes. At Brandon and the U of M the process appears to be much less democratic. These differences in administrative approach are mirrored across the country and must ultimately dilute the total response.

I urge you therefore to make yourself aware of the details of our current situation and to respond individually to them. We are not asking for a political position one way or the other - what we need are your thoughts as educators and researchers. Let the association know what your fears and alternatives are and allow us to represent them where we can.

CAUT has provided a draft letter for response to Mr. Axworthy's discussion paper which is now available from the UWFA office. Please make use of it or compose your own from scratch as you wish. Analysis and information are our stock in trade and, it seems to me, both are sorely needed in the current debate.

Tim Babcock,
President

The Electronic Association!

There is now a UWFA folder available through the university's electronic Bulletin system. Start your debate there.

To access the UWFA forum, simply type "BULLETIN" at the VAX \$ prompt and then type "SELECT UWFA". If you want to post a notice, simply type "ADD".

This forum will be used to provide UWFA information to members but more importantly it is available for you to ask questions and start discussions on whatever topic you see fit.

Also, Gary Russell has started a MOFA gopher server which is available after selecting "University of Manitoba" from the U of W Gopher menu. This server also provides FTP capabilities for certain electronic data. Currently the files available are both the U of W and U of M collective agreements and Mr. Axworthy's green paper summary.

Once logged on see BULLETIN FACULTY for further details.

REPORT ON THE 1994 WESTERN REGIONAL CONFERENCE OF FACULTY ASSOCIATIONS

Kristine Hansen, Psychology

Kim Best and I attended this year's Western Regional Conference of Faculty Associations, held in Edmonton, October 27 - 29. This is always a useful conference because of its manageable size and focus on local faculty association issues. The major theme, "The Challenge of Accountability", concerned comprehensive auditing, university accreditations, and performance indicators. If these buzzwords aren't familiar, they soon will be, and we need to educate ourselves. I've prepared a separate newsletter report on this topic, so I'll concentrate here on the other major conference focus, which was the common issues arising from individual association reports.

Collective Bargaining

Things are rough all over. Negotiations have been difficult and protracted, and settlements low. Most of what I heard had a familiar ring: demands for concessions on CDI's and salary structure, pension plan problems, and questions arising about the true future savings from early retirement plans and their true current costs. Several contract disputes have gone to arbitration.

There is a trend for difficult issues to be referred to joint consultative committees for resolution after negotiations conclude. (UWFA agreed to such committees in the last round at the table.) Other associations report slow start-up and slow progress for

these committees. I see a big red warning sign that we may wish to heed as we enter the next round of negotiations. Leverage may be hard to come by away from the main bargaining table, and stalemates on serious issues are a danger.

Sexual Harassment Policies

Several sexual harassment policies have been revised or renegotiated recently, and several universities are developing parallel human rights policies. Some associations complain that administrators' actions in this sphere have been punitive and short on due process. Associations are emphasizing education and prevention, and some are cost-sharing gender equity training programs with their administrations.

Government Policies

The media have exaggerated its contents: it does not propose the end of tenure, and it promises that "academic freedom will not be affected." It requires, instead, that financial exigency and redundancy clauses be negotiated at the Universities of Alberta and Calgary, where they currently do not exist. Most Canadian agreements contain such clauses, including our own, and they are generally seen as protection against arbitrary termination.

On the other hand, the scary implication arises that the Klein government believes such clauses will permit substantial numbers of terminations that aren't allowed under the current agreements. There are other problems. The government won't say what they want to see negotiated, while indicating they will impose what they want if they aren't satisfied. They will only say that this will be "a private enterprise model". The white paper also refers to "performance indicators" to be judged against "national standards", but it is unclear what these indicators and standards will be, and there is no provision for consulting faculty. Alberta faculty report that the universities have become increasingly "corporatized" by government interference and administrative inaction, and that the power of Human Resources personnel has risen in university internal affairs.

The white paper also contains plans for "applied degrees" to be delivered through community colleges, for limiting tuition fees while reducing university grants, and for expanding community college transfer credit. Clearly, more future Alberta students will take university-credit courses from faculty with no research role.

The General Conference Mood

While not absolutely all was doom and gloom, faculty across the West are beset by concerted attacks on collective agreements, administrations unable to

prevent encroachments on autonomy, and direct government actions like bargaining interference and major grant reductions. The general consensus was that we must fight for academic values and autonomy, and become more influential in governance matters. At the same time, we must help our administrations meet the demand for "accountability" by promoting openness in university operations, and by helping to set appropriate accountability criteria rather than allowing others to do it for us. (See the accompanying article on accountability.)

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Accountability: Opportunity or Attack on Autonomy Kristine Hansen, Psychology

Demands for university accountability are increasing, and faculty response was the major theme of this year's Western Regional Conference. (See conference report in this newsletter.) CAUT policy is that faculty should participate in university responses to ensure greater accountability by seeking governance changes that increase openness and transparency, the establishment of a national system of accreditation, and accountability provisions concerning teaching and research. Many faculty worry that governments are using the rhetoric of public accountability to rationalize more direct governmental control. We all know that the prevailing westerly winds can bring us more than weather, and events in B.C. and Alberta demonstrate the urgency and importance of our developing informed and considered responses to accountability mechanisms such as comprehensive auditing, performance indicators, and accreditation. I've summarized conference content on these issues below.

Comprehensive Auditing (Value for Money)

Fiscal restraint has increased demands that excellence be rewarded, poor performance be punished, and funds be expended where the payoff will be greatest (value for money). Roger Simpson, Principal with the Auditor General of Canada, told us that whether the universities like it or not, governments will increasingly demand comprehensive audits, which go far beyond traditional financial auditing to assess "efficiency, economy, and effectiveness." Such audits access "hard data indicators" against "assertions" (derived from the university's mandate, mission, etc.), making comparisons to similar programs and institutions. The wide scope of comprehensive audits encompasses program evaluation, financial auditing, institutional efficiency assessments, and anything else deemed relevant.

Mr. Simpson suggested we consider how to make comprehensive audits work for us, rather than be threatened by them. If we become involved in defining

assertions and indicators so that assessment is valid, he suggested, both administrators and faculty can obtain credible outside evidence that we're doing what we say we do. If we don't we run the risk that auditors will develop other measures that are disadvantageous. He urged faculty to push for the involvement of non-accountant specialists (e.g. active or retired academics), to seek substantial input in setting audit criteria, and to seek the opportunity to see draft reports and correct misperceptions.

Responses were mixed. Some faculty sought further elaboration, while one commented, "I've never understood the logic that says we'd better do it to ourselves before somebody else does it to us."

Performance Indicators

SSHRC President Lynn Penrod discussed the difficulties involved in developing quantitative "PI's" that both summarize accurately complex activities, and are valid indices of desirable performance. She, too, opined that blind resistance was foolhardy, and that academics will fare best by using their own expertise to help develop credible PI's.

Bill Bruneau (CAUT Vice-President) responded that many indicators developed to date have been dangerous to the academic enterprise and reflective of undesirable aims (e.g., low faculty - student ratios, rapidity of degree completion ignoring students' need to work, speed with which graduates find jobs in secondary and tertiary industries, etc.). He argued for an attempt to transform the notion of accountability by rejecting quantitative summary data in favour of complex qualitative description that captures the complexity of what we do. He also suggested we might want to rate governments on PI's measuring how well they support higher education, and generate an economic climate that provides meaningful jobs that utilize graduates' skills "effectively."

Accreditation

CAUT's national accreditation system proposal would ensure individual university accountability by reviewing teaching, research, library holdings, student services, community service, academic freedom, non-discrimination, diversity, administrative effectiveness, and financial efficiency. (See CAUT, Governance and Accountability, a report worth reading - available in the UWFA office). The accreditation agency would be privately owned by Canadian universities and governed by a commission representing the AUCC, CAUT, the granting agencies, and the Council of Ministers of Education, with an emphasis on appointees chosen to represent the public interest. In addition to demonstrating accountability, CAUT maintains that such a system would provide better academic control over degree-granting status than would provincial governments, and would provide a bulwark against U.S.

college incursions into the Canadian degree market under NAFTA. Apparently, the AUCC has been cool to the accreditation idea.

Ernst Benjamin, outgoing General Secretary of the American Association of University Professors, told us that accreditation is far preferable to performance indicators, etc., because it relies on expert opinion rather than bureaucratic judgements, and because it allows the assessment of complex phenomena rather than relying on simple measures. He also argued that substantial accountability provisions already exist, and that we should emphasize this fact. Boards already exist to ensure public accountability. Governments already direct through licensure, auditing, and funding control. Universities compete for enrollment and grant funds, and "the market" determines outcomes. He also stressed that we must demand that accountability systems measure inputs (funding, staffing, material resources) as well as outputs. He gets my personal prize for quote of the day: "Why is it that when the Western world is privatizing everything in sight, they want to socialize the universities?"

Conclusion

If nothing else, the conference made it apparent to me that we UWFA members must inform ourselves about accountability issues and give serious thought to our responses, both individually and collectively. Maybe we don't have to "do it to ourselves", but can instead influence agendas so that "accountability" means a fair and accurate assessment of whether we meet appropriate and desirable institutional goals, in a context that considers what we have to work with as well as what we produce. It seems clear that unless we undertake involvement to this end, "they" will indeed "do it to us".

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SURPRISES ON TURNING 65

John Ryan, Geography

This past summer on August 13 I turned 65 (a birthday I share with Fidel Castro, but he's 3 years older and has done a few more things).

My first surprise was staged by my wife, aided and abetted by Annette and Reg Skene, to whose house I was lured for a truly grand surprise party - with about 50 people to regale me with wine, food, and song. It was an evening worthy of launching at least another 35 years...

My second surprise came on August 15, this one staged by Mary Anne Walls, the Benefits Administrator, who wrote me a letter regarding my "postponed retirement." This was in response to a memo I had sent her in March to the effect that I

wouldn't be retiring after turning 65. My memo was worded in a way not to dispel the rumour that I would teach to at least age 90 or until I could once again teach the Geography of the USSR (whichever came first).

Ms. Walls' timely letter advised me that since I decided not to retire on my "Normal Pension Commencement Date" of September 1, 1994, the status of my benefit coverage would be as follows: "Your Life Insurance and Long Term Disability coverage will cease on August 31, 1994. Health and Dental coverage will remain in effect until your actual date of retirement with the exception of the Travel Health Plan; however, you will retain limited travel health coverage equal to 80% of expenses up to a maximum annual benefit of \$2,500 under the extended Health Plan." Well, surprise, surprise!! Until then, I had simply assumed that if I continued to teach after turning 65 that I would be covered by all aspects of the Collective Agreement and that I would be eligible for all benefits. When I sought clarification on these matters, Mary Anne Walls curtly informed me that all these points are noted in the "Employee Benefits" pamphlets. As it turns out, indeed they are, and I suppose I should have been aware of this, but I wasn't. In fact, until she gave me the pamphlets, I don't recall ever seeing them before. These are significant and important issues and they should not come as a surprise to any of our members. Neither the UWFA nor the administration should allow important information to be conveyed to our members by means of "pamphlets." On checking with my colleagues, I discovered that very few were aware of these matters.

In my particular case, if I had been alerted to the termination of my life insurance within a reasonable timeframe, I could have taken the time to contact various insurance companies to arrange for some type of replacement policy. As it was, it became a mad scramble and it disrupted that last half of August for me. "Shopping" for insurance was rather instructive. A Canada Life agent came flying to our house within an hour of me contacting the company, and, armed with brochures and impressive print-outs, insisted that I should take out a \$300,000 "Whole Life" policy, at a cost of only \$886 per month. This led to his early retirement out the door. For \$100,000 term insurance, Great West Life wanted \$175 per month, several others wanted about \$150, but I managed to get it at \$120 per month from Transamerica (a company that pioneered term insurance in the US and Canada). Arrangements then had to be made for an exacting medical exam, and by the time the results came in and before the policy was actually issued it was mid-September, so I was without insurance for a couple of weeks. All this was rather disconcerting, especially since we have a substantial non-insurable house renovation loan.

There is a further matter in this regard. If we are not forced to retire after turning 65, why should our life insurance policy terminate at the so-called "Normal Pension Commencement Date"? If a faculty member chooses to teach beyond 65, he or she would continue to carry out all the normal duties and responsibilities of a

member as specified in the Collective Agreement. If that's the case, why should any benefits to this member be eliminated or reduced? The termination of insurance and other benefits appear to be based solely on age alone. On thinking about this, it appears to me that discrimination of this kind would not stand up in court. This is an issue that should be examined. If the insurance contract was imposed on us, it should be grieved; if we mutually agreed to this, it should be renegotiated.

There were some other surprises as well. Retirement for me was always some time in the future so I hadn't checked out the details of my pension. It was only after a lengthy discussion with Mary Anne Walls that I discovered that my pension will be 76% of what I thought it would be. Partly, it's because I am married and my wife is 4 years younger than I am. Also, because of a 1976 Revenue Canada regulation, my pension (before the 24% reduction), based on 31 years of employment, would be capped at \$53,388.82 despite the fact that, based on my salary, I would be eligible for about \$58,000 at the end of this year. This regulation, for pension purposes, effectively caps the average of the best 3 years of salary at \$86,111, and, beyond this, the way to calculate your pension is to multiply \$1,722.22 (an arbitrary figure set by Revenue Canada) by the total number of years of service. Moreover, so long as you are employed, pension deductions will continue to be made, even though your pension may be capped. Anyone out there not aware of this? Furthermore, is there anything we can do about it?

With respect to the Old Age Pension and the Canada Pension Plan, you should apply for both pensions shortly before turning 65, even if you plan to work beyond 65 (I am indebted to Tony Kuz for this advice). Both pensions amount to almost \$1,100 per month, but if you don't apply, it's money you won't get. There is no advantage in waiting till you actually retire, and it will not be paid to you retroactively.

A surprise of the kind my wife arranged for me was a great thing, but my other post-65 surprises I could have done without. Particularly in the interests of "senior" faculty members, surely it is now time that the UWFA, together with the administration, instituted annual seminars or workshops on retirement matters.

And finally, in a somewhat retiring mode, I'd like to share with you the concluding verse of a song sung for me at the August 13 party (words by Jim Richtik to the tune of the Beatles' "When I'm Sixty-four"):

You could be happy working for NAFTA
When our water's gone
You could get a Senate seat from Jean Chretien
Double-dip our governments just like his friends
Selling our birthright to the U.S.
At a dollar forty-five
Our biggest worry
Will you vote Tory
Now you're sixty-five?