



The Alberta
Teachers' Association

2020 Annual Report



2020




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MISSION STATEMENT

The Alberta Teachers' Association, as the professional organization of teachers, promotes and advances public education, safeguards standards of professional practice and serves as the advocate for its members.





OBJECTS

As set out in the *Teaching Profession Act*, the objects of the Alberta Teachers' Association are

- 1** to advance and promote the cause of education in Alberta;
- 2** to improve the teaching profession
 - a. by promoting and supporting recruitment and selection practices that ensure capable candidates for teacher education,
 - b. by promoting and supporting adequate programs of preservice preparation, internship and certification,
 - c. by promoting the establishment of working conditions that will make possible the best level of professional service,
 - d. by organizing and supporting groups that tend to improve the knowledge and skill of teachers,
 - e. by meetings, publications, research and other activities designed to maintain and improve the competence of teachers,
 - f. by advising, assisting, protecting and disciplining members in the discharge of their professional duties and relationships, and
 - g. by assessing the professional competence of its members by means of a professional practice review process provided for under the bylaws of the association;
- 3** to arouse and increase public interest in the importance of education and public knowledge of the aims of education, financial support for education, and other education matters;
- 4** to co-operate with other organizations and bodies in Canada and elsewhere having the same or like aims and objects.

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Message from the President

THE YEAR 2020 WAS REMARKABLE FOR TEACHERS AND THE EDUCATION SYSTEM, not just in Alberta but around the world.

The novel coronavirus (COVID-19) pandemic emerged in March, prompting the closure of schools. With the closures, teachers, school and system leaders, students, and families faced the challenge of shifting from in-person to at-home learning with limited time, resources or certainty. This uncertainty continued through much of the year.



School re-entry plans began to emerge in June, with the Association providing input into the safety measures required to promote a safe space for students and school staff. Although the Association's advocacy efforts were couched in our emergent research that centred on teachers' and school leaders' experiences in the time of COVID-19, the final re-entry plans did not reflect the input provided. The pandemic highlighted the need to address—among other matters—the ongoing issue of class size. Ultimately, the additional measures proposed to ensure safe school re-entry were not implemented.

While many students and teachers returned to the in-person classroom in the fall, class isolations related to COVID-19 often disrupted schooling. Pivoting teaching pedagogy—sometimes switching between virtual and in-person teaching throughout a term—became vital. While navigating new norms in the classroom, whether in person or online, teachers turned challenges into opportunities, and displayed creativity and resilience that were commendable. Though socially distant, the teaching profession came together.

The pandemic also brought into sharp focus income insecurity for substitute teachers. They were laid off in the spring. They were asked to teach in classrooms with ambiguity around what would happen if they subsequently fell ill or were forced to self-isolate. Substitute teachers are valued members of the profession and are essential to our education system. The Association advocated on their behalf in 2020 and will continue to do so.

Even as teachers showed their ability to adapt in unprecedented times, the profession faced other challenges—some new, some old.

In 2020, the Association continued to advocate on behalf of teachers in relation to the government's curriculum renewal processes and direction for

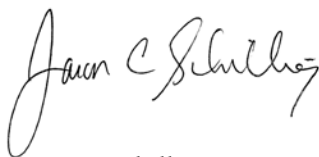
While navigating new norms in the classroom, whether in person or online, teachers turned challenges into opportunities, and displayed creativity and resilience that were commendable.

the Alberta Teachers' Retirement Fund (ATRF) to transfer its investment funds to the Crown corporation Alberta Investment Management Corporation (AIMCo). On the latter point, active and retired teachers contributed their voices and words to the Hands Off My Pension campaign. Our voices were heard, even if the desired outcome was not yet achieved.

Throughout 2020, the Association—at both the provincial and local levels—found ways to sustain services to and support for teachers across the province. Meetings and professional development opportunities on a local and provincial level shifted from in person to online to adhere to health guidelines. Even our Annual Representative Assembly was held virtually for the first time, with representatives demonstrating their tireless commitment to their colleagues and to the Association and its democratic processes.

This annual report captures the work of the Association—its staff, its governing body and its member volunteers—for Alberta teachers in a year that challenged us all to rethink how we work, how we teach.

If nothing else, 2020 confirmed what we already knew—Alberta teachers are resilient and relentlessly dedicated to their students. They are ready to meet any challenge, even a pandemic, with grace and fortitude, and always with the support of their Association.



Jason Schilling
President

Message from the Executive Secretary

AS I WRITE THIS FOR INCLUSION IN THE 2020 ANNUAL REPORT, I am struck by the fact that not since the Second World War have our province and the teaching profession been more disrupted by global events than they were by the emergence of the global COVID-19 pandemic in 2020 and by the stark impact the pandemic had upon us all.



The pandemic created uncertainty and anxiety.

When Alberta's schools closed in March, so did Barnett House. I made the decision, with the support of Council and senior management, to disperse Association staff to work from their homes and avoid coming into the office unless absolutely necessary to perform their work. Furthermore, in-person meetings with individual teachers and subgroups were sharply curtailed, and major events postponed and/or hosted virtually. These steps were essential for ensuring that the Association could maintain critical services to its members while also ensuring, to the greatest degree possible, the safety of our employees and their families. The Association was determined to model the concern and response that teachers expected of government and employers. As 2020 drew to a close and teachers, students and parents wondered when in-person schooling would resume, we were contemplating when we would be able to return safely to our offices and, in the meantime, how we could continue to support teachers and subgroups in the field. Looking to the year ahead, the guiding principle that informed all of our operational decisions throughout 2020 remains our lodestar: to sustain the highest quality of service to members while protecting the public health of teachers and the community.

The pandemic forced change.

As we focused on the challenges posed by the pandemic, Association staff quickly pivoted to working online from home. In the midst of its own restructuring, Information and Technology Services (ITS) ensured that staff had the requisite tools to avoid any disruption in supports for teachers across the province. Across program areas and staff cohorts, our dedicated staff adapted—employing virtual meeting platforms or shifting to in-person work and meeting practices—to ensure that the Association continued to meet its regulatory and professional obligations. A key example of this was the Annual Representative Assembly, which was held virtually to ensure that, despite all else, the members were able to exercise their governance responsibilities and uphold the democratic values and practices of our Association.

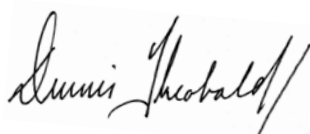
Looking to the
year ahead, the
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our lodestar: to
sustain the highest
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to members while
protecting the
public health of
teachers and the
community.

The pandemic complemented innovation.

It would have been easy in 2020 to simply put all our organizational development projects on hold until we had returned to some greater semblance of normalcy. We chose, however, the more difficult path forward. In 2020, the Association's ITS and Human Resources units underwent major restructuring, and the Teacher Welfare and Member Services program areas were amalgamated to form an integrated Teacher Employment Services, developments that are reflected in this report. These changes, and others throughout the organization, were made to improve efficiency and efficacy while enhancing service to members and honouring their expectation that we would make the best use of their fees. In a sense, the changes were forced upon us: given external pressures, growing complexity and risk, and increased levels of demand from members, we could not simply continue to scale up our conventional approaches and hope for the best. This would have been financially and operationally unsustainable. Our approach over the past year and going forward must instead be more sophisticated and innovative. As we look to 2021, we still face increased demands, environmental ambiguity and external challenges, and will continue to embrace purposeful innovation for optimal operations in response.

The province is now at a watershed moment: just as the possibility of mass vaccination appears to be in sight, new variants of the COVID-19 virus have emerged. We will learn as spring turns into summer what the prospects for public education and for the profession are in the face of this pandemic for the remainder of 2021, and we will need still more time to understand the long-term effects of the pandemic on the Association, teachers and students, and the province. It is already apparent, however, that many previously established truths and wisdoms have been challenged and found wanting, but one enduring truth remains unchanged—the centrality of the education system and teachers to maintaining the very fabric of our communities' social, cultural and economic relationships. Knowing this, teachers were there for their students. Even when faced with uncertainty and anxiety, teachers were there. A pandemic didn't change that.

For 102 years, the Association has served and advocated for its members. A pandemic didn't change that either.



Dennis Theobald
Executive Secretary

Provincial Executive Council

Table Officers



Jason C Schilling
President



Darrin A Bauer
Vice-President



Jenny L Regal
Vice-President



Greg A Jeffery
Past President



Dennis E Theobald
Executive Secretary

District Representatives

Calgary City



Kathy A Hoehn



Kevin L Kempt



Darren J Moroz

Calgary District



Karen M Nakaska

Central



Brenton J Baum

Calgary Public Teachers Local No 38,
Calgary Separate School Local No 55

Canadian Rockies Local
No 59, Christ the Redeemer
Local No 29, Foothills Local
No 16, Rocky View Local
No 35

Greater Black Gold Teachers'
Local No 8, St Thomas
Aquinas Teachers' Local
No 45, Timberline Local
No 9, Unité locale
francophone No 24,
Wetaskiwin Local No 18

Central East



M Murray Lalonde

Aspen View Local No 7, Battle River Local No 32, Greater St Paul Local No 25, Lakeland Catholic Separate Local No 30, Northern Lights Local No 15, Park Plains East Local No 31

Central North



Robert J Twerdoclib

Evergreen Local No 11, Evergreen Catholic Local No 44, Northern Gateway Local No 43, Parkland Teachers' Local No 10, Pembina Hills Local No 22, Woodland Rivers Local No 40

Central South



Don M Brookwell

Chinook's Edge Local No 17, Clearview Teachers Local No 33, Red Deer Catholic Local No 80, Red Deer City Local No 60, Wolf Creek Local No 3

South East



Heather D McCaig

Grasslands Local No 34, Medicine Hat Local No 1, Medicine Hat Catholic Teachers Local No 39, Prairieland Local No 36, Prairie Rose Local No 2, Three Drums of Wheat Local No 20

South West



Katherine D Pritchard

Holy Spirit Catholic Local No 5, Horizon Local No 4, Lethbridge Public School Local No 41, Livingstone Range Local No 14, Palliser Local No 19, Westwind Local No 12

Edmonton District



Paul A Froese

Elk Island Local No 28, Elk Island Catholic Teachers Local No 21, Greater St Albert Catholic Local No 23, St Albert Public Teachers Local No 73, Sturgeon Local No 27

Edmonton McMurray



Nancy L Ball

Edmonton Catholic Teachers Local No 54, Edmonton Public Teachers Local No 37, Fort McMurray Local No 48



Greg P Carabine



Carmen N Glossop

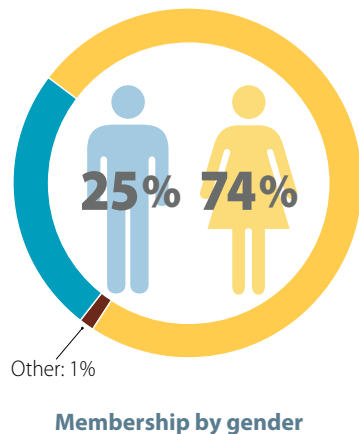


Peter F MacKay

Fort Vermilion Local No 77, Grande Prairie and District Catholic Teachers Local No 42, Greater Peace Local No 13, High Prairie Local No 62, Northern Spirit Local No 6, Northland Local No 69, Trumpeter Local No 26

Membership

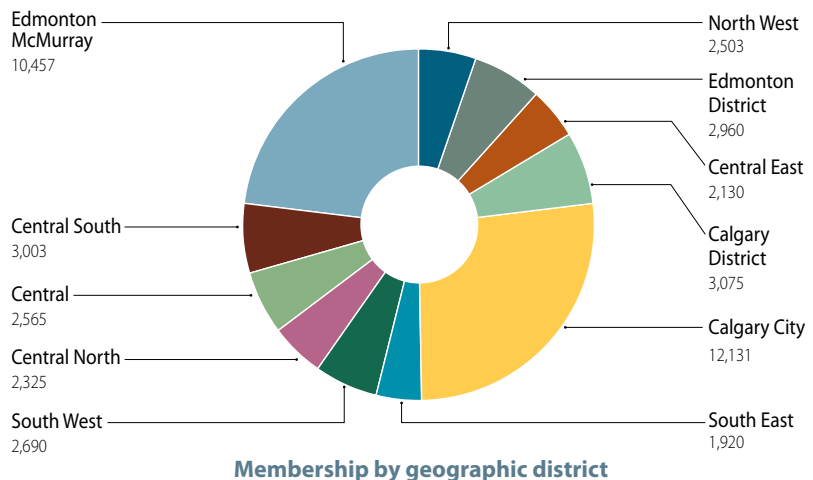
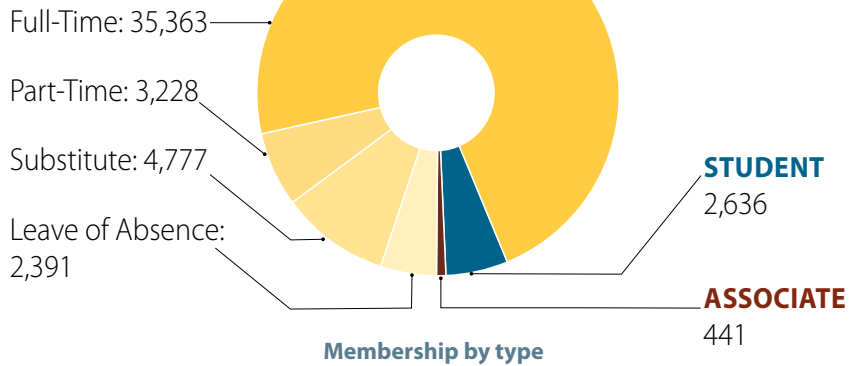
48,836
TOTAL MEMBERSHIP



In 2020, the total membership of the Association was 48,836.

The *Teaching Profession Act* gives certain central office teachers the right to elect active membership, associate membership or nonmembership in the Association. At year-end, 69 per cent of the central office teachers eligible to make an election of membership status had elected active membership, 11 per cent had elected associate membership, and 20 per cent had elected nonmembership.

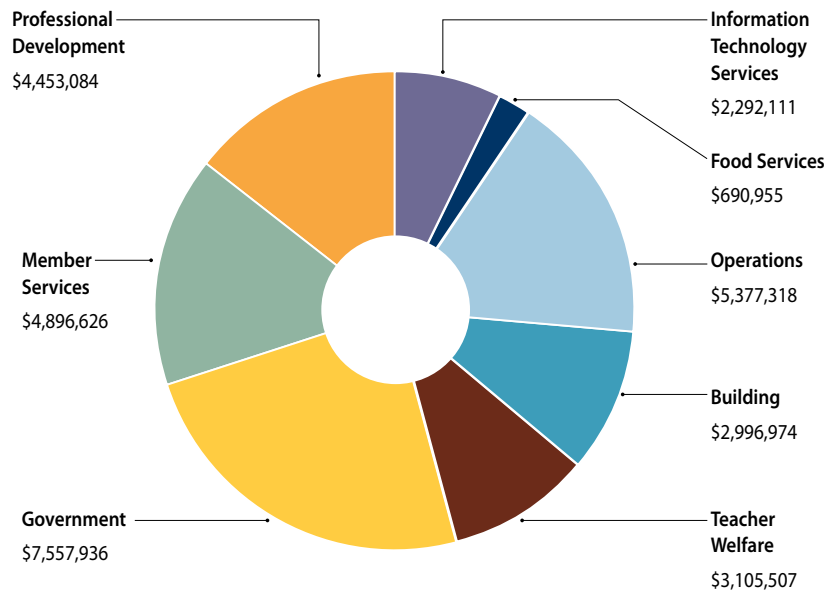
ACTIVE



Operating Expenditures by Program Area

\$31.37
MILLION
PROGRAM AREA EXPENDITURES

159 STAFF



Operating expenditures by program area

Note: Nondepartmental and nonrebatable expenses not included in figures shown.



213 DAYS

on average worked by each executive staff officer



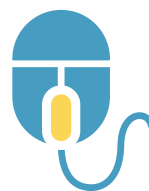
8,557

PARTICIPANTS attended 210 workshops presented by Association instructors



8,950 KM

travelled by each staff officer, on average, on Association business



998,149

VISITS to the Association's provincial website in 2020



24,310

CONTACTS with members by Teacher Employment Services staff



1,348 RESEARCH

AND INFORMATION QUESTIONS answered by ATA library staff

Association Committee Members

Standing Committees

Benefits, Insurance and Pension Committee

Katherine D Pritchard (Chair)
Brenton J Baum
Amelia A Bird
Mark K Breadner
Michael F Doll
Jennifer L Fredeen
Anne-Marie E Huizing (Observer)
Debbie A Mckinlay
Carolyn R Pawelko
Myra J Rybotycki (Observer)
Jeff Sharun
TBD (Alberta Teachers' Retirement Fund Board Representative)
TBD (Alberta Retired Teachers' Association [ARTA] Pension Committee Chair)
Chris Gibbon (Secretary)
Sue Beyer (Administrative Secretary)

Central Table Bargaining Committee

Peter F MacKay (Chair)
Brian J Andrais
Darrin A Bauer
Carmen N Glossop
Murray Lalonde
Heather D McCaig
Sean D Brown (Secretary)
Debbie McAvoy (Administrative Secretary)

Communications, Advocacy and Public Education Committee

Don Brookwell (Chair)
Nancy L Ball
Savi Houldin
Heather D McCaig
Jonathan H Teghtmeyer
Mike Wheeler
Shelley L Magnusson (Secretary)
Jen Janzen (Administrative Secretary)

CTF Committee

Jason Schilling (Chair)
Nancy L Ball
Darrin A Bauer
Don Brookwell
Carmen N Glossop
Kathy Hoehn
Greg Jeffery
Murray Lalonde
Darren J Moroz
Karen M Nakaska
Katherine D Pritchard
Jenny Regal
Dennis E Theobald
Robert J Twerdoclib
Elissa D Corsi (Secretary)
Jessica Grayson (Administrative Secretary)

Curriculum Committee

Paul A Froese (Chair)
Brenton J Baum
Lori M Bell (Observer, Alberta Education)
Kevin Bergeron
Annie Garneau (French Curriculum Specialist)
Dan Karas (Observer, Alberta Education)
Riley S Kostek
Philip A McRae
Colette M Mondor
Shirley A Mykituk

Katherine D Pritchard
Jessie L Shirley (Observer, College of Alberta School Superintendents)
Gina Troskot
Lindsay N Unland
Lynne V Wiltse (Curriculum Specialist)
TBD (Curriculum Specialist)
Mark D Swanson (Secretary)
Cheryl L O'Brien (Administrative Secretary)

Diversity, Equity and Human Rights Committee

Robert J Twerdoclib (Chair)
Phoebe A Arcilla
Youssra M Badr
Shannon R Dube
Kathy Hoehn
Tim Jeffares
Phyllis M Kelly
Anna Kirova (University of Alberta [U of A], Faculty of Education)
Karsten Koch (Alberta Education)
Joshua T LaFleur
Stephanie L MacPhail
Farha D Shariff (U of A, Faculty of Education)
Dan Grassick (Secretary)
Lindsay J Yakimyshyn (Administrative Secretary)

Finance Committee

Jenny Regal (Chair)
Brenton J Baum
Greg Carabine
Greg Jeffery
Karen M Nakaska
Katherine D Pritchard
Dennis E Theobald
Pedro Carriel (Secretary)
Caroline Inacio (Administrative Secretary)

Indigenous Education Committee

Catherine E Brown
Lynda L Burgess (Alberta Education)
Lisa M Cruickshank (Rupertsland Institute)
Julia A Mcdougall
Kevin Kempt
Melissa A Purcell
Peggy L Townsend
Robert J Twerdoclib
Janis M Weasel Bear-Johnson
Patrick W Loyer (Secretary)
Jessica Grayson (Administrative Secretary)

Political Engagement Committee

Robert J Twerdoclib (Chair)
Michael T Aldridge
Don Brookwell
Shelley L Magnusson
Karen M Nakaska
Kristy H Ruaben
Megan J St Croix
Jonathan H Teghtmeyer (Secretary)
Kim L Clement (Administrative Secretary)

Resolutions Committee

Darrin A Bauer (Chair)
Carmen N Glossop
Murray Lalonde
Darren J Moroz
Joni A Turville (Secretary)
Shelley A Svidal (Administrative Secretary)

School Leaders Issues and Concerns Committee

Greg Carabine (Chair)
Andrea L Craigie
José da Costa (Observer, U of A, Faculty of Education)
Allen Davidson (Observer, CASS)
Dorice D de Champlain
Satinder Dhillon (Observer, Alberta Education)
Bobbie-Jo L Douglas

Eve Godin
Chris Gonsalvez
Corey R Haley (Council for School Leadership [CSL])
Peter F MacKay
Murray P Outtrim
Brenda Spencer (Observer, Werklund School of Education)
Mark A Sylvestre (CSL President)
Adriana S Wild
Konni deGoeij (Secretary)
Nikki Cloutier (Administrative Secretary)

Strategic Planning Group

Nancy L Ball (Chair)
Pam Arnason
Lisa M Everitt
Andrew D Finlay
Karen M Nakaska
Jason Schilling
Jonathan P Sharek
Dennis E Theobald
TBD (Consultant)
Philip A McRae (Secretary)
Shelley A Svidal (Administrative Secretary)

Substitute Teachers Committee

Darren J Moroz (Chair)
Cindy Beasley
Sam C Cheng
Patricia A Kolotyluk
Allison E McCaffrey
Jerri A Perrin
Val Peter
Keith W Hadden (Secretary)
Michelle Caron (Administrative Secretary)

Table Officers Committee

Jason Schilling (Chair)
Darrin A Bauer
Greg Jeffery
Jenny Regal
Dennis E Theobald
Brian J Andrais (Secretary)
Audrey Dutka (Administrative Secretary)

Teacher Education and Certification Committee

Kevin Kempt (Chair)
Kelly W Aleman
Val Browne
Natalie C Burns
Shane M Little (Edmonton Area Field Experiences Committee [AFEC] Chair)
Daphne A Sander (Lethbridge AFEC Chair)
Cynthia N Yacey (Calgary AFEC Chair)
Daniel Huard (St Mary's University Student)
Caleb Vetter (The King's University Student)
Henry Algera (The King's University)
Amy M Burns (Werklund School of Education)
Martine Cavanagh (U of A, Campus Saint-Jean [CSJ])
Bill Dunn (U of A, Faculty of Education)
Susan M Knechtel (Observer)
Sharon P Pelech (University of Lethbridge [U of L], Faculty of Education)
Crystal M Pelletier (Ambrose University)
Paolina M Seitz (St Mary's University)
Gladys Y Sterenberg (Mount Royal University)
Lila Borhot (Alberta Education)
Paul A Froese
Mark D Swanson
TBD (CSJAFEC Chair)
TBD (Concordia University of Edmonton)
TBD (Advanced Education)
Monique A Gravel (Secretary)
Jessica Grayson (Administrative Secretary)

Women in Leadership Committee

Kathy Hoehn (Chair)
Nancy L Ball
Catherine L Currie
Sonja D Dykslag
Joanne Harle
Elissa D Corsi
Shelley L Magnusson
Lisa M Everitt (Secretary)
Mark Milne (Administrative Secretary)

Professional Conduct and Practice

Professional Conduct Appeal Committee

Trevor J Smith (Chair)
Wendy M Maltais (Vice-Chair)
Brenda L Parker
Wayne Prokopiw
Sheila L Fraser (Alternate)
Dan Jackson (Alternate)
TBD (Public Member)

Professional Conduct Committee

Sharalynn Anderson
Joann M Blachford
Alicia R Bonnell
Corey T Borys
Daniel Ceresa
Stephani E Clements
Craig P DeJong
Sonja D Dykslag
James E Grondin
Alysha D Grosky
Jonathan A Hemphill
Rick Kremp
Brenna A Liddell
Richard W McAdie
Don McLaughlin
Erin E Montgomery
Nelson D Moulton
Rob O'Brien
Murray P Outtrim
Heather J Quinn
Diane M Sellars
Fitz Sherman
Stuart M Shigehiro
Lori A Szmul
Bilyana N Tokusheva
Brice J Unland
Wade B Westworth
Daniel L Wyton
TBD (Public Member)
TBD (Public Member)
TBD (Public Member)

Professional Conduct Complainant Appeal Committee

Lori S Arksey (Chair)
Valerie A Ling (Vice-Chair)
Todd A Eistetter (Alternate)
Nicole A French-Gillies (Alternate)
TBD (Public Member)

Professional Practice Appeal Committee

Murray J Marran
Noreen C Holt
Sara N Lambert
Allison E McCaffrey
Kristy E Smith
Maria David-Evans (Public Member)

Professional Practice Complainant Appeal Committee

Steven P Kaplan
Chris McCullough
Daryl M Chichak
Moni Riez
TBD (Public Member)

Professional Practice Review Committee

Elizabeth R Grill
Corey R Haley
John C Murphy
Kelly Thomas
Adriana S Wild
Norm Dargis
Chantal S Malette
Kelly W Aleman
Sandra L Bessant
Marla D Bowers
Sherry K Constantin
David E Cracknell
Andrew D Finlay
Tabatha F Hart
Christine Pastega
Kevin C Pizzey

Other ATA-Supported Bodies

Advisory Committee on Teacher Education

Dennis E Theobald (Chair)
Monique A Gravel (Secretary)
Jessica Grayson (Administrative Secretary)

Alberta Advisory Committee for Educational Studies

Jody L Dennis
Philip A McRae
Nikki Cloutier (Administrative Secretary)

ATA Educational Trust, Board of Trustees

Angelo A Delli Santi (Chair)
Maxine M Anderson (ARTA)
Raiven Hansen-Downs (Public Member)
Laurie A Paddock
Sally R Rudakoff
Gaylene R Schreiber
Robert D Stepaniuk
Jessica Grayson (Administrative Secretary)

Membership Eligibility Board

Jason Schilling (Chair)
Markiana J Cyncar-Hryschuk
Darren Lund (Werklund School of Education)
Lynn McGarvey (U of A, Faculty of Education)
Kelly Thomas
Cynthia N Yacey
TBD (U of L, Faculty of Education)
Dan Grassick (Secretary)

Membership Eligibility Committee

Dan Grassick (Chair)
Ken Der
Ronna H Mosher (Werklund School of
Education)
Susan M Knechtel (Secretary)

Returning Officers

Robert T Mazzotta
Kyle E McIntosh

Teacher Qualifications Committee

Sean D Brown (Chair)
Daniel W Balderson (U of L, Faculty of
Education)
Amy M Burns (Werklund School of
Education)
David E Cracknell (Alternate)
Bill Dunn (U of A, Faculty of Education)
Christine Harris
Carmen M Somers (Alberta Education)
Natalie K Townshend
Susan M Knechtel (Secretary)
Lesley A Smith (Administrative
Secretary)

Teacher Salary Qualifications Board

Jason Schilling (Chair)
Jaime L Beck (Werklund School of
Education)
Maryanne Doherty (U of A, Faculty of
Education)
Michelle Draper (Alberta School Boards
Association [ASBA])
Greg Jeffery
Lorraine M Stewart (ASBA)
Michael E Walter (Alberta Education)
TBD (Alberta Education)
TBD (U of L, Faculty of Education)
Dennis E Theobald (Secretary)

Awards

Fellowships and Awards

Honorary Membership

The Association's highest award, this category of membership is reserved for members of the Association or other persons who have given meritorious service to the teaching profession or to the advancement of education.

Edward (Ed) M Stelmach (to be presented in 2021)

Public Education Award

The Public Education Award is occasionally offered to an individual or group not involved in teaching or education that has given outstanding support to public education in Alberta.

Raymond (Ray) J Martin (to be presented in 2021)

Educational Research Award

Zaidi Rahat (University of Calgary)

Doctoral Fellowships

Lisa Taylor
Kimberly Edmondson

Nadene M Thomas Graduate Research Bursary

Daniel Filiatreault

John Mazurek Memorial–Morgex Insurance Scholarship

Dianna Kroetch

University of Alberta Milton Ezra LaZerte Gold Medal

Catherine Antonious

University of Alberta Campus Saint-Jean Marie-Louise Brugeyroux Gold Medal in Education

Sarah Dickson

University of Calgary Clarence Sansom Gold Medal in Education

Katherine McCall

University of Lethbridge William Aberhart Gold Medal in Education


Jennifer Matosevic

** The Indigenous Education Award; Local Public Relations Awards; Local Political Engagement Award; and Diversity, Equity and Human Rights Award programs were suspended for the 2019/20 year.*



GOVERNMENT

The work of the Government program area involves the coordination and supervision of all aspects of Association activity. A major function is the advocacy of Association policy to the provincial government and its departments, school trustees, and organizations with educational interests.



Governance

The business of the Association is transacted by an executive committee, known as the Provincial Executive Council, that is composed of five table officers and fifteen district representatives. Council oversees the implementation of policy, formulates interim policy, interprets the application of policy, and guides staff and committees in areas in which there is no policy. Council establishes guidelines for the general operation of the Association and directs the process that staff follow in developing and implementing programs. In addition to considering program reports, recommendations from committees, and reports from representatives and staff, Council deals with issues and concerns directed to it by staff and members. Council is responsible for receiving, reviewing and, if necessary, appealing decisions of the Professional Conduct Committee. Developing the annual budget and proposed program prognoses and considering resolutions for the Annual Representative Assembly occupy a significant amount of Council's time.

The president is the official spokesperson and chief representative of the Association and is chair of Council and of other designated committees. The president, two vice-presidents, the past president and the executive secretary form the Table Officers Committee. This committee acts on matters referred to it by Council, takes action in response to emergent issues or when time is of the essence, and deals with administrative matters delegated to it by Council. Administrative matters include authorizing representations and delegations and ratifying, on behalf of Council, local fees and the constitutions of specialist councils, convention associations and locals. The committee oversees Summer Conference and the Local Presidents' Meetings. It reviews new and revised legislation and regulations dealing with education in Alberta.

Table officers represent the Association in formal meetings with the government and other organizations. Table officers are also responsible for ensuring appropriate Association representation on government committees, recommending to Council the terms of reference for and membership on Association committees and task forces, and arranging opportunities to discuss issues relating to public education with representatives of major political parties and interest groups. The table officers also constitute the Steering Committee for the Annual Representative Assembly.

In 2020, the Association continued to consider the recommendations of the review of the Association's governance structures and processes that was initiated in 2018 at the direction of Council. The review was undertaken as part of Council and the secretariat's continuing effort to seek out opportunities to improve service to members. The contents of Watson Inc's report are being thoughtfully considered by Council and, where appropriate, additional consultations will take place before any final decisions are made or implemented.

Also in 2020, the Association continued the budget review initiated at the direction of the 2019 Assembly. Internal feedback was solicited, the scope of the review was clarified, and benchmarking work was conducted. In December, Finance Committee approved a draft frame of reference for presentation to the 2021 Assembly. The frame of reference includes major milestones for the 2021/22, 2022/23 and 2023/24 fiscal years, culminating in full implementation of all changes.

Two ad hoc committees, the Committee on Council Election Processes and the Committee on Understanding Aggression(s) in Alberta Schools and School Communities, completed their work in 2020 and were disbanded. The former committee made a series of recommendations aimed at improving Association election practices, and the recommendations accepted by Council were operationalized in preparation for the 2021 elections. The latter committee produced a research report clarifying how aggression is experienced by teachers and school leaders and what policy mechanisms might be effective for managing incidents of aggression in the context of Alberta's public schools.

The Annual
Representative
Assembly
dealt with
»» 228
resolutions,
approving 196
and defeating 28.

A new standing committee, the Bargaining Advisory Committee, was established by Council in 2020 in accordance with the 2020/21 budget. The purpose of the committee is to provide feedback to the Central Table Bargaining Committee and to members on central and local bargaining issues. The Teacher Welfare Services Committee and the Well-Being of Children and Youth Committee were disbanded in 2020, again in accordance with the 2020/21 budget, and the Pension Committee was renamed the Benefits, Insurance and Pension Committee and its mandate was expanded to incorporate benefits and insurance issues previously assigned to the Teacher Welfare Services Committee.

Annual Representative Assembly

The Annual Representative Assembly is the major legislative event in the Association calendar. Each local is represented according to population (with a minimum of two delegates). The Assembly is responsible for establishing the Association's policy, budget and fees.

The 103rd Annual Representative Assembly was scheduled to be held in Calgary on 2020 05 16–18, but due to the pandemic, it was rescheduled and held virtually on 2020 08 13–15. The virtual Assembly was attended by 410 delegates from 55 locals, a representative from the Alberta Retired Teachers' Association (ARTA) Special Local No 1, a student local observer, 3 specialist council observers, 11 local observers, members of Provincial Executive Council, staff and invited guests.

The Assembly dealt with 228 resolutions, approving 196 and defeating 28. One resolution was declared as “action taken,” and 3 resolutions were referred for study and report.

In addition to debating resolutions, delegates received the annual report of the Association, which included the auditor's report and financial statements for 2019/20, and heard reports from President J C Schilling and Executive Secretary D E Theobald.

Summer Conference

Summer Conference, the premier training event for Association leaders, was first held in 1949 in Banff. In 2020, due to the pandemic and on the advice of Alberta's chief medical officer of health, Summer Conference at the Banff Centre was cancelled. To support and train Association leaders, staff provided a range of learning opportunities throughout the year, including one-on-one and virtual meetings.

Local Presidents' Meetings

In 2020, meetings of local presidents were convened on three occasions.

Participants from 54 of the Association's 55 local associations, as well as a representative from the ARTA Special Local No 1, attended the meeting that was held 2020 02 07–08 in Edmonton. The meeting included an address from President J C Schilling, a provincial update, a general session and question period, a finance and budget presentation, and two round-table discussion sessions. Local presidents also attended information sessions on pension basics for locals, redevelopment of the strategic plan, preparation for the Annual Representative Assembly and a review of Information Technology Services (ITS). The meeting also allowed local presidents to meet for a geographic district group session with their district representatives.

Participants from the 55 local associations attended a virtual meeting of local presidents on 2020 08 12, in advance of the virtual Assembly. The meeting allowed for review of new resolutions from Provincial Executive Council, as well as the opportunity to discuss other resolutions, local issues and concerns, and the prevote on resolutions.

Fifty-three of the 55 local associations, as well as a representative from the ARTA Special Local No 1, were represented at the meeting of local presidents held virtually on 2020 10 24. The meeting included an address from President J C Schilling, a provincial update, a general session and question period, two round-table discussion sessions, a discussion on the pandemic, and a presentation on the media campaign. Local presidents also attended sessions on the budget process, Association awards, the development and advancement of policy, ITS, professional development and political engagement.

In addition, from September to December 2020, President Schilling held monthly one-hour virtual question-and-answer sessions for local presidents. These meetings allowed local presidents to engage in unstructured conversations on emerging local issues.

Professional Conduct

One hundred twenty-six new requests for investigations of possible unprofessional conduct were received in 2020 (175 in 2019). One hundred thirty-three investigations were completed, and 17 were cancelled when the complainants withdrew the request. Sufficient evidence to warrant hearings was found in 39 cases. An additional 32 cases were deemed suitable for handling by means of the invitation process. One hundred sixty-one investigations were under way at year-end.

Twenty-four hearings were conducted in 2020 by separate hearing committees of three to five persons drawn from the Professional Conduct Committee. Twenty-four members were found guilty on 83 counts of unprofessional conduct. Table 1 shows the nature of the offences, and Table 2 summarizes the penalties imposed. Ten invitations were held in 2020, all of which resolved the matter to the satisfaction of the Association. Twenty-five invitation cases were pending resolution at year-end.

Either a member who has been the subject of an investigation or Provincial Executive Council may appeal the outcome of a hearing to the Professional Conduct Appeal Committee, a group composed of four Association members and one public member. Two appeals were received and heard in 2020. The committee ordered a new hearing in one appeal.

A complainant dissatisfied with a decision that no hearing is warranted may appeal that decision to the Complainant Appeal Committee (made up of two Association members and one public member), which may order a hearing. In 2020, six appeals were received and three were heard. The committee referred one appeal to a hearing of the Professional Conduct Committee and concurred that a hearing of the Professional Conduct Committee was not warranted for two appeals.

A training session for members involved in the administration of professional discipline was held in October. A L Berg, L M Everitt, C M Gibbon, C W Gonsalvez, D R Grassick, S Magnusson, C W Schoffer and J H Teghtmeyer served as secretaries to the hearing and appeal committees, and D J Ackerman, S Dua and L A Kaun were administrative secretaries. Legal counsel was provided by J T Casey, QC, A Akgungor, K Haymond, J Kully and L Monsma of Field LLP and by R W Rand, QC, and A Wood of Rand & Company LLP.

Table 1. Unprofessional Conduct Convictions in 2020

| Nature of Offence | Frequency* |
|---|------------|
| Conduct Judged Unprofessional | |
| —in relation to students | 37 |
| —in relation to school authorities | 1 |
| —in relation to colleagues | 11 |
| —in relation to the profession | 27 |
| Conviction on an Indictable Offence | 6 |
| Conviction on Other Criminal Charges | 1 |
| * Some cases involved multiple charges. Twenty-four members were found guilty of unprofessional conduct. | |

Table 2. Unprofessional Conduct Penalties Imposed in 2020

| Type of Penalty | Frequency* |
|---|------------|
| Reprimand (Oral) | 1 |
| Reprimand (Written) | 10 |
| Severe Reprimand (Written) | 13 |
| Fine | 14 |
| Suspension of Certificate | 1 |
| Cancellation of Certificate | 7 |
| Suspension from the Association | 1 |
| Expulsion from the Association | 7 |
| * Some cases involved multiple charges, multiple penalties or both. Twenty-four members were penalized for unprofessional conduct. | |

Professional Practice Review

The Association assumed responsibility for the practice review process in September 2009. In 2020, no requests for a hearing were received. The usual fall seminar for members of the three professional practice review committees was not held due to the absence of cases and/or new information. A refresher seminar will be held if and when needed.

The Professional Practice Review Committee (PPRC) consists of at least seven Association appointees and three members of the public. Each time the executive secretary or the Complainant Appeal Committee directs that a hearing be held into the professional competence of a teacher, five members of the PPRC are selected to constitute a hearing committee. The second committee, the Professional Practice Complainant Appeal Committee (PPCAC), consists of between two and four Association appointees and one member of the public. The purpose of the PPCAC is to hear appeals from complainants in the event that a superintendent, after investigating the competence of a teacher, concludes that a hearing before the PPRC is unwarranted. The third committee, the Professional Practice Appeal Committee (PPAC), consists of between three and five Association appointees and one public member. The purpose of the PPAC is to hear appeals concerning a finding or order of a hearing committee. Appeals may be initiated by the investigated teacher, the superintendent or Provincial Executive Council.

Legislation

The following bills with implications for the Association or for public education were passed by the Legislative Assembly of Alberta in 2020.

Bill 5—*Fiscal Measures and Taxation Act, 2020*

Tabled by Finance Minister T Toews, Bill 5, *Fiscal Measures and Taxation Act, 2020*, requires school boards and charter schools to obtain permission from the province before spending their reserve funding for the following two years. The new legislation also changes how the government and school boards bargain with teachers. The bill mandates that the Teachers' Employer Bargaining Association board has 15 representatives, 8 from government and 7 from school boards (increased from 6 from school boards) to negotiate a provincial collective agreement with the Alberta Teachers' Association. The bill also grants the 15-member, government-dominated board—rather than another group of 61 school board representatives—the final say on agreements with teachers.

Bill 15—Choice in Education Act, 2020

Introduced by Minister of Education A LaGrange on 2020 05 28, Bill 15, *Choice in Education Act, 2020*, amends the *Education Act* so that new charter schools no longer need approval from a publicly elected board and home-schooled students no longer require approval or supervision for their education program. With respect to home-schooling, parents still have to notify the ministry of their education plan, but there is no requirement for ministerial approval. Prior to the bill being passed, proposed charter schools needed to demonstrate that publicly elected boards had refused to offer certain educational programming in order to get a licence to operate. Under the new law, charter schools will be allowed to bypass the board and go directly to the minister of education for approval.

Bill 15 also includes a preamble recognizing parental rights and clauses allowing for the creation of vocation-based charter schools and protecting the status and funding of private schools. Bill 15 came into effect on 2020 09 01.

Bill 32—Restoring Balance in Alberta's Workplaces Act, 2020

Introduced by Minister of Labour J Copping on 2020 07 07, Bill 32, *Restoring Balance in Alberta's Workplaces Act, 2020*, requires unions to indicate to members the amount or percentage of the union dues, assessments or initiation fees that relates to (1) political activities and other causes, including general social causes or issues, charities or non-governmental organizations, and organizations or groups affiliated with or supportive of a political party, and (2) collective bargaining and the representation of members. When the bill is enacted, members will not be required to pay the portion of union dues related to the first category.

Public Assurance

In 2020, the Association continued to be a member of Alberta Education's System Excellence Advisory Committee. The committee is a forum to provide strategic advice to the deputy minister regarding (1) the work of the Teaching and Leadership Excellence in Alberta initiative, (2) the development and implementation of the provincial leadership development program applicable to teachers in roles as principals and superintendents, (3) future direction for providing public assurance in the K–12 education system and (4) other K–12 system improvement initiatives identified by Alberta Education. Key stakeholder groups from Alberta are represented on the committee, which represents a collaborative effort to ensure the quality of Alberta's education system. In 2020, the government and deputy minister of education did not hold a formal committee meeting with the education partners.

Representation to the Government of Alberta and Other Political Bodies

The Association advocated on behalf of teachers and addressed issues of interest to the teaching profession with government officials, including the minister and deputy minister of education, the minister of finance, and the minister of labour and immigration. Matters addressed in 2020 include the pandemic; safety of teachers, students and staff; pandemic-related school closures and reopening scenarios; vaccine priority for teachers and staff as front line workers; class size; supports for student needs; the composition of the expert curriculum advisory panel; proposed changes to the curriculum; the *Choice in Education Act, 2020*; provincial standardized testing; cuts to public education funding; bargaining and related matters; Association professional conduct processes; teacher job

losses; the *Restoring Balance in Alberta's Workplaces Act, 2020* (see Legislation, page 24); the transfer of teacher pension investment management from the Alberta Teachers' Retirement Fund to the Alberta Investment Management Corporation (AIMCo); and AIMCo's performance management of pension assets.



The CTF is the unifying force for teachers in the provinces and territories across Canada.

Liaison with Alberta Organizations

Table officers are responsible for maintaining contact with other provincial organizations. They fulfill this obligation by meeting with representatives of these organizations, attending their annual meetings, writing to them about specific issues and meeting with them informally as occasions arise. These organizations include the Alberta School Boards Association, the Public School Boards' Association of Alberta, the Alberta Catholic School Trustees' Association, the College of Alberta School Superintendents, the Council of Catholic School Superintendents of Alberta, the Alberta School Councils' Association, the Alberta Federation of Labour, the Alberta Union of Provincial Employees, the United Nurses of Alberta, the Health Sciences Association of Alberta and the Canadian Union of Public Employees (Alberta Division). In addition, the Association was represented on several provincial bodies, including Alberta Education committees, the Education Society of Edmonton, the Alberta Assessment Consortium, Friends of Medicare, SafeGen (formerly the Job Safety Skills Society), the Parkland Institute and Public Interest Alberta.

Liaison with Canadian Educational Organizations

The Association maintains contact with educational organizations outside of Alberta by sending representatives to their annual conferences, subscribing to their publications and maintaining informal contacts with their leaders. In 2020, the Association hosted the Western Staff Development Conference, and Association representatives virtually attended the Canadian Teachers' Federation (CTF) Annual General Meeting, the CTF National Staff Meeting and the Manitoba Teachers' Society Annual General Meeting. Many annual conferences were cancelled in 2020 due to the pandemic. Association representatives liaised with Canadian educational organizations whenever virtual opportunities were offered.

Canadian Teachers' Federation

The CTF is the unifying force for teachers in the provinces and territories across Canada and represents nearly all the teachers' organizations operating in Canada's provinces and territories.

The CTF provides a forum for the elected representatives and staff of member organizations to share intelligence and learning across the provinces and to engage in collective problem solving and the sharing of best practices in collective bargaining, communication, political action, advocacy, member services, pensions and benefits. This has been and will continue to be particularly important as the teaching profession moves through the pandemic.

Further, the CTF generally coordinates and acts as the agent of the Association and other provincial teachers' organizations on matters and programs affecting teachers nationally and globally. This includes lobbying on federal legislation affecting teachers; coordinating advocacy and collective action on issues of concern to teachers; providing a clearing house for research, information and statistics; and operating programs that facilitate teacher cooperation in international settings.



The Association contributes to international cooperation projects organized by the CTF and by other international cooperation partners.

In 2020, the CTF continued to work for Alberta teachers. The CTF played an important role in successfully advancing with the federal government the provision of \$2 billion in support for the provinces and territories through the Safe Return to Class Fund; following advocacy from the CTF, specifically with the prime minister's office, the fund was announced. This successful campaign resulted in the federal government's providing the Alberta government with \$262 million directed to education. In November, the CTF launched a Teachers' Bargaining Network, which provides a platform for bargainers from all provinces and territories and allows the CTF's member organizations to update one another on trends, new developments and challenges they encounter at the negotiating table. Additionally, the CTF's submission regarding the Fall Economic Statement was hand delivered to the minister of finance by the minister for women and gender equality. The statement included an increase in funding for mental health support to be accessible free of charge to all Canadians and simplified the tax deduction for home office expenses to ensure that teachers could claim costs associated with transitioning to online learning.

Research undertaken by the CTF and member organizations is shared and employed in support of provincial and local initiatives. The Association has made extensive use of CTF documentation in support of diversity, equity and human rights; Indigenous education; and the status of women. Furthermore, the CTF provides support for francophone education. Recently, the CTF began a national campaign to promote the teaching profession for French-language schools in minority settings and to address the significant shortage of French first language teachers.

The CTF's 100th Annual General Meeting was held virtually 2020 07 07–09. Thirteen delegates from Alberta attended. Moreover, the Association is represented nationally by J L Regal as a vice-president of the CTF.

International Cooperation

The Association contributes to international cooperation projects organized by the CTF and by other international cooperation partners. In 2020, approximately 68 per cent of the Association's international cooperation funds were earmarked for CTF initiatives, while 32 per cent of funds were allotted to other international cooperation initiatives.

Due to the pandemic and the cancellation of the 2020 Project Overseas Program, the CTF Committee moved to offer the 2020 participants the chance of first refusal for the 2021 program, provided that they continue to meet eligibility requirements. All participants expressed interest in participating in the program in the 2021 year. The committee further decided to direct CTF to hold the funds that the Association distributed for 2020 programming for application to 2021 programming.

In 2020, the Association also contributed financial support to the following international cooperation initiatives:

- ATA Dominica IT Project Summer Institute
- Tools for Schools, Africa Foundation
- Canadian Women for Women in Afghanistan
- CoDevelopment Canada
- Canadian Organization for Development Through Education
- Change for Children

Many of the above programs went ahead in 2020 as planned. Where international travel was not possible due to the pandemic, Alberta teachers pivoted the way in which they supported teachers and students overseas. The ATA Dominica IT Project Summer Institute offered five courses in the summer to assist teachers in integrating learning



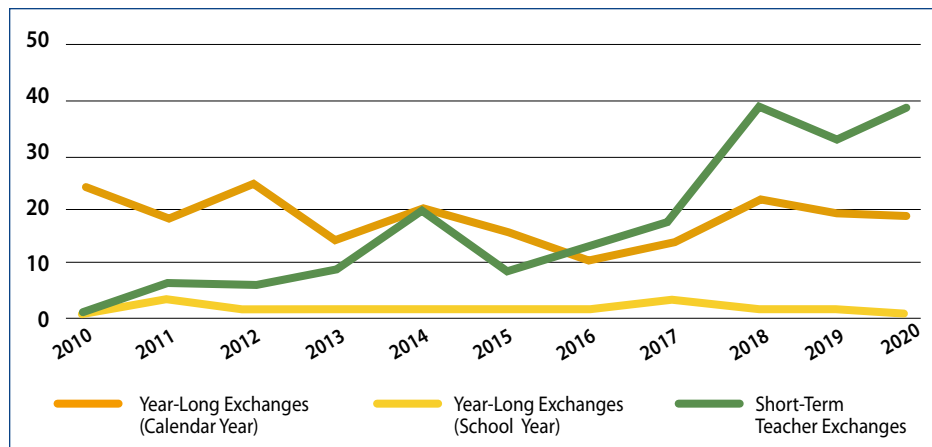
technologies into both in-class and online instruction. The institute had five highly dedicated Alberta teachers conduct online instruction through the two-week program. Change for Children had planned to send a cohort of Alberta teachers to Guatemala in summer 2020, but the pandemic made this impossible.

In addition, Provincial Executive Council approved the disbursement of the 2019/20 budget for periodic international cooperation (\$2,500) to the Education International Solidarity Fund, through the CTF, in support of teachers, their families and school communities affected by the explosion on 2020 08 04 in Lebanon.

Educator Exchange Programs

In 2020, the Educator Exchange Programs made 58 placements. Nineteen teachers participated in year-long exchanges in different regions in Australia. Participation in short-term exchanges increased, with 39 teachers participating in such exchanges in Australia, Germany, Iceland and Spain. Due to the pandemic and travel restrictions, the short-term exchange program pivoted to a virtual format—e-exchanges. This virtual peer-to-peer professional development opportunity allowed teachers to study perspectives and practices related to such topics as rural and remote education, literacy and numeracy, second language learning, and inclusion.

E-exchanges are available within the province and with the Association's international partnerships and are an exciting and flexible collaboration opportunity to expand the reach of the program and enhance teacher practice.



Educator Exchange Programs placements, 2010–20

Support for Special Projects and Initiatives

The Association periodically receives requests to fund or support special projects initiated by other organizations. Such requests are placed before the Table Officers Committee, which, in turn, recommends appropriate action to Provincial Executive Council.

In 2020, the Association

- provided financial contributions to the Alberta Division of the Canadian Mental Health Association, French for the Future, Friends of Medicare, MediaSmarts and the Parkland Institute;
- provided in-kind support to the Alberta Assessment Consortium, the Institute for Sexual Minority Studies and Services, and the Society for Safe and Caring Schools and Communities (support for the Society ceased in June 2020 with the disbandment of the organization); and
- provided both financial and in-kind support to the Alberta Advisory Committee for Educational Studies, the Aspen Foundation for Labour Education, CIVIX, Public Interest Alberta and the United Way.

External Communications

The Association uses a variety of media, including print publications, the website and social media, to speak to members and to the public. Cross-platform communication ensures that Alberta teachers can easily access information from their Association, no matter how they prefer to access it.

ATA Magazine—The Association published two issues of the *ATA Magazine* in 2020, with rural education and trauma as the featured topics, respectively, in the winter and the fall issues. The spring issue was cancelled due to pandemic restrictions disrupting production.

On the advertising front, the Association continued a contract, established in 2019, with Trevor Battye Advertising Sales to book advertisements for the magazine. Revenue from advertisement sales helps offset the cost of design, printing and distribution. The average circulation per issue in 2020 remained approximately 37,100 copies.

In fall 2020, the magazine's print version was supplemented with a full version of the publication available electronically via the digital platform Digimag.



Through its communications and advocacy work, the Association strives to heighten awareness of the benefits of public education.

ATA News—The *ATA News* is available to all members and is distributed primarily through schools. It is the journal of record of the Association. Fourteen regular issues were published in 2020, with an average circulation of 37,500 copies per issue.

When the pandemic prompted the closure of schools in March 2020, the *ATA News* temporarily ceased printing and focused on a digital-only publication for the remainder of the school year. The *ATA News* resumed printing in fall 2020, as schools reopened. Issues continued to be published electronically via Digimag and an e-mail notification called the *ATA eNews*, which provides recipients with a sampling of *ATA News* content.

Throughout 2020, the *ATA News* continued its agreement with Trevor Battye Advertising Sales, with paid advertisements helping to offset the cost of production, printing and distribution. Each year, the paper also provides an estimated \$35,000 worth of complimentary advertising for initiatives sponsored by the Association and its community partners.

The Learning Team—In 2020, three issues of *The Learning Team* were published, with an average circulation of 25,500 copies per issue. The newsletter, which is distributed to Alberta's school councils, aims to strengthen the relationship between parents and teachers as they work together for children's education.

Association Website—The website is the Association's primary tool for communicating and engaging with its internal and external stakeholders. In 2020, the website received 998,149 visits (956,791 in 2019), with an average of 6,539 page views per day (7,888 in 2019).

Social Media—The Association has an active presence on Twitter, Facebook, YouTube and LinkedIn. These social media sites are used to reinforce Association campaigns (both ongoing and short-term), to engage communities of interest and to drive traffic to the Association's website. In 2020, the Association's Twitter feed had 31,200 followers, and its tweets had generated 4.4 million impressions. The Association's Facebook page had 17,902 likes, and its posts had generated 7.2 million impressions.

Advocacy, Communications and Public Education

Through its communications and advocacy work, the Association strives to heighten awareness of the benefits of public education. To meet this aim, the Association engaged in the following public relations, advertising and other communications initiatives in 2020.

The Face of Education public relations campaign continued in 2020, featuring a diverse selection of students and reminding Albertans that public education exists to serve all children. In the spring of 2020, the campaign's focus shifted to feature six Alberta teachers sharing their teaching experiences. In the fall, two more spots were added, and two additional spots have been filmed—to be released in 2021—to showcase the diversity of teachers in Alberta. The campaign also positions the Association as a strong advocate for public education by highlighting the needs of teachers and students in relation to optimal conditions of learning.

The Association also supported the Can We Talk? campaign, which communicates that teachers, in their unique roles, are often able to act as early intervenors in students' mental health struggles. Can We Talk? is an ongoing promotion that includes advertising and public service announcements under the banner of the Healthy Minds, Bright Futures campaign. The Can We Talk? public service announcements were carried by Global Edmonton, Global Calgary and Global Lethbridge, as well as 630 CHED and QR77.

In addition, the Association supported advocacy efforts for public education through its Community Relations Grant program, which provides funding to locals to undertake initiatives that profile public education, represent teachers as active and concerned community members, or show teachers and the Association as concerned about the mental health of children and youth. The Association also maintains a presence at teachers'

conventions and encourages every school in the province to identify an outstanding volunteer and present that person with a Public Education Volunteer of the Year award certificate and decal. While many of these endeavours were affected by the cancellation of in-school learning in March 2020, they continued to be available.

The Association's communications efforts also include the work of local communications officers (LCOs). In 2020, one LCO meeting was hosted by the Association, with the spring meeting being cancelled due to the pandemic. Throughout the year, LCOs connected and worked together to support communications within their own locals.

Political Engagement

The Association's political engagement program continued to focus on enhancing teachers' awareness of and active engagement with the political process, increasing the awareness that members of the legislative assembly (MLAs) have of education and communicating teachers' concerns about matters affecting student learning. In 2020, the program's activities included a Political Engagement Seminar, meetings of and work undertaken by local political engagement officers (LPEOs), and advocacy at the local level.

In 2020, the Association's Political Engagement Committee began implementing the 2019/20 Political Engagement and Public Education Advocacy Action Plan. The plan



Teachers and concerned citizens participated in the March for What Matters, at the Alberta legislature grounds on 2020 02 27

involves member focus groups, peer-to-peer teacher engagement, parent organizing supports and targeted online advertising. The committee also launched a website and postcards to help encourage partisan participation of individual teachers, and initiated work on a 2021 school board elections plan.

The Political Engagement Seminar, held in March, was attended by more than 100 local representatives, as well as 25 parent delegates. Agenda items included a series of talks featuring President J C Schilling, A Pike (Alberta School Councils' Association) and J H Tegtmeyer (Association staff); a panel discussion; an environmental scan; breakout sessions on such topics as political engagement using social media, lobbying and understanding election campaigns; a presentation on how to engage and energize meetings; and a facilitated group discussion with B Moore-Kilgannon (Parkland Institute).

LPEO meetings were held virtually in May and October. The May meeting, attended by 25 local representatives, included an environmental scan, as well as updates on a few issues and campaigns. The October meeting, attended by 45 local representatives, included an introduction to the role of a political engagement officer, an environmental scan, a provincial update, an update on Association campaigns, and time for small- and large-group sharing. At year-end, the corps of LPEOs stood at 47 out of a possible 55 members.

In 2020, locals encouraged their members to contact government on such issues as class size, pensions, education funding and inclusion. Ten locals (three in 2019) took advantage of the Political Engagement Grant provided to support such efforts.

The Association also undertook MLA outreach campaigns related to the AIMCo pension takeover, including e-mails to MLAs expressing praise for reduced contribution rates as a result of the Alberta Teachers' Retirement Fund's strong investment results; concern over investment losses by AIMCo; and support for Bill 203, *Pension Protection Act*.

In addition to these activities, routine monitoring of the legislature continued throughout the year. Regular connections were made and consultations were held with opposition education critics and caucus staff.

Women in Leadership

The Women in Leadership (WIL) Committee was established in 2019 to provide supports that enable the advancement of women in educational leadership within school jurisdictions and the Association. The committee accomplishes its mandate through policy recommendations, the organization of an annual summit and research on the career progression of women in educational leadership.

In March 2020, the inaugural WIL Summit was held at Barnett House, with approximately 120 teachers, school leaders and school jurisdiction leaders in attendance. The committee also engaged in planning for the 2021 WIL Summit, which is to be held virtually. With the Annual Representative Assembly passing a resolution to provide enhanced funding to the annual summit, the committee and its subcommittee for summit planning created a Summit Speakers Series. The series—virtual sessions with keynote speakers held monthly leading up to the summit—began in December 2020 with The Right Honourable K Campbell presenting on the importance of women in politics.

In addition, in 2020, locals were supported in establishing WIL committees, primarily through presentations to local councils and at a meeting of local presidents. Further, research on women in leadership was published and disseminated (see Research, page 33).

The Association
conducted
research on
Alberta schools
and the pandemic
in late April,
gathering
more than
» 8,100
teacher and
school leader
responses.

Strategic Planning Initiatives

The strategic planning initiatives of the Association include the work of the Strategic Planning Group (SPG), which identifies, studies and advises Provincial Executive Council on emerging issues and opportunities of interest to the Association; a grant program; other support for local sessions on strategic planning and foresight; and public lectures.

As the main channel through which the Association undertakes strategic planning, the SPG engages in strategic planning across short-, medium- and long-term horizons; proposes policy where appropriate; and undertakes research to develop strategic foresight. The group plans and participates in the annual June and September planning meetings. At its meetings in 2020, the SPG considered research briefs (see Research, page 34), reviewed pandemic pulse research studies, and scanned articles and conference reports to identify trends that will continue to shape public education. In addition, the group oversaw the administration of the Association's Member Opinion Survey (see Research, page 34), the results of which are used to help the Association and its subgroups undertake long-range planning.

In 2020, the Association continued with the redevelopment of its strategic plan in consultation with such groups as Council, local presidents and Association subgroups. The SPG guided this redevelopment.

The Association also administers a Strategic Planning Grant program that assists the Association's subgroups in conducting strategic planning activities to examine their long-term goals and activities in the context of the Association's strategic plan. In 2020, three locals, three specialist councils and one teachers' convention association were approved for matching grants of up to \$2,000 each.

Finally, the Association organizes public lectures and other events that highlight the role that public education plays in shaping the future of the province. Given the pandemic and public health orders throughout 2020, in-person public lectures were temporarily suspended.

Research

Association research is coordinated in the Government program area, though all program areas participate in Association research projects. Many of the projects are carried out with the assistance of university-based researchers and with the support of the Association's locals and other subgroups. During 2020, the following major research projects were completed or under way.

Coronavirus (COVID-19) Pandemic Research Activities

With the global onset of the novel coronavirus (COVID-19) pandemic and resultant suspension of in-person K–12 classes in Alberta in March 2020, an emergent need became evident for research on the effects of the pandemic on the profession and public schools.

The Association conducted research on Alberta schools and the pandemic in late April, gathering more than 8,100 teacher and school leader responses via a random stratified and longitudinal chain referral sampling. This first study gathered data in five key areas of concern: well-being, equity, technology use and online instruction, pedagogical practices and the profession of teaching, and the return to public school buildings. The study's full research instrument was adopted by the CTF and released nationally to gather an additional data set of 18,000 responses from teachers across the country.

In addition, four pandemic pulse surveys were administered between September and December. Each of these 10-minute surveys gathered a quick "pulse" of the profession and measured the effects of school re-entry (both online and in person) during the

pandemic. These pulse surveys reported on the first week of school re-entry; COVID-19 prevention, infection and control measures in Alberta K–12 schools; well-being, workplace safety and COVID-19 information reliability; and COVID-19 quarantines, isolations, curriculum concerns and mental health. The data gathered were discussed with education partners and Alberta Education, and shared widely in the media as the only systematic research on the effect of the pandemic on Alberta's K–12 teachers and school leaders in the historical record.

Beginning Teachers and Substitute Teachers

To continue the Association's research on Alberta's beginning teachers, the literature review and findings from the latest survey conducted at the Beginning Teachers' Conference were integrated into professional development activities and virtual presentations in 2020 related to supporting mentorship of teachers in their early years of practice. An environmental scan and research study, including focus group results, was also mobilized through virtual presentations and publications in support of Alberta's substitute teachers.

Compassion Fatigue, Emotional Labour and Educator Burnout

In 2020, the Association partnered with the Alberta School Employee Benefit Plan to explore through a provincial research project the phenomena of emotional labour, burnout and compassion fatigue in education workers. This partnership started as part of a two-year research project, with expert assistance from a group of researchers from the University of Calgary and a research advisory group. The relational nature of learning requires significant emotional labour on the part of teachers, school leaders and other educational workers, especially during the pandemic. The phase 1 report, *Compassion Fatigue, Emotional Labour and Educator Burnout: Research Study*, was published and disseminated through virtual presentations at Association and education partner events.

Women in Educational Leadership

In 2020, the Association published *Women in Educational Leadership Needs Assessment Survey*, a research report exploring what Alberta teachers think about gender discrimination in the teaching profession and how it manifests itself within school jurisdictions and the Association. This research study supports a deeper understanding of the barriers women face in their career progression in the teaching profession in Alberta, as well as what structures might be implemented to support women in educational leadership. The report raises important questions for further research in the area of women in leadership and the teaching profession. The research was disseminated through presentations at Association and education partner events.

Understanding Aggression(s) in Alberta Schools and School Communities

A research report entitled *Understanding Aggression(s) in Alberta Schools and School Communities* was published and disseminated in 2020. This study, the result of the work of an Association ad hoc committee established in 2018/19, presents a thorough examination of the complex issue of aggression toward teachers and school leaders. The report combines the findings of the research with the current literature to help clarify how aggression is experienced by teachers and school leaders and what policy mechanisms might be effective for managing incidents of aggression in the context of Alberta public schools.

Artificial Intelligence and K–12 Education: Potential Scenarios and the Impact on Teaching

In 2020, the Association initiated a limited collaboration with the University of Alberta and the Kule Centre for Advanced Study to conduct a research and policy-scoping

initiative reporting on the expected impact of artificial intelligence (AI) on the field of education and the key ethical, bias and policy issues that will most likely need strategic attention. An AI and Education Scoping Plan was created in 2020. The project will culminate in a report on the opportunities and issues related to AI in education—specifically for the profession of teaching in Alberta.

Teacher Action Research Initiatives

The Association continued to support and disseminate the work of the Alberta schools involved in international action research projects with Finland and Iceland. In particular, a virtual session was held in the spring of 2020 with several hundred students and teachers from Iceland, Finland and Alberta, along with psychologist J Carrington and researcher P Sahlberg, to discuss resilience and better understand ways to support comprehensive school health, play and individual well-being. The Alberta partnerships with Finland and Iceland involve principals, teachers and students working side by side in an action research model to engage in activities focused on what they believe makes a great school for all.

To address topics of strategic importance to the teaching profession, the Association produces research briefs on a variety of subjects. In 2020, a research brief was created on the prevalence and impact of aggression in Alberta schools.

In addition to carrying out studies on topics of current concern, the Association administers the Member Opinion Survey (MOS) on an annual basis. In 2020, the survey was conducted online in both English and French, resulting in a valid and highly reliable data set for strategic consideration. The responses allow the Association to track trends and issues to ensure that its programs and services meet the needs of members and advance the profession of teaching. Among the topics broached in the 2020 survey were actions that members were prepared to support or undertake that might demonstrate a high degree of loyalty to the Association.

The Association continued to engage in its collaborative initiatives, the eQuality Project and Growing Up Digital (GUD) in Alberta. In 2020, Sesame Workshop supported the development of the global GUD project as a research partner interested in expanding the activities into early learning research in Alberta and New South Wales, Australia.

The Association also produces publications and engages in other activities to ensure that the results of its research connect with as wide an audience as possible. In 2020, the Association's research was highlighted in multiple Alberta newspapers, international media (such as the *Washington Post*), and teachers' federation publications (such as the Saskatchewan Teachers' Federation's *Bulletin* and the CTF's *Research and Professional Learning Digest*). The Association also disseminates its research findings by presenting papers at provincial, national and international meetings and conferences, including in 2020 at the virtual American Educational Research Association Conference and the CTF National Teacher Research Network.

In addition, the Association supports research activities undertaken by other organizations, including the Alberta Advisory Committee on Educational Studies and the Kule Institute for Advanced Study Signature Collaborations Grant Programme. Further, the Association held a virtual meeting with postsecondary institutions in 2020 to identify common areas of research and identify potential opportunities for the Association and universities to collaborate.

The ATA library's
web guides
were viewed
»» 270,603
times in 2020.

Library Services

Launched in September 2019, the ATA library's web guides—with content integrated from the former 2Learn website—were an important channel for members to access high-quality online resources in March 2020 when teachers began teaching remotely due to the pandemic. In 2020, the guides were viewed 270,603 times.

During the year, the library built 61 new guides, bringing the total collection to include 167 guides. Of these, 25 were English guides and 36 were French guides. A total of 3,120 resources were added to the guides during the year. In addition, “crosswalks” were added to all of the guides to facilitate quick navigation between related guides, enabling members to more easily find materials to support their teaching.

For the first time, the ATA library hosted a practicum student from the University of Alberta School of Library Studies master's program in fall 2020. During the online practicum, the student supported the expansion of the web guides and the library's current awareness initiatives.

Throughout the year, library staff provided presentations to support development of information fluency skills at the Student Local Conference, Beginning Teachers' Conferences and Substitute Teachers' Conference and to professional development facilitators. In addition, library staff delivered two online professional development sessions to teachers in the summer.

Finally, the library website was redesigned in 2020 to improve usability, with a tutorial video added to introduce members to the library's services and resources.

Table 3. Library Service Statistics

| | 2020 |
|------------------------------------|-------|
| Circulation Services | |
| —physical materials loaned | 2,990 |
| —e-journals routed | 525 |
| —e-books loaned | 10 |
| Information and Research Questions | 1,348 |
| Online Reservations | 2,501 |
| Searches in Journal Databases | 2,775 |
| Searches in E-Book Database | 53 |



French Services

Staff in French Services provide translation and terminology services to staff and all Association subgroups. Staff translate into French such documents as handbooks, posters, brochures, correspondence and PowerPoint presentations. In 2020, 23 French publications were updated or reprinted, and 28 new documents were published in French. New substantial publications or considerably revised publications available in French are listed in Publications (see page 63).

French Services provides ongoing support to the library and works with Information Technology Services to ensure that the French Services webpages are updated and accurate. In particular, French Services staff were instrumental in assisting the library with preparing French library guides (see Library, page 35) for publication. Further, in partnership with the CTE, French Services provides an annual report for member organizations.


Field Service

In 2020, staff in the Government program area offered workshops and assistance related to advocacy, communications, educational technology, local planning, media relations, mental health, political engagement, public relations, strategic planning, the effects of domestic violence and women in leadership. This assistance was provided both over the phone and in person at local and school meetings. Staff also assisted Association subgroups in conducting research projects and implementing strategic plans.



TEACHER EMPLOYMENT SERVICES

Effective September 1, 2020, the Member Services and Teacher Welfare program areas were amalgamated to become Teacher Employment Services. This program area continues to assist teachers, both individually and collectively, with professional problems and school division or local issues. Teacher Employment Services staff also work to raise the status of the teaching profession by promoting and advancing the interests of teachers to secure conditions that will make possible the best levels of professional service.



Member Services
contact with members

2018: 15,453

2019: 14,505

»» 2020: 13,444

**Table 4. Summary of Teacher Employment Services
(Member Services) Contact with Members**

| Issue | 2020 | |
|----------------------------|---------------|---------------------|
| | Number | Percentage of Total |
| Criminal/Assault | 135 | 1 |
| Interpersonal relations | 1,901 | 14 |
| Employment information | 3,865 | 29 |
| Issues with parent/student | 498 | 4 |
| Employer action | 2,497 | 19 |
| Professional competence | 670 | 5 |
| Medical | 1,612 | 12 |
| Liability matters | 185 | 1 |
| Legal issues | 410 | 3 |
| Professional conduct | 686 | 5 |
| Other | 913 | 7 |
| SUBTOTAL | 13,372 | 99.5 |
| No category assigned* | 72 | 0.05 |
| TOTAL | 13,444 | 100 |



MEMBER SERVICES

Local Organization

The Teacher Employment Services—Member Services program area is responsible for assisting locals with their ongoing operations and provides advice, as requested, on such topics as local annual reports and changes to constitutions. During the year, the Table Officers Committee ratified amendments to 14 local constitutions, including 3 student local constitutions. Changes were also made to the model constitution regarding emergent governance and occupational health and safety.

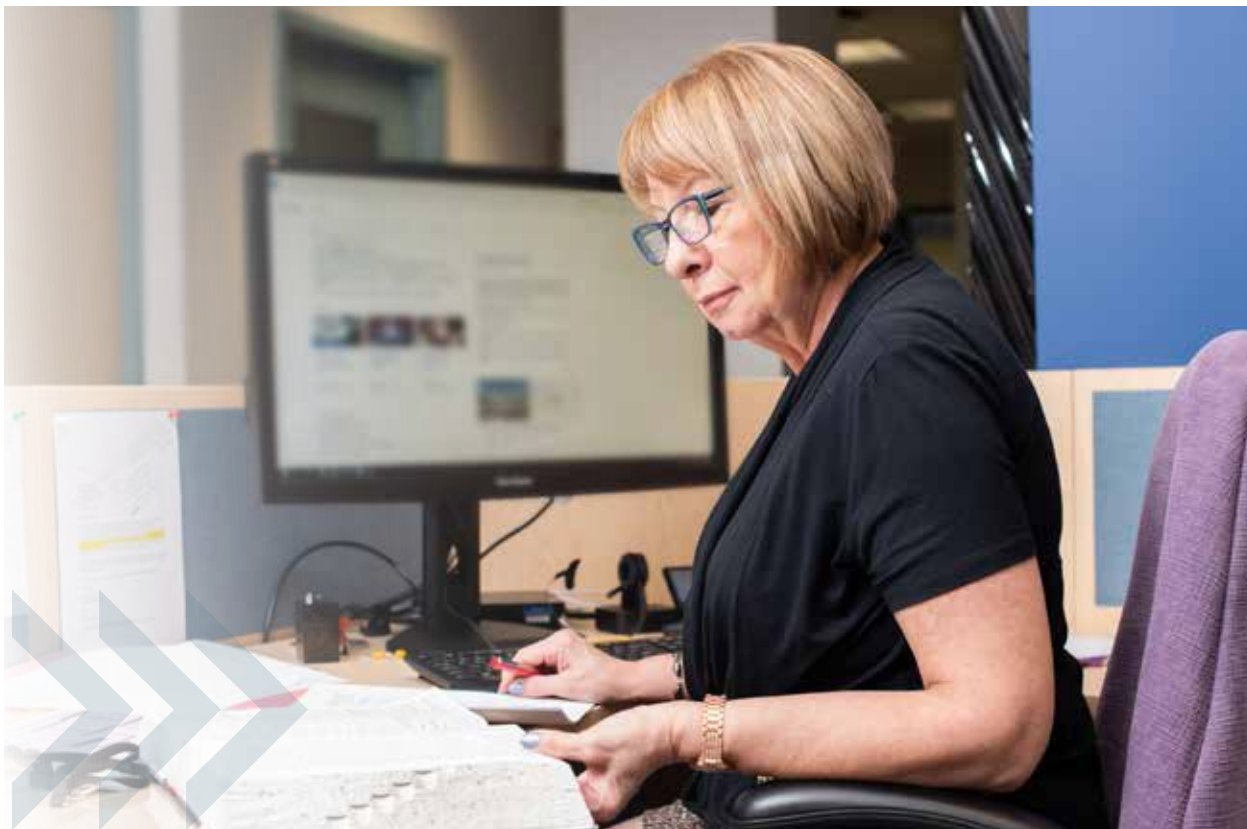
Online support and tutorials for local secretaries and treasurers were offered in 2020 in place of the annual Local Secretaries' Seminar and the Local Treasurers' Seminar. The local secretaries' activities focused on the updated *Local Secretaries' Handbook*, the duties of a local secretary, best practices, privacy issues and records services for locals. The local treasurers' activities included training related to annual membership fee and local rebate calculation, the local rebate report, honoraria and reimbursements for Annual Representative Assembly delegates, president release time, the grant-in-aid formula for Summer Conference, tax implications of internal professional development funds, scholarships and bursaries, tips for setting up a professional development fund, budgeting assistance and surplus calculation, financial transparency, the collective agreement, pensionable earnings, expense claims for exceptional items, financial reports, and the creation of finance policies.

The Association also held the annual Student Local Conference, which was attended by 34 delegates from 11 of the 14 student locals, virtually in 2020. The conference included a session detailing student local processes and changes due to the pandemic; a presentation entitled "Finding Our Way in Indigenous Education: Connecting Hearts and Minds"; and breakout sessions for each student local to meet with its respective staff liaison. Presidents, secretaries and treasurers also attended sessions specific to their individual roles and responsibilities. During the conference, the new online *Student Local Handbook 2020/21* was also highlighted.

Further, program area staff presented 51 preservice and other information sessions to a total of 1,347 education students at universities and colleges across the province. The sessions included information on the Association's services, liabilities and the Code of Professional Conduct.

School Representative Program

The school representative program supports key contacts in each local and prepares members in the local who are serving as school representatives. A core element of the program is the *School Representative Toolkit*, a resource that enables school representatives to familiarize themselves with their role and maximize their effectiveness. In 2020, the toolkit was revised to update the Frequently Asked Questions section and to align it with significant changes in Association structures, processes and terminology. The toolkit was distributed to locals through the Members Only section of the Association's website.



Member Assistance

Teacher Employment Services—Member Services staff help teachers with problems arising from their professional practice and advise members on issues related to their employment status and professional relations. Statistics on the number of contacts that staff had with members in 2020 and the issues involved are reported in Table 4 (page 38).

Staff Relations Service

The Staff Relations Service (SRS) is a mediation/facilitation service that provides active members of the Association with a mechanism for resolving problems in staff relations that are negatively affecting the working environment and have not been successfully resolved through informal approaches. The program was initially designed to resolve such conflicts by working with either the majority of or an entire school staff. However, a review of the program revealed that conflicts were usually confined to a smaller group within the staff. Over time, there had been fewer and fewer requests for the program.

Following the 2016 Annual Representative Assembly, the program was revised and launched as a third-party mediation service approved by the Association. The SRS program uses a certified mediator to facilitate a conflict resolution process with up to six staff members in conflict at a school. In 2020, there were seven requests for the SRS.

Healthy Interactions Program

Healthy Interactions—Resolving Interpersonal Conflict is a conflict-resolution program that the Association delivers in two formats. The first is a four-day workshop for active

members who wish to become facilitators of the Healthy Interactions program. Those who participate in this workshop earn a certificate that entitles them to teach the program at the school or district level. The Association provides resources and ongoing support to facilitators, including assistance in establishing a professional development plan for implementing a districtwide Healthy Interactions program. This workshop is available upon request.

The second format is a two-day workshop entitled Understanding Conflict, which is offered to active and associate members who are interested in improving their personal communication and conflict resolution skills. Focusing on the individual skill-building aspects of the program only, this two-day workshop is facilitated by Association staff and by Association administrator instructors (see page 59). This workshop is generally offered at the request of a school division or school. Understanding Conflict is also available upon request in a more condensed, half-day version to help individual schools target specific areas of conflict resolution that can assist in creating healthy school communities.

In 2020, one half-day session for a school division was delivered in person to 16 participants. Three additional half-day sessions were presented virtually between April and December with three school staffs, totalling 72 member participants.

Teacher Growth, Evaluation and Supervision

Alberta Education's Teacher Growth, Supervision and Evaluation (TGSE) Policy deals with accountability and continuous professional growth, and ensures that a teacher's professional practice is under ongoing supervision. The policy defines the process, and the Teaching Quality Standard defines the competencies for professional practice. The two-day workshop that focused on TGSE Policy was held two times in 2020 with school and district office leaders.

Reflecting the revised Teaching Quality Standard and the new Leadership Quality Standard for the teaching profession, which came into effect September 2019, the workshop reviews the critical role of leaders in the growth, supervision and evaluation process and the duties that leaders must perform as outlined in the *Education Act* and provincial policy. The workshop also referred to current literature regarding TGSE, including a recent report by researchers from the universities of Calgary, Lethbridge and Alberta that will inform the new provincial policy that is expected to become effective in the near future.

A virtual version of the two-day TGSE workshop was being developed and is to be launched in early 2021.

Field Service

Throughout the year, Teacher Employment Services—Member Services staff made 51 presentations to teachers at professional development days, teachers' conventions, school staff meetings and, upon request, to university students and student locals. These presentations addressed such topics as administrators and the law (including dealing with unsatisfactory teaching performance); the Code of Professional Conduct; confidentiality issues related to student records (including counselling records); changes in the legal landscape; issues for administrators; liabilities associated with the use of technology; teacher growth, supervision and evaluation; teachers' rights and responsibilities; the law and the teaching profession; the respective roles of teachers and educational assistants; the Association's work; dealing with difficult people; and ways to address parent concerns.

COLLECTIVE BARGAINING

Collective Bargaining

Collective bargaining for teachers whose employer is one of the 61 Public, Catholic, or francophone school divisions occurs within the framework established by the *Public Education Collective Bargaining Act* and takes place at a central table, as well as between the Association and the respective employer school divisions.

Central Table Bargaining

The 2020 List of Central and Local Matters was delayed by the pandemic and, at year-end, had not been completed. The Central Table Bargaining Committee must complete list bargaining before bargaining the 2020 central agreement with the Teachers' Employer Bargaining Association.

Due to changes in bargaining practices, and considering the importance of openly communicating with and more closely involving teachers with regard to central table bargaining, the Bargaining Advisory Committee was formed in 2020. The committee, which includes all Bargaining Unit Teacher Welfare Committee chairs, held three meetings in 2020.

Local Collective Bargaining

The Association is the bargaining agent for 61 bargaining units in the province: 41 public, 16 separate and 4 Francophone. The Association also bargains for 6 charter/private schools (Almadina School Society, Aurora Academic Charter School, Boyle Street Education Centre, Clear Water Academy, New Horizons Charter School and Valhalla School Foundation).

At year-end, some agreements for 2018–20 had not yet been reached, and others had not yet been completed and signed off. Table 5 shows the bargaining units that have reached agreements.

Grievances

Violations of the collective agreement occur regularly, prompting, on average, the filing of at least one grievance each week of the year. When local action to resolve a dispute is unsuccessful, grievances are filed against that school division. Some other school divisions more quickly rectify issues once the Association brings attention to division staff about alleged violations. Many of these issues do not require further action.

Collective agreements for the 2018–20 round of bargaining experienced minor changes to grievance procedure at both the central and local levels. Dependent upon whether the collective agreement article in question was local or central, a grievance is filed quoting either Article 15 (central procedure) or Article 16 (local procedure). On occasion, grievances are filed at both levels.

Fifty-five grievances arising from alleged violations of collective agreements were initiated in 2020. Of these, 47 remained outstanding at year-end. Eight were resolved at the local/central initial stage, 29 were in the early stages of the process and 18 had proceeded to arbitration. In addition, 70 grievances remained outstanding from previous years and were in various stages of arbitration or abeyance at year-end. A summary of the status of grievances and arbitrations in progress at year-end is presented in Table 7.

Teacher assignable and instructional time grievances initiated in 2018 remained outstanding at the end of 2020. Arbitration dates that had been scheduled for mid-2020 were postponed into 2021 due to the pandemic.

Table 5. Local Collective Bargaining

| Bargaining Unit | Agreement Reached | Bargaining Unit | Agreement Reached |
|---------------------------|-------------------|-------------------------|-------------------|
| Aspen View SD | 2019 11 07 | Greater St Albert RCSSD | 2020 01 20 |
| Battle River SD | 2020 06 22 | Holy Family CSD | 2019 09 27 |
| Black Gold SD | 2020 02 12 | Holy Spirit RCSSD | 2020 01 09 |
| Buffalo Trail PSD | 2020 01 06 | Horizon SD | 2020 09 01 |
| Calgary RCSSD | 2020 03 02 | Lakeland RCSSD | 2019 11 05 |
| Calgary SD | 2020 08 24 | Lethbridge SD | 2019 12 13 |
| Canadian Rockies SD | 2019 11 29 | Livingstone Range SD | 2020 06 25 |
| Chinook's Edge SD | 2019 11 07 | Medicine Hat CSSD | 2020 06 10 |
| Christ the Redeemer CSSD | 2020 05 29 | Medicine Hat SD | 2020 06 24 |
| Clearview SD | 2020 06 24 | Northern Lights SD | 2020 05 08 |
| CS Centre-Est | 2020 06 15 | Northland SD | 2020 01 14 |
| CS Centre-Nord | 2019 11 08 | Palliser SD | 2020 03 06 |
| CS Nord-Ouest | 2019 11 08 | Parkland SD | 2020 03 06 |
| East Central Alberta CSSD | 2020 12 12 | Peace River SD | 2019 09 25 |
| Edmonton CSD | 2019 12 13 | Peace Wapiti SD | 2020 09 21 |
| Edmonton SD | 2020 03 02 | Pembina Hills SD | 2020 02 05 |
| Elk Island CSSD | 2020 01 20 | Prairie Land SD | 2020 01 30 |
| Elk Island PSD | 2020 06 10 | Prairie Rose SD | 2020 10 22 |
| Evergreen CSSD | 2020 01 24 | Red Deer CSD | 2020 05 21 |
| Foothills SD | 2020 02 11 | Red Deer PSD | 2020 01 10 |
| Fort McMurray PSD | 2020 10 01 | Rocky View SD | 2019 11 26 |
| Fort McMurray RCSSD | 2020 11 12 | St Albert PSD | 2019 11 13 |
| Fort Vermilion SD | 2020 01 20 | St Paul Education SD | 2019 12 16 |
| Golden Hills SD | 2019 11 05 | St Thomas Aquinas RCSSD | 2019 11 26 |
| Grande Prairie PSD | 2020 10 26 | Westwind SD | 2019 06 27 |
| Grande Prairie RCSSD | 2020 12 09 | Wild Rose SD | 2019 10 09 |
| Grande Yellowhead PSD | 2020 06 19 | Wolf Creek SD | 2019 10 02 |
| Grasslands SD | 2020 01 16 | | |

Table 6. Averages of Collective Agreements in Effect 2020 08 31

| Years of Teacher Education | Minimum | Maximum |
|----------------------------|---------|---------|
| Four | 59,781 | 94,255 |
| Five | 63,139 | 97,677 |
| Six | 66,870 | 101,442 |

Table 7. Status of Grievances and Arbitrations

| | Grievances | | | Arbitrations | | | |
|----------------|------------|-------------|-----------------------------|--------------|-------------------|-------------------|-------------|
| | Ongoing | In Abeyance | Resolved Initial Stage 2020 | Ongoing | Decision Received | Agreement Reached | In Abeyance |
| Previous Years | 0 | 16 | 15 | 54 | 0 | 10 | 0 |
| 2020 Local | 6 | 4 | 4 | 6 | 0 | 0 | 0 |
| 2020 Central | 11 | 8 | 4 | 12 | 0 | 0 | 0 |

Also outstanding from 2015 and 2016 under the *Assurance for Students Act* are seven grievances. In two of these grievances, conflicting judicial review decisions were received. Given these conflicting decisions, the Association requested a judicial review, which was held on 2020 10 01. The Justice assigned to the review concluded that the application for judicial review was to be dismissed. The Association has reviewed this matter and will advance the issue to the Court of Appeal.

Appeals to Alberta School Employee Benefit Plan and Other Insurance Matters

The Association assists and advises members with various benefits issues, including extended disability benefits (EDB) with the Alberta School Employee Benefit Plan (ASEBP), long-term disability with other carriers such as Great West Life and Manulife, and policy appeals with regard to insurance plan document issues. In 2020, the Association received 920 teacher calls and e-mails raising concerns in one or more of these areas. This included several teachers who were provided with advice and assistance with regard to their employer benefit plan carriers (Great West Life and Manulife). Further, one case cited concerns with Employment Insurance (EI). Following advice and the procurement of further documentation, the teacher's EI claim was accepted.

The Association represents teachers to various appeal bodies. In 2020, two teachers were represented to the ASEBP Board of Trustees, one through an EDB appeal hearing and one through a policy (plan document) appeal.

Staff also resolved matters related to EI, Canada Pension Plan Disability or occupational health and safety issues by providing further information to the plan providers on behalf of the teachers, by writing to plan providers for elucidation of the issue, or by clarifying to the teacher what is required on their part.

The number of contacts to Teacher Employment Services increased significantly during the pandemic, especially after the provincial government closed schools and school divisions laid off substitute teachers. In particular, substitute teachers were forced to file for EI, while the federal government's creation of the Canada Emergency Response Benefit caused angst and confusion among substitute teachers. There were in excess of 800 calls and e-mails concerning this issue or some variation of this issue.

Collective
Bargaining
contacts with
members in 2020:

»» 10,866

Teacher Welfare Education and Communication

Education Program

The Teacher Welfare Education Program aims to foster Teacher Welfare Committee (TWC) leadership capacity through a formalized education process and to ensure that an adequate number of TWC members are trained in collective bargaining issues. The program offers two levels of certification in leadership and negotiation skills. In 2020, 10 Level 1 and 7 Level 2 certificates were issued. Since the program's inception, 195 Level 1 certificates and 97 Level 2 certificates have been issued.

The certificate process aims to ensure that members have access to a variety of courses and programs that will assist them in developing the skills and capacity necessary to serve as leaders on a TWC or a Negotiating Subcommittee. To achieve each level of the certificate, a member must complete all core courses and a number of options. Courses are usually offered at Summer Conference (see page 21) and Collective Bargaining Conferences (formerly Teacher Welfare Area Conferences). Often courses are also offered at meetings of the bargaining unit, local, school staff and the TWC.

Due to the pandemic, the spring Collective Bargaining Conference was cancelled; however, the fall conference was held virtually with 233 attendees (including staff). This conference offered seven courses, with the majority of teachers attending their choice of two of these courses. The conference also attended to the struggles facing bargaining units, the importance of unifying around the concept of One Big Bargaining Unit, and an environmental scan. In addition, the agenda included breakout workshop sessions for members from the Teacher Welfare Education Program and a session with TWC chairs on their role as members of the Bargaining Advisory Committee.

Communications

Worth Talking About, a series of information articles, was launched in December 2019. In 2020, this series continued with weekly articles offering information on and insight into current issues important to teachers. Topics broached include salary, government budgeting, teacher pensions, the pandemic and its effect on the teaching profession, mental health management, working from home, and remaining safe in a new reality.

Teacher Welfare Liaisons

In 2020, 15 teacher welfare liaisons (TWLs) assisted bargaining units in preparing for negotiations and apprised staff of activities in their assigned units. The corps met once in early 2020 and discussed central and local bargaining, the 2020 List of All Matters, the bargaining needs survey, *Worth Talking About* and Summer Conference. In addition, TWLs were provided with information regarding the Alberta School Employee Benefit Plan Retirement Incentive for Teachers and Educators (RITE).

By the end of August 2020, liaisons had carried out approximately 47 consultations with Teacher Welfare committees (TWCs), local executives and individual members. These consultations involved attending local executive and TWC meetings, and assisting with bargaining. Due to Association budget constraints, the Teacher Welfare Liaisons corps was disbanded effective 2020 08 31.

Pensions and Retirement

Educating teachers on their pensions and their retirement remains a large part of the Association's mandate. The Alberta Teachers' Retirement Fund (ATRF) provides much of this education through its website and member consultations (both over the telephone and in person); however, planning for retirement remains complex. To address issues and questions that surface, staff produce explanatory information that is disseminated

through the Association's website, brochures and the *ATA News*. The Benefits, Insurance and Pension Committee (formerly the Pension Committee, now also assuming the functions of the disbanded Teacher Welfare Services Committee) continues to assist in the development of communications related to pensions. Further, in early 2020, the Association initiated virtual financial wellness workshops, with Capital Estate Planning providing information for attendees.

Pension Plan Asset Transfer

One major area of concern regarding teacher pensions emerged with the introduction of Bill 22, *Reform of Agencies, Boards and Commissions and Government Enterprises Act*, in 2019. The act directs that all Teacher Pension Plan assets be moved from the ATRF to the Crown corporation Alberta Investment Management Corporation (AIMCo). At year-end, ATRF was still working with AIMCo on the Investment Management Agreement, which identifies the ATRF as the pension plan and AIMCo as the investor. The transfer of funds from ATRF to AIMCo must be completed no later than 2021 12 31.

Retiree Benefits Plan

The Alberta Retired Teachers' Association (ARTA) provides benefits to retired teachers upon retirement and other educational workers at age 65. This benefit plan had been administered through third-party provider Alberta School Employee Benefits Plan (ASEBP) since 2013. Effective 2021 01 01, ARTA would be self-administering its Retiree Benefits Plan.

Retirement Consultants

In 2020, the Retirement Consultants corps provided locally sponsored preretirement workshops throughout the province for teachers close to retirement. The corps met once in early 2020. During its meeting, the corps heard a presentation by ATRF, held a forum discussion, reviewed early retirement incentive plans, and developed a retirement question-and-answer document for the Association's website. By the end of August, the corps had provided approximately 130 hours of service in 2020 to members and locals through preretirement workshops.

The Retirement Consultants' corps was disbanded due to Association budget constraints effective 2020 08 31. Locals will continue to host the full-day preretirement workshops for teachers close to retirement, with local officials hosting and facilitating the all-day session.

Table 8. Summary of Teacher Employment Services—Collective Bargaining Staff Contact with Members

| Issue | 2020 |
|---------------------------------|---------------|
| Extended Disability/Sick Leaves | 2,682 |
| Maternity/Parental Leaves | 1,517 |
| Other Leaves | 616 |
| Collective Agreement Issues | 1,917 |
| Bargaining | 408 |
| Pension/Retirement | 462 |
| Other | 3,264 |
| TOTAL | 10,866 |

Field Service


Teacher Employment Services—Collective Bargaining staff continued to meet with local Teacher Welfare committees (TWCs) in 2020. The 2018–20 bargaining round will extend into 2021, with several bargaining units continuing to bargain that round. Bargaining Unit General Meetings were held throughout the year, with units accepting opening bargaining proposals to employers, authorizing the filing for mediation or ratifying a memorandum of agreement.

Staff also continued to meet with bargaining units on nonbargaining matters, presenting workshops on such topics as maternity leave, understanding collective agreements, pension basics for local officials and the calculation of instructional time. Statistics on those contacts with members in 2020 are reported in Table 8.



PROFESSIONAL DEVELOPMENT

The primary goal of the Professional Development program area is to establish and maintain high standards with respect not only to the practice of individual teachers but also to teaching as a profession.



Professional Practice Standards

In 2020, the Association continued to provide support for the implementation of the Professional Practice Standards for the teaching profession. In particular, staff developed and offered presentations about the Teaching Quality Standard and the Leadership Quality Standard. These presentations were made available to teachers and school leaders at various events including local professional development days, Professional Development Area Conferences and teachers' conventions. They were also provided upon request to classes at Alberta's faculties of education.

Curriculum

The Association's participation in curriculum-related work has been severely curtailed over the 18 months preceding year-end. Nonetheless, in 2020 the Association continued to stress the need for teachers to play a central role in all facets of curriculum development, field testing and implementation. In particular, the Association responded to the release of the report of the Curriculum Advisory Panel (2019 12 20), as well as a new Ministerial Order on Student Learning that came into effect 2020 08 06.

Following advice from the minister of education's advisors on draft curriculum, employers nominated teachers to review and comment on the draft K–6 curriculum. Those selected were invited to attend a two-day virtual event to provide their insights and expertise.

Inclusive Education

In 2020, the Association continued to develop resources to support teachers and school leaders in establishing inclusive learning environments. These resources were developed as part of the grant funding received through Alberta Education to support implementation of the Teaching Quality Standard (TQS) and Leadership Quality Standard (LQS). Many of the resources described below were developed in collaboration with the Association's Council for Inclusive Education.

First, the Association developed a new resource series entitled *Common Threads* for Inclusive Education, which contains background information, teaching strategies and additional resources to support each of the topics outlined within the series (see Publications, page 63). More resources for this series continue to be developed and translated into French.

Second, a resource guide entitled *Establishing Inclusive Learning Environments* was created to support school principals and professional development leaders as they work collaboratively with school staff to develop professional competence in inclusive education. This guide includes 21 professional learning activities to support the establishment of inclusive learning environments, as required by the TQS and LQS. Topics addressed include emotional and mental health, sexual orientation and gender identity, classroom management, programming for individual needs, inclusive learning teams and student leadership.

In 2020, the Association signalled its continuing commitment to participate in Alberta Education's Advisory Committee for Building an Inclusive Education System. Alberta Education has indicated there are no plans to hold further meetings of this committee.



Inclusive education resources, such as *Common Threads for Inclusive Education* and *Establishing Inclusive Learning Environments*, and Indigenous education resources, including the *Stepping Stones* series, are available on the Association's website under My ATA>Professional Development.



Indigenous Education

Gaining proficiency related to the Indigenous-focused competencies and indicators in the Teaching Quality Standard (TQS) and Leadership Quality Standard (LQS) continues to be a priority for many teachers and school leaders across the province. The Association is committed to providing authentic supports, resources and information to teachers to assist them with their acquisition of foundational knowledge of First Nations, Métis and Inuit.

In 2020, the Indigenous Advisory Circle, consisting of 11 First Nations, Métis and Inuit Elders and Knowledge Keepers from across the province, continued to provide guidance and feedback on Indigenous education and the advancement of reconciliation. The Indigenous Advisory Circle is a direct connection to learning, listening and engaging with Elders and Knowledge Keepers within Indigenous communities across Alberta. The Indigenous Advisory Circle gathered four times throughout the year to provide feedback on newly developed Indigenous education workshops and resources, training for Indigenous education professional development facilitators, and advice on Association policies and administrative regulations.

Involvement from First Nations, Métis and Inuit is integral in the development of new Indigenous education resources and workshops. The Association's Indigenous Advisory Circle, Rupertsland Institute Centre for Métis Excellence and the Sixties Scoop Indigenous Society of Alberta (SSISA) have provided advice and feedback on many of the newly developed Stepping Stones resources (see Publications, page 63). Furthermore, consultation and collaboration from the Association's Indigenous Advisory Circle and SSISA have resulted in the development of two new Indigenous education workshops, *Finding Our Way in Indigenous Education: Connecting Hearts and Minds*, and *The Sixties Scoop: Understanding Implications and Contributing Towards Reconciliation*.

Diversity, Equity and Human Rights

The Association's Diversity, Equity and Human Rights (DEHR) programming includes the development of strategies, resources and policy to support members in meeting the increasingly complex needs of their diverse school communities. Through both the provincial DEHR and local DEHR committees, initiatives related to the following were undertaken: addressing discrimination, racism and oppression; advocating for students and teachers from visible minorities, sexual and gender minorities and those with disabilities; promoting cultural responsiveness and inclusivity; and safeguarding the well-being of children and youth.

In 2020, the following activities promoted an awareness of diversity, equity and human rights issues:

- Providing ongoing assistance to help local associations establish and develop local DEHR committees and student-and-teacher Gay-Straight Alliances (GSAs)/Queer-Straight Alliances (QSAs)
- Collaborating with the Council of School Counsellors to develop a new resource focused on helping teachers support the mental health of refugee students
- Providing \$20,000 in grants to support 13 DEHR projects by individual schools and local associations across the province
- Celebrating the Association's continued allyship and support for Alberta's 2SLGBTQ+ community by installing a rainbow crosswalk at Barnett House
- Launching an online antiracism and antioppression speaker series designed to provide teachers and school leaders with the knowledge they need to help them address individual, institutional and systemic racism in their contexts



In addition, the Association continued to collaborate with education partners, including the Associated Schools Project Network (ASPnet), the Canadian UNESCO National Coordinating Committee, the Canadian Multicultural Education Foundation and the SOGI 123 Educator Network. The Association also supported the annual GSA/QSA student conference hosted by the University of Alberta's Institute for Sexual and Gender Minority Studies and Services.

Teacher Education and Certification

The Association undertook the following activities regarding teacher education and certification in 2020:

- Collaborated with Alberta Education in presentations to education students in the final phase of their teacher education program
- Expanded the program of delivery for preservice teacher education programs at various phases of the program
- Ensured that students in their final practicum at the time of teachers' convention who were members of their student local or student members of the Association were provided with no-cost opportunities to attend convention
- Sponsored the attendance of an Area Field Experience chair to the annual WestCAST 2020 Conference
- Recommended to Provincial Executive Council the names of fellowship and award recipients

In 2020, the Association offered services to the universities of Alberta, Calgary, Lethbridge and Campus Saint Jean, as well as to Ambrose University, Concordia University of Edmonton, Grande Prairie Regional College, Keyano College, Medicine Hat College, Mount Royal University, Red Deer College, St Mary's University and The King's University.

Teacher Qualifications

The Teacher Qualifications Service, the agency responsible for assessing teacher qualifications for salary purposes, has been operating since March 1967 under an agreement between Alberta Education, the Alberta School Boards Association (ASBA) and the Alberta Teachers' Association. Comparative statistics on qualifications issued are shown in Table 9.

In 2020, the Teacher Qualifications Committee, to which a teacher can appeal if dissatisfied with an assessment, considered two requests for reassessment.

The Teacher Salary Qualifications Board establishes the principles under which the Teacher Qualifications Service evaluates teacher preparation for salary purposes and hears appeals of the decisions of the committee. The principles adopted by the board are printed in the *Members' Handbook*, posted on the Association's website and published in pamphlet form. The board is made up of appointees from the Association, the Alberta School Boards Association, Alberta Education, the University of Alberta, the University of Calgary and the University of Lethbridge.

Table 9. Statements of Qualifications Issued

| | 2020 |
|------------------------------------|--------------|
| Based on in-province documents | 1,530 |
| Based on out-of-province documents | 1,156 |
| Duplicate | 134 |
| TOTALS | 2,820 |
| Fees received | \$296,676 |

*New fee structure in effect 2020 05 01

University Liaison

One aspect of the Association's liaison with universities is representation on a variety of committees and boards. In 2020, staff represented the Association on each faculty of education council: Campus Saint-Jean, Concordia University of Edmonton, The King's University, the University of Alberta, Mount Royal University, the University of Lethbridge, the University of Calgary, Ambrose University and St Mary's University. In turn, universities named representatives to several standing committees of the Association.

Another aspect of the Association's liaison with universities is assisting instructors responsible for presenting information about the Association to university classes. Such assistance includes meeting with instructors at each university, making presentations to education classes and producing such publications as *Teaching in Alberta—A Teacher Education Learning Resource*. Among the topics covered in university presentations are ethics; certification and the Teaching Quality Standard; collective bargaining; diversity in the classroom; professionalism; public education; relationships with parents; social media, technology and professionalism; student assessment; teacher contracts; teacher governance; teacher growth, supervision and evaluation; teacher liability; teachers and the law; and the organization of the Association.

Inductions

In 2020, 21 locals held induction ceremonies. A total of 526 new members were welcomed into the profession at inductions. Each new member received an induction package containing an induction certificate, a membership card and pertinent materials for beginning teachers. Of the 526 new Association members, seven received their induction materials in French.

Program for Beginning Teachers

Typically, the Association organizes two conferences for beginning teachers. In 2020, the conferences, normally held in Edmonton and Calgary, were ultimately cancelled due to the pandemic. Two short mini-conferences were scheduled to be held virtually in January 2021 to support teachers new to the profession.

Like the in-person Beginning Teachers' Conferences, these virtual mini-conferences aim to

- orient beginning teachers to the teaching profession and to the role of the Association,
- ease beginning teachers' transition into the profession,
- provide beginning teachers with the skills and information they need to succeed in their first years,
- acquaint beginning teachers with the services the Association provides to teachers, and
- help beginning teachers to develop a network of supportive colleagues.

Mentorship Program

The Association continued to provide a number of locals and jurisdictions with advice on how to establish mentorship programs for beginning teachers. The Association's primary role in this regard is to ensure that both mentors and beginning teachers receive adequate preparation and support. Mentorship programs vary considerably among schools and school jurisdictions, reflecting such factors as fiscal restraints, availability of substitute coverage, availability of time for mentors and proteges to meet during the school day, travel due to geographical challenges, the number of experienced teachers able to serve as mentors, and competing district-run mentoring program offerings that may not reflect the Association mentoring program model.

In relation to mentorship programs, Association staff tailor support to respond to local circumstances. In some cases, staff encourage locals and districts to implement mentoring partnerships, while in others, they work within existing jurisdiction-led or local-led mentoring programs. The Association monitors and evaluates these programs on an ongoing basis.

The Association continued to maintain formal mentoring partnerships with the following districts and locals: The Peace Wapiti School Division and Northern Spirit Local No 6, The Grande Prairie and District Catholic Schools and Grande Prairie and District Catholic Teachers Local No 42, The Grande Prairie School Division and Trumpeter Local No 26, The Greater St Albert Roman Catholic Separate School Division and Greater St Albert Catholic Local No 23, The Medicine Hat School Division and Medicine Hat Local No 1, and The Buffalo Trail School Division and Park Plains East Local No 31.

The Association also provided a continuum of mentoring assistance over the past year in Calgary Public Teachers Local No 38 and Calgary Separate School Local No 55.

Each formal partnership is monitored by a steering committee consisting of local representatives, district representatives and Association staff. The steering committees develop a frame of reference and guiding principles; coordinate activities for mentors, beginning teachers, school leaders and district staff; and monitor and evaluate the program. Formal collaborative mentoring programs provide quality professional development and a support system that attracts new teachers to the profession and contributes to their retention.

To support beginning teachers working in francophone schools and in French immersion programs, the Association also publishes its mentoring resources in French, and bilingual staff work with individual locals/districts to offer the mentorship program.

Program for School Leaders

The purpose of this program is to develop materials for, and provide professional development to, school leaders on a variety of topics. In 2020, workshops, presentations and sessions were provided on such topics as school leadership development in school divisions and school leadership within the teaching profession. Further, learning sessions were hosted by Association locals and Alberta faculties of education.

With the pandemic restrictions emerging in spring 2020, the Association pivoted the delivery method for professional learning for school leaders and aspiring school leaders in Alberta. In August, the Association held the annual Educational Leadership Academy (ELA) in an online format over the three days, with six three-hour modules. For the event, a record 1,280 Alberta school leaders and aspiring school leaders engaged in professional learning with education leaders from around the world, with a focus on moving from crisis to hope and renewal. The program included B Pont (Organisation for Economic Co-operation and Development), A Hargreaves, P Sahlberg and A Doucet. The online venue allowed a far greater number of participants to connect during the

»»» Throughout the year, specialist councils hosted numerous online professional development opportunities for teachers across all grade levels.

event. Further, several sessions were recorded and will be available as episodes of the Council for School Leadership's (CSL) uLead Podcast.

The Association also hosted the annual Leadership Essentials for School Leaders Conference in an online format, with online workshops beginning in November. The conference aimed to provide relevant and diverse sessions to support and enhance leadership practice.

In addition to offering professional learning events, the Association produces *Leadership Update*, a newsletter intended to provide school leaders with information on issues that they face and to introduce them to services available from the Association. The newsletter, which was published five times in 2020, is mailed to all school principals and posted on the Association's website. In late 2020, the Association also published and disseminated a comprehensive document entitled *Leadership Services for School Leaders* that lists all Association services available to aspiring and current school leaders.

Further, the Association continued to support the work of the CSL in the development and implementation of the annual uLead Conference. In recent years this event has become an international event attracting more than 1,200 delegates annually from multiple countries, a range of teacher and leadership organizations, and ministries of education around the world while continuing to serve the needs of Alberta's school leaders for a high-quality professional learning experience. Due to the pandemic, the 2020 event was postponed until May 2022.

In conjunction with the CSL, the Association also supports an active action research alliance that engages Alberta principals and district leaders in collaborative action research work with counterparts in Queensland, New South Wales and Victoria, Australia.

Specialist Councils

In 2020, the Association had 21 active specialist councils serving the teachers of Alberta. In 2020, grants to these councils totalled \$862,000. Membership data for specialist councils are presented in Table 10.

Due to pandemic restrictions, no in-person specialist council conferences were held in 2020. Throughout the year, the councils hosted numerous online professional development opportunities for teachers across all grade levels. These events spanned the geography of the province, working to support teachers in every region and offered targeted professional development to meet the needs of Alberta's diverse teaching population.

Beyond addressing teacher needs through professional development sessions, specialist councils also sought to provide research-supported professional reading for their members. This was accomplished through the development of book lists, newsletters (11 were produced across the councils) and academic journals (6 were produced across the councils).

Specialist councils also worked to represent the needs and views of Alberta teachers. During 2020, specialist councils advocated for the inclusion of several policies in the Association's policy bank and established or maintained formal liaisons with representatives of postsecondary institutions and Alberta Education.

The Association works to ensure executive teams from each specialist council are supported to provide the best possible service to the teachers of Alberta. To achieve this, training was provided in January 2020 to presidents, editors, webmasters, secretaries and treasurers of the councils.

Table 10. Regular and Student Memberships in Specialist Councils

| Council (Inaugural Year) | 2020 |
|--|-------------|
| Alberta School Learning Commons (1975) | 148 |
| Career and Technology Education Council (1997) | 764 |
| Council for Inclusive Education (1970) | 744 |
| Council for School Leadership (1961) | 1,889 |
| Council of School Counsellors (1961) | 453 |
| Early Childhood Education Council (1966) | 2,833 |
| Educational Technology Council (1982) | 534 |
| English as a Second Language Council (1992) | 837 |
| English Language Arts Council (1961) | 1,533 |
| Fine Arts Council (1963) | 981 |
| First Nations, Métis and Inuit Education Council (2008) | 517 |
| Global, Environmental & Outdoor Education Council (1976) | 398 |
| Health and Physical Education Council (1962) | 1,905 |
| Le Conseil français (1970) | 744 |
| Mathematics Council (1961) | 1,555 |
| Middle Years Council (2005) | 722 |
| Outreach Education Council (2002) | 192 |
| Religious and Moral Education Council (1974) | 283 |
| Science Council (1961) | 1,446 |

Teachers' Conventions

Nine teachers' conventions were held in 2020. The approximate attendance of each convention is shown in Table 11.

Convention sessions attended to curricular subjects, pedagogical topics and leadership strategies in alignment with the Teaching Quality Standard (TQS) and the Leadership Quality Standard (LQS). Further, convention programs focused on a number of common themes, including Indigenous education and education for reconciliation, trauma-informed practices, comprehensive school health, the use of school makerspaces and learning commons, play-based pedagogy, and the TQS and the LQS.

Convention Associations

Throughout the year, the Association held a number of meetings for convention association executives to develop new ideas for meeting members' professional development needs through convention programs, to share promising practices, and to receive role-specific training to improve their individual and collective efficacy. With restrictions related to the pandemic emerging in March 2020, these meetings were primarily held online.

Table 11. 2019 Convention Attendance

| Convention | Attendance ¹ | |
|--------------------------|-------------------------|--------------------------------|
| Calgary City | 10,507 | (from 2 locals) |
| Central Alberta | 2,163 | (from 5 locals ²) |
| Endless Skies | 2,272 | (from 9 locals) |
| Greater Edmonton | 9,088 | (from 3 locals) |
| Mighty Peace | 1,535 | (from 5 locals ²) |
| North Central | 6,307 | (from 18 locals ²) |
| Palliser District | 3,790 | (from 9 locals ²) |
| South Western Alberta | 1,966 | (from 6 locals ²) |
| South Eastern Alberta | 1,071 | (from 4 locals) |
| TOTAL¹ | 38,699 | |

¹ The approximate number of active members (employed full-time and part-time only) at the time each convention was held. This number does not include the number of substitute teachers, teachers on leave, associate members, student members, or teachers from neighbouring provinces and territories who may have attended convention.

² Members in 7 locals attend multiple conventions. The total number of locals will not equal 55.

With the amalgamation of the Central East Alberta Teachers' Convention Association and Northeast Teachers' Convention Association in 2019, the first Endless Skies Teachers' Convention was held 2020 02 13–14.

At its 2020 09 24–25 meeting, Provincial Executive Council decided that, given the pandemic, 2021 teachers' conventions would be held fully online. The Association led several online planning sessions in the fall to support convention boards in their planning and in their technical infrastructure. All convention boards will host a mix of live sessions using Zoom and on-demand prerecorded sessions. The South Western Alberta Teachers' Convention Association and the Southeastern Alberta Teachers' Convention Association decided to jointly plan their 2021 teachers' convention for one year only, naming the event the Southern Alberta Teachers' Convention.

Convention Review

With the Committee on Convention Review having presented its final report to Council in 2019, a Convention Review Implementation Plan was developed by staff and presented to Council in January 2020. The plan was approved in principle and several recommendations—including ensuring greater alignment of program sessions and exhibits with the TQS and LQS—have been implemented. Other recommendations from the final report are being implemented more gradually or considered in the longer term.

Professional Development Facilitators

To foster effective regional professional development (PD) for Alberta teachers, the Association maintains a corps of PD facilitators. Among other activities, PD facilitators help staff deliver programs to school-based and local PD committees in the following ways:

- Provide a bimonthly PD newsletter to school-based and local PD committees
- Provide service on a short-term basis to locals and local PD committees that require specific field service

»»» A total of
73
Indigenous
education
workshops were
facilitated by
the Indigenous
education PD
facilitators,
with a total of
2,287 participants
attending.

- Help individual schools and school-based PD committees assess their needs and plan and evaluate programs
- Participate in Association task forces and other bodies that are established from time to time
- Report to PD staff on a regular basis

In addition, PD facilitators supported such activities as Association mentorship programs and undertook formal assignments that included workshops, presentations and meetings in the province, and ongoing, more informal work in support of individual PD chairs and locals. Finally, to continue to support beginning teachers throughout the province, the PD facilitators struck a subcommittee to continue to respond to the current needs of beginning teachers.

PD facilitators participated in a spring training session, the Professional Development Course and the fall Professional Development Area Conference (see Professional Development, Field Service, page 60), all of which were held virtually. At their monthly meetings, PD facilitators provided updates on their regional PD activities, and explored new Association resources and publications for their regional newsletters.

Indigenous Education Professional Development Facilitators

A subgroup of the professional development (PD) facilitator corps, the Indigenous education PD facilitator corps has been active since 2019 09 01. Members continue to identify the Indigenous-focused competencies and indicators within the Teaching Quality Standard and Leadership Quality Standard as areas in which they require professional development and support. Indigenous education PD facilitators facilitate the Indigenous education workshops, and provide support for teachers and school leaders to contextualize the content based on the local area. In addition, the Indigenous education PD facilitators are available to assist in developing and maintaining relationships with First Nations, Métis and Inuit Elders, Knowledge Keepers and Cultural Advisors.

In 2020, 16 Indigenous education PD facilitators were assigned to regions across the province and recruitment for two vacant positions was under way. A total of 73 Indigenous education workshops were facilitated by the Indigenous education PD facilitators, in person and through online platforms, with a total of 2,287 participants attending. The most requested Indigenous education workshops were Indigenous Content in the New Teaching Quality Standard—Moving from Inspiring to Requiring, Full Circle—Social Implications of Indigenous Realities, Indigenous Education Resources—Where Do I Start?, The Sixties Scoop—Understanding Implications and Contributing Towards Reconciliation, and Finding Our Way in Indigenous Education—Connecting Hearts and Minds.

Two workshops were codeveloped by Indigenous education PD facilitators: $\subset \vee \Delta^{\circ}$ tapwewin: Dismantling Anti-Indigenous Racism, and A Call to Action for Advancing Indigenous Women in Education: Restoring Balance Through Truth, Justice and Reconciliation. These newly developed workshops will be piloted during the 2021 teachers' convention season.

Indigenous Education PD facilitators attended the fall Professional Development Area Conference (PDAC) and Indigenous education PD facilitator meetings, which were held virtually, for training and professional development purposes.



Association Instructors

The Association instructor (AI) corps, consisting of 54 teachers and administrators, delivers Association workshops at schools, locals, conventions and conferences. Seven members of the corps offer workshops in French and eight specialize in presenting First Nations, Métis and Inuit workshops.

In the spring, AIs were trained on facilitating workshops, planning and preparing workshops for delivery, creating meaningful connections, and delivering the workshop Recognizing and Addressing Anxiety in Schools. In addition—taking into account pandemic restrictions—training was provided virtually in August to support the pivot to online delivery of workshops, with Zoom skills training offered and online engagement strategies shared.

AIs facilitated the following workshops to support teachers in meeting the Teaching Quality Standard competencies: Fostering Effective Relationships; Applying Foundational Knowledge About First Nations, Métis and Inuit; Engaging in Career-Long Learning; Establishing Inclusive Learning Environments; Demonstrating a Professional Body of Knowledge; and Leading a Learning Community. Workshops were promoted through the Association's website and social media, brochures, and posters distributed to all schools.

Over the course of the year, four new workshops were developed or revised: Mental Health 101, Making the Most of a Teaching life—How to Be Well and Stay Well, Classroom Management—Beyond the Basics, and Creativity—Our Next Generation Depends on It.

In 2020, AIs presented 210 workshops to 8,557 participants at schools, local professional development days, teachers' conventions and specialist council events.

Association
Administrator
Instructors
presented

»» 68
workshops to
3,125 participants.

Association Administrator Instructors

The Association administrator instructor (AAI) corps, consisting of 13 school administrators, delivers Association workshops at schools and to groups of administrators. In 2020, AAIs delivered 68 workshops to 3,125 participants on a variety of topics, including at the Association's Leadership Essentials for School Leaders conference and at teachers' conventions. In August, AAIs were trained to support the transition from in-person to online workshop delivery.

Agile Schools Network

The Association's Agile Schools Network is a collaborative initiative that seeks to improve the quality and equity of Alberta's education system and increase teachers' and school leaders' ability to create a learning environment where all students can demonstrate their skills at a level that reflects their potential. Through this collaborative initiative, school teams will gain the evidence, skills and networks to lead disciplined innovation processes to ensure deeper learning for all students. Further, the network is fully scalable; it grows as teachers and school leaders learn the techniques involved in driving positive change in their schools and can then train the next cohort (or innovation hub) on the Learning Sprint process. Similar networks have been formed recently in British Columbia, Saskatchewan and Manitoba.

In 2020, the network continued to engage teachers from both urban and rural school districts from across the province. Due to the pandemic, learning activities were held via webinar format online. In May, 448 teachers participated in an online workshop—Harnessing Teaching Sprints for Professional Growth—that introduced participants to the Teaching Sprints concept to equip them with the tools required to lead this process within their own contexts. An additional 823 teachers and school leaders participated in a related workshop, Leading Through Uncertainty: How Alberta School Leaders Can Navigate the Path from Crisis to Renewal, in late May.

In November and December, in collaboration with the Council for School Leadership, the Association held two workshops on running Teaching Sprints, which empower school leadership teams to lead iterative change focused on supporting all teachers in their schools to experience ongoing growth in their professional expertise. Five hundred twenty-six teachers in leadership teams across Alberta participated in these workshops.

Special Projects

Reflection on My Professional Practice Tool

The Association has created an updated digital resource for developing annual professional growth plans. A comprehensive digital, interactive Reflection on My Professional Practice tool is available to assist teachers and school leaders in reflecting on the knowledge, skills and attributes of their professional practice as related to the Teaching Quality Standard (English and French) and/or the Leadership Quality Standard. This interactive tool allows certificated staff to reflect on their practice and respond to a questionnaire. Personal results of the self reflection appear in bar graph summary format, providing a profile of strengths and considerations for growth plan goals. The self-reflection tool also includes suggested resources to support implementation of the competency indicators. In 2020, the Leadership Quality Standard Reflection on My Professional Practice tool was developed in French for francophone school leaders.

More than
 »»» 50
 webinars
 were offered to
 15,000 members
 between April and
 June in 2020.

Communities of Practice Inquiry Grant

Since the 2017/18 school year, the Alberta Teachers' Association has been pleased to offer matching grants of up to \$2,000 each school year for groups of teachers to develop a community of practice that addresses an issue of professional relevance using an inquiry model. Teachers engaging in this work explore issues related to the following:

- Teacher leadership in curriculum
- Support for beginning teachers
- Support for teachers new to Alberta
- Communities of practice supporting inclusive education
- Communities of practice supporting Indigenous education
- Any other topic that can be addressed using an inquiry approach

During the 2019/20 school year, grants of \$1,000 each were awarded to Unité locale francophone No 24 and Wolf Creek Local No 3 under the Communities of Practice Inquiry Grant program. In spring 2020, due to the low number of grant applications, the program was discontinued.

Field Service

Demand for professional development (PD) workshops and presentations provided by staff remained high for the first three months in 2020. Statistics on the workshops and presentations provided by staff are shown in Table 12. Workshops were also delivered by Association instructors, whose work is described on page 58, and Association administrator instructors, whose work is described on page 59.

In the spring, the Association pivoted PD program delivery online due to restrictions connected to the pandemic, quickly implementing strategies for delivering PD in a virtual setting and offering learning opportunities for teachers through webinars. With this pivot, between 2020 04 01 and 2020 06 30 more than 50 webinars were offered to 15,000 members. In addition, the Association continued to develop online web-based service for professional growth planning and continued to use the Communities PD collaborative website, which is primarily intended to support PD leaders involved in locals, specialist councils and teachers' convention associations. The website also aims to deliver materials and information to members of the Association's two instructor corps.

The Association held one Professional Development Area Conference (PDAC) in 2020. The spring PDAC, normally held in Calgary, was cancelled due to pandemic restrictions. The fall PDAC, held virtually in November, had 124 attendees. Delegates to the fall conference included local PD chairs, local presidents, convention association presidents and program chairs, specialist council presidents, PD facilitators, Indigenous education PD facilitators, and members of Provincial Executive Council. The conference included a provincial update, regional meetings and breakout sessions.

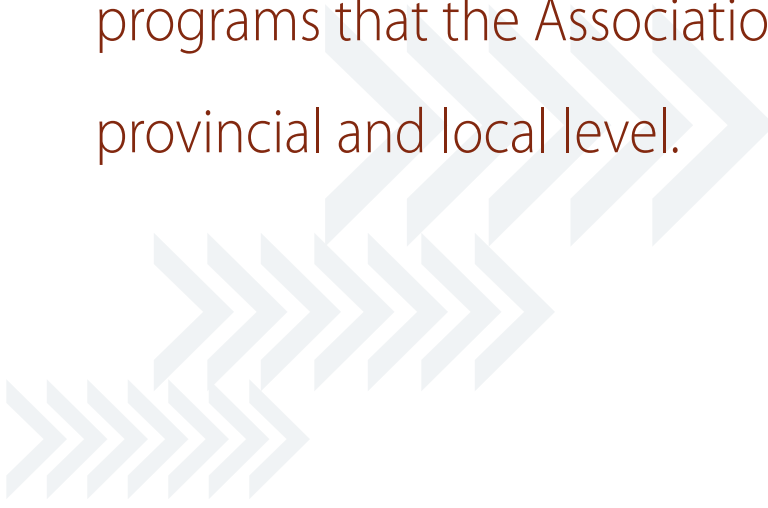
Table 12. Field Service Delivered by Professional Development Staff

| | 2018 | 2019 | 2020 |
|-----------------------------|--------|--------|--------|
| Workshops and presentations | 230 | 264 | 349 |
| Participants | 16,772 | 17,910 | 20,873 |



OPERATIONS

Operations encompasses Finance, Document Production, Human Resources, Central Records and Archives, Building, and Information Technology Services, all of which support and enable the programs that the Association carries out on a provincial and local level.



On average,
executive staff
officers each
worked
»»213
days.

Human Resources

Human Resources supports the Association's service to members by providing specialized knowledge and consultation to leadership and staff in support of a high-performance workforce. This includes developing programs and policy that engage, develop, assess and align workforce strategies in support of the Association's mission and objectives. Traditional supports include supporting the Association's service to members by maintaining appropriate staffing levels, handling matters related to employee and labour relations, ensuring health and safety compliance, facilitating and coordinating staff training and development, and assisting the coordination of the organization's administrative functions. In 2020, human resources staff also worked with locals to manage staffing matters and policy development.

Key initiatives undertaken in 2020 included the following:

- Restructuring the unit to better align with the Association's business and human resources needs
- Updating the Association's Respect in the Workplace Policy
- Analyzing the results of the Association's first engagement survey and, in response, implementing initiatives in collaboration with the Engagement Committee
- Rolling out a new classification system
- Providing workforce planning support for the amalgamation of Teacher Welfare and Member Services program areas
- Conducting organizationwide hazard assessments
- Planning and supporting the Association's pandemic response as a part of an internal crossfunctional team

The Association has 159 employees, encompassed in the following staff groups: 37 executive staff, 49 professional staff and 73 support staff.

In 2020, 12 recruitment competitions were conducted. Other changes included three additional promotions due to restructuring and six retirements (four support staff and two professional staff).

Taking into account leaves, on average, executive staff officers worked 213 days and travelled 8,950 km in 2020.

Document Production and Distribution

Document Production (DP) is a diverse department, specializing in editing, design, photography, digital printing, distribution, stationery and mailing. DP staff work in partnership with Association staff across program areas, specialist councils and locals to create, develop and distribute professional communication solutions.

Throughout 2020, editorial and graphic design work focused on specialist council newsletters and journals, research monographs, the *ATA News* and the *ATA Magazine*. Other work undertaken in 2020 comprised the editing, creative design and development of internal and external publications, banners, brochures, postcards and communications to support the activities of the Association. In particular, DP staff provided editorial, graphic design, printing and/or distribution services for inclusive education resources; Indigenous education resources; public relations campaigns; research initiatives; Diversity, Equity and Human Rights programming; World Teachers' Day; and Substitute Teachers' Appreciation Week.

In response to concerns surrounding the pandemic and the ability to safely collate and assemble school mailing items, as well as the Alberta government's announcement of school closures in March, the decision was made to cancel remaining school mailings for the 2019/20 school year. Some information scheduled to be included in these school mailings was communicated through the Association's website and social media platforms. Items distributed through six scheduled school mailings to school representatives included promotional materials for specialist council activities; information for Beginning Teachers' Conferences; Indigenous education resources; issues of *The Learning Team*, *Leadership Update*, *Ever Active Schools* and *PRECIS*; materials related to Education Week, Hats On! for Mental Health Day, My Classroom Concerns Are... MLA Letter Writing campaign and the Society for Safe and Caring Schools & Communities; Substitute Teachers' Appreciation Week campaigns; Association library bookmarks; Educator Exchange Programs materials; and Aspen Foundation for Labour Education information materials.

Publications

The Association produces many types of documents, ranging from monographs to brochures to workshop materials. New substantial publications produced in 2020, or those which were considerably revised, are captured in the list below.

ATA Membership and Services

Welcome to the Profession: A Quick Guide to the Alberta Teachers' Association; Bienvenue dans la profession: Petit guide de référence de l'Alberta Teachers' Association; Services en français de l'ATA

Professional Development

Professional Development Program and Services Guide; Common Threads for Inclusive Education Professional Growth Resources/Fils conducteurs en éducation inclusive—Ressources destinées au perfectionnement professionnel—Planifier votre parcours d'apprentissage; Livret Pierres d'assise no 15—Pensionnats : l'expérience des Inuits, Stepping Stones No 15, Residential Schools—Inuit Experience; Livret Pierres d'assise no 16—Nation métisse de l'Alberta, Stepping Stones No 16, Métis Nation of Alberta; Livret Pierres d'assise no 18—Rafle des années 1960, Stepping Stones No 18, The Sixties Scoop Atelier, Une histoire commune, un avenir à partager : initiation aux traités (Our Shared History, Our Shared Future: A Brief Introduction to Treaties); Common Threads for Inclusive Education—Autism Spectrum Disorder; Common Threads for Inclusive Education—High Ability and Gifted Students; Common Threads for Inclusive Education—Learning Disabilities; Common Threads for Inclusive Education—Understanding Challenging Behaviours; Common Threads for Inclusive Education—Emotional and Mental Health; Common Threads for Inclusive Education—Student Assessment in an Inclusive Classroom; Common Threads for Inclusive Education—Parent Collaboration; Teachers' Convention Attendance Guidelines and FAQs (English/French)

Research

Compassion Fatigue, Emotional Labour and Educator Burnout: Research Study; Understanding Aggression(s) in Alberta and School Communities; Women in Educational Leadership Needs Assessment Survey

Teachers as Professionals

Leadership Services for School Leaders; Substitute Teachers: Professional Replacements (revised); Teachers' Rights, Responsibilities and Legal Liabilities (revised)/Droits, responsabilités et obligations légales de enseignants; Dépliant du Programme d'échanges en éducation: échanges de courte durée (EEP Short-Term Exchange Brochure); Formulaire de candidature du Programme d'échanges en éducation: échanges de courte durée (EEP Short-Term Exchange Application Form)



Information Technology Services

Historically, the role of Information Technology Services (ITS) was focused on reliably and securely delivering the Association's technology needs. The core of the Association's business technology is Alinity, the central member database. Alinity—which approximately 126 staff use on a daily basis—was implemented in 2007 and continued to be supported throughout 2020.

A new direction in ITS was established in 2020 to provide the technology support and services the Association needs to meet current and emerging technology needs. Improved service orientation and responsiveness, and a business driven and user driven approach to technology support were embraced.

ITS supports online services, including the provincial website, online voting and hosting services. Online voting was used five times in 2020, supporting three memorandums of agreements, a letter of understanding and a mediator's recommendation. At year-end, the Association was hosting websites for 20 specialist councils, 53 locals and 3 teachers' convention associations. Eight additional subgroups were using the Association to host secure members-only sites.

Remote collaboration technologies were introduced by ITS in response to the province's work-from-home measures related to pandemic restrictions. Video-conferencing technologies were rolled out across the Association, with ITS providing support for the Association's virtual Annual Representative Assembly in August 2020. Further, enterprise collaboration tools were piloted in 2020 with a full deployment expected to be rolled out in 2021.

»»» In 2020, the records management staff continued to operate a central repository at Barnett House with a capacity for over 7,500 cartons.

Records Management

In 2020, the records management staff continued to operate a central repository at Barnett House with a capacity for over 7,500 cartons. The facility, which houses Association and subgroup records, eliminated the Association's reliance on leased extramural document storage. Records management staff continued to schedule and securely destroy records for which the Association no longer maintained a business need. Decommissioned technology was securely destroyed and components recycled as appropriate. The systematic digitization of Association records continued. The records management staff undertook the review of the retention schedule in preparation for the implementation of electronic records management software. Further, records management support and services were provided to all Association staff and subgroups throughout the year, and training presentations were made at various Association conferences and meetings.

Archives

The archives completed new accessions in both print and electronic format. These accessions represent records of permanent value to the Association, including corporate records. Historical research services were provided to Association staff and subgroups. Archives staff corresponded and cooperated with other archival institutions, including the Provincial Archives of Alberta and archives located abroad. In addition, archives staff completed the relocation of archival materials and established a new archival warehouse.

Regulation Compliance/Privacy and Canada's Antispam Legislation

In 2020, the Association continued to provide training to all incoming staff respecting compliance with the *Personal Information Protection Act (PIPA)* and to support compliance efforts across subgroups. All requests for information made under *PIPA* were fulfilled. Training sessions were provided to Association staff and subgroup executives regarding the collection, use and disclosure of personal information. Staff developed training materials and plans for additional sessions. The Association also represented members in matters before the Office of the Information and Privacy Commission with respect to *PIPA* and the *Freedom of Information and Protection of Privacy Act (FOIP)*.

In 2020, the Association also provided training to members respecting Canada's antispam legislation primarily focused on the use of commercial electronic messages.

Barnett House

Major repairs and upgrades to Barnett House undertaken in 2020 include the following: repaired stairwells in the parkade and coated them with a slip-resistant material, replaced an electrical panel in the parkade, installed a new touchless drinking fountain on the main floor by the library, replaced a sump pump in the boiler room, installed barriers in Teacher Qualifications Service and the reception area, and retrofitted the pylon sign to LED lights. In 2020, the water proofing of the ramps in the parkade was completed; warranty issues will be monitored.

The Association continues to lease space to the Alberta Teachers' Retirement Fund and the Alberta Colleges and Institutes Faculties Association.

Revenues from the cafeteria and food services were \$19,461.47, catering revenues were \$156,164.20, meeting room rentals were \$55,620.00 and liquor sales were \$2,922.22, for total revenues of \$234,167.89. As food services had to close unexpectedly due to pandemic restrictions, the Association donated 230 kg of fresh product to the food bank.

Southern Alberta Regional Office

In June 2020, the Southern Alberta Regional Office, along with the Calgary Public and Calgary Separate locals, moved into new offices at the Deerfoot Atrium in Calgary.

Funds and Expenditures

In 2020, \$82,618 was charged to the Special Emergency Fund (SEF). Investment earnings from the fund totalled \$2,579,654 (not inclusive of unrealized gains or loss) and no budget allocation was approved for the year.

At its December 2019 meeting, Provincial Executive Council authorized the withdrawal of \$5 million from the SEF to support the ongoing operations of the Association. This transaction is reflected in the 2019/20 audited financial statements, within the Cash Flow Statement. The market value of the SEF at 2020 08 31 was \$25,845,031.

The Capital Fund was established to fund the costs of furniture, equipment and major renovations. As budgeted, \$1,127,500 was allocated to the fund plus investment earnings of \$164,795 (not inclusive of unrealized gains or loss). During the year, the fund was charged \$207,358 to reflect annual furniture and fixtures purchases. The market value of the fund at 2020 08 31 was \$1,825,246.

The SARO Lease Fund was created to provide investment income to offset the costs of leasing space for the Association's Calgary office. Income from the fund in excess of the leasing costs is available for general operations. If the investment income is not sufficient to cover the leasing costs, the difference is paid from general revenues. The market value of the fund at 2020 08 31 was \$2,719,363.



FINANCIAL STATEMENTS

Year ended August 31, 2020



Independent Auditor's Report

To the Members of The Alberta Teachers' Association

Opinion

We have audited the financial statements of The Alberta Teachers' Association (the "Association"), which comprise the statement of financial position as at August 31, 2020, and the statements of operations, changes in members' equity and cash flow for the year then ended, and notes to the financial statements, including a summary of significant accounting policies.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Association as at August 31, 2020, and its results of operations and its cash flow for the year then ended in accordance with Canadian accounting standards for not-for-profit organizations.

Basis for Opinion

We conducted our audit in accordance with Canadian generally accepted auditing standards. Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audit of the Financial Statements* section of our report. We are independent of the Association in accordance with the ethical requirements that are relevant to our audit of the financial statements in Canada, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Responsibilities of Management and Those Charged with Governance for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with Canadian accounting standards for not-for-profit organizations, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is responsible for assessing the Association's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless management either intends to liquidate the Association or to cease operations, or has no realistic alternative but to do so.

Those charged with governance are responsible for overseeing the Association's financial reporting process.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with Canadian generally accepted auditing standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Independent Auditor's Report (continued)

As part of an audit in accordance with Canadian generally accepted auditing standards, we exercise professional judgment and maintain professional skepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Association's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Association's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Association to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

BDO Canada LLP
Chartered Professional Accountants

Edmonton, Alberta
November 13, 2020

THE ALBERTA TEACHERS' ASSOCIATION
Statement of Financial Position
Year ended August 31, 2020

| | <u>Special Emergency</u> | <u>Capital</u> | <u>SARO Lease</u> | <u>Property and Equipment</u> | <u>Unappropriated</u> | <u>TOTAL</u> |
|--|--------------------------|----------------|-------------------|-------------------------------|-----------------------|---------------|
| | | | | | | |
| ASSETS | | | | | | |
| CURRENT | | | | | | |
| Cash and Cash Equivalents | \$ - | \$ - | \$ - | \$ - | \$ 7,099,137 | \$ 7,099,137 |
| Fees Receivable | - | - | - | - | 1,649,167 | 1,649,167 |
| Other Receivables | - | - | - | - | 355,567 | 355,567 |
| Prepaid Expenses | - | - | - | - | 686,757 | 686,757 |
| Due from (to) Other Funds | (8,325,455) | 2,500,362 | (933,718) | - | 6,758,811 | - |
| | (8,325,455) | 2,500,362 | (933,718) | - | 16,549,439 | 9,790,628 |
| ACCRUED PENSION ASSET (Note 9) | - | - | - | - | 5,025,000 | 1,859,000 |
| INVESTMENTS (Note 3) | 25,845,031 | 1,825,246 | 2,719,363 | - | - | 30,389,640 |
| PROPERTY AND EQUIPMENT (Note 4) | - | - | - | 34,805,246 | - | 34,805,246 |
| | \$ 17,519,576 | \$ 4,325,608 | \$ 1,785,645 | \$ 34,805,246 | \$ 21,574,439 | \$ 80,010,514 |
| | | | | | | \$ 76,576,231 |
| LIABILITIES | | | | | | |
| CURRENT | | | | | | |
| Accounts Payable and Accrued Liabilities | \$ - | \$ - | \$ - | \$ - | \$ 2,485,971 | \$ 2,485,971 |
| Fees Payable to Locals | - | - | - | - | 2,584,427 | 2,584,427 |
| Current Portion Capital Lease Obligations (Note 5) | - | - | - | 134,214 | - | 134,214 |
| Current Portion Mortgages Payable (Note 6) | - | - | - | 4,820,957 | - | 4,820,957 |
| Deferred Grant Revenue | - | - | - | - | 353,311 | 353,311 |
| | - | - | - | 4,955,171 | 5,423,709 | 10,378,880 |
| POST RETIREMENT BENEFITS (Note 9) | - | - | - | - | 7,416,000 | 6,985,000 |
| MORTGAGES PAYABLE (Note 6) | - | - | - | 12,812,500 | - | 12,812,500 |
| CAPITAL LEASE OBLIGATIONS (Note 5) | - | - | - | 268,428 | - | 268,428 |
| | - | - | - | 18,036,099 | 12,839,709 | 30,875,808 |
| | | | | | | 32,549,260 |
| COMMITMENTS (Note 7) | | | | | | |
| CONTINGENCIES (Note 8) | | | | | | |
| MEMBERS' EQUITY | | | | | | |
| Appropriated | 17,519,576 | 4,325,608 | 1,785,645 | 16,769,147 | - | 40,399,976 |
| Unappropriated | - | - | - | - | 8,734,730 | 8,734,730 |
| | 17,519,576 | 4,325,608 | 1,785,645 | 16,769,147 | 8,734,730 | 40,399,976 |
| | \$ 17,519,576 | \$ 4,325,608 | \$ 1,785,645 | \$ 34,805,246 | \$ 21,574,439 | \$ 80,010,514 |
| | | | | | | \$ 76,576,231 |

The accompanying notes and schedules are an integral part of these financial statements.

Approved By:

_____, Director

_____, Director

THE ALBERTA TEACHERS' ASSOCIATION

Statement of Operations

Year ended August 31, 2020

| | <u>Special Emergency</u> | | <u>Capital</u> | | <u>SAROL Lease</u> | | <u>Properties and Equipment</u> | | <u>Unappropriated</u> | | <u>TOTAL</u> | |
|---|--------------------------|-------------------|-------------------|-------------------|--------------------|------------------|---------------------------------|-----------------------|-----------------------|---------------------|---------------------|---------------------|
| | 2020 | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 | 2019 |
| REVENUE | | | | | | | | | | | | |
| ATA Membership Fees | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 39,387,313 | \$ 39,284,237 | \$ 39,387,313 | \$ 39,284,237 |
| Advertising | - | - | - | - | - | - | - | - | 137,326 | 180,779 | 137,326 | 180,779 |
| TQS Evaluations | - | - | - | - | - | - | - | - | 263,086 | 284,645 | 263,086 | 284,645 |
| Registration Fees | - | - | - | - | - | - | - | - | 91,302 | 65,490 | 91,302 | 65,490 |
| Rentals | - | - | - | - | - | - | - | - | 1,329,441 | 1,412,746 | 1,329,441 | 1,412,746 |
| Printing | - | - | - | - | - | - | - | - | 37,856 | 127,049 | 37,856 | 127,049 |
| Publications | - | - | - | - | - | - | - | - | 9,441 | 5,422 | 9,441 | 5,422 |
| Food Services | - | - | - | - | - | - | - | - | 542,049 | 782,693 | 542,049 | 782,693 |
| Public Education Action Sales | - | - | - | - | - | - | - | - | 28,487 | 32,572 | 28,487 | 32,572 |
| Gain (Loss) on Disposal of Equipment | - | - | - | - | - | - | 7,090 | (4,447) | - | - | 7,090 | (4,447) |
| Grants | - | - | - | - | - | - | - | - | 359,043 | 2,158,215 | 359,043 | 2,158,215 |
| Miscellaneous | - | - | 180,000 | 156,000 | - | - | - | - | 70,949 | 98,418 | 250,949 | 254,418 |
| Realized Investment Earnings | 2,579,654 | 3,218,564 | 164,795 | 158,706 | 277,886 | 292,683 | - | - | 63,218 | 51,091 | 3,085,553 | 3,721,044 |
| Unrealized Loss on Investments | (1,175,195) | (2,503,376) | (95,309) | (191,040) | (133,773) | (227,762) | - | - | - | - | (1,404,277) | (2,922,178) |
| TOTAL REVENUE | 1,404,459 | 715,188 | 249,486 | 123,666 | 144,113 | 64,921 | 7,090 | (4,447) | 42,319,511 | 44,483,357 | 44,124,659 | 45,382,685 |
| EXPENDITURES - Schedule 1 | | | | | | | | | | | | |
| Government | - | - | - | - | - | - | - | - | 7,557,936 | 8,292,610 | 7,557,936 | 8,292,610 |
| Member Services | - | - | - | - | - | - | - | - | 4,896,626 | 4,960,109 | 4,896,626 | 4,960,109 |
| Professional Development | - | - | - | - | - | - | - | - | 4,453,084 | 4,840,564 | 4,453,084 | 4,840,564 |
| Teacher Welfare | - | - | - | - | - | - | - | - | 3,105,507 | 3,486,411 | 3,105,507 | 3,486,411 |
| Building | - | - | - | - | - | - | - | - | 2,996,974 | 2,778,560 | 2,996,974 | 2,778,560 |
| Operations | - | - | - | - | - | - | - | - | 6,041,109 | 6,166,978 | 6,041,109 | 6,166,978 |
| Food Services | - | - | - | - | - | - | - | - | 690,955 | 836,343 | 690,955 | 836,343 |
| Information and Technology | - | - | - | - | - | - | - | - | 2,292,111 | 2,277,902 | 2,292,111 | 2,277,902 |
| Non-departmental | - | - | - | - | - | - | - | - | 3,791,962 | 4,628,504 | 7,280,638 | 8,471,589 |
| Other (Non-rebatable) | 82,618 | 377,157 | - | - | - | - | 3,488,676 | 3,843,085 | 3,700,370 | 3,803,072 | 3,782,988 | 4,180,229 |
| TOTAL EXPENDITURES | 82,618 | 377,157 | - | - | - | - | 3,488,676 | 3,843,085 | 39,526,634 | 42,071,053 | 43,097,928 | 46,291,295 |
| Excess (Deficiency) of Revenue Over Expenditures | \$ 1,321,841 | \$ 338,031 | \$ 249,486 | \$ 123,666 | \$ 144,113 | \$ 64,921 | \$ (3,481,586) | \$ (3,847,532) | \$ 2,792,877 | \$ 2,412,304 | \$ 1,026,731 | \$ (908,610) |

The accompanying notes and schedules are an integral part of these financial statements.

THE ALBERTA TEACHERS' ASSOCIATION
Statement of Changes in Members' Equity
Year ended August 31, 2020

| | Special Emergency | | Capital | | SARO Lease | | Property and Equipment | | Unappropriated | | TOTAL | |
|----------------------------|-------------------|---------------|--------------|--------------|--------------|--------------|------------------------|---------------|----------------|--------------|---------------|---------------|
| | 2020 | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 | 2019 |
| MEMBERS' EQUITY, | | | | | | | | | | | | |
| BEGINNING OF YEAR | \$ 18,777,389 | \$ 21,648,722 | \$ 3,155,979 | \$ 4,861,867 | \$ 1,694,169 | \$ 1,923,911 | \$ 16,886,024 | \$ 15,502,641 | \$ 3,513,412 | \$ 6,204,371 | \$ 44,026,973 | \$ 50,141,513 |
| EXCESS (DEFICIENCY) | | | | | | | | | | | | |
| OF REVENUE OVER | | | | | | | | | | | | |
| EXPENDITURES | 1,321,841 | 338,031 | 249,486 | 123,666 | 144,113 | 64,921 | (3,481,586) | (3,847,532) | 2,792,877 | 2,412,304 | 1,026,731 | (908,610) |
| INTERFUND | | | | | | | | | | | | |
| TRANSFERS (NOTE 10) | (2,579,654) | (3,209,364) | 920,143 | (1,829,554) | (52,637) | (294,663) | 3,364,709 | 5,230,915 | (1,652,559) | 102,669 | - | - |
| PENSION REMEASUREMENTS AND | | | | | | | | | | | | |
| OTHER ITEMS (NOTE 9) | | | | | | | | | | | | |
| MEMBERS' EQUITY, | | | | | | | | | | | | |
| END OF YEAR | \$ 17,519,576 | \$ 18,777,389 | \$ 4,325,608 | \$ 3,155,979 | \$ 1,785,645 | \$ 1,694,169 | \$ 16,769,147 | \$ 16,886,024 | \$ 8,734,730 | \$ 3,513,412 | \$ 49,134,704 | \$ 44,026,973 |

The accompanying notes and schedules are an integral part of these financial statements.

THE ALBERTA TEACHERS' ASSOCIATION
Statement of Cash Flow
Year ended August 31, 2020

| | Special Emergency | Capital | SARO Lease | Property and Equipment | Unappropriated | TOTAL |
|--|-------------------|-------------|-------------|------------------------|---------------------|----------------------------------|
| | | | | | | 2020 2019 |
| Net Inflow (Outflow) of Cash Related to the Following Activities | | | | | | |
| OPERATING | | | | | | |
| Excess (Deficiency) of Revenue Over Expenditures | \$ 1,321,841 | \$ 249,486 | \$ 144,113 | \$ (3,481,586) | \$ 2,792,877 | \$ 1,026,731 \$ (908,610) |
| Items Not Affecting Cash | | | | | | |
| Depreciation | - | - | - | 3,488,676 | - | 3,488,676 3,843,085 |
| Unrealized Loss on Investments | 1,175,195 | 95,309 | 133,773 | - | - | 1,404,277 2,922,178 |
| Loss (Gain) on Disposal of Equipment | - | - | - | (7,090) | - | (7,090) 4,447 |
| Interfund Transfer | (4,804,920) | (171,505) | (88,843) | 3,364,709 | 1,700,559 | - - |
| | (2,307,884) | 173,290 | 189,043 | 3,364,709 | 4,493,436 | 5,912,594 5,861,100 |
| Changes in Non-Cash Operating Working Capital Items | | | | | | |
| Fees Receivable | - | - | - | - | 630,520 | 630,520 (456,163) |
| Other Receivables | - | - | - | - | 83,557 | 83,557 865,236 |
| Prepaid Expenses | - | - | - | - | (179,531) | (179,531) 162,264 |
| Accounts Payable and Accrued Liabilities | - | - | - | - | (617,722) | (617,722) (444,971) |
| Fees Payable to Locals | - | - | - | - | 330,087 | 330,087 (183,781) |
| Deferred Grant Revenue | - | - | - | - | (209,043) | (209,043) (975,285) |
| Accrued Vacation Pay | - | - | - | - | (481) | (481) 70,842 |
| Net Change in Employee Future Benefits | - | - | - | - | 1,346,001 | 1,346,001 656,070 |
| | (2,307,884) | 173,290 | 189,043 | 3,364,709 | 5,876,824 | 7,295,982 5,555,312 |
| INVESTING | | | | | | |
| Additions to Property and Equipment | - | - | - | (1,845,661) | - | (1,845,661) (3,705,738) |
| Proceeds on Disposal of Equipment | - | - | - | 151,406 | - | 151,406 94,282 |
| Proceeds on Sale of Investments | 5,000,000 | - | - | - | - | 5,000,000 - |
| Purchase of Investments, net | (2,692,116) | (173,290) | (189,043) | - | - | (3,054,449) (2,315,974) |
| | 2,307,884 | (173,290) | (189,043) | (1,694,255) | - | 251,296 (5,927,430) |
| FINANCING | | | | | | |
| Proceeds from Mortgage | - | - | - | - | - | - 15,000,000 |
| Repayment of Barnett House Expansion Line of Credit | - | - | - | - | - | - (15,000,000) |
| Mortgage Payments | - | - | - | (1,514,949) | - | (1,514,949) (1,452,449) |
| Capital Lease Payments | - | - | - | (155,505) | - | (155,505) (167,010) |
| | - | - | - | (1,670,454) | - | (1,670,454) (1,619,459) |
| NET CASH INFLOW (OUTFLOW) | - | - | - | - | 5,876,824 | 5,876,824 (1,991,576) |
| CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR | - | - | - | - | 1,222,313 | 1,222,313 3,213,889 |
| CASH AND CASH EQUIVALENTS, END OF YEAR | \$ - | \$ - | \$ - | \$ - | \$ 7,099,137 | \$ 7,099,137 \$ 1,222,313 |

The accompanying notes and schedules are an integral part of these financial statements.

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

1. BACKGROUND

The Alberta Teachers' Association (the "Association"), as the professional organization of teachers, promotes and advances public education, safeguards standards of professional practice and serves as the advocate for its members. It is incorporated under the Teaching Profession Act of the Province of Alberta. The Association is exempt from income tax in accordance with Section 149(1) of the Canadian Income Tax Act.

2. BASIS OF PRESENTATION AND ACCOUNTING POLICIES

These financial statements have been prepared in accordance with Canadian accounting standards for not-for-profit organizations using the restricted fund method of accounting for contributions and reflect the following accounting policies:

Controlled entities

The Association controls 86 entities that have been established to provide a front line service resource to members and professional development opportunities for members. These entities were established through by-laws and motions of the Association and are administered by volunteer executive committees elected by the membership of the particular entity. These entities have no legal status and are not taxable under the Income Tax Act. The Association has chosen not to exercise direct financial control over these entities; however, if any of these entities were to cease operations, the assets and liabilities would be assigned to the Association.

The fiscal years of these entities do not necessarily coincide with the Association's fiscal year. The more significant entities follow substantially the accounting policies of the Association; however, others have established accounting policies that were determined to be more appropriate for their circumstances. Due to the large number of entities involved and the relative immaterial size of each entity, the accounts of the controlled entities have not been consolidated with those of the Association and certain disclosures have not been made.

Fund accounting

The Association's accounts are maintained in accordance with principles of restricted fund accounting for contributions. The accounts have been segregated into the following funds or appropriations to reflect the purposes for which funds are designated.

a) Special emergency

This appropriation is maintained by budget allocations approved by the Annual Representative Assembly and reduced by emergent expenditures that are approved by the Provincial Executive Council or the Annual Representative Assembly. The source of Provincial Executive Council's authority to expend funds from this fund derives from the Teaching Profession Act Section 11(1) and By-laws 33 and 81(1) and (2).

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

2. BASIS OF PRESENTATION AND ACCOUNTING POLICIES (continued)

b) Capital

This appropriation is maintained to provide for future building or significant renovation costs. Allocations to and from this appropriation are determined by the Provincial Executive Council or the Annual Representative Assembly.

c) SARO lease

This appropriation is maintained to provide income to offset costs for leasing space for the Calgary office. Any excess or shortfall in earnings is credited or charged to general operations.

d) Property and equipment

This appropriation represents the investment in property and equipment.

e) Unappropriated

The unappropriated is maintained to provide for unrestricted contributions for which no restricted fund exists.

Cash and cash equivalents

The Association considers cash and all highly liquid investments with original terms to maturity of less than three months to be cash equivalents. Included in the ending cash balance is \$353,311 (2019 - \$562,354) of restricted cash related to grant funding.

Financial instruments

The Association initially measures its financial assets and financial liabilities at fair value when the Association becomes a party to the contractual provisions of the financial instrument. The Association subsequently measures all its financial assets and financial liabilities at amortized cost, except for investments and derivatives. Investments are measured at fair value with changes recognized in the statement of operations.

The Association measures derivative contracts at fair value. Changes in fair value and relevant revenue and expenditures are recognized in the statement of operations.

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

2. BASIS OF PRESENTATION AND ACCOUNTING POLICIES (continued)

Property and equipment

Property and equipment are stated at cost. Buildings, building improvements, equipment, leasehold improvements, tenant inducements and automobiles are depreciated using the rates described in Note 4. When a property and equipment asset no longer has any long-term service potential to the Association, the excess of its net carrying amount over any remaining net book value is recognized as an expenditure in the statement of operations. Any write-down will not be subsequently reversed.

Depreciation of property and equipment will begin in the year following acquisition except for depreciation of automobiles which is recorded in the year of acquisition and on a straight-line basis using the applicable rates described in Note 4.

Equipment under capital lease

Equipment under lease, whereby substantially all the benefits and risks of ownership rest with the Association, is accounted for as a capital lease. This equipment is depreciated on the straight-line basis over the term of the lease.

Employee benefit plans

The Association has established and maintains two defined benefit plans. The defined benefit obligation is determined using an actuarial valuation prepared for accounting purposes. The total cost of the defined benefit plans for the period is comprised of the current service costs, finance costs, and remeasurements and other items. The current service costs and finance costs are charged to operations for the period, while remeasurements and other items are charged directly to members' equity as they occur.

a) Pension plan

The Association has established and maintains a defined benefit pension plan for eligible employees classified as professional or support staff. This plan provides for a pension benefit based on service and a percentage of the member's highest five-year average earnings and the average year's maximum pensionable earnings. Pension fund assets are measured at fair value at the statement of financial position date. Pensions accrued for services prior to January 1, 1997 have been indexed at 70% of the Consumer Price Index. Effective January 1, 2010, pensions have been indexed at a rate of 60%. Pensions falling in between these periods may be increased on an ad hoc basis.

An independent corporate trustee holds the assets of the plan. Expected return on plan assets is based on the market value of the assets as at August 31 as reported by the independent corporate trustee. The most recent actuarial valuation for funding purposes was performed as at December 31, 2016, and extrapolated to August 31, 2020 for accounting purposes. The next actuarial valuation for funding purposes must be effective no later than December 31, 2019 and will be completed for filing prior to the December 31, 2020 due date.

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

2. BASIS OF PRESENTATION AND ACCOUNTING POLICIES (continued)

b) Other benefit plans

The Association also sponsors other defined benefit plans for eligible employees classified as executive, professional or support staff. These plans provide health care, life insurance and other post-employment benefits.

Other benefit plans are not funded. The most recent actuarial valuation for accounting purposes was performed as at August 31, 2020.

Revenue recognition

The Association follows the restricted fund method of revenue recognition related to contributions. Membership fees and charges for goods or services are recognized as revenue in the year received or receivable and allocated to appropriations on the basis approved by the Annual Representative Assembly. Membership fees collected on behalf of controlled entities are recorded on a net basis. Investment earnings consist of dividends, interest income and realized gain, net of related expenditures. Unrealized loss on investments consists of changes in fair value of the investments. Investment earnings and unrealized loss on investments are allocated to appropriations based on the investments held in each appropriation.

Grants

The Association records government grant revenue and expenditures on a gross basis and, at year-end, any unused grant funds are classified as deferred grant revenue in the statement of financial position. Grant expenditures are recorded in non-departmental expenditures in the statement of operations.

Use of estimates

Of necessity, management must make estimates and assumptions that affect the reported amount of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and revenue and expenditures during the year. Key areas of estimation where management has made subjective judgments, often as a result of matters that are inherently uncertain, include those relating to accrued pension asset, useful life of property and equipment and corresponding depreciation rates, fair value of financial instruments, and post-retirement benefits.

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

3. INVESTMENTS

| | 2020 | | 2019 | |
|-------------------|----------------------|----------------------|----------------------|----------------------|
| | Fair Value | Cost | Fair Value | Cost |
| Allocated to: | | | | |
| Special emergency | \$ 25,845,031 | \$ 26,351,087 | \$ 29,328,110 | \$ 28,388,630 |
| Capital | 1,825,246 | 1,872,791 | 1,747,264 | 1,699,501 |
| SARO lease | 2,719,363 | 2,795,358 | 2,664,093 | 2,601,218 |
| | \$ 30,389,640 | \$ 31,019,236 | \$ 33,739,467 | \$ 32,689,349 |

The investments are held in the Franklin Templeton Institutional Balanced Fund and the asset mix is as follows:

| | 2020 | 2019 |
|--------------------------|---------------|---------------|
| Cash | 3.5% | 6.0% |
| Fixed Income | 34.2% | 36.4% |
| Canadian Equities | 22.9% | 25.3% |
| US Equities | 20.5% | 15.1% |
| International Equities | 13.9% | 15.1% |
| Emerging Market Equities | 5.0% | 2.1% |
| | 100.0% | 100.0% |

4. PROPERTY AND EQUIPMENT

| | | 2020 | | 2019 | |
|-------------------------------|------------|----------------------|--------------------------|----------------------|----------------------|
| | Rates | Cost | Accumulated Depreciation | Net Book Value | Net Book Value |
| Buildings | 2% | \$ 38,192,061 | \$ 8,041,459 | \$ 30,150,602 | \$ 30,914,443 |
| Building improvements | 10% | 19,156,193 | 19,156,193 | - | 1,316,698 |
| Equipment | 10%-33% | 6,585,862 | 4,872,317 | 1,713,545 | 2,230,903 |
| Leasehold improvements | lease-term | 32,219 | 32,219 | - | 8,940 |
| Tenant inducements | lease-term | 1,645,981 | 175,104 | 1,470,877 | 288,938 |
| Automobiles | 20% | 1,690,411 | 780,761 | 909,650 | 1,116,578 |
| | | 67,302,727 | 33,058,053 | 34,244,674 | 35,876,500 |
| Land | | 157,930 | - | 157,930 | 157,930 |
| Equipment under capital lease | lease-term | 777,523 | 374,881 | 402,642 | 494,984 |
| | | \$ 68,238,180 | \$ 33,432,934 | \$ 34,805,246 | \$ 36,529,414 |

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

4. PROPERTY AND EQUIPMENT (continued)

Additions to property and equipment include non-cash capital lease additions of \$63,163 (2019 - \$607,907).

5. CAPITAL LEASE OBLIGATIONS

The Association leases certain printing and reproduction equipment under capital leases. Future minimum payments under the capital leases are as follows for the fiscal years ending in:

| | |
|-------------------------------------|------------|
| 2021 | \$ 134,214 |
| 2022 | 134,214 |
| 2023 | 134,214 |
| <hr/> | |
| Total minimum lease payments | 402,642 |
| Less current portion | 134,214 |
| <hr/> | |
| Long-term capital lease obligations | \$ 268,428 |

6. CREDIT FACILITIES

The Association has a credit arrangement with its bank for an operating line of credit authorized to a maximum of \$2,000,000. This line of credit is to fund temporary cash flow shortages relating to operations. Interest is charged at the bank's floating prime lending rate. Advances under the line of credit are repayable on demand and have not been drawn on as at August 31, 2020.

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

6. CREDIT FACILITIES (continued)

The following table provides details concerning the outstanding mortgages' principal amounts at year-end:

| | <u>2020</u> | <u>2019</u> |
|---|----------------------|---------------|
| Scotiabank Bankers's Acceptance, bearing interest at 0.47% per annum reset monthly plus stamping fee of 1.15%, requiring monthly principal payments of \$38,745 plus interest, maturing March 17, 2021 | \$ 2,595,957 | \$ 3,060,906 |
| Scotiabank Banker's Acceptance, bearing interest at 2.61% per annum reset monthly plus stamping fee of 1.10%, requiring monthly principal payments of \$25,000 plus interest, maturing June 30, 2021 | 1,475,000 | 1,775,000 |
| Scotiabank Banker's Acceptance, bearing interest at 2.91% per annum reset monthly plus stamping fee of 1.10%, requiring monthly principal payments of \$62,500 plus interest, maturing September 30, 2022 | 13,562,500 | 14,312,500 |
| | 17,633,457 | 19,148,406 |
| Less current portion | 4,820,957 | 4,110,914 |
| Long-term portion | \$ 12,812,500 | \$ 15,037,492 |

Credit facilities are secured by a collateral mortgage for \$25,000,000, a first fixed charge over the Barnett House building owned by the Association, a general security agreement over all present and future personal property, and appropriate insurance coverage.

Approximate future minimum annual payments under these mortgages payable are as follows for the fiscal years ending in:

| | |
|------|----------------------|
| 2021 | \$ 4,820,957 |
| 2022 | 750,000 |
| 2023 | 12,062,500 |
| | \$ 17,633,457 |

The above minimum annual payments reflect the current financing agreements and maturity dates as of August 31, 2020.

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

7. COMMITMENTS

The Association is committed under operating leases, expiring in November 2020, with third parties on leased premises located in Calgary, Alberta. In 2020, the Association entered into a ten year lease agreement with third parties on leased premises located in Calgary, Alberta, with the first five years being basic rent free. The Association shall pay its share of the operating costs, property taxes and other charges provided for in the lease throughout the entire term.

The above leases have approximate future minimum annual payments, excluding operating costs, property taxes and other charges, as follows for the fiscal years ending in:

| | |
|------------------|--------------|
| 2021 | \$ 61,004 |
| 2022 | - |
| 2023 | - |
| 2024 | - |
| 2025 | - |
| Subsequent years | 1,315,575 |
| | <hr/> |
| | \$ 1,376,579 |

8. CONTINGENCIES

The Association is a defendant in lawsuits arising in the normal course of operations. As the outcomes of these actions are not determinable, no provision has been made in the financial statements. Any awards or settlements will be reflected in the statement of operations in the period that the liability becomes likely and the amount can be reasonably determined.

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

9. EMPLOYEE BENEFIT PLANS

Information concerning the Association's employee benefit plans, in aggregate, is as follows:

| | <u>Pension Plan</u> | | <u>Other Benefit Plans</u> | |
|-----------------------------------|---------------------|-----------------|----------------------------|----------------|
| | 2020 | 2019 | 2020 | 2019 |
| Accrued benefit obligations | \$ (70,585,000) | \$ (67,741,000) | \$ (7,416,000) | \$ (6,985,000) |
| Fair value of plan assets | 75,610,000 | 69,600,000 | - | - |
| Accrued benefit asset (liability) | \$ 5,025,000 | \$ 1,859,000 | \$ (7,416,000) | \$ (6,985,000) |

The net benefit plan expenditure is as follows:

| | <u>Pension Plan</u> | | <u>Other Benefit Plans</u> | |
|--|---------------------|--------------|----------------------------|------------|
| | 2020 | 2019 | 2020 | 2019 |
| Current service costs, net of payments | \$ 2,433,000 | \$ 1,877,000 | \$ 586,000 | \$ 510,000 |
| Interest cost on accrued benefits | 1,989,000 | 2,200,000 | 196,000 | 231,000 |
| Expected return on plan assets | (1,975,000) | (2,395,000) | - | - |
| Net benefit plan expenditure | \$ 2,447,000 | \$ 1,682,000 | \$ 782,000 | \$ 741,000 |

The total expenditure from the two plans is \$3,229,000 (2019 - \$2,423,000) which has been included in salaries and benefits in the department to which it relates, see Schedule 1.

Pension remeasurements and other items recognized in members' equity consist of the following:

| | <u>Pension Plan</u> | | <u>Other Benefit Plans</u> | |
|--|---------------------|----------------|----------------------------|--------------|
| | 2020 | 2019 | 2020 | 2019 |
| Difference between actual return and expected return | \$ 4,655,000 | \$ 2,113,000 | \$ - | \$ - |
| Actuarial loss | (279,000) | (6,935,932) | (295,000) | (383,000) |
| Pension remeasurements and other items | \$ 4,376,000 | \$ (4,822,932) | \$ (295,000) | \$ (383,000) |

The total remeasurements credited to members' equity from the two plans during the year is \$4,081,000 (2019 – charged \$5,205,932).

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

9. EMPLOYEE BENEFIT PLANS (continued)

The significant actuarial assumptions adopted in measuring the Association's accrued benefit obligations are as follows:

| | <u>Pension Plan</u> | | <u>Other Benefit Plans</u> | |
|---|---------------------|-------------|----------------------------|-------------|
| | <u>2020</u> | <u>2019</u> | <u>2020</u> | <u>2019</u> |
| Benefit obligations | | | | |
| Discount rate | 2.70% | 2.85% | 2.4% | 2.7% |
| Rate of compensation increase | 3.0% | 3.0% | 3.5% | 3.5% |
| Benefit costs | | | | |
| Discount rate | 2.70% | 2.85% | 2.4% | 2.7% |
| Rate of compensation increase | 3.0% | 3.0% | 3.5% | 3.5% |
| Rate of inflation on health benefits | | | | |
| Dental care | - | - | 3.0% | 4.0% |
| Extended health care | - | - | 5.0% | 4.5% |
| Vision care | - | - | 2.0% | 2.5% |
| Average remaining service life of employees | 11 years | 10 years | 10 years | 10 years |

For measurement purposes, it is anticipated that the rate of inflation on health benefits will remain at the levels identified above.

Pension plan assets are invested entirely in a diversified fund. The distribution by major asset category as at August 31, 2020, is as follows:

| | |
|-----------------|---------------|
| Equities | 61.0% |
| Debt securities | 32.9% |
| Cash and other | 6.1% |
| | 100.0% |

The Association's payments for employee future benefits during the year are as follows:

| | <u>Pension Plan</u> | | <u>Other Benefit Plans</u> | |
|---------------------------|---------------------|---------------------|----------------------------|-------------------|
| | <u>2020</u> | <u>2019</u> | <u>2020</u> | <u>2019</u> |
| Association contributions | \$ 1,237,000 | \$ 1,309,000 | \$ - | \$ - |
| Benefits paid | - | - | 646,000 | 458,000 |
| Total benefits | \$ 1,237,000 | \$ 1,309,000 | \$ 646,000 | \$ 458,000 |

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

10. INTERFUND TRANSFERS

As part of ongoing operations, the Association transfers certain amounts between funds or appropriations. These transfers are approved by the Provincial Executive Council or the Annual Representative Assembly.

For the year ended August 31, 2020, the following transfers were made:

| | Special Emergency | Capital | SARO Lease | Property and Equipment | Unappropriated | Total |
|---|----------------------|--------------|---------------|---------------------------|----------------|---------------|
| Members' equity, beginning of year | \$ 18,777,389 | \$ 3,155,979 | \$ 1,694,169 | \$ 16,886,024 | \$ 3,513,412 | \$ 44,026,973 |
| Excess (deficiency) of revenue over expenditures | 1,321,841 | 249,486 | 144,113 | (3,481,586) | 2,792,877 | 1,026,731 |
| | 20,099,230 | 3,405,465 | 1,838,282 | 13,404,438 | 6,306,289 | 45,053,704 |
| Transfer for property and equipment additions | - | (207,358) | - | 207,358 | - | - |
| Transfer representing proceeds on disposition | - | - | - | (151,409) | 151,409 | - |
| Transfer to offset leasing costs | - | - | (52,637) | - | 52,637 | - |
| Transfer related to property and equipment additions | - | - | - | 3,308,760 | (3,308,760) | - |
| Transfer for capital allocation | - | 1,127,501 | - | - | (1,127,501) | - |
| Realized investment earnings | (2,579,654) | - | - | - | 2,579,654 | - |
| Pension remeasurements (Note 9) | - | - | - | - | 4,081,000 | 4,081,000 |
| | (2,579,654) | 920,143 | (52,637) | 3,364,709 | 2,428,439 | 4,081,000 |
| Members' equity, end of year | \$ 17,519,576 | \$ 4,325,608 | \$ 1,785,645 | \$ 16,769,147 | \$ 8,734,728 | \$ 49,134,704 |

For the year ended August 31, 2019, the following transfers were made:

| | Special Emergency | Capital | SARO Lease | Property and Equipment | Unappropriated | Total |
|---|----------------------|--------------|---------------|---------------------------|----------------|---------------|
| Members' equity, beginning of year | \$ 21,648,722 | \$ 4,861,867 | \$ 1,923,911 | \$ 15,502,641 | \$ 6,204,374 | \$ 50,141,514 |
| Excess (deficiency) of revenue over expenditures | 338,031 | 123,666 | 64,921 | (3,847,532) | 2,412,304 | (908,610) |
| | 21,986,753 | 4,985,533 | 1,988,832 | 11,655,109 | 8,616,678 | 49,232,904 |
| Transfer for property and equipment additions | - | (1,417,154) | - | 1,417,154 | - | - |
| Transfer representing proceeds on disposition | - | - | - | (94,287) | 94,287 | - |
| Transfer to offset leasing costs | - | - | (294,663) | - | 294,663 | - |
| Transfer related to property and equipment additions | - | - | - | 3,908,047 | (3,908,047) | - |
| Transfer for capital allocation | - | (412,400) | - | - | 412,400 | - |
| Excess of investment income earnings | (3,209,364) | - | - | - | 3,209,364 | - |
| Pension remeasurements (Note 9) | - | - | - | - | (5,205,932) | (5,205,932) |
| | (3,209,364) | (1,829,554) | (294,663) | 5,230,915 | (5,103,265) | (5,205,932) |
| Members' equity, end of year | \$ 18,777,389 | \$ 3,155,979 | \$ 1,694,169 | \$ 16,886,024 | \$ 3,513,412 | \$ 44,026,973 |

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

11. FINANCIAL INSTRUMENTS

Market price and interest rate risk

The Association is exposed to interest rate risk on its fixed and floating interest rate financial instruments. Fixed rate instruments subject the Association to a fair value risk while the floating rate instruments subject it to a cash flow risk.

The Association is exposed to interest rate risk on its debt as described in Note 6. The Association manages its exposure to interest rate risk through use of a derivative instrument.

The Association is exposed to fluctuations in the market prices of its investments. This risk is managed by the Association's investment policies, which prescribe the investment asset mix. The Association invests in a balanced portfolio, comprised of approximately 60% mixed currency equities and 40% bonds and cash.

The impact of COVID-19 on financial markets has been known to cause significant volatility and there is uncertainty related to how this could impact the Associations' investment portfolio in the future.

Credit risk

The Association provides credit to members and customers in the normal course of operations. The Association does not consider this risk to be significant.

12. RELATED PARTY TRANSACTIONS

The Association controls 86 entities as described in Note 2.

The Association received registration fees, printing and rental revenue totaling \$733,178 (2019 - \$851,230) from the controlled entities. This revenue is included in the respective accounts as reported in the statement of operations. Other receivables include \$123,856 (2019 - \$117,045) due from the above related parties.

The Association paid grants and seminar costs totaling \$1,491,793 (2019 - \$2,095,144) to the controlled entities. These expenditures are included in various expense accounts reported in Schedule 1. Accounts payable and fees payable to Locals include \$2,588,543 (2019 - \$2,427,043) due to the above related parties.

All transactions were in the normal course of business and have been recorded at the exchange amounts.

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2020

13. IMPACT OF COVID-19

The impact of COVID-19 in Canada and on the global economy has been significant. The effect on the Association so far has been to delay or cancel certain initiatives, programs and events. As the impacts of COVID-19 continue, there could be further impact on the Association and its members. Management is actively monitoring the effect on its financial condition, liquidity and operations. Given the daily evolution of the COVID-19 outbreak and the global responses to curb its spread, the Association at this time is not able to fully estimate the future effects of the COVID-19 outbreak on its results of operations, financial condition, or liquidity at this time.

14. COMPARATIVE FIGURES

The financial statements have been reclassified, where applicable, to conform to the presentation used in the current year. The changes do not affect prior year operations.

THE ALBERTA TEACHERS' ASSOCIATION
EXPENDITURES
Year ended August 31, 2020

SCHEDULE 1

| | 2020 | 2019 |
|---------------------------------|------------------|------------------|
| GOVERNMENT | | |
| Annual Representative Assembly | \$ 34,910 | \$ 415,882 |
| Committees | 85,248 | 130,327 |
| Conferences | 17,378 | 26,505 |
| Education | 163,844 | 351,217 |
| Elections | 3,010 | 127,080 |
| Library | 126,266 | 157,139 |
| Local Presidents' Meetings | 63,620 | 70,850 |
| President | 200,984 | 191,521 |
| Provincial Executive Council | 1,497,584 | 1,586,857 |
| Public Education Promotion | 196,194 | 224,929 |
| Publications | 301,751 | 451,929 |
| Publicity | 368,310 | 379,607 |
| Representation | 256,626 | 324,559 |
| Research | 209,348 | 230,178 |
| Salaries and Benefits | 4,032,863 | 3,624,030 |
| | 7,557,936 | 8,292,610 |
| MEMBER SERVICES | | |
| Committees | 216,035 | 269,628 |
| Conferences | 16,345 | 30,058 |
| Education | 331,691 | 604,369 |
| Member Assistance | 1,578,111 | 1,310,168 |
| Publications | 9,288 | 13,556 |
| Representation | 8,916 | 2,418 |
| Salaries and Benefits | 2,721,617 | 2,715,590 |
| Travel Insurance | 14,623 | 14,322 |
| | 4,896,626 | 4,960,109 |
| PROFESSIONAL DEVELOPMENT | | |
| Committees | 69,264 | 137,725 |
| Conferences | 14,707 | 15,813 |
| Conventions | 39,789 | 79,384 |
| Education | 1,152,192 | 1,534,818 |
| Evaluations | 6,778 | 28,691 |
| Publications | 3,937 | 15,532 |
| Representation | 1,751 | 7,270 |
| Salaries and Benefits | 3,106,160 | 2,942,297 |
| Specialist Councils | 36,118 | 57,283 |
| Workshop Development | 22,388 | 21,751 |
| | 4,453,084 | 4,840,564 |

THE ALBERTA TEACHERS' ASSOCIATION
EXPENDITURES
Year ended August 31, 2020

SCHEDULE 1

| | 2020 | 2019 |
|-----------------------------------|------------------|------------------|
| TEACHER WELFARE | | |
| Bargaining | 829,394 | 860,309 |
| Committees | 21,793 | 21,868 |
| Conferences | 9,228 | 47,259 |
| Education | 390,090 | 835,117 |
| Publications/Communications | 1,326 | 1,047 |
| Representation | 18,199 | 11,737 |
| Salaries and Benefits | 1,835,477 | 1,709,074 |
| | 3,105,507 | 3,486,411 |
| BUILDING | | |
| Operating Costs - Barnett House | 1,655,922 | 1,453,490 |
| Operating Costs - SARO | 253,155 | 235,619 |
| Salaries and Benefits | 1,087,897 | 1,089,451 |
| | 2,996,974 | 2,778,560 |
| OPERATIONS | | |
| Audit | 96,549 | 100,420 |
| Equipment Maintenance | 715 | 286 |
| Equipment Rental | 163,449 | 274,322 |
| External Services | 52,342 | 36,905 |
| General | 196,725 | 74,744 |
| Human Resources | 117,575 | 194,578 |
| Interest and Bank Charges | 25,403 | 83,118 |
| Mortgage Interest | 666,026 | 731,817 |
| Office Staff Pension Plan | 169,958 | 88,607 |
| Postage and Telephone | 174,638 | 179,499 |
| Salaries and Benefits | 4,221,909 | 4,178,293 |
| Stationery and Supplies | 155,820 | 224,389 |
| | 6,041,109 | 6,166,978 |
| FOOD SERVICES | | |
| Food Purchases | 157,023 | 252,701 |
| Salaries and Benefits | 504,650 | 543,274 |
| Supplies | 29,282 | 40,368 |
| | 690,955 | 836,343 |
| INFORMATION AND TECHNOLOGY | | |
| Salaries and Benefits | 1,568,637 | 1,470,504 |
| Technical Services | 723,474 | 807,398 |
| | 2,292,111 | 2,277,902 |

THE ALBERTA TEACHERS' ASSOCIATION
EXPENDITURES
Year ended August 31, 2020

SCHEDULE 1

| | 2020 | 2019 |
|--|----------------------|----------------------|
| NON-DEPARTMENTAL | | |
| Contingency | 33,035 | 31,490 |
| Deferred Pension Adjustment | 1,210,000 | 373,000 |
| Depreciation | 3,488,676 | 3,843,085 |
| Employee Benefits | 1,298,299 | 899,575 |
| Future Benefits Adjustment | 136,000 | 283,000 |
| Grants and Awards | 493,958 | 626,909 |
| Public Grants | 359,043 | 2,158,215 |
| Salaries and Benefits | 261,627 | 256,315 |
| | 7,280,638 | 8,471,589 |
| OTHER (NON-REBATABLE) | | |
| 2Learn.ca | - | 66,011 |
| Canadian Teachers' Federation Fees | 1,084,963 | 1,091,073 |
| IT Project | 732,090 | 694,559 |
| Public Relations Campaign | 965,925 | 1,022,144 |
| Real Learning First | 55,364 | 67,850 |
| Special Emergency Appropriation (Schedule 2) | 82,618 | 377,157 |
| Specialist Council Grants | 862,028 | 861,435 |
| | 3,782,988 | 4,180,229 |
| TOTAL EXPENDITURES | \$ 43,097,928 | \$ 46,291,295 |

THE ALBERTA TEACHERS' ASSOCIATION
Special Emergency Appropriation Expenditures
Year ended August 31, 2020

SCHEDULE 2

| | 2020 | 2019 |
|---------------------------------------|------------------|-------------------|
| Real Learning First | \$ - | \$ 527 |
| 2019 Election Readiness | - | 269,745 |
| Election Initiatives and Preparedness | 82,618 | 106,884 |
| | \$ 82,618 | \$ 377,157 |



The Alberta
Teachers' Association