

Special Edition

A Newsletter for Specialist Council Executive Members

Volume 1:3 April 2012

Welcome to Spring!



Andrea Berg
Executive Staff Officer,
Professional Development

I hope that you all enjoyed a restful and rejuvenating spring break. This is the third publication of *Special Edition*, our tri-annual newsletter for specialist council executives, which was launched in the fall of 2011. As the factotum to all 21 specialist councils, I hope these publications prove a useful source of information and tips to assist you in your important roles on your council's executive.

We recently completed a successful membership drive at the 10 different teachers' conventions. Thank you to the presidents who volunteered to organize the schedule for each booth and to all of those who took a turn at monitoring the booth. To date, we have signed up 695 new members

and are awaiting additional registrations that continue to trickle in from different conventions. The booth also provided a unique opportunity to inform Association members at large about the programs and services specialist councils provide.

The provincial Association is gearing up for its annual Summer Conference at the Banff Centre, August 13–16, 2012. A joint session will be provided this year for specialist council presidents and conference directors. This session will explore topics relevant to presidents and conference directors, such as facility selection, contracts, online registration, strategic planning, technology strategies, promoting membership, alternative ideas for professional development, privacy legislation, budgeting and finances, leading successful meetings, year planning, annual report writing and much more. Please note: this year, Summer Conference has been shortened by one day. For additional information or registration, please contact Karin Champion at karin.champion@ata.ab.ca or at 1-800-232-7208. I hope to see all of our councils represented at Summer Conference this year!

Thank you for your time and dedication in promoting professional development through your specialist council. Please call me at 1-800-232-7208 or 780-447-9423 (in Edmonton) or e-mail me at andrea.berg@ata.ab.ca with any questions, comments or suggestions.

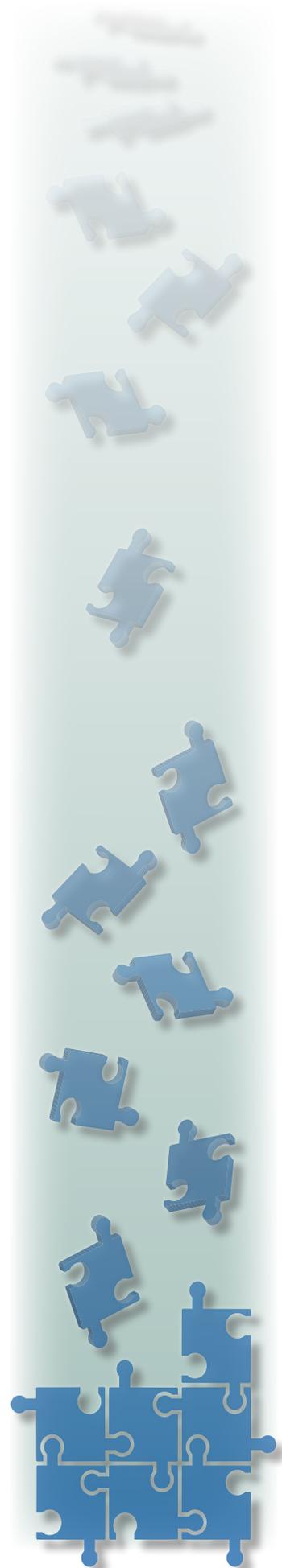


Services and Contacts for Specialist Councils

All departments can be reached through the central ATA telephone numbers: 780-447-9400 (Edmonton area) or 1-800-232-7208 (elsewhere in Alberta). E-mail contacts are listed where applicable. For additional information, contact Cheryl O'Brien in Professional Development (contact information below).

Service	ATA Contact
Editorial assistance, desktop publishing, artwork, printing, binding and mailing for publications	Supervising editor, Publications Karen Virag karen.virag@ata.ab.ca
Specialist council publications are available in the ATA library	ATA library library@ata.ab.ca
Distribution and handling of orders for additional council publications and materials	Distribution Ian Campbell ian.campbell@ata.ab.ca
Production of council stationery (letterhead, envelopes, business cards and so on)	Staff advisor
Artwork, layout, desktop publishing and editorial assistance for conference brochures and council membership brochures	Staff advisor
Inclusion of items in school mailings	Document production manager Renee Hughes renee.hughes@ata.ab.ca
Review of conference speaker and facility contracts	Staff advisor
Copies of generic specialist council application forms	Professional Development Cheryl O'Brien cheryl.obrien@ata.ab.ca
Conference publicity: All specialist council conferences for the upcoming year are featured free of charge in a centre-spread advertisement in a September and January issue of the <i>ATA News</i> . One small reminder notice is also available free of charge. Contact Raymond Gariepy to arrange for this additional advertisement. Councils may purchase additional advertising space.	Managing editor, <i>ATA News</i> Raymond Gariepy raymond.gariepy@ata.ab.ca

Council news, other than conference information, may be published free of charge in the Notices and Events column of the <i>ATA News</i> . News release services are also available for council activities.	Managing editor, <i>ATA News</i> Raymond Gariepy raymond.gariepy@ata.ab.ca
Council conference information is included (if available) in the events calendar on the ATA website. Conference dates and location may also be included in the Member's Diary.	Professional Development Cheryl O'Brien cheryl.obrien@ata.ab.ca
Special and joint project grants to assist councils	Staff advisor
Annual operational grants to each council	Staff advisor
Year-end financial review	Accountant: Subgroups services Didi Heer didi.heer@ata.ab.ca
Training for presidents, editors, treasurers and webmasters	Professional Development Andrea Berg andrea.berg@ata.ab.ca
Membership service	Professional Development Debra Augustyn debra.augustyn@ata.ab.ca
Constitutional changes	Staff advisor
Contact with outside agencies	Staff advisor
Professional development directory includes contact information for specialist council presidents, secretaries, treasurers and conference directors in addition to PD chairs and convention executives.	Professional Development Barb Bossert barb.bossert@ata.ab.ca
Records storage	Margaret Shane ATA Records Manager and Privacy Officer margaret.shane@ata.ab.ca
Websites	Webmaster Greg Romaniuk greg.romaniuk@ata.ab.ca
Membership lists	Professional Development Cheryl O'Brien cheryl.obrien@ata.ab.ca
Conference registration forms	Professional Development Cheryl O'Brien cheryl.obrien@ata.ab.ca



Annual Report reminder/protocol



Cheryl O'Brien
Administrative Officer,
Professional Development

Every specialist council must present an annual report of its operation and activities to the Association by August 31 of each year. The forms for doing this were mailed to council executives on April 3.

Councils can return Par 1 of the forms in two ways: by hard copy or electronically by clicking on following link: www.teachers.ab.ca/For%20Members/Forms%20and%20Online%20Services/SpecialistCouncilForms/Pages/Specialist%20Council%20Annual%20Report%20Form.aspx.

Regionals submit their reports to the parent council for inclusion in the council's submission to the Association. The regional form is available at www.teachers.ab.ca/SiteCollectionDocuments/ATA/Quick%20Links/ATAForms/RegionalAnnualReport.PDF

[SiteCollectionDocuments/ATA/Quick%20Links/ATAForms/RegionalAnnualReport.PDF](http://www.teachers.ab.ca/SiteCollectionDocuments/ATA/Quick%20Links/ATAForms/RegionalAnnualReport.PDF)

Specialist council executives (usually the president) are responsible for completing the report and submitting it to Barnett House. Refer to your council's executive handbook for further clarification of roles and responsibilities.

Part 2 contains sections on financial operations, membership, administration, activities and plans. You must also send an audited financial statement, **which must include a statement of assets and liabilities, a statement of revenue and expenditures, and a summary of financial activity for the annual conference and any regional councils for the most recently completed fiscal year of operation**, and, if required, a copy of the council's current constitution. Reports are due at Barnett House **no later than August 31** each year and, generally, cover the preceding school year. Grants for the following year depend upon receipt of the **complete report**. Failure to comply with Association directives or requirements will result in the suspension of all financial and other forms of assistance and services to the council until the report and statements are received. To facilitate completion of a council's annual report, the Association provides, on request, free review-of-account services. You must request this service by **June 30**.

Specialist council information is part of the package given to ARA delegates; it is also distributed to other Association members in the Annual Report.

Please contact Andrea Berg at andrea.berg@ata.ab.ca or Cheryl O'Brien at cheryl.obrien@ata.ab.ca if you have any questions or require assistance.



Upcoming visual changes to TNET sites

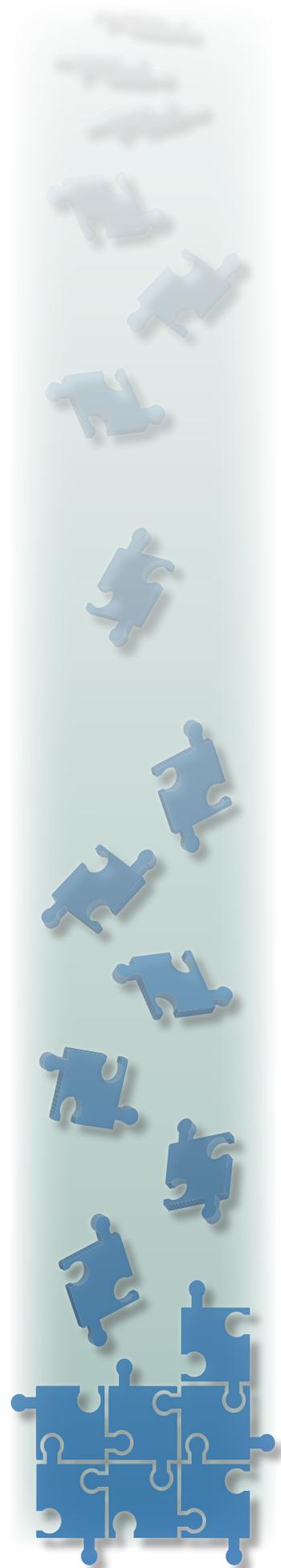


Gregory J Romaniuk
Information and
Technology Services

Over the next few months, the Alberta Teachers' Association will make available an update to the look and feel of specialist council websites published on TNET. At present, your TNET site's visual presentation is based on the page

layout of the provincial ATA website prior to its last visual update. Once the updated look and feel are released to TNET, your council webmaster will have an opportunity to make edits and organizational changes to your site before the new visual identity is turned on. When the update is activated by your webmaster, your specialist council site should inherit much of the visual identity of the Association's current provincial website.

The upcoming visual update is part of an extended plan to deliver new services and features for TNET sites on an ongoing basis. A goal of the phase 3 Web services upgrade is to bring additional functionality and options, while maintaining a delivery framework that provides choice and is relatively straightforward to learn and maintain. Planning and development of phase 3 upgrades for specialist council websites will occur over the next several months. If you'd like to discuss your TNET site or features you would like to see on your specialist council website, please contact Gregory Romaniuk at greg.romaniuk@ata.ab.ca.



What Do Editors Do, Anyway?



Karen Virag
Supervising Editor, Publications

I find that specialist council editors are always relieved when I tell them they don't actually have to copy edit articles. Their job is to gather material for their publication. The Association has an editorial unit in the Publications area that has three full-time editors: Penny Harter, Kristina Lundberg and Judith Plumb. Between them they more than 40 years of editing experience, which shows in the top-notch editing services they provide to specialist councils (as well as to other program areas in the Association). Here are some of the things they consider when editing a manuscript:

- Jargon. Clichés. Redundancies. All of these can rub readers and editors the wrong way or make their eye glaze over and their blood boil. Editors replace them with clear, concise, plain language.
- Inconsistency in point of view and changes in verb tense.
- Overuse of the passive voice. Remember, nothing gets done without someone or something doing it.
- Noun clusters. Editors break these up by adding prepositions, converting a noun to a verb or rephrasing completely, if necessary. For example, “teacher burnout alleviation strategies” might read “strategies for alleviating teacher burnout.”
- Gender-inclusive language.
- Spelling. The ATA uses Canadian spelling as specified in the *Canadian Oxford Dictionary*.
- ATA style. Like most organizations, the ATA has an in-house style to determine such things as capitalization and spelling conventions, and the use of the serial comma and italics. Our editors apply this style to all material.
- Style issues. We use the conventions suggested in *Chicago Manual of Style*, 16th edition, for material that is not covered by ATA house style.
- Verbiage and pretentious or unclear writing. And sometimes unintentionally funny sentences, like this one that appeared in an article about a game in phys ed class: “Make sure that the body has some legs under the balls.”

The “Do You Know That ...” Series



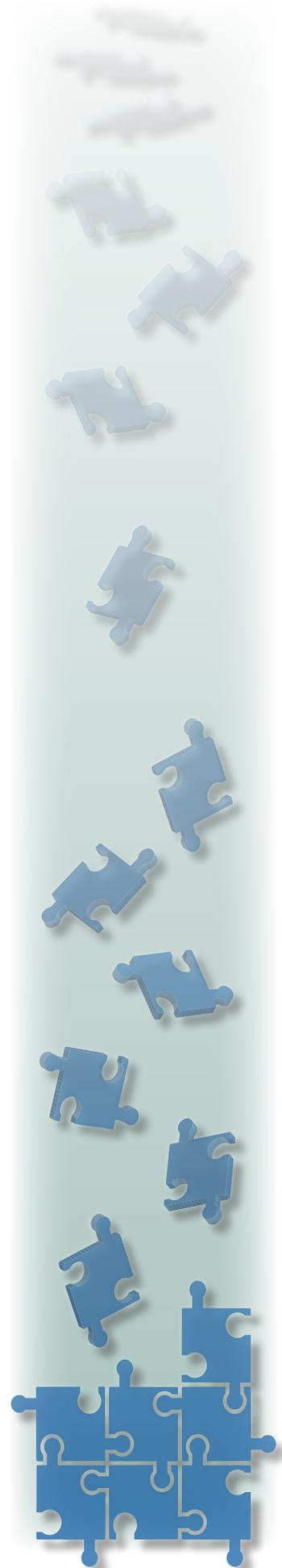
Didi Heer

Accountant, Subgroup Services

Back by popular demand—okay, I’m delusional. There is no demand, popular or otherwise. But in keeping with seasonal themes—in this case, the tax season—here is some fascinating fodder you might find useful. I would have preferred a spring or Easter theme, but best not to associate these joyful seasons with the rough-and-tumble world of treasurers and high finance.

Nonprofit v charitable organizations. Charitable organizations have a special tax status conferred by the Canada Revenue Agency (CRA) under the *Income Tax Act* (the act). This allows CRA to issue receipts to donors for tax purposes. Specialist

councils are nonprofit organizations (NPO) just like the Alberta Teachers’ Association. Therefore, councils may not issue receipts for tax-deductible donations. What is the difference? While both types of organizations operate on a nonprofit basis, they are defined differently under the act. Charities must be established exclusively for charitable purposes as specifically defined in the act. Charities are issued a charitable organization number that must appear on receipts for tax-deductible donations. They must also spend a minimum amount on their charitable activities each year. NPOs are not bound by the same provisions; therefore, they can operate for social welfare, civic improvement, pleasure, sport, recreation or any other purpose except profit to personally benefit their members. In other words, NPOs can realize income but cannot distribute it to individual members. The income must be used only to advance the established purpose of the organization. NPOs do not have a charitable organization number. However, this does not mean that councils cannot accept donations or accept sponsorship proceeds. Sponsorships are different from donations in that sponsors receive something of value in exchange for money, goods or services. For example, a council can acknowledge a business sponsorship in its conference brochure and allow the company’s logo to be displayed in the brochure. In this case, the business receives promotional and advertising benefits. The council can issue a regular invoice acknowledging the sponsorship that can be claimed by a business as an expense for tax purposes.



The tax man cometh part *deux*: tax waiver form for nonresident individuals. Just a reminder that people must fill out this form *before* they enter Canada. The purpose of the form is for people to obtain permission in advance from CRA to not pay taxes for fees earned in Canada. This form authorizes the council to not withhold tax. It does not mean that nonresidents do not pay tax; instead, it means that they will be paying it in their country of origin subject to whatever tax treaty is in place between Canada and that country. This is the other (but little known) purpose of the waiver. CRA can actually let you know if you should withhold tax. The US and Canada have a tax treaty to avoid double taxation for their citizens, hence the tax-waiver provision.

Harmonized sales tax (HST). I'm sure that everyone knows that HST simply means that GST and provincial tax are applied to purchases as one amount, based on a set percentage rate depending on the province. Under the CRA place-of-supply rule, the only sales

tax you should be paying is the GST at 5 per cent of purchase amount if the goods or services are received or delivered in Alberta, since we do not have sales tax here. The only time sales tax higher than 5 per cent is applicable is if your council received the services outside of Alberta.

Bursaries, grants or scholarships. I don't see this very often, but since we are on the subject, if your councils are contemplating awarding any of these, there might be tax implications for you and the recipient. Please contact me if you need advice about this. Specifically, grants to assist people in their research are considered taxable income. Similarly, payment to someone for research or the commissioning of a project by a council is a consulting fee and is also taxable. In either case, it should be reported to the Association as an honorarium.

I look forward to sharing many more delightful business topics with you in the future. Hope everyone had a happy Easter.



Meeting Trends for 2012



Leanne Calderwood
Director,
Global Accounts
Helmsbriscoe

Spring is always a fascinating time of year for meeting planners. It's typically then that meeting planner trade publications, associations and website resources launch their predictions for the year ahead for our industry. There are always the predictable ones, things we see in our everyday interactions with our industry partners and collaborators, but always a few surprises as well.

As conference planners for the ATA, you may find these interesting and helpful as you plan your conferences for the upcoming year:

Increased demand and slow supply growth have led to higher rates in full-service hotels and luxury properties. You may be seeing this in Calgary for sure, where demand has always exceeded supply. Typical increases due to inflation is 3–5 per cent; however, because rates dipped significantly in 2010, some rates are seeing jumps of 10 per cent just to catch up to pre-2009 values.

Due to the adverse lending environment, hotel construction

has not kept up with increased demand. As a result, **luxury and upscale hotels in major markets are heavily booked** and room rates have increased almost 12 per cent in the past two years. This is certainly the case in Calgary.

In 2011, the hotel industry sold more rooms than ever before, and this trend is continuing in 2012.

Underbooking is now a risky approach. In recent years, many meeting planners have routinely underreserved to avoid attrition penalties. This was a smart planning strategy in recessionary times, but the realities of today's marketplace have made this approach risky.

According to an article in *Hotel Business*, **80 per cent of meeting planners expect to maintain or increase their North American meetings in 2012.** Space is tight, transient bookings are up, and planners who expect extra rooms to be available at the last minute will likely be caught short or, at the very least, face premium prices.

Organizations must shift back to advance planning. Clearly, the high occupancy numbers in major markets point toward early booking, but during the recession many companies fundamentally changed their planning habits. Now meeting planners must help their organizations understand that advance planning—not waiting—is once again the smartest way to maximize value.

Concessions offered by hotels are changing and clients may no longer be able to obtain some of the radical booking concessions offered in 2009 and 2010.

(Source: Smith Travel Research on 2012 Hotel Trends)



It's definitely a different story from 2009 when cancellations were rampant and hotels were left with lots of inventory. The cautionary tale of booking short term to reduce the risk is now a thing of the past, and conference spaces are booking five to six years in advance just to confirm popular dates.

Negotiation of hotel contracts is still the best tool to combat rising prices, and the market has seen a significant increase of clients using negotiation services (for example,

HelmsBriscoe) to work on their contracts.

To learn more about how these trends could affect your future programs, feel free to contact me. Have a great spring season!

Leanne Calderwood
Director, Global Accounts
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And for the conference directors....



Donna Swiniarski
Communications

Extreme Hosting

Ever wonder what motivates presenters to shout “Pick me!” when it comes to conference speaking engagements? Practise the points below and be ready for a barrage of eager presenters.

- Give as much lead time as possible when trying to book speakers. No one likes to be called upon at the last minute.
- Within 24 hours after talking with the speakers, mail or e-mail written confirmations, which include the conference theme, date, location and any other specifics you discussed. If there is a contract to be signed, send it as well.
- Information about the speakers’ time slots and rooms should be sent as soon as it is available, but no later than a month in advance. In this communication include the conference centre’s

name and address, parking information and a floor map indicating the registration desk, speakers’ room numbers and any other critical information. If you have a program booklet, include a complimentary copy.

- A week before the conference, assigned hosts should call the speakers, introduce themselves and check if the speakers have any questions about their participation. Plan to meet at the registration desk on the day of the session. The hosts should provide a phone number in case any problems arise prior to the speaking engagement.
- On conference day, hosts meet the speakers at the registration desk, welcome them to the conference, give them a name tag and escort them to their sessions. Providing a bottle of water or a small packet of tissues is a nice gesture.
- Hosts are responsible for introducing the sessions and the speakers and handling any on-site problems related to the room and the audience. Hosts are also responsible for thanking the speakers and presenting thank-you gifts or cards on behalf of the specialist council. Even if speakers are not being paid for a session, token gifts or cards should be presented in recognition of their participation.
- Send a letter of recognition and thanks (mail or e-mail) from the specialist council president or conference director to each speaker within a week following the event.

Putting yourself in the speakers’ shoes and treating speakers with courtesy and respect will profit the professional reputations of both your specialist council and the Alberta Teachers’ Association.





ATA

SUMMER CONFERENCE

64TH ANNUAL ATA SUMMER CONFERENCE AT THE BANFF CENTRE, AUGUST 13–16, 2012

Specialist Council and Convention Association Programs

- Specialist Council Presidents'/Conference Directors' Seminar
- Convention Chairs'/Program Chairs' Seminar

Specialist councils/convention associations may send two representatives to attend these programs. Representatives must (1) be Association members; (2) obtain sponsorship from their specialist council/convention association; and (3) meet eligibility requirements.

Please note the following important upcoming activities and deadlines:

April 20–21: Spring Regional Professional Development Area Conference (PDAC), Edmonton. Specialist council presidents or designates are invited to attend. Extra delegates may attend at the council's expense. For registration information, please go to www.surveymonkey.com/s/pdac or contact Mardi Veinot at 1-800-232-7208.

May 1: Educational Trust Project Grants deadline: Each year, the Trust awards a number of project grants of up to \$3,000 to help individuals and groups (including specialist councils) conduct research or develop practical classroom materials for Alberta teachers. The materials and resources produced through these grants are placed in the ATA library, where teachers can borrow them. Go to www.teachers.ab.ca and click on For Members/ Grants, Awards and Scholarships for more information

August 13–16: Summer Conference, Banff Centre. Specialist council presidents and conference directors are invited to attend. Please contact Karin Champion at karin.champion@ata.ab.ca for information or registration.

August 31: Specialist Council Annual Reports due, including audited financial statement, for July 1, 2011 to June 30, 2012. Please submit to Cheryl O'Brien at cheryl.obrien@ata.ab.ca.

September 15 and November 15: Strategic Planning Grant deadline: Each year, the Association offers its subgroups—locals, specialist councils and convention associations—matching grants of up to \$2,000 each to offset the costs of organizing strategic planning retreats to discuss their plans and set long-term goals. Applications will be considered in two rounds. The first deadline is **September 15**, following which five applications will be chosen to receive grants. The second deadline is **November 15**, following which five additional applications will be selected. Go to www.teachers.ab.ca and click on For Members/ Grants, Awards and Scholarships for more information

September 30: \$400 Educational Trust Conference Grants deadline: Each year, the Trust awards a number of grants to help defray the costs associated with attending an ATA specialist council conference. Eligible expenses include registration, accommodation, fuel, food and (if applicable) the cost of a substitute teacher. Go to www.teachers.ab.ca and click on For Members/ Grants, Awards, Scholarships for application forms. You may wish to advertise these grants to your members in an upcoming publication.

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