



The Alberta
Teachers' Association

2022 Annual Report

2022



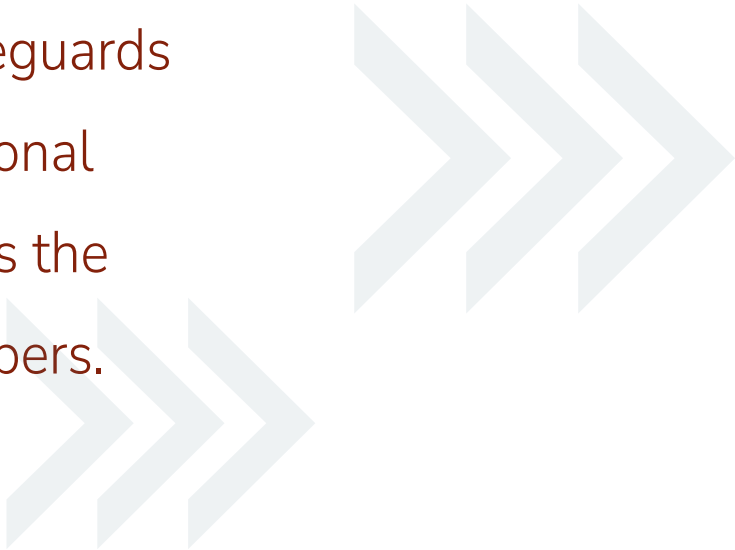
The Alberta
Teachers' Association

2022 Annual Report



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, and protecting members in the discharge of their professional duties and relationships, and
- 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 LAST FEW YEARS have been challenging for teachers, who had to reinvent what learning means and looks like during the pandemic. Throughout this journey, teachers supported their students and their families, often as their own personal well-being fell to the wayside. Although 2022 continued to present challenges, hopeful moments also emerged and brought teachers together, standing for public education.



In 2022, the Association advocated for teachers and students in several key areas, including curriculum, collective bargaining, the Association's regulatory function and publicly funded public education.

First, the Association addressed the development and implementation of new curriculum at the elementary level, advocating for a halt to a curriculum that was developed with little input from the profession. The profession also called for a halt to the curriculum's implementation, which was announced with only weeks left in the school year. Thanks to the Association's advocacy efforts and work with stakeholders, including parents, the government reconsidered and significantly revised its implementation plan, lessening the impact on teachers and students.

Even though the advocacy efforts had some positive outcomes, many teachers had to work through the summer to prepare for the new curriculum with little to no resources and supports. As additional subjects were being piloted at the elementary level, teachers continued to advocate for a curriculum that would help students grow, give them the best possible foundation for learning and prepare them for their future—a curriculum that would take students forward, not back to the past.

Second, the Association continued to pursue improved working conditions through collective bargaining. This year, the negotiations for teachers' collective agreements concluded with a mediator's recommendation. The mediator's recommendation was considered and debated by members, who ultimately voted to accept the recommendation by a small margin, signalling to the government that teachers are not happy with the status quo.

Third, the Association engaged in advocacy efforts after the government introduced and passed Bill 15, the *Education (Reforming Teacher Profession Discipline) Amendment Act* in May 2022. The bill sought to remove the regulatory function from the Association and place it within the Department of Education. Self-governance is a hallmark of professionalism and has been part of the identity of the Alberta Teachers' Association for more than 86 years. This bill changes the identity and culture of the teaching profession and was passed without any meaningful consultation with the profession. With the regulatory

»»» As much as there have been hard moments this past year, there have been hopeful moments—and teachers have been there for both, representing continuity and exemplifying resilience for their students.

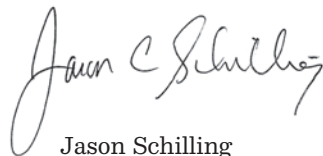
function beginning to transition to the government toward the end of 2022, the Association will continue its work to uphold the teaching profession and to support its members into the future.

Finally, at the 2022 Annual Representative Assembly, teachers passed a forward-looking resolution that called for the Association to “initiate a broadly based, outward-facing program of research, expert consultation, public dialogue, and member outreach to examine the academic, social and emotional challenges facing students in the *post-pandemic period* with the objective of identifying potential education policy responses to improve student well-being and success.” The resolution aimed to make public education a top priority not only in the next provincial election, but also beyond the election cycle.

Work in this vein began at Summer Conference and continued throughout 2022. A key part of this advocacy campaign, a Stand for Education rally was held at the provincial legislature on October 22. More than 5,000 teachers and public supporters attended the event, sending a clear message to all political parties that public education matters.

Throughout the past few years, teachers have shown their continued dedication to public education. Still facing the impacts of the COVID-19 pandemic, teachers and students returned to some normalcy in the fall, with activities such as sports, drama, school assemblies and in-person meetings resuming. As much as there have been hard moments this past year, there have been hopeful moments—and teachers have been there for both, representing continuity and exemplifying resilience for their students.

This annual report captures the work of the Association—its staff, its governing body and its member volunteers—for Alberta teachers in yet another year that challenged us all to rethink the role and the identity of the Association. As the Association moves into a new era, we will look for the opportunities and the possibilities to build better outcomes for teachers, students and the province.



Jason Schilling
President

Message from the Executive Secretary

A FOCUS OF THE ASSOCIATION over the last year has been to enhance the organization's strategic and operational capacity to resist continuing threats and attacks by government on the profession while striving to improve the employment and classroom conditions of its members. While government's attempts to diminish public education can be tracked back to the mid-1990s, it was only in 2022 that we saw the full expression of this government's antipathy toward the profession, practices and institutions that have served Albertans for almost eight decades.



In 2022, the provincial government continued to exclude teachers from conversations and decisions related to such areas as curriculum development and professional regulation. At the same time, it expanded its support for charter and private schools while allowing financial support for public education to be eroded by the combined effects of inflation and enrolment growth. Schools across the province were faced with ongoing shortages of substitute teachers and classroom assistants while managing the residual impacts of the COVID-19 pandemic. All these factors contributed to growing moral distress, declining indicators of mental wellness and diminished work-life and professional satisfaction among teachers provincewide as documented in surveys of members and in the anecdotes shared with elected representatives and Association staff members.

In response, the Association launched campaigns to counter narratives being advanced by the government, striving to engage members and the public to protect the profession and public education all while enhancing support for individual members, locals, bargaining units and subgroups. Despite our collective efforts, though, the government continued to vigorously pursue the destructive course it had set out.

From the perspective of Association operations, the single most notable development of 2022 was the implementation of Bill 15 and stripping away from the Association its professional regulatory functions. In accordance with the new regulatory regime, the Association continued to fulfill its obligations, concluding previously scheduled hearings, investigating discipline cases under way or newly submitted prior to September 1, and conducting preliminary inquiries into complaints submitted between September 1 and December 31. Association staff met regularly with government to discuss and clarify the ill-conceived plans for the government's own professional conduct and practice processes and to help organize the orderly transition of cases previously initiated to the newly created office of the Alberta Teaching Profession Commission. The transition of cases to the government will continue into 2023 and operational changes in response to the shift were in progress at year-end, the most important of these being the assumption by the Association of a representation and protective role for members who might be caught up by the government's process. Regardless of where the regulatory function resides, the Association remains committed to ensuring that the integrity of the profession is upheld and has comported itself accordingly.

Another notable pivot made in 2022 was in response to Bill 32, the *Restoring Balance in Alberta's Workplaces Act, 2020*. Working under severe time constraints, the Association developed a strategy that will enable it to continue to meet all its legislated objectives by segregating funds for what is designated by the act to be its "core" work (eg, union and

»»» The operational learnings from the pandemic will continue to be considered and applied, with improving service to members remaining our top priority.

professional development activities) from noncore work (eg, advocacy activities, political engagement and support for allied national and provincial organizations). Rather than pursue the option of conducting individual member fee elections and incurring their associated administrative burden and related costs, Provincial Executive Council reorganized the financial structure of the Association to establish a new Defence and Advocacy Fund (DAF). The DAF is intended to be a self-sustaining fund for “noncore” activities, which remain important to the Association’s mandate of promoting and advancing public education, safeguarding standards of professional practice and serving as the advocate for its members.

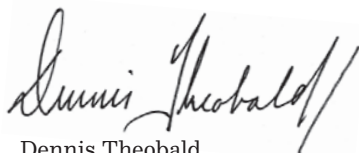
Collective bargaining at the provincial central table was also a major focus of the Association in 2022. After enduring successive years of fiscal constraint, the Association attempted to realize improvements in compensation and conditions of service but was not able to arrive at a negotiated agreement on key issues, including salary. These critically important issues then became the subject of a mediation process, the outcome of which was narrowly approved by a majority of teachers voting on the mediator’s recommendation. As the year progressed, the focus shifted to negotiating local agreements, with all indications being that local bargaining would be difficult and drawn out.

With service to members at the front of mind, Association staff returned to Barnett House and the Southern Alberta Regional Office through a staged re-entry plan in the spring. Throughout the pandemic, the Association prioritized continuity of service to members in balance with protecting the health, safety and well-being of staff, members and our communities. As the impact of the pandemic abated, programming that had been offered virtually was once more able to be offered to members in person. Still, the operational learnings from the pandemic will continue to be considered and applied, with improving service to members remaining our top priority.

The Association launched some elements of a new website in 2022. The digital refresh project, initiated in 2021, has been a considerable undertaking for staff and contracted vendors, and much work remains to be done. The new website aims to fulfill the mandate of the Association, in part by making crucial information for members and the public accessible and easy to understand. With thousands of pages of information regarding all aspects of Association operations to review and migrate, the development of the new website will continue into 2023.

As 2022 draws to a conclusion, there is a glimmer of hope for improvement. The change of leadership in the United Conservative Party has resulted in efforts by government to improve consultation with the Association and to seek out areas of cooperation. There are also signs that the government will relieve some of the worst financial pressure being felt in the education sector and modify plans for curriculum implementation in response to teacher pressure and in anticipation of what is likely to be a hotly contested provincial election.

Of course, 2023 will bring new challenges, but we will face these challenges together as we work to strengthen public education for the benefit of our members and the students they teach.



Dennis Theobald
Executive Secretary

Provincial Executive Council

Table officers



Jason C Schilling
President



Greg P Carabine
Vice-President



Jenny L Regal
Vice-President



Greg A Jeffery
Past President



Dennis E Theobald
Executive Secretary

District representatives

Calgary City



Kathy A Hoehn

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



Kevin L Kempt



Darren J Moroz

Calgary District



Karen M Nakaska

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

Central



Brenton J Baum

Greater Black Gold
Teachers' Local No 8,
St Thomas Aquinas
Teachers' Local
No 45, Timberline Local
No 9, l'Association
des enseignantes
et des enseignants
francophones de
l'Alberta Local 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



Rick C Kremp

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



Darrin A Bauer



Carmen N Glossop



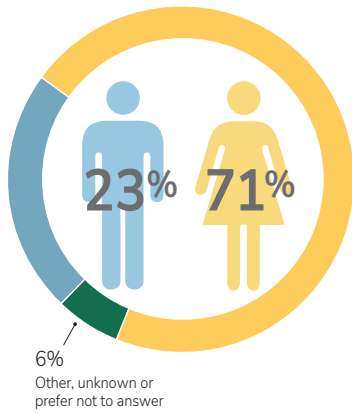
Peter F MacKay

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

North West

Membership

51,277
TOTAL MEMBERSHIP



Membership by gender

In 2022, the total membership was 51,277.

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, 62 per cent of the central office teachers eligible to make an election of membership status had elected active membership, 12 per cent had elected associate membership and 26 per cent had elected nonmembership.

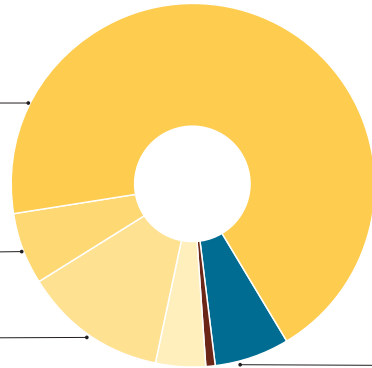
ACTIVE

Full-Time
35,327

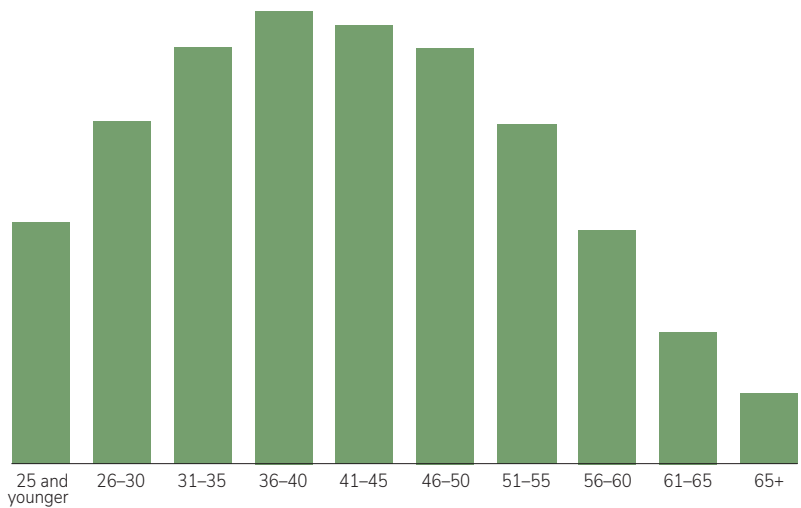
Part-Time
3,313

Substitute
6,606

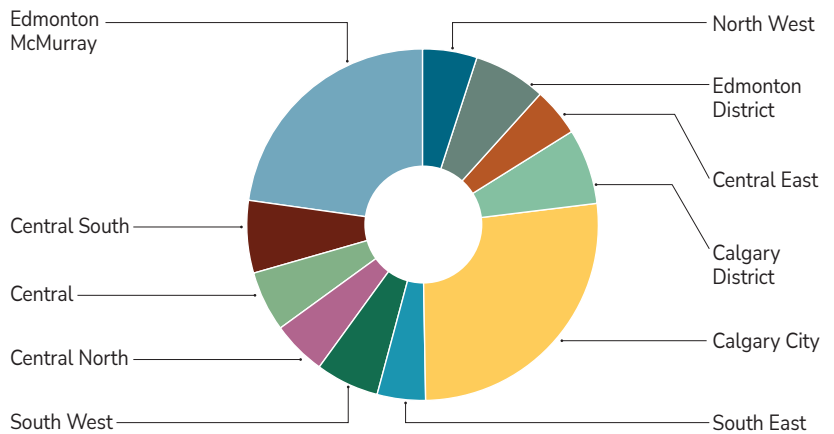
Leave of Absence
2,230



Membership by type



Membership by age

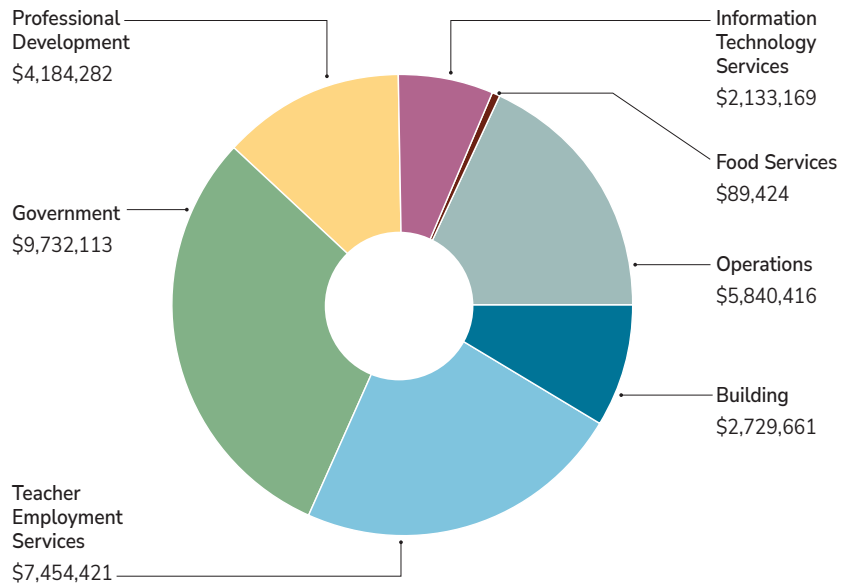


Membership by geographic district

Operating Expenditures by Program Area

\$32.16
MILLION
PROGRAM AREA EXPENDITURES

154 STAFF



Operating expenditures by program area

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



205 DAYS
on average worked by each executive staff officer



7,437
PARTICIPANTS attended 171 workshops presented by Association instructors



15,161 KM
travelled by each executive staff officer, on average, on Association business



1,063,488
VISITS to the Association's provincial website



20,229
CONTACTS with members by Teacher Employment Services staff



2,657
RESEARCH AND INFORMATION QUESTIONS answered by ATA library staff

Committee Members

Standing Committees

Membership as of 2022 12 31

Benefits, Insurance and Pension Committee

Kevin Kempt (Chair)
Mark Breadner
Sean Brown
Marjorie Charles
Michael Doll
Jay Duffett
Jennifer Fredeen
Anne-Marie E Huizing
Murray Lalonde
Waishing Lam
Luigi Pollio
TBD (Alberta Retired Teachers' Association [ARTA])
Myra Rybotycki (Secretary)
Sue Beyer (Administrative Secretary)

Central Table Bargaining Committee

Peter MacKay (Chair)
Darrin Bauer
Carmen Glossop
Murray Lalonde
Robert Mazzotta
Heather McCaig
Sean Brown (Secretary)
Debbie McAvoy (Administrative Secretary)

Communications, Advocacy and Public Education Committee

Brenton Baum (Chair)
Darrin Bauer
Andrea Berg
Melanie Buckley
Kathy Hoehn
Melanie Stevenson
Mike Wheeler
Shelley Magnusson (Secretary)
Jen Janzen (Administrative Secretary)

CTF Committee

Jason Schilling (Chair)
Nancy Ball
Darrin Bauer
Brenton Baum
Don Brookwell
Greg Carabine
Carmen Glossop
Greg Jeffery
Rick Kremp
Murray Lalonde
Karen Nakaska
Jenny Regal
Dennis Theobald
Genevieve Blais (Secretary)
Debbie McAvoy (Administrative Secretary)

Curriculum Committee

Paul Froese (Chair)
Tania Brudler (Alberta Education)
Teresa Fowler
Shelley Gartner
Kathy Hoehn
Cheyenne Kopinsky
Riley Kostek
Kathiana Marc
Richelle Marynowski
Heather McCaig
Philip McRae
Colette Mondor
Jade Oldfield
Cheryl Przybilla (Alberta Education)
Jessie Shirley (College of Alberta School Superintendents [CASS])
Mark Swanson
Lindsay Unland
Nancy Luyckfassel (Secretary)
Cheryl O'Brien (Administrative Secretary)

Diversity, Equity and Human Rights Committee

Kathy Hoehn (Chair)
Phoebe Arcilla
Youssra Badr
Christy Haggarty
James Hwang
Rick Kremp

Jenna Lowe (University of Lethbridge [U of L], Faculty of Education)
Amrit Rai Nannan
Kathy Robinson (University of Alberta [U of A], Faculty of Education)
Kristine Wilkinson
John Williamson
Alysson Blaine (Alberta Education)
Andrea Berg (Secretary)
Tracee McFeeters (Administrative Secretary)

Finance Committee

Jenny Regal (Chair)
Don Brookwell
Carmen Glossop
Greg Jeffery
Rick Kremp
Darren Moroz
Dennis Theobald
Pedro Carriel (Secretary)
Caroline Inacio (Administrative Secretary)

Indigenous Education Committee

Cathy Brown (Chair)
Lynda Burgess (Alberta Education)
Phillip Campiou (Indigenous Advisory Circle)
Lisa Cruickshank (Rupertsland Institute)
Linda Doyle
Murray Lalonde
Julia McDougall
Karen Nakaska
Janis Weasel Bear-Johnson
Tracy Zweifel (Alberta Native Friendship Centre)
Melissa Purcell (Secretary)
Jessica Grayson (Administrative Secretary)

Political Engagement Committee

Karen Nakaska (Chair)
Andrew Boylan
Elissa Corsi
Stephen Gibbings
Carmen Glossop
Kevin Kempt
Allison McCaffrey
Heather McCaig
Lindsay McNelly
Kristy Ruaben
Shelley Magnusson (Secretary)
Kim Clement (Administrative Secretary)

Resolutions Committee

Greg Carabine (Chair)
Paul Froese
Peter MacKay
Karen Nakaska
Joni Turville (Secretary)
Shelley Svidal (Administrative Secretary)

School Leaders Issues and Concerns Committee

Katherine Pritchard (Chair)
Brenton Baum
Cameron Bernhard
Andrea Craigie
José da Costa (U of A, Faculty of Education)
Allen Davidson (CASS)
Dorice de Champlain
Satinder Dhillon (Alberta Education)
Eve Godin
Owen Holloway
David Hurley
Aliya Kuzhabekova (Werklund School of Education)
Lynn Leslie (Council for School Leadership [CSL] Representative)
Mark Sylvestre (CSL President)
Tanya Thiessen
Chris Gonsalvez (Secretary)
Nikki Cloutier (Administrative Secretary)

Status of Racialized Teachers Working Group

Rick Kremp (Cochair)
Gail Wilson (Cochair)
Andrea Berg
Rupi Bergamin
Cecil Hall
Fitz Sherman
Kenny Yeung

Kristine Wilkinson (Secretary)
Tracee McFeeters (Administrative Secretary)

Strategic Planning Group

Nancy Ball (Chair)
Lisa Everitt
Andrew Finlay
Sandra Haltiner
Peter MacKay
JJ Ondrus
Jason Schilling
Dennis Theobald
Philip McRae (Secretary)
Shelley Svidal (Administrative Secretary)

Substitute Teachers Committee

Don Brookwell (Chair)
Kevin Forney
Christine Harris
Christina Jones
Steven Navratil
Jerri Perrin
Val Peter
Danny Maas (Secretary)
Michelle Caron (Administrative Secretary)

Table Officers Committee

Jason Schilling (Chair)
Greg Carabine
Greg Jeffery
Jenny Regal
Dennis Theobald
Robert Mazzotta (Secretary)
Audrey Dutka (Administrative Secretary)

Teacher Education and Certification Committee

Darren Moroz (Chair)
Val Browne
Henry Algera (The King's University)
Darrin Bauer
Brent Bradford (Concordia University of Edmonton)
Amy Burns (Werklund School of Education)
Maryanne Doherty (U of A, Faculty of Education)
Dave Elwood (Red Deer Polytechnic)
Rania Eshak (Campus Saint-Jean Area Field Experiences Committee [AFEC] Chair)
Amanda Jackman (Alberta Education)

Norma Jani (Edmonton AFEC Chair)
Eva Lemaire (U of A, Campus Saint-Jean)
Larry Neville (Calgary AFEC Chair)
Sharon Pelech (U of L, Faculty of Education)
Crystal Pelletier (Ambrose University)
Julia Rheume (Red Deer Polytechnic)
Daphne Sander (Lethbridge AFEC Chair)
Paolina Seitz (St Mary's University)
Mark Swanson
Edward Tiet (U of A Student)
Natalie Townshend
Norman Vaughan (Mount Royal University)
Ted Wheat
Susan Wilson
Diane Wishart (Advanced Education)
TBD (University of Calgary Student)
Monique A Gravel (Secretary)
Jessica Grayson (Administrative Secretary)

Women in Leadership Committee

Nancy Ball (Chair)
Teresa Cusano
Joanne Harle
Anne-Marie Huizing
Adrienne Peoples-Sprecker
Katherine Pritchard
Lisa Everitt (Secretary)
Margaret Shane (Administrative Secretary)

Professional Conduct and Practice

Professional Conduct and Practice Review General Panel

The panel comprises the members of the professional conduct and practice review committees (see below).

Nelson Moulton (Chair)
Brenna Kowalchuk (Vice-Chair)

Professional Conduct Appeal Committee

Wendy Maltais (Chair)
Stephani Clements (Vice-Chair)
Brenda Parker
Fitz Sherman
Don McLaughlin (Alternate)
TBD (Public Member)
Sudeep Dua (Administrative Secretary)

Professional Conduct Committee

Grant Barron
Cameron Bernhard
JoAnn Blachford
Aliece Bonnell
Corey Borys
Andrew Boylan
Daniel Ceresa
Marjorie Charles
Craig DeJong
Jonathan Hemphill
Brenna Kowalchuk
Meagan Kuik
Greg Meeker
Nelson Moulton
Alissa Passmore
Heather Quinn
Sally Rudakoff
Diane Sellars-Myshchysyn
Cheryl Semeniuk
Stuart Shigehiro
Jill Stankov
Brice Unland

Wade Westworth
Daniel Wyton
Katrina Zack
TBD (Public Member)
TBD (Public Member)
TBD (Public Member)
Sudeep Dua (Administrative Secretary)

Professional Conduct Complainant Appeal Committee

Lori S Arksey (Chair)
Chris McCullough (Vice-Chair)
James E Grondin (Alternate)
Richard W McAdie (Alternate)
TBD (Public Member)
Sudeep Dua (Administrative Secretary)

Professional Practice Appeal Committee

Murray Marran
Allison McCaffrey
Noreen Holt
Sara Lambert
Kristy Smith
Maria David-Evans
Sudeep Dua (Administrative Secretary)

Professional Practice Complainant Appeal Committee

Steven Kaplan
Chris McCullough
Daryl M Chichak
Moni Riez
TBD (Public Member)
Sudeep Dua (Administrative Secretary)

Professional Practice Review Committee

Elizabeth Grill
Corey Haley
Adriana Klassen
John Murphy
Kelly Thomas
Chantal Malette
Sandra Bessant
Marla Bowers
Chad Bowie
Arief Ebrahim
Andrew Finlay
Tabatha Hart
Christine Pastega
TBD (Public Member)
TBD (Public Member)
TBD (Public Member)
Sudeep Dua (Administrative Secretary)

Other ATA-Supported Bodies

Advisory Committee on Teacher Education

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

Alberta Advisory Committee for Educational Studies

Jody Dennis
Philip McRae
Nikki Cloutier (Administrative Secretary)

ATA Educational Trust, Board of Trustees

Sally Rudakoff (Chair)
Sheila Hobday (Public Member)
Nadina Kaminer
Melissa Morton
Cory Schoffer
Robert Stepaniuk
TBD (ARTA)
Neil Hepburn (Administrative Secretary)

Membership Eligibility Board

Jason Schilling (Chair)
Nadine Armbruster
Lynn McGarvey (U of A, Faculty of Education)
Mikkel Nannan
Jackie Seidel (Werklund School of Education)
Len Sproule (U of L, Faculty of Education)
Monique Wilson
Mark Swanson (Secretary)

Membership Eligibility Committee

Mark Swanson (Chair)
Betty Fu
Linda Laidlaw (U of A, Faculty of Education)
Susan Wilson (Secretary)

Returning Officers

Dave Matson
Kyle McIntosh

Teacher Qualifications Committee

Dan Coles (Chair)
Daniel Balderson (U of L, Faculty of Education)
Amy Burns (Werklund School of Education)
Angelo Delli Santi
Amanda Jackman (Alberta Education)
Joshua LaFleur
Lynn McGarvey (U of A, Faculty of Education)
Natalie Townshend
Susan Wilson (Secretary)
Lesley Smith (Administrative Secretary)

Teacher Salary Qualifications Board

Jason Schilling (Chair)
Robin Bright (U of L, Faculty of Education)
Maryanne Doherty (U of A, Faculty of Education)
Matthew Hebert (Alberta Education)
Tammy Henkel (Alberta School Boards Association)
Greg Jeffery
Theodora Kapoyannis (Werklund School of Education)
Dan Karas (Alberta Education)
Dennis Theobald (Secretary)
Nikki Cloutier (Administrative 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.

H Mark Ramsankar
Gordon Thomas

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.

Darren Lund (posthumously)
Carla Peck

Educational Research Award

Cory Wright-Maley (St Mary's University)

Doctoral Fellowship

Linda Doyle
Mathew Campbell

Nadene M Thomas Graduate Research Bursary

Jillian Marino

John Mazurek Memorial–Morgex Insurance Scholarship

Angelo Delli Santi

University of Alberta Milton Ezra LaZerte Gold Medal

Clara Terra

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

Jade Sinclair

University of Calgary Clarence Sansom Gold Medal in Education

Elisa Hall


University of Lethbridge William Aberhart Gold Medal in Education

Breanne Furlanich



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 5 table officers and 15 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. Developing the annual budget and proposed program prognoses and considering resolutions for the Annual Representative Assembly (ARA) occupy a significant amount of Council's time.

In 2022, Council was responsible for receiving, reviewing and, if necessary, appealing decisions of the Professional Conduct Committee, a role that it will gradually divest itself of with the transfer of professional regulatory processes previously undertaken by the Association to the Government of Alberta beginning on 2023 01 01.

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; the constitutions of specialist councils, convention associations and locals; and the frames of reference of teacher welfare committees. The Table Officers 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 ARA.

In 2022, the Association participated in professional development on effective governance facilitated by WATSON. Council ended its relationship with WATSON in December but will continue to refine governance processes.

Also, the Association continued the budget review initiated at the direction of the 2019 ARA. The main objective of the review is to improve the budget process based on the guiding principles of alignment, flexibility, transparency and stakeholder engagement, and efficiency. With the support of BDO Canada, a high-level process map of the current budget process was completed, and a series of interviews was conducted with comparable organizations as part of the benchmarking component. In the fall 2022, the Association received a draft Future State Design report and began assessing both its content and applicability, with implementation to follow accordingly in the coming years.

Annual Representative Assembly

The Annual Representative Assembly (ARA) 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 105th ARA was held at the Hyatt Regency in Calgary on 2022 05 21–23.

ARA 101 sessions were offered virtually to delegates attending the Assembly. ARA 101 sessions, hosted by staff most responsible for the various aspects of ARA, provided delegates with information and an opportunity to ask questions. The ARA 101 sessions were the following:

- Purpose of the Annual Representative Assembly (offered 2022 04 25)
- Rules of Order and Procedure (offered 2022 05 09)
- Budget/Finance 101 (offered 2022 05 16)

Recordings of these sessions were placed on the ARA share site for all delegates to review in advance of the ARA.

The ARA was attended by 405 delegates from 55 locals, 2 representatives from the Alberta Retired Teachers' Association Special Local No 1, 5 specialist council observers, 5 student local observers, 6 local observers, members of Provincial Executive Council, staff and invited guests.

The Assembly dealt with 233 resolutions, approving 206 and defeating 22. Two resolutions were referred for study and report, one resolution was tabled and two resolutions were not moved. There were no resolutions declared as action taken.

In addition to debating resolutions, delegates received the annual report of the Association, which included the auditor's report and financial statements for 2021/22, and heard reports from President J C Schilling and Executive Secretary D E Theobald.

»» 340

delegates
attended the
2022 Summer
Conference in
Banff.

Summer Conference

Summer Conference, the premier training event for Association leaders, was first held in 1949 in Banff. The 2022 Summer Conference was held in Banff on 2022 08 08–12 and was attended by 340 delegates. J A Turville and R T Mazzotta served as codirectors of the conference.

Thirteen programs were offered at Summer Conference.

Local Association Programs

In all, 53 of the 55 local associations, as well as one Association bargaining unit from a charter school, were represented at the 2022 local association programs, which are captured below:

- The Introduction to Collective Bargaining Course is designed to introduce the collective bargaining process to members new to a teacher welfare committee. The program consisted of joint sessions with the Advanced Collective Bargaining Course, as well as a course-specific session. Addressed in these sessions were topics on representing subgroups, communications, duty of fair representation and how bargaining is organized with the Association. M J Rybotycki served as director.
- The Advanced Collective Bargaining Course is designed to continue the development of bargaining skills necessary for conducting negotiations on behalf of teachers. Participants had an opportunity to further develop the skills introduced in the Introduction to Collective Bargaining Course. The program explored a more refined

model of negotiation theory, analysis of data, preparation of collective agreement language and costing procedures. The course provided an opportunity for delegates to practise the skills acquired during the week in a bargaining simulation. J S Gerun served as director.

- The Local Political Engagement Officers' Seminar is designed to offer local political engagement officers leadership development to enhance the effectiveness of their local's political engagement efforts. Participants examined opportunities for teachers related to political engagement and political advocacy. E D Corsi served as director.
- The Local Presidents' Seminar allowed local presidents to examine the role of a local president, review issues facing the Association, meet with members of Provincial Executive Council and share information about local initiatives. K W Hadden served as director.
- The Local Program Course focused on the roles and responsibilities of local office holders and school representatives. Emphasis was placed on the skills needed to be an effective leader within a local association and the skills necessary to maintain professional responsibilities while handling member concerns and acting as a teacher representative. T T Thiessen served as director.
- The Professional Development (PD) Course supports local PD chairs and PD committee members to meet the current PD needs of their local members. Delegates gained an understanding of their roles and responsibilities and had the opportunity to explore such topics as current issues, skill development, local initiatives and challenges, succession planning and PD supports and services. M D Swanson and M A Gravel served as directors.

Table 1. Participation in Local Association Programs at Summer Conference

| Course | Number of Local Participants | Number of Locals Represented |
|--|------------------------------|------------------------------|
| Advanced Collective Bargaining Course | 47 | 33 |
| Introduction to Collective Bargaining Course | 37 | 24 |
| Local Political Engagement Officers' Seminar | 35 | 33 |
| Local Presidents' Seminar | 48 | 47 |
| Local Program Course | 39 | 27 |
| Professional Development Course | 39 | 28 |
| Women in K-12 Educational Leadership Seminar | 39 | 32 |

Table 2. Participation in Other Programs and Seminars at Summer Conference

| Course | Number of Participants (not including PEC) |
|--|--|
| Convention Seminar | 13 |
| Specialist Council Conference Directors' Seminar | 10 |
| Specialist Council Presidents' Seminar | 12 |
| Association Instructors' Seminar | 12 |
| Indigenous Education PD Facilitators' Seminar | 6 |
| Professional Development Facilitators' Seminar | 3 |

- The Women in K–12 Educational Leadership Seminar is designed to enhance the leadership skills of participants involved in their local Women in Leadership (WIL) committees. This course examined mechanisms that local WIL committees can utilize to grow networks of support for women teachers and school leaders. The seminar created opportunities for local WIL committee members to connect with each other to share their strategies for supporting the leadership potential of women in the profession to ensure that the Association and school divisions better reflect the gender composition of the teaching force in Alberta. L M Everitt served as director.

Due to the mediator’s recommendation being ratified by teachers and the Teachers’ Employer Bargaining Association in May 2022, the Bargaining Advisory Committee Seminar was not offered in 2022.

Convention Association and Specialist Council Programs

- The Convention Seminar is designed to provide new members of convention association executive committees and boards with the opportunity to discuss upcoming teachers’ conventions. Sessions included convention finances, privacy laws and best practices in managing information and working with PD subgroups. D W Maas served as director.
- The Specialist Council Presidents’ and Conference Directors’ Seminars are designed to develop specialist council presidents’ and conference directors’ leadership and organizational skills. The seminars consisted of joint sessions as well as role-specific sessions. Addressed in these sessions were such topics as peer leadership, use of technology in event administration, strategic planning, financial planning, communications planning and the implications of privacy legislation for councils. C W Gonsalvez and D R Grassick served as codirectors.

Association Corps Programs

- The Association Instructors’ Seminar allowed participants to review the Association instructors’ handbook and procedures, learn facilitation skills and receive training on delivering workshops. N J Luyckfassel served as director.
- The Indigenous Education PD Facilitators’ Seminar allowed participants to examine the roles of an Indigenous education PD facilitator and to learn about Indigenous leadership and wellness, as well as numeracy and connections in First Nations, Métis and Inuit traditional games. M A Purcell served as director.
- The PD Facilitators’ Seminar was held in conjunction with the PD Course. PD facilitators collaborated on promotional material that highlighted the services that the facilitators provide and developed strategies to support PD leaders in their local context. M A Gravel served as director.

Local Presidents’ Meetings

In 2022, meetings of local presidents were convened on three occasions.

Participants from 52 of the Association’s 55 local associations, as well as a representative from the Alberta Retired Teachers’ Association (ARTA) Special Local No 1, attended the virtual meeting that was held in Edmonton on 2022 02 04(eve)–05. The meeting included an address from President J C Schilling; a provincial update; a general session that included information on Bill 32, the *Restoring Balance in Alberta’s Workplaces Act, 2020*; a session on emerging local issues; a question period; a finance and budget presentation; and two consecutive roundtable discussion sessions. The meeting also allowed local presidents to meet for a session with their district representatives.

Participants from 53 of the 55 local associations attended the meeting of local presidents held on 2022 05 20 in Calgary, in advance of the 105th Annual Representative 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 in Edmonton on 2022 10 21(eve)–22. The meeting included an address from President Schilling, a provincial update, a session on emerging local issues and a question period. Local presidents then prepared to attend the Stand for Education rally held on 2022 10 22 at the Alberta legislature grounds.

In addition, President Schilling held weekly Local Presidents' Meetings in September and October to prepare for the Stand for Education rally.

Professional Conduct and Practice Review

Effective 2022 09 01, transitional legislation was imposed on the Association as part of Bill 15, the *Education (Reforming Teacher Profession Discipline) Amendment Act*. The Association was required to implement a new regulatory system until 2022 12 31, at which point Alberta Education would assume responsibility for complaints alleging unprofessional conduct or incompetent practice of all teaching certificate holders in the province of Alberta.

Under this transitional legislation, the Association received 59 new requests for investigations of possible unprofessional conduct. Two cases were withdrawn prior to preliminary inquiries being completed. Forty-two preliminary inquiries were completed, with one case resulting in no further action, one case being deemed suitable for handling via dispute resolution under the Association's Discipline Bylaw (invitation process) and one case being withdrawn. Forty-six of the requests were transferred to Alberta Education, of which 13 preliminary investigations needed to commence, 22 were recommendations for preliminary investigations and 11 required Alberta Education to conduct a preliminary inquiry. As the transitional legislation has multiple stages, any cases requiring a preliminary investigation to commence on or before 2023 01 01 were not included in the files transitioned. These statistics are included in the final numbers reported below.

In 2022, 177 new requests for investigations of possible unprofessional conduct were received, 121 investigations were completed and 18 were cancelled when the complainants withdrew the request. Sufficient evidence to warrant hearings was found in 27 cases. An additional 38 cases were deemed suitable for handling by means of the invitation process. At year-end, 140 investigations were under way.

In order to comply with the new legislation, the Association was required to create a Professional Conduct and Practice Review General Panel. This panel was to be used to populate all disciplinary committees under the Association's auspices including Professional Conduct Committee (PCC), Professional Conduct Appeal Committee (PCAC), Complainant Appeal Committee (CAC), Professional Practice Review Committee, Professional Practice Complainant Appeal Committee and the Professional Practice Appeal Committee. Due to the short timelines encompassing the transitional legislation, no hearings were held by any of the transitional committees.

However, under the previous legislation, 23 hearings were conducted in 2022 by separate hearing committees of three to five persons drawn from the PCC. Table 3 shows the nature of the offences, and Table 4 summarizes the penalties imposed.

Thirty-one invitations were held in 2022, all of which resolved the matter to the satisfaction of the Association. Eleven 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 PCAC, a group composed of four Association members and one public member. Two appeals were received in 2022. One appeal from 2021 concluded where the committee had quashed the PCC hearing committee's findings and order. Two appeals had convened but adjourned to be heard in 2023.

A complainant dissatisfied with a decision that no hearing is warranted may appeal that decision to the CAC (made up of two Association members and one public member), which may order a hearing. In 2022, three new appeals were received and ten were heard. The committee referred one appeal to a hearing of the PCC and concurred that a hearing of the PCC was not warranted for nine appeals.

No training session was held for members involved in the administration of professional discipline this year because of the passing of Bill 15.

The Association received no requests for a practice review hearing in 2022.

Table 3. Unprofessional Conduct Convictions in 2022

| Nature of Offence | Frequency* |
|--|------------|
| Conduct Judged Unprofessional | |
| —in relation to students | 24 |
| —in relation to school authorities | 2 |
| —in relation to colleagues | 3 |
| —in relation to the profession | 25 |
| Conviction on an Indictable Offence | 2 |
| Conviction on Other Criminal Charges | 0 |
| * Some cases involved multiple charges. Twenty-one members were found guilty of unprofessional conduct. | |

Table 4. Unprofessional Conduct Penalties Imposed in 2022

| Type of Penalty | Frequency* |
|--|------------|
| Reprimand (Oral) | 0 |
| Reprimand (Written) | 10 |
| Severe Reprimand (Written) | 8 |
| Fine | 16 |
| Course | 2 |
| Treatment | 2 |
| Recommendation for Suspension of Certificate | 1 |
| Recommendation for Cancellation of Certificate | 1 |
| Suspension from the Association | 1 |
| Expulsion from the Association | 2 |
| * Some cases involved multiple charges, multiple penalties or both. Twenty-one members were penalized for unprofessional conduct. | |

Bill 55

Although it was passed and proclaimed in 2021, the major provisions of Bill 55, the *College of Alberta School Superintendents Act* came into effect in September 2022. The act established the legislative basis for the College of Alberta School Superintendents (CASS) to become a self-regulating professional organization with responsibility for upholding the *Superintendent Quality Standard* and standards of conduct among superintendents and deputy superintendents employed in public, separate and francophone school authorities. When originally passed, the legislation recognized the superintendency as a profession distinct and separate from teaching, a long-standing ambition of CASS that had been resisted by previous governments. CASS proceeded

to actively encourage central office teachers, many of whom had been members by election of the ATA, to instead join its ranks. Ironically, the passage of Bill 15 (see below) immediately removed from CASS responsibility for administering processes to uphold standards of professional practice and conduct of its membership as well as the associated expense.

Bill 15

The proclamation of Bill 15, the *Education (Reforming Teacher Profession Discipline) Amendment Act*, on May 31, 2022, set into motion a process for creating the office of the Alberta Teaching Profession Commission to oversee teacher and teacher leader conduct and competency complaints for the profession. Bill 15 nullified improvements to the Association discipline process that were to have been introduced under Bill 85 passed the previous year and stripped the Association of responsibility for professional regulation that it had exercised since the mid-1930s.

Under the legislation beginning January 1, 2023, all new complaints about alleged unprofessional conduct or practice must be directed to the teaching profession commissioner.

The legislation and associated regulations require the Association to complete hearings initiated prior to January 1, 2023. Investigations initiated and already under way under the auspices of the Association prior to that date will also be completed by the Association, with reports turned over to the commissioner for further action if and as she determines. Where a complaint has been received before January 1, 2023, but a preliminary inquiry, preliminary investigation or investigation has not been initiated, responsibility will be transferred to the commissioner in accordance with a complex transition process set out in regulations. The Association will endeavour to complete its investigations by June 30, 2023; those that remain incomplete at that date will be transferred to the government, although extensions may be granted by the commissioner.

The government's new regulatory processes will apply to all certificated teachers in the province, including teachers, school leaders, central office staff and superintendents in public, separate, francophone, charter, and private schools and systems. They will be subject to a new Code of Professional Conduct and Practice that, at the beginning of November 2022, was still being developed but must be in place on January 1, 2023.

The government's process is subject to political interference. The commissioner, who is not a certificated teacher, is not independent of the Department of Education and decisions made by a hearing panel, whose membership will not be representative of the profession, will be reviewed and can be unilaterally overturned by the minister of education.

Effective January 1, 2023, the Association will be assisting and representing its active members who are the subjects of investigations, alternative resolution processes or hearings administered by the commissioner to ensure that they are treated fairly and in accordance with principles of natural justice and administrative law. As 2022 drew to a close, the Association was putting into place new policy, processes and capacity to ensure that the rights of its members who are subject to the government's processes are appropriately protected.



Rally for public education at the Alberta legislature grounds on 2022 10 22.

Legislation

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

Bill 32—*Restoring Balance in Alberta's Workplaces Act*

In July 2020, the *Restoring Balance in Alberta's Workplaces Act* introduced new rules regarding union financial statements and union dues elections. These rules were not proclaimed at that time but were fully in effect in 2022.

Bill 32 is a broad piece of legislation that is intended to impact the advocacy efforts of unions. In the case of education, the amendments to the *Public Education Collective Bargaining Act* (PECBA) made by Bill 32 require the Association to segregate its activities into three groups:

- Group 1—Political and other causes activities
- Group 2—Professional development and professional governance activities
- Group 3—Bargaining agent activities and other activities that do not fit into the other two groups

This structure will require the Association to calculate the amount or percentage of its membership fees that relate to Groups 1, 2 and 3 and provide that information to teachers before the Association can charge any fees. Teachers are not required to pay the amount or percentage of membership fees that relate to Group 1 unless the teacher makes an election to do so in accordance with the regulations. School boards cannot deduct the amount of the membership fees relating to Group 1 unless a teacher has made an election. Teachers can revoke their election. The Association cannot use fees collected in relation to activities in Groups 2 and 3 except for activities in

Groups 2 and 3. Only that portion of fees collected because of a positive election by a teacher can be used for Group 1 activities.

In 2022, the Association created the Defence and Advocacy Fund in response to Bill 32 (see Funds and Expenditures). Association staff continue to work on the analysis necessary to comply with this legislation.

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. Matters addressed in 2022 include the pandemic; removal of mask mandates in schools; teacher, student and staff absenteeism; safety and mental health needs for teachers, students and staff; staff and teacher shortages; class size and student complexity; implementation of the draft K–6 curriculum; the impact of assessments on students and teachers; the *Education (Reforming Teacher Profession Discipline) Amendment Act, 2022* and the removal of the discipline function from the Association; the new Alberta Code of Professional Conduct for teachers and teacher leaders; the new Alberta Teacher and Teacher Leader Registry; and bargaining and related matters.

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, 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 2022, Association representatives attended the Canadian Teachers' Federation/Fédération canadienne des enseignantes et des enseignants (CTF/FCE) annual general meeting and the CTF/FCE National Staff Conference. Association representatives also liaised with Canadian educational organizations as occasions arose.

Canadian Teachers' Federation

The Canadian Teachers' Federation/Fédération canadienne des enseignantes et des enseignants (CTF/FCE) is the national, bilingual federation of teachers' organizations and leads the national vision for quality publicly funded education. The CTF/FCE represents nearly all the teachers' organizations operating in Canada's provinces and territories.

CTF/FCE promotes and supports quality, inclusive, publicly funded public education in all its forms. The CTF/FCE upholds teaching as a profession and advocates for adequate resourcing, labour rights and social justice across Canada and around the world. The three priorities for the CTF/FCE are (1) ensuring adequate funding and resourcing for public education, (2) strengthening labour rights and unionization, and (3) advancing social justice.

Through the CTF/FCE, elected representatives and staff of member organizations share information and learning and engage in collective problem solving and the sharing of best practices. The CTF/FCE generally coordinates and acts as the agent of the Alberta Teachers' Association and other provincial teachers' organizations on matters and programs affecting teachers nationally and globally, including coordinating advocacy and collective action on issues of concern to teachers.

In 2022, Alberta teachers represented the Association on three CTF/FCE advisory committees: the Advisory Committee on Diversity and Human Rights, the Advisory Committee on the Status of Women, and the Advisory Committee on French as a First Language. Additionally, two Alberta teachers represented the Association on the Advisory Group on Eliminating Systemic Racism, Oppression, and Discrimination. In her role as CTF/FCE vice-president, J L Regal served on the Advisory Committee on the Teaching Profession as a CTF/FCE executive liaison.

In 2022, the CTF/FCE elected by acclamation H Yetman from the Quebec Provincial Association of Teachers as president-designate. The CTF/FCE will no longer have the role of a past president but will now have five vice-presidents. S Morse, past president of the CTF/FCE, will complete her term on the executive committee, and all other executive committee members continue their two-year terms until 2023.

The CTF/FCE engages in research through data collection, analyses and reports on issues impacting teachers and teachers' organizations. This research includes issues specific to French-language schools and supports the Association's own activities in this area. The Association has made extensive use of CTF/FCE documentation in support of collective bargaining, diversity, equity, human rights, Indigenous education and the status of women.

The CTF/FCE's 102nd annual general meeting took place in Ottawa 2022 07 06–08. Twelve delegates from Alberta attended.

The Association continues to be represented nationally by Regal, who serves as a vice-president of the CTF/FCE.

International Cooperation and Partnerships

The Association contributes to international cooperation projects organized by the CTF/FCE and by other international cooperation partners. In 2022, approximately 64 per cent of the Association's international cooperation funds were earmarked for CTF/FCE initiatives, while 36 per cent of funds were allotted to other international cooperation initiatives.

Due to COVID-19 and the cancellation of the 2021 and 2022 Project Overseas program, the Association moved to offer the chance of first refusal to 2020's successful

applicants for the 2023 program, provided that they continue to meet eligibility requirements. Eight of the ten successful applicants agreed to participate in Project Overseas in 2023. The Association further decided to direct CTF/FCE to hold the funds that the Association had distributed for 2021 programming for application to 2023 programming.

In 2022, the Association also contributed financial support to several international cooperation initiatives including the following:

- 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 (CODE)
- Change for Children

Where international travel was not possible, Alberta teachers supported teachers and students overseas in other ways. Canadian Women for Women in Afghanistan continued producing, recording and uploading digital lessons, including 88 videos for the Grade 7 science and history curricula. Participants in the ATA Dominica IT Project shared their expertise in information technology online with teachers in the Commonwealth of Dominica, with a focus on using Chromebooks and Google resources. Change for Children had planned to send a cohort of Alberta teachers to Guatemala and Nicaragua in the summer of 2022; due to the pandemic, this was not possible, though three professional tours are pending for the summer of 2023. Finally, CoDevelopment Canada and ANDES 21 de Junio continued with the expansion of the Non-Sexist and Inclusive Pedagogy project in Salvadoran classrooms.

Educator Exchange Programs

In 2022, the Educator Exchange Programs (EEP), a Government of Alberta program administered by the Association, made 19 virtual (e-exchange) placements in Iceland, Germany, Spain and Australia. All in-person exchanges remained paused during 2022. Both in-person and virtual exchanges enable participants to engage in a deep dive into a shared area of interest.

During the year, EEP held meetings with overseas partners to determine potential areas of growth and to explore the reinstatement of short-term in-person experiences in 2023. Plans were made for the resumption of short-term in-person exchanges to Germany, Spain and Iceland. Although the year-long exchanges with Australia remain paused, both Queensland and South Australia are set to launch short-term exchanges with Alberta teachers and school leaders.

Virtual exchanges have now been offered in Mexico and with any of Alberta's 16 Accredited International Schools across the globe.

Short term in-person and virtual exchanges were advertised across many platforms and continue to provide an important avenue of professional development. Participants reported the following outcomes: learning and widening of perspectives, creation of shared resources with international colleagues, and appreciation of different approaches and diversity.

In 2022, the research report *Benefits of International Teacher and Student Exchanges for Participant Outcomes, School Communities and K-12 Education Systems* was produced. The project was undertaken jointly by the Association and the Government of Alberta to improve understanding of the value that exchanges generate

at the individual, school and education-system levels. Dressler and her research team at the University of Calgary conducted this research, which will inform stakeholders and underline the importance of purposeful design and best practices in exchange programming going forward.

Support for External 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 2022, the Association provided

- financial contributions to Friends of Medicare, the Canadian Mental Health Association and the Parkland Institute;
- in-kind support to the Alberta Assessment Consortium and the Institute for Sexual Minority Studies and Services; and
- both financial and in-kind support to the Alberta Advisory Committee for Educational Studies, the Alberta School Councils' Association, Public Interest Alberta and the United Way.



The ATA Magazine's feature on anti-Black racism, published in the fall of 2021, won an award for best editorial package at the 2022 Alberta Magazine Awards.

External Communications

ATA Magazine—The Association published three issues of the *ATA Magazine* in 2022, with curriculum, arts education and caring professions as the featured topics, respectively, in the winter, spring and fall issues.

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 2022 was approximately 36,500 copies. The magazine also continued to be published electronically via the digital platform Digimag.

At the 2022 Alberta Magazine Awards, hosted by the Alberta Magazine Publishers Association, the *ATA Magazine's* feature on anti-Black racism, published in the fall of 2021, won an award for best editorial package.

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. Fifteen regular issues and one special issue were published in 2022, with an average circulation of 37,000 copies per issue.

Issues continued to be published electronically via Digimag and an e-mail notification, the ATA eNews, which provides recipients with a sampling of *ATA News* content.

Throughout 2022, 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 2022, *The Learning Team* continued as a digital-only publication, with three themed issues on vaccination, resilience and the value of

In 2022, the Association's tweets generated

»»» 5.8 million

impressions and its Facebook posts generated

»»» 8 million impressions.

public education. The Association continued its partnership, formed in 2021, with the Alberta School Councils' Association for the purpose of collaborating on the content and distribution of *The Learning Team*. Aimed mainly at parents, *The Learning Team* strives 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 2022, the Association embarked on a process with Edmonton-based digital agency Yellow Pencil to modernize its digital efforts in a multiphase approach, starting with a new website that launched in July. The legacy website has been maintained while content is being migrated to the new website. The new website aims to offer information in an approachable, easy-to-understand way, using best practices for optimal user experience. A new content governance model was established to help to ensure that all information posted to the new site is easy to find and conforms to accessibility practices. In 2022, the website received a total of 1,063,488 visits with an average of 6,774 page views per day.

Social Media—The Association has an active presence on Twitter, Facebook, Instagram, 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 2022, the Association's Twitter feed had 35,100 followers, and its tweets generated 5.8 million impressions. The Association's Facebook page had 21,000 likes, and its posts generated 8.8 million impressions. The Association's Instagram page, created in 2018, had 7,270 followers.

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 2022.

The Association launched a One Profession United campaign to engage members in response to Bill 15, the *Education (Reforming Teacher Profession Discipline) Amendment Act*, which removed professional disciplinary functions from the Association. For this campaign, the Association developed talking points for members, PowerPoint slides for meetings with members, tools for calling or e-mailing members of the legislative assembly (MLAs), an issues page on its website, frequently asked questions (FAQ) documents, a special issue of the *ATA News* and a myth-busting print publication. The Association also employed public opinion polling, an emergent Zoom meeting of school representatives, emergent meetings of local presidents and local political engagement officers, broadcast voice mails, social media tactics, and member information meetings as part of its response to Bill 15.

The Association continued its Stand for Education campaign in 2022, creating a multiphase communications plan that began with the Stand for Education Rally on October 22. More than 5,000 people attended the rally, which featured entertainment, speeches and uplifting messages in support of public education. Seeking to create a bold new vision for public education in Alberta, the campaign also included provincial roundtables that began in late 2022 (see Research, page 36).

The Association worked with Tag Advertising to create a public relations campaign called Defend. The campaign was designed to continue the work of the Stand for Education campaign while simultaneously increasing a sense of urgency and vigilance

in the face of threats to public education, including attacks on the profession, funding issues and revisions to curriculum.

For World Teachers' Day, which is celebrated every year on October 5, the Association contracted Tag Advertising to create a radio advertisement stating that teachers are essential in the transformation of education. A billboard encouraging the public to stand for education also appeared across the province in honour of World Teachers' Day.

To acknowledge the National Day for Truth and Reconciliation on September 30, the Association produced a video for its YouTube channel.

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 campaign. In 2022, public service announcements were carried by Global Edmonton, Global Calgary and Global Lethbridge, as well as 630 CHED and QR77. Schools were encouraged to participate in Hats On! for Mental Health Day in early May to demonstrate support for mental health.

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 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.

The Association's communications efforts also include the work of local communications officers (LCOs). In 2022, two LCO meetings were held, with one being held jointly with local political engagement officers. 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 awareness of MLAs' education issues, and communicating teachers' concerns about matters affecting student learning.

In 2022, 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.

The Political Engagement Seminar, held virtually in March, was attended by more than 60 local representatives. The seminar featured a keynote presentation by Naheed Nenshi, an environmental scan, a panel of several former MLAs who were previously teachers, and a presentation on the financial future of the province.

LPEO meetings were held in June and November. The June meeting, attended by 40 local representatives, included an environmental scan, a panel discussion with political scientists, an analysis of the United Conservative Party leadership race, an opposition party education panel, and time for small-group work and sharing. The November meeting, held jointly with local communications officers, included an environmental scan, a provincial update from the president and the executive secretary, a political update, and a presentation on the Association's political and communications action plan.



At year-end, the corps of LPEOs stood at 51 out of a possible 55 members. In 2022, locals encouraged their members to contact government on such issues as class size; Bill 15, the *Education (Reforming Teacher Profession Discipline) Amendment Act*; education funding; and inclusion. At the provincial level, the Association's Political Engagement Committee met five times in 2022.

Women in Leadership

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

In March 2022, the WIL Summit was held virtually, with approximately 220 teachers, school leaders and school jurisdiction leaders in attendance. The summit included breakout sessions, as well as speaker sessions with J Wong and J Holmes.

The committee also hosted a WIL Sharing Circle, where representatives from local WIL committees discussed the challenges and successes they were experiencing. Participants were also able to share strategies for developing WIL committees at the local level.

The WIL Speakers Series continued in 2022, featuring J Smith, L LeMay, C Gosling, H Yetman, and S Armstrong.

Throughout the year, the committee benefited from the work of the Women in Leadership Advisory Council, which provides the committee with information, advice and suggestions from communities throughout Alberta.

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 fall planning meetings. At its meetings in 2022, the SPG considered research briefs, 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 37), the results of which inform the long-range planning of the Association and its subgroups.

In 2022, the Association, guided by the SPG, completed the redevelopment of its strategic plan in consultation with such groups as Council, local presidents and Association subgroups. Approved by Council in March, the Foundational Framework for Long-Term Direction is a strategic framework designed to guide the Association over the long term. Its purpose is to energize a vibrant teaching profession in Alberta and, with education partners and the involvement of the public, to support great schools for all through thoughtful strategic actions.

The Association also administers a Strategic Planning Grant program that assists its subgroups in conducting strategic planning activities to examine their long-term goals and activities in the context of the Association's strategic framework. In 2022, one local, one specialist council and one teacher welfare committee 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 in place in the first part of 2022, in-person public lectures were suspended.

Research

Association research is coordinated in the Government program area, though all program areas may participate in Association research projects. Many of the projects are carried out with the assistance of university-based researchers and global experts and with the support of Alberta's teachers through the Association's locals and other subgroups. During 2022, the following major research projects were completed or under way.

COVID-19 Pandemic Research Activities

The Association has been committed to monitoring and openly reporting on COVID-19 developments throughout the pandemic in support of students, their families, and Alberta teachers and school leaders, and in the broader interests of public education. In 2022, the Association continued to conduct its pandemic pulse (rapid research) surveys, with the data gathered being reported in infographics and full research reports, disseminated via social media, and discussed with education partners and the minister of education. The results were also reported widely in the media as the

only systematic and longitudinal research into the conditions and experiences of Alberta's K–12 schools during the COVID-19 pandemic.

The Association also produced a research study entitled *A Declaration of Hope: Recovery and Resiliency in Alberta K–12 Schools*. This Association research study explored hope from both health—specifically, counselling psychology—and educational perspectives. A comprehensive environmental scan was conducted on the state of hope/hopelessness in Alberta schools coming out of the first phase (acute infection) of the global pandemic. The project further highlighted opportunities for the practical application of hope and resiliency building within the teaching profession in Alberta and for other education workers who provide caregiving interactions in Alberta schools

Beginning Teachers

The Association has been tracking support for teachers in the early years of practice across a longitudinal study, which has now been published in academic journals. It remains the only large data set collected specifically on beginning teachers' experiences during the COVID-19 pandemic across North America.

This research activity tracks baseline data each year on beginning teachers' experiences through a research survey and focus groups. It continues to explore the province's needs in terms of supporting early-career teachers with increasingly complex teaching and learning contexts. Supporting and mentoring new teachers constitutes a cornerstone commitment of the Association.

The findings from the latest survey were shared with the Government of Alberta and faculties of education and have continued to be integrated into professional development activities and presentations in 2022 related to supporting mentorship of teachers in their early years of practice.

Stand for Education Public Engagement

Part of the Association's Stand for Education campaign was a public engagement process conducted through research roundtables. The 2022 roundtable discussions aimed to generate new ideas, approaches and proposals for meaningful solutions based on the following guiding question: What are your hopes for Alberta's children and our public schools so that they can thrive now and into the future?

Two evening public forums (roundtables) were held in Edmonton, on 2022 12 01, and in Calgary, on 2022 12 06, with approximately 150 total participants. In addition, multiple submissions were collected from Albertans who visited the Association's Stand for Education website and submitted individual responses. The Association also received additional data sets from multiple roundtables held by Association locals, student locals, committees, specialist groups and the Alberta School Councils' Association.

Growth of Standardized and Diagnostic Testing in Alberta Schools

This research activity focused on the growth of diagnostic assessments and government policy that is advancing more systematic standardized testing regimes across the entire Alberta K–12 system. It evaluated the nature and growth of diagnostic testing/assessments across Alberta schools and articulated the challenges with the efficacy and negative impact of this movement. This study has generated potential questions or policy considerations related to the work intensification and bureaucratic burdens of the teaching profession.

Artificial Intelligence and K–12 Education: Potential Policy Formation

With the emergence of artificial intelligence (AI) applications such as ChatGPT impacting the world of education, the Association drew on research assets developed within its 2021 AI scoping project. In particular, the research findings from this research project, designed and executed in partnership with the University of Alberta Faculty of Education and the Kule Institute for Advanced Study (KIAS), were used to draft policy resolutions in this emerging area.

Teacher Action Research Initiatives

The Association continued to support and disseminate the work of the Alberta schools involved in the international action research projects between the Association and Finland (FINAL) and Iceland (ALICE). While travel remained paused due to the pandemic, the ongoing relationships were strengthened through meetings of the steering committees and the lead teachers and principals within the action research projects.

The participating Alberta schools and jurisdictions in these international collaborations—selected through an open expression of interest—are five Alberta high schools partnering across five cities in Finland and three small rural Alberta schools collaborating with three rural and remote Icelandic schools. The Finland and Iceland partnerships 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.

Member Opinion Survey

The Association administers the Member Opinion Survey (MOS) on an annual basis. In 2022, the survey was conducted online, resulting in a valid and highly reliable data set of 2,494 teacher and school leader responses. The MOS survey seeks feedback from a large random stratified sample of full- and part-time members on a range of topics. 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 2022 survey were classroom and school complexity; school leaders' membership in the Association; Bill 32, the *Restoring Balance in Alberta's Workplaces Act, 2020*; plans for the future (attrition/retention); well-being; and the ongoing impacts of COVID-19.

Collaboration and Knowledge Mobilization

The Association also continued to collaborate with scholars, policy-makers, non-governmental organizations and youth on the eQuality Project. The Association also continued its partnership with Boston Children's Hospital and Harvard Medical School on The GUD Project—Growing Up Digital in Alberta.

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 2022, the Association's research was again disseminated through multiple Alberta newspapers, international media and the CTF/FCE. The Public Health Agency of Canada also involved the Association in its national discussions and review of the impact of technology on childhood and development. Further, the Association supports research activities undertaken by other organizations, including the Alberta Advisory Committee for Educational Studies and the KIAS Signature Collaborations Grant Programme. The Association held virtual meetings with several associate deans of research of Alberta postsecondary institutions in 2022 to identify common areas of research and opportunities for the Association and universities to collaborate.

Library Services

The ATA library’s web guides have served as an important channel for members to access high-quality online resources since the start of the pandemic. In 2022, the web guides were viewed 257,612 times. This year, library staff began incorporating links to Indigenous content into the curriculum guides to support teachers as they include Indigenous perspectives in their classrooms.

The library also added 1,063 new items to the physical collection this year. The library’s 58 makerspace kits remained popular, being circulated 659 times in 2022.

Table 5. Library Service Statistics

| | 2022 |
|------------------------------------|-------|
| Circulation Services | |
| —physical materials loaned | 3,102 |
| —e-books loaned | 61 |
| Information and Research Questions | 2,657 |
| Online Reservations | 2,693 |
| Searches in Journal Databases | 2,468 |
| Searches in E-Book Database | 447 |

French Services

Staff in French Services provide translation, editing and terminology services to staff and all Association subgroups. Staff translate into French such documents as handbooks, posters, brochures, surveys, collective agreements, correspondence and PowerPoint presentations. In 2022, 16 French publications were updated or reprinted, and 20 new documents were published in French. New substantial publications or considerably revised publications available in French are listed in Publications (see page 65).


French Services provides ongoing support to the ATA 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 maintaining 43 existing French resource guides (see Library Services, page 38), as well as French catalogue records. Further, in partnership with the CTF/FCE, French Services provides an annual report for member organizations.



TEACHER EMPLOYMENT SERVICES



The Teacher Employment Services program area is designed 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. Members can contact Teacher Employment Services with confidence that confidentiality will be maintained and their interests will be protected.



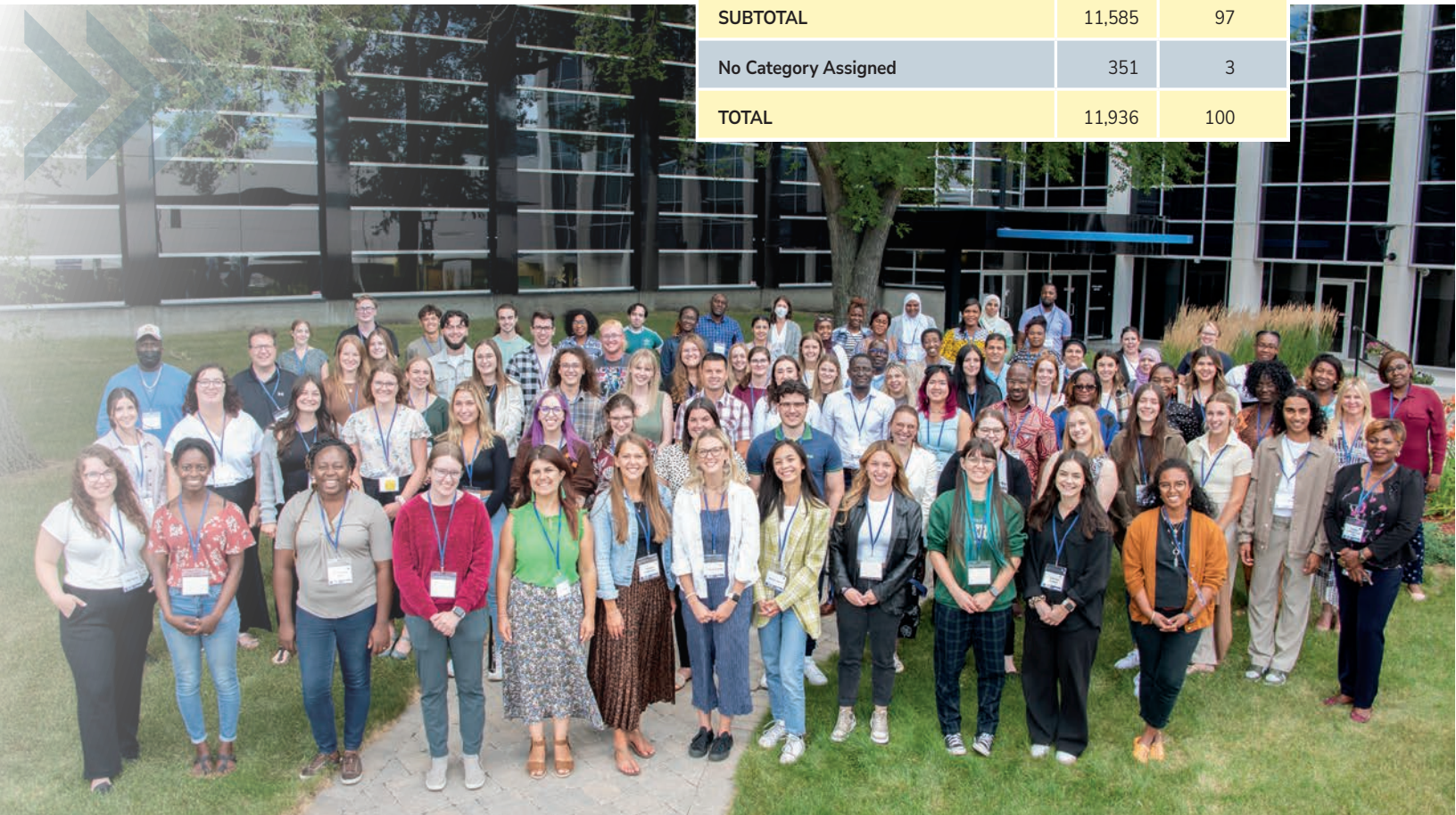
Teacher Employment Services Contact with Members

Employment Services and Collective Bargaining

»» 20,229

Table 6. Summary of Teacher Employment Services—Employment Services Staff Contact with Members

| Issue | 2022 | |
|----------------------------|---------------|---------------------|
| | Number | Percentage of Total |
| Employment Information | 2,891 | 24 |
| Employer Action | 2,161 | 18 |
| Interpersonal Relations | 2,103 | 18 |
| Issues with Parent/Student | 966 | 8 |
| Medical | 754 | 6 |
| Professional Conduct | 580 | 5 |
| Professional Competence | 513 | 4 |
| Legal Issues | 315 | 3 |
| Liability Matters | 171 | 1 |
| Criminal/Assault | 147 | 1 |
| Other | 984 | 8 |
| SUBTOTAL | 11,585 | 97 |
| No Category Assigned | 351 | 3 |
| TOTAL | 11,936 | 100 |



EMPLOYMENT SERVICES

Local Associations

The Teacher Employment Services (TES) 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 seven local constitutions, including three student local constitutions.

The Local Secretaries' Seminar was held in person on 2022 06 03, with 20 local secretaries in attendance. Local secretaries were provided with a political update on the status of education in Alberta, reviewed the duties of a local secretary and the relevant reports and forms, learned about privacy issues and records services for locals, and heard a presentation from the Professional Development (PD) program area on running effective meetings in both an in-person and a hybrid format. In addition, secretaries were provided with an overview of the role and functions of the Association, discussed issues in small groups, and engaged in a question-and-answer session with Association staff.

The Local Treasurers' Seminar was held at Barnett House on 2022 05 27–28, with 42 local treasurers in attendance, representing 40 locals (some locals were represented by both the outgoing and the incoming treasurers). Topics included resources and support for new treasurers; updates to the *Local Treasurers' Handbook*; local governance review; QuickBooks Basic; grant-in-aid; the collaboration site, including available resources; calculation of the 2022/23 annual membership fee and local rebate; honoraria; reimbursement for Annual Representative Assembly expenses; president release time; and possible ways to address an accumulated surplus.

The Student Local Conference was held 2022 09 23(eve)–24, with representation from Ambrose University, Keyano College, Medicine Hat College, Mount Royal University, Red Deer Polytechnic, St Mary's University, The King's University, the University of Alberta, the University of Calgary, and the University of Lethbridge. The 33 participants attended a keynote on bias and discrimination in schools, a session on planning and marketing of student local events and a presentation on the history of the Association; received information on student local financial and other processes; and received information about and a tour of the ATA library. Further, the Alberta Assessment Consortium provided information on the services and resources available to student locals, and the PD program area delivered sessions on the Association's specialist councils, workshops and presentations.

Staff from TES—Employment Services presented 35 preservice and other information sessions to a total of 950 education students at schools, school divisions and universities across the province. The sessions included information on the Association's programs and services, teacher liability, 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 2022, the tool kit was significantly revised to ensure its usability online. It was

distributed to locals through the members-only section of the Association's website. Additionally, two webinars were held on 2022 10 13—with 153 registrants—to provide school representatives with information pertaining to the Stand for Education Rally and to answer questions regarding the school representative role.

Member Assistance

TES staff help teachers with problems arising from their professional practice and advise members on issues related to employment status, professional relations, leaves, pensions and collective agreement matters. Statistics on the number of contacts that TES—Employment Services had with members in 2022 and the issues involved are reported in Table 6.

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 that 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.

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 2022, there were 11 requests for the SRS. It is anticipated that there may be an increase in mediation requests as the new professional regulatory discipline model rolls out in 2023.

Healthy Interactions Program

The Healthy Interactions Program was not held in 2022 due to a lack of registrations. During the year, staff began revising the program, changing it to a one-day workshop that could be delivered in school divisions upon request.

Teacher Growth, Supervision and Evaluation

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 (TQS)* defines the competencies for professional practice.

In 2022, an open-enrolment, two-day workshop on the TGSE Policy was held multiple times in virtual format with school and district office leaders. This offering gives participants from across the province the opportunity to attend the workshop when there may not be a request for the workshop for their entire division. In-person workshop presentations were also in high demand throughout 2022, with many boards requesting the workshop for their aspiring leadership cohorts and their division leadership teams.



Condensed versions of the workshop were offered on a number of occasions when individual schools or district offices requested that the presenters focus on a specific aspect of the TGSE workshop. This also includes the advanced supervision one-day workshop, which extends the conversation on quality supervision with school leaders who have already completed the standard two-day workshop.

Reflecting the *TQS* and the *Leadership Quality Standard (LQS)* for the teaching profession, 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 references current literature regarding TGSE.

In 2022, work continued on the development of a French version of the full two-day workshop

Program for Substitute Teachers

The Association's program for substitute teachers is primarily connected to the work of the Substitute Teachers Committee, which studies the challenges, concerns and needs of substitute teachers. In 2022, the committee reviewed and updated its action plan and work plan to encourage locals to involve substitute teachers more fully. The committee also continued to advocate for substitute teachers. In addition, the committee hosted a virtual training day for local substitute teacher chairs in May and a local substitute teacher chair meeting in October.

The Substitute Teachers' Conference was held 2022 10 14–15 in Edmonton, with 121 attendees from across the province. The conference focused on wellness and included 20 professional development sessions related to curricular subjects and pedagogical topics in alignment with the *Teaching Quality Standard*, as well as sessions related to wellness and workplace matters.

In 2022, a design refresh of the Substitute Teachers' Appreciation Week poster was also undertaken.

Field Service

Throughout the year, Teacher Employment Services—Employment Services staff made 89 employment services presentations to a total of 3,200 teachers at professional development days, teachers' conventions and school staff meetings and, upon request, to university students and student locals. These presentations addressed such topics as school leaders and the law (including dealing with unsatisfactory teaching performance); the Code of Professional Conduct; confidentiality issues related to student records (including counselling records); occupational health and safety; issues for school leaders; liabilities associated with the use of technology; teacher growth, supervision and evaluation; teachers' rights and responsibilities; the law and the teaching profession; the respective role of teachers and educational assistants; the Association's work; how to deal with difficult people; and ways to address parent concerns.

COLLECTIVE BARGAINING

Collective
Bargaining
contacts with
members in 2022:

»» 8,293

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 (PECBA)* and takes place at a central table, as well as between the Association and the respective employer school divisions. The Association also bargains for six 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).

Central Table Bargaining

The Teachers' Employer Bargaining Association (TEBA) and the Association were unable to reach agreement on all aspects of the List of All Matters (LAM) in 2020 and referred the dispute to an arbitration board that determined whether the remaining matters were central or local. That decision was received on 2021 08 25, and central table matters bargaining commenced shortly thereafter and continued into 2022. With respect to matters bargaining, several items remained unresolved. The parties applied for mediation and a Mediator's Recommendation was received in early May. Thirteen member information meetings (MIMS) pertaining to the recommendation were held during May (six virtually and seven in person throughout the province). Just over 4,000 teachers attended at least one of the scheduled MIMs. The final vote for ratification took place in early June, with 22,801 teachers casting their vote. This resulted in ratification of the Mediator's Recommendation by a majority vote of 51.14 per cent.

Local Collective Bargaining

Once the Mediator’s Recommendation concluded central table bargaining, the Association opened bargaining at local tables during the month of June. Initial proposal preparation for the 61 *PECBA* school divisions commenced in early September, and many bargaining sessions with employers had already occurred by the end of 2022.

Many bargaining meetings with employers were scheduled during the fall, and a few such meetings had occurred by the end of 2022. No local memoranda were reached by year-end. In two instances where an agreement could not be reached, applications for mediation had been initiated, one by an employer and the second by the Association.

Averages of collective agreements in effect 2022 09 01 are reported in Table 7.

Table 7. Averages of Collective Agreements in Effect 2022 09 01

| Years of Teacher Education | Minimum | Maximum |
|----------------------------|----------|-----------|
| Four | \$60,845 | \$95,916 |
| Five | \$64,259 | \$99,402 |
| Six | \$68,048 | \$103,227 |

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 efforts to resolve a dispute are unsuccessful, grievances are filed against that school division. Some school divisions more quickly rectify issues once the Association brings alleged violations to the attention of division staff. Many of these issues do not require further action.

A new grievance procedure and an expedited arbitration process were introduced during the central table bargaining of the 2020–24 collective agreement as Letters of Understanding coming into effect in February 2022. Once local memoranda are reached, the new grievance language will be included in collective agreements and the specific letter of understanding that authorized the new procedure will cease to be in force.

Within the procedure, three parties are involved in the filing of a grievance: the Association or individual grievor, the division and TEBA. The Association and the respective division must attempt to reach a conclusion without TEBA’s involvement. The process then calls for a sole arbitrator to be chosen in an effort to more quickly hear the grievance at the arbitration stage.

Twenty-nine grievances arising from alleged violations of collective agreements were initiated in 2022. Of these, 23 remained outstanding at year-end. Six were resolved at the local/central initial stage, 15 remain in the early stages of the process, and 8 had proceeded to arbitration. In addition, 64 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 8.

Seven grievances remained outstanding from 2015 and 2016 under the *Assurance for Students Act (ASA)*. The process for these grievances continues. Though much time has passed since the various school divisions failed to live up to their obligations under the Modified Framework Agreement and ministerial order legislated as part of the *ASA*, the Association and its legal team believe there is still great value in

Table 8. Status of Grievances and Arbitrations

| | Grievances | | | Arbitrations | | | |
|----------------|------------|-------------|-----------------------------|--------------|-------------------|-------------------|-------------|
| | Ongoing | In Abeyance | Resolved Initial Stage 2022 | Ongoing | Decision Received | Agreement Reached | In Abeyance |
| Previous Years | 0 | 31 | 19 | 28 | 2 | 25 | 5 |
| 2022 | 11 | 2 | 6 | 9 | 0 | 1 | 0 |

pursuing these grievances. If arbitrators eventually find that school divisions failed to live up to their obligations, and that failure resulted in teachers working more than they should, the arbitrators are likely to award the Association or teachers damages based on the value of the extra time spent by teachers on unnecessary tasks.

Appeals to Alberta School Employee Benefit Plan and Other Insurance Matters

The Association assists with and advises members on various benefits issues, including extended disability benefits (EDB) with the Alberta School Employee Benefit Plan (ASEBP) and long-term disability with other carriers such as Canada Life, Manulife and Morneau Shepell. The Association also assists with policy appeals regarding insurance plan document issues. In 2022, the Association received 188 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.

Beginning in early 2021 and continuing into 2022, 11 school divisions were taking part in ASEBP’s Sick Leave Support pilot. The program is similar to the Early Intervention Plan whereby ASEBP becomes involved early in the process to assist the teacher in a speedy recovery and to try to return the teacher to work early in the sick leave process. Teacher participation in the pilot is voluntary.

The Association represents teachers to various appeal bodies. In 2022, five teachers were represented to the ASEBP board of trustees through either an EDB or policy appeal hearing.

Other matters often brought to the Association for assistance relate to employment insurance, Canada Pension Plan disability, occupational health and safety issues, and human rights issues. In 2022, there were no cases that moved forward in these areas despite the Association receiving nearly 100 phone calls and e-mails from teachers seeking advice concerning one of more of these issues.

Teacher Welfare Education and Communication

Education Program

The Teacher Welfare Education Program (TWEP) 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 2022, 28 Level 1 and 34 Level 2 certificates were 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 and Collective Bargaining Conferences. Occasionally, courses are also offered at meetings of the bargaining unit, the local, school staff or the TWC.

The spring Collective Bargaining Conference was held in Calgary on 2022 04 29–30, with 195 in-person attendees and 27 virtual attendees. Attendees heard a presentation on polling and participated in discussions concerning the future look of the conference. The fall conference was held in Edmonton on 2022 11 17–18, with 250 attendees. Attendees heard a presentation on the pulse of the profession and discussed some emerging bargaining trends during breakout sessions. Each conference also included updates on collective bargaining, school division finances and other issues of note for TWC members. Further, 11 TWEP workshops were offered at the spring conference, and 14 were offered during the fall conference.

Communications

Worth Talking About is a series of articles offering information on and insight into current issues important to teachers. Several articles were published in this series during 2022, including “The Nature of Teaching Duties,” “The Impact of the Mediator’s Recommendation,” “Criminal Record and Vulnerable Sector Checks” and “Sick Leave Management.”

Pensions and Retirement

Educating teachers on their pensions and their retirement remains a large part of the Association’s mandate, with Association staff continuing to address issues and questions on these topics from teachers. The Alberta Teachers’ Retirement Fund (ATRF) also provides consultations over the telephone, in-person education, and materials and resources through its website and the MyPension portal.

Pre-retirement workshops are conducted virtually for members nearing retirement. In addition, other virtual pension information sessions and financial wellness workshops are offered for teachers in the field.

Since 2021, the Alberta Investment Management Corporation (AIMCo) has been the investor of teacher pension funds. Funds are closely monitored by ATRF through an Investment Management Agreement (IMA) and through regular meetings between ATRF and AIMCo. The ATRF board continues to set investment strategy that AIMCo must maintain as part of the IMA.

ASEBP maintains a relatively new retirement benefits plan similar to that of the Alberta Retired Teachers’ Association (ARTA). Teachers may choose to remain with ASEBP throughout their retirement years, purchase benefits through ARTA or locate a plan outside the education sector.

Field Service

Teacher Employment Services—Collective Bargaining staff regularly meet with local TWCs. Opening for bargaining with employers began in June 2022. During the fall, member surveys and initial proposal development meetings were held with TWCs. Throughout the year, staff also met with bargaining units or TWCs on nonbargaining matters, including providing workshops on matters of interest to those groups.

**Table 9. Summary of Teacher Employment Services—
Collective Bargaining Staff Contact with Members**

| Issue | Number | Percentage of Total |
|---------------------------------|--------------|---------------------|
| Extended Disability/Sick Leaves | 2,489 | 30 |
| Collective Agreement Issues | 1,348 | 16 |
| Maternity/Parental Leaves | 1,049 | 13 |
| Other Leaves | 626 | 8 |
| Bargaining | 373 | 4 |
| Pension/Retirement | 245 | 3 |
| Other | 2,163 | 26 |
| TOTAL | 8,293 | 100 |



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 2022, the Association continued to support Alberta's professional practice standards for the teaching profession. In particular, the Association supported its nine convention boards as they continued to ensure that their program offerings aligned with the *Teaching Quality Standard (TQS)* and *Leadership Quality Standard (LQS)*, and that each of the convention programs identified the competency or competencies that each session was intended to address. Further, the Association provided support to faculties of education in their work with preservice students and the professional practice standards.

Curriculum

The Association was not engaged by Alberta Education in any curriculum-related work in 2022. Nonetheless, the Association stressed that teachers need to play a central role in all facets of curriculum development, field testing and implementation. Elected officials and staff continued to encourage dialogue on this topic between Alberta Education and the Association, albeit with limited success.

On 2022 05 12, the Association hosted a Curriculum Circle to examine the recently released version of the following curriculum: K–3 mathematics, K–3 English language arts and literature, and K–6 physical education and wellness. Members from the nine specialist councils impacted by the new curriculum were invited to provide feedback on it and discuss implementation.

In 2022, presentations were available upon request regarding the K–6 Draft Curriculum and the findings of the Association's *Professional Curriculum Analysis and Critique of Alberta Education's 2021 Draft K–6 Curriculum*.

Inclusive Education

Programs and supports continued to be developed and implemented to support teachers and school leaders with establishing inclusive learning environments.

In addition, the Association undertook the following activities regarding inclusive education:

- Disseminated a resource series entitled *Common Threads for Inclusive Education* and a resource guide entitled *Establishing Inclusive Learning Environments*
- Updated a resource on immigrant and refugee students as part of the *Common Threads for Inclusive Education* resource series

Indigenous Education

Gaining proficiency related to the Indigenous-focused competencies and indicators in the *TQS* and *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 2022, 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 way to learn, listen and engage



with Elders and Knowledge Keepers within Alberta Indigenous communities. The Indigenous Advisory Circle gathered four times throughout the year to provide feedback and guidance on newly developed Indigenous education workshops, resources and publications and to provide advice on Association policies and administrative regulations.

In 2022, a report entitled *Honouring the Voices of Indigenous Teachers and School Leaders in Alberta School Communities* was published. The Association, in coordination with D Donald, a researcher from the University of Alberta, conducted an evaluation of the experience of Indigenous teachers, school leaders and central office leaders within Alberta's public education system. The data was gathered through listening to and learning from Indigenous teachers, school leaders and central office leaders through a survey and online focus group conversations. The results of these evaluation activities are outlined in the report.

Further, an Indigenous education resource guide entitled *Strengthening the Heartbeat of Reconciliation: Advancing Truth and Reconciliation in Classrooms and Schools* was published in 2022. This resource, which supports the Indigenous-focused competencies and indicators in the *TQS* and *LQS*, is intended to support teachers in developing and nurturing student and professional learning experiences related to the history and legacy of residential schools.

The newly developed mentorship program for Indigenous teachers and school leaders, *wicihtotân* (Cree for "let's help each other"), was also implemented in 2022. More than 90 participants joined the first of three online *wicihtotân* gatherings scheduled for 2022/23. The *wicihtotân* gatherings are an opportunity to connect with colleagues across the province, share learnings and experiences, and support each other.

»»» \$20,000

in grants was provided to 15 projects related to diversity, equity and human rights completed by individual schools and local associations across the province.

Diversity, Equity and Human Rights

The Association's Diversity, Equity and Human Rights (DEHR) programming focuses on the development of resources and supports to assist teachers and school leaders with responding to a wide range of issues, including addressing discrimination, racism and oppression; advocating for the inclusion of students and teachers who are ethnoculturally, physically, cognitively, sexually and gender diverse; promoting cultural responsiveness and inclusivity; and safeguarding the well-being of children and youth.

Highlights of the Association's DEHR work in 2022 include the following:

- Providing ongoing assistance to local associations in establishing and developing local DEHR committees
- Providing \$20,000 in grants to support 15 DEHR-related projects completed by individual schools and local associations across the province
- Establishing the Status of Racialized Teachers Working Group
- Establishing the online Alberta Teachers' Association Gay-Straight Alliance network for teachers
- Highlighting exemplary DEHR initiatives through the ATA Local Showcase program

The annual Diversity, Equity and Human Rights Conference was held virtually. Keynote and breakout sessions provided delegates with the opportunity to challenge their perceptions of anti-oppression and antiracism, unlearn anti-Blackness and the fundamentals of gender and sexuality, and consider strategies they could use in their schools and Association work to promote more inclusive teaching and learning environments.

The Association also continued to collaborate with education partners, including the UNESCO Associated Schools Network and the SOGI 123 Educator Network.



Teacher Education and Certification

The Association undertook the following activities regarding teacher education and certification in 2022:

- Maintained the online/in-person 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 a convention
- Recommended the names of fellowship and award recipients to Provincial Executive Council
- Discussed the effects of the pandemic on preservice and inservice teachers

In 2022, the Association offered services to the University of Alberta, the University of Calgary, the University of Lethbridge, Campus Saint-Jean, Ambrose University, Concordia University of Edmonton, Northwestern Polytechnic, Keyano College, Medicine Hat College, Mount Royal University, Red Deer Polytechnic, St Mary's University and The King's University.

Teacher Qualifications

Teacher Qualifications Service (TQS), 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 Association. Comparative statistics on qualifications issued are shown in Table 10.

In 2022, TQS implemented the first phase of an online application tool as part of its modernization initiative. To date, more than 3,000 applications have been processed

Table 10. Statements of Qualifications Issued

| | 2022 |
|------------------------------------|--------------|
| Based on In-Province Documents | 1,552 |
| Based on Out-of-Province Documents | 1,314 |
| Duplicate | 302 |
| TOTAL | 3,168 |
| Fees Received | \$359,610 |

using the online application tool. In addition, TQS began digitizing microfiche records to preserve the information on the films. Imaging of 42,000 records has taken place.

The Teacher Qualifications Committee, to which a teacher can appeal if dissatisfied with an assessment, considered two requests for reassessment in 2022.

The Teacher Salary Qualifications Board establishes the principles under which TQS evaluates teacher preparation for salary purposes and hears appeals of the decisions of the committee. The principles adopted by the board are posted on the Association's website. The board is made up of appointees from the Association, ASBA, Alberta Education, the University of Alberta, the University of Calgary and the University of Lethbridge.

University Liaison

One aspect of the Association's liaison with universities is representation on a variety of committees and boards. In 2022, staff represented the Association on each faculty of education council: Ambrose University, Campus Saint-Jean, Concordia University of Edmonton, Mount Royal University, St Mary's University, The King's University, University of Alberta, University of Calgary and University of Lethbridge. In turn, universities named representatives to several standing committees of the Association.

Another aspect of the Association's liaison with universities is to assist 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 organizational structure of the Association.

Inductions

Induction ceremonies are formal events at which new teachers are officially welcomed into the profession. Every year, hundreds of new teachers are officially inducted into the Association at locally hosted induction ceremonies. Each new member receives an induction package, which contains an induction certificate and various resources to help them experience success in their first years of teaching. Induction packages are available in both English and French. In 2022, a total of 1,120 new members were welcomed into the profession at 35 locally hosted induction ceremonies.

Program for Beginning Teachers

In 2022, the in-person Beginning Teachers' Conference was held in Edmonton, with 638 beginning teachers participating in the 65 sessions offered. The conference aimed 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 establishing 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 protégés to meet during the school day, travel requirements due to geographical challenges, the number of experienced teachers able to serve as mentors, and competing school division mentoring program offerings that may not reflect the Association's mentoring program model.

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

In 2022, the Association rolled out its new mentorship program based on current research and provincial needs. The Association continued to maintain formal mentoring partnerships with the following districts and locals: Peace Wapiti School Division and Northern Spirit Local No 6, Grande Prairie Roman Catholic Separate School Division and Grande Prairie and District Catholic Teachers Local No 42, Grande Prairie School Division and Trumpeter Local No 26, Greater St Albert Roman Catholic Separate School Division and Greater St Albert Catholic Local No 23, Medicine Hat School Division and Medicine Hat Local No 1, Buffalo Trail

School Division and Park Plains East Local No 31, and Conseil scolaire du Centre-Est and l'Association des enseignantes et des enseignants francophones de l'Alberta.

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, as well as Hunting Hills High School in Red Deer.

Each formal partnership is monitored by a steering committee consisting of local representatives, jurisdiction 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 to attract new teachers to the profession and contribute 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 and jurisdictions to offer the mentorship program.

School Leadership Programs

The purpose of this program is to develop materials for and provide professional development to school leaders on a variety of topics. In 2022, the Association held a virtual school leader speaker series that featured leadership experts. Each session had 100–150 participants.

In April, the Council for School Leadership (CSL) of the Association hosted its annual leadership conference, uLead. This year's event, held in collaboration with the Canadian Association of Principals, hosted more than 1,200 leaders and aspiring leaders from around the world for three days of conversations, collaboration and learning.

In August, the Association held the annual Educational Leadership Academy, which focused on leadership for reconciliation this year. This five-day immersive experience brought together 43 leaders and offered classroom- and land-based learning experiences. While journeying with local Elders and Knowledge Keepers, members were engaged in learning about medicine teachings, tipi teachings and Blackfoot teachings and in gaining a greater understanding of residential schools.

In November, the Association hosted the annual Leadership Essentials for School Leaders conference, with 180 registrants. The conference aimed to provide relevant and diverse sessions to support and enhance leadership practice. The two-day online conference included keynote speakers, a plenary session and 20 breakout sessions.

In addition, the Association and the CSL collaboratively produced *Leadership Update*, a quarterly newsletter intended to provide school leaders with information on issues that they face and to introduce them to available Association services.

Finally, the Association maintained a webpage dedicated to providing school leaders and aspiring school leaders with information about events to promote their professional growth.

Specialist Councils

The Association has 21 active specialist councils that serve to increase members' pedagogical and leadership knowledge and abilities in general and in their defined specialty areas. In 2022, the Association provided \$862,000 in grants to support the councils' programs and services. Annual membership statistics for the specialist councils are presented in Table 11.

Throughout the year, specialist councils hosted numerous professional development events for teachers and school leaders across the province. Some councils held in-person conferences for the first time since the onset of the COVID-19 pandemic in 2020; others continued to focus on online webinars and conferences. Council conferences, symposia, workshops and webinars were well attended and tailored to the diverse learning needs of teachers from every region of the province.

Table 11. Regular and Student Memberships in Specialist Councils

| Council (Inaugural Year) | 2022 |
|--|---------------|
| Alberta School Learning Commons Council (1975) | 90 |
| Career and Technology Education Council (1997) | 641 |
| Council for Inclusive Education (1970) | 1,553 |
| Council for School Leadership (1961) | 2,644 |
| Council of School Counsellors (1961) | 406 |
| Early Childhood Education Council (1966) | 2,480 |
| Educational Technology Council (1982) | 375 |
| English as a Second Language Council (1992) | 687 |
| English Language Arts Council (1961) | 1,388 |
| Fine Arts Council (1963) | 822 |
| Global, Environmental and Outdoor Education Council (1976) | 339 |
| Health and Physical Education Council (1962) | 1,672 |
| Indigenous Education Council (2008) | 380 |
| Le Conseil français (1970) | 530 |
| Mathematics Council (1961) | 1,350 |
| Middle Years Council (2005) | 690 |
| Outreach Education Council (2002) | 117 |
| Religious and Moral Education Council (1974) | 255 |
| Science Council (1961) | 1,285 |
| Second Languages and Intercultural Council (1998) | 639 |
| Social Studies Council (1961) | 828 |
| TOTAL | 19,171 |



Specialist councils also continued to contribute to professional and educational research literature through the publication of curated book lists, newsletters and academic journals. Content for these publications came from council members, teachers pursuing graduate and doctoral studies, professors in Alberta’s faculties of education, and researchers from around the world.

As the Association’s experts in their respective areas of specialty, specialist councils contributed to the policy direction of the Association by developing and advocating for new policy resolutions that were considered and debated at the 2022 Annual Representative Assembly.

The Association works to ensure that executive teams from the specialist councils are supported to provide the best possible service to teachers in Alberta. To this end, meetings and training events for the teams were held throughout the year.

Teachers’ Conventions

Eight teachers’ conventions were held in 2022, with all conventions taking place fully online due to the pandemic. All conventions offered a mix of online live sessions and on-demand, prerecorded sessions. The approximate attendance of each convention is shown in Table 12.

Convention sessions addressed curricular subjects, pedagogical topics and leadership strategies in alignment with the *TQS* and the *LQS*. Further, convention programs focused on a number of common themes, including Indigenous education

and education for reconciliation, trauma-informed practices, mental health and well-being for students and staff, teaching and learning strategies for online and blended learning, and the *TQS* and the *LQS*.

Table 12. 2022 Convention Attendance

| Convention | Attendance | |
|------------------------|------------|------------------|
| Calgary City | 10,323 | (from 2 locals) |
| Central Alberta | 2,145 | (from 5 locals) |
| Endless Skies | 2,210 | (from 9 locals) |
| Greater Edmonton | 9,048 | (from 3 locals) |
| Mighty Peace | 1,501 | (from 5 locals) |
| North Central | 5,988 | (from 18 locals) |
| Palliser District | 3,879 | (from 9 locals) |
| Southeastern Alberta* | 1,043 | (from 4 locals) |
| South Western Alberta* | 1,981 | (from 6 locals) |
| * Held jointly | | |

Convention Associations

Throughout the year, the Association held online meetings for convention association executives to develop new ideas for meeting members’ professional development (PD) needs through convention programs, to increase PD capacity, and to offer role-specific training to improve individual and collective efficacy. Additionally, the Association led several online planning sessions to support convention boards with planning and technical infrastructure for online conventions.

The South Western Alberta Teachers’ Convention Association (SWATCA) and the Southeastern Alberta Teachers’ Convention Association (SEATCA) jointly planned their 2022 teachers’ convention, naming the event the Southern Alberta Teachers’ Convention.

Given changes in provincial health restrictions related to the COVID-19 pandemic, Provincial Executive Council decided on 2022 05 05–06 that all 2023 teachers’ conventions would take place in person. With this in mind, SWATCA and SEATCA decided to independently plan their 2023 teachers’ conventions, resulting in a return to nine teachers’ conventions being planned for 2023.

Convention Review

Recommendations from the 2019 report of the Committee on Convention Review implemented in 2022 include the following:

- Developed formal structures to coordinate the programs and services offered by convention boards, specialist councils, and other Association committees and subgroups

Professional Development Facilitators

The Association's PD facilitator corps, consisting of nine teachers, helps staff deliver programs by

- providing a bimonthly PD newsletter to school-based and local PD committees,
- providing service on a short-term basis to locals and local PD committees when specific field service is required,
- facilitating or delivering PD updates and presentations at Association-sponsored events,
- helping individual schools and school-based PD committees assess their needs and plan and evaluate programs,
- participating in Association task forces and other bodies as needed, and
- reporting to staff on a regular basis.

In addition, in 2022, PD facilitators supported such activities as the Association's mentorship program and undertook formal assignments that included workshops, presentations and meetings in the province, as well as ongoing, informal work in support of individual PD chairs and locals.

PD facilitators participated in the PD Course at Summer Conference and the PD Area Conferences (see Professional Development, Field Service, page 62). At their meetings, PD facilitators provided updates on their regional PD activities; explored new Association resources, publications and events for their regional newsletters; and received training on the mentorship program.

Indigenous Education Professional Development Facilitators

A subgroup of the PD facilitator corps, the Indigenous education PD facilitator corps has been active since 2019 09 01. Indigenous education PD facilitators facilitate 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 2022, 112 Indigenous education workshops were facilitated by 15 Indigenous education PD facilitators in person and through online platforms, with a total of 1,018 participants attending. The most requested Indigenous education workshops were ᑕᑕᑕᑕ tapwewin: Dismantling Anti-Indigenous Racism; Finding Our Way in Indigenous Education—Connecting Hearts and Minds; Indigenous Content in the New Teaching Quality Standard—Moving from Inspiring to Requiring; Indigenous Matriarchy—Balance Through Truth, Justice and Reconciliation; and Engaging in Numeracy and Connections Through First Nations, Métis and Inuit Traditional Games.

Further, Indigenous education PD facilitators contributed to the development of a new resource entitled *Strengthening the Heartbeat of Reconciliation: Advancing Truth and Reconciliation in Classrooms and Schools*.

Indigenous education PD facilitators attended the PD Area Conferences (see Professional Development, Field Service, page 62), Summer Conference (see Summer Conference, page 23) and Indigenous education PD facilitator meetings.

Association
administrator
instructors
presented
»» 36
workshops
to 1,625
participants.

Association Instructors and Association Administrator Instructors

Association instructors—56 teachers and school administrators—deliver Association workshops at schools, locals, conventions and conferences. Workshops in French are offered by 8 members of the corps. In 2022, Association instructors presented 171 workshops to 7,437 participants at schools, local PD days, teachers’ conventions and specialist council events. Over the course of the year, the Building Compassion Resilience workshop series was developed. Further, two workshops (Trauma-Informed Practice: Safe, Supportive and Self-Regulated Classrooms; and PRISM: Professionals Respecting Individual Sexual and Gender Minorities) were revised. One workshop, Culturally Responsive Teaching, was translated into French.

Association administrator instructors—11 school administrators—delivered Association workshops at schools, local PD days, teachers’ conventions and specialist council events and to groups of administrators. In 2022, Association administrator instructors delivered 36 workshops to 1,625 participants.

In May 2022, Association instructors and Association administrator instructors met in person as a group and were trained in facilitating workshops, planning and preparing workshops for delivery, and delivering newly developed workshops.

Throughout the year, the instructors corps facilitated workshops to support teachers in meeting the *Teaching Quality Standard* competencies, with workshops promoted through the Association’s website and social media.

Online Professional Development

The Association continued to offer online professional development in 2022. Virtual sessions focusing on school leadership, women in leadership, specialist council offerings and Indigenous education were held throughout the year. Members were engaged through a variety of media, including a Facebook page, YouTube channel and Instagram account. A unified webpage outlining all professional development offerings for Alberta teachers was also established and advertised in 2022.

Professional Development staff and Association instructors continued to offer virtual learning sessions for groups as requested. The Association also offered numerous live online workshops and presentations to members.

Special Projects

Reflection on My Professional Practice Tool

The Association continued to offer members a digital resource for developing annual professional growth plans. The comprehensive digital and interactive Reflection on My Professional Practice tool is available to assist teachers and school leaders in reflecting on the competencies associated with the *Teaching Quality Standard* (English and French) and 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 the implementation of the competency indicators.

Field Service

Staff provided PD workshops and presentations throughout 2022. Statistics on the workshops and presentations provided by staff are shown in Table 13. Workshops were also delivered by the two instructor corps (see Association Instructors and Association Administrator Instructors, page 61).

The first part of 2022 saw the PD program delivered online due to restrictions connected to the pandemic. By April, the majority of the workshop program moved to in-person delivery. In 2022, 145 workshops and presentations were offered to 6,512 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 two PD Area Conferences (PDACs) in 2022. The PDACs each included a keynote speaker, a provincial update, regional meetings and breakout sessions. The spring PDAC was held in person and hosted 132 attendees from across the province. The fall PDAC, held in November, hosted 151 attendees from across the province. Delegates to both PDACs included local PD chairs, local presidents, convention association presidents and program chairs, specialist council presidents, PD facilitators, Indigenous education PD facilitators, members of the Indigenous Advisory Circle and members of Provincial Executive Council.

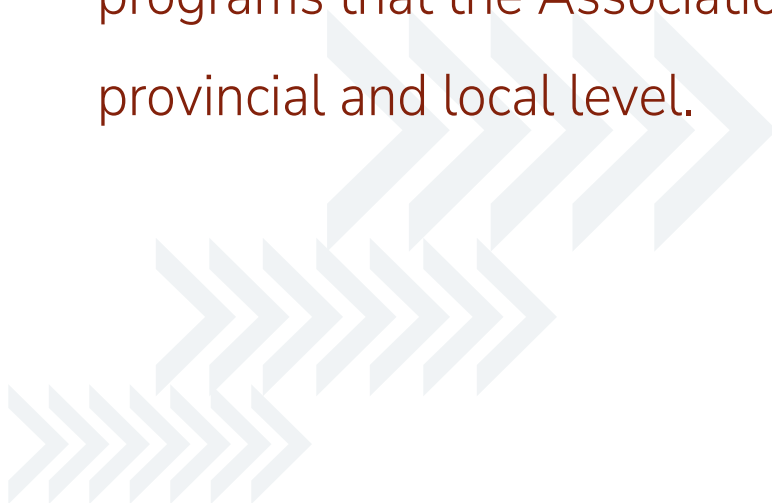
Table 13. Field Service Delivered by Professional Development Staff

| | 2022 |
|-----------------------------|--------|
| Workshops and Presentations | 238 |
| Participants | 11,753 |



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.



Human Resources

Human Resources supports the Association's service to members by providing specialized knowledge and consultation to leadership and staff in support of an engaged workforce. This includes developing programs and policy that strategically align workforce strategies in support of the Association's mission and objectives. Traditional supports include 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.

Key initiatives and accomplishments for 2022 include the following:

- Selected as one of Alberta's Top 75 Employers of 2022
- Facilitated a successful return of all staff back to the office after working remotely for two years
- In consultation with the Engagement Committee, administered periodic pulse surveys to monitor and support staff engagement and well-being
- In collaboration with NorQuest College, organized the Association's first leadership development program, with more than 50 staff members participating
- Entered into a partnership with the Canadian Centre for Diversity and Inclusion to build staff awareness and knowledge related to diversity, equity and inclusion practices

At year-end, the Association had 154 employees, encompassed in the following staff groups: 67 support staff, 51 professional staff and 36 executive staff.

In 2022, 35 recruitment competitions were conducted. Other staff changes included 8 promotions and 13 retirements.

Taking into account leaves, on average, executive staff officers worked 205 days and travelled 15,161 kilometres in 2022.

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 materials.

Throughout 2022, 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 2022 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 distribution services for the Stand for Education multiphase campaign; the Indigenous mentorship program; Beginning Teachers' Conference; Summer Conference; public relations campaigns; and research initiatives, including pulse surveys. Additionally, DP staff took on tasks to assist with the development and deployment of the new Association website.

The distribution of school mailings continued in 2022. All items included in school mailings are also posted to the local collaboration website and school representative collaboration website. Items distributed through nine scheduled school mailings included promotional materials for the 2023 Provincial Executive Council election;

specialist council items; information for the Beginning Teachers' Conference; Walking Together resources; issues of *The Learning Team* and *Leadership Update*; information from Ever Active Schools; materials related to campaigns for Education Week, Hats On! for Mental Health Day, One Profession United, Substitute Teachers' Appreciation Week and Stand for Education; Association library brochures; and materials advertising the leadership speaker series, school leader PD opportunities and educator exchange programs.

Publications

ATA Membership and Services

Members' Handbook; School Representative Toolkit; Student Locals (brochure)

Human Rights Issues

Diversity, Equity and Human Rights (brochure)

Teachers as Professionals

Teachers: The Professional Face of Education (brochure)

Teacher Guides

Leaves of Absence; Part-Time Teaching—Frequently Asked Questions; Sick Leave; Why Is There an ATA?

Research

Honouring the Voices of Indigenous Teachers and School Leaders in Alberta School Communities; Report on Indigenous Teachers and Leaders in Alberta's Public School System; COVID-19, Caregiving and Careers of Alberta Teachers and School Leaders—a Qualitative Study

Professional Development

Professional Development Program and Services Guide; Strengthening the Heartbeat of Reconciliation: Advancing Truth and Reconciliation in Classrooms and Schools

French Publications

Politiques administratives et éducatives de l'ATA; Fils conducteurs en éducation inclusive—Troubles du spectre de l'autisme no 9; Présentation Bienvenue dans la profession; Trousse des représentants d'école; Petit Guide Sections locales d'étudiants; Livret Services en français de l'ATA Présentation Association des enseignantes et des enseignants francophones de l'Alberta (AEEFA); Petit guide DEHR; Comité du bien-être enseignant—cadre de référence; Présentation Comment le secteur EB peut-il vous aider?; Présentation Les parents et l'école; Fils conducteurs en éducation inclusive—Notes sur la terminologie no 1; Atelier L'enseignement adapté aux différences culturelles; Livret Orientations stratégiques, grands défis et cadre stratégique de l'ATA; Petit guide Élection de 2023 du CEP de l'ATA; Atelier Tables rondes de la campagne Défendons l'éducation publique; Présentation de la campagne Défendons l'éducation publique; Atelier HeartCARE; Livret Enseignants et conseillers scolaires en éducation - Collaborer pour l'éducation publique; Petit guide Le visage professionnel de l'éducation; Présentation Garder son emploi Limites professionnelles : Ce que les nouveaux enseignants doivent savoir; Monographie Comportement Observation Évaluation Enseignement Stratégies (COÉES); Fils conducteurs en éducation inclusive—Élèves immigrants et réfugiés no 10; Présentation Enseignants et conseillers scolaires en éducation; Présentation Pratique de soutien; Rapport annuel 2022-2023 de la section locale No7 Société des étudiants en pédagogie de la Faculté Saint-Jean - 1re partie (formulaire interactif)

The Association produces many types of documents, including monographs, brochures and workshop materials. New substantial publications produced in 2022, or those which were considerably revised, are captured in the list on the previous page.

Information Technology Services

The Association's Information Technology Services (ITS) focused on operational stability and long-term strategies in 2022. A new director of ITS was hired, and implementation of the new strategies began.

An agreement was signed to migrate remaining services to the cloud over the next two years. External cyber-security attacks increased in 2022, with approximately 1,200 focused attempts per month, and updated cloud-based security services have successfully defended against this increased threat.

The new website was launched with a new structure and interface on a cloud platform, seeing more than one million visitors. Once the consolidation of the legacy site is complete, additional functionality will be added to the new site.

A new vendor, WBM Technologies LP, was contracted to provide robust and responsive support for service desk, desktop and printer support, and back-end server support to further stabilize operations. The ITS team has leveraged more services from managed service vendors for security operations, as well, to ensure specialized knowledge and constant improvement in this area.

The ITS team began a retooling to modernize technology services, as well as processes and policies to ensure that global best practices, such as the Information Technology Infrastructure Library, are applied to the Association's services to improve the robustness and effectiveness of ITS.

The operational budget was restructured to better reflect ongoing operational costs of the newly onboarded vendors and to prepare for future operational costs.

In addition, in 2022 ITS supported three online votes and one ratification vote.

Records Management

During the first quarter of 2022, Records Management continued all services to staff and members remotely during the closure of Barnett House. With Barnett House staff recalled to the building as of 2022 04 04, in the second to fourth quarters life cycle management of records continued and on-site shredding services and shredding truck services resumed. Training presentations were made to Association subgroup executives at virtual and in-person events. In the last quarter of 2022, the process of selecting an electronic document records management system commenced.

Archives

The Archives completed 185 new accessions in both print and electronic format. A new archives descriptive database was developed and implemented based on RAD (Rules of Archival Descriptions) for use in identifying and retrieving records requested by staff and members. These accessions represent records of permanent value to the Association, including corporate records. Historical research services were provided to Association staff and subgroups. The Archives corresponded and cooperated with provincial, national and international archival institutions. Digitization of archival materials resumed as of 2022 04 04.



Regulation Compliance/Privacy and Canada's Antispam Legislation

In 2022, the Association continued to provide training to all incoming staff respecting compliance with the *Personal Information Protection Act (PIPA)*. The Association received and processed requests for access under *PIPA*. Training sessions were provided to Association staff and subgroup executives regarding the collection, use and disclosure of personal information at various Association virtual events and meetings. The Association also represented members in matters before the Office of the Information and Privacy Commissioner with respect to *PIPA* and the *Freedom of Information and Protection of Privacy Act*. In 2022, the Association continued to provide training to members respecting Canada's antispam legislation and developed training materials and plans for additional sessions to be delivered in 2023.

Buildings

In 2022, the following major repairs and upgrades to Barnett House were undertaken: upgraded the mailroom, installed a healing garden, constructed a garage for outdoor equipment storage, extended the loading dock and replaced a leaky rainwater leader in the boiler room.

The Association continues to lease space at Barnett House to the Alberta Teachers' Retirement Fund, the Alberta Assessment Consortium, Edmonton Public Local No 37, Edmonton Catholic Local No 54 and the Alberta School Councils' Association.

The cafeteria and food services resumed in September 2022 with a new menu and staffing structure. Room bookings started to increase but had not returned to pre-COVID-19 levels by year-end.

Funds and Expenditures

In 2022, the Defence and Advocacy Fund (DAF) was set up with \$16,000,000 of initial "seed money" transferred into it from the Special Emergency Fund (SEF). The DAF ended the year with a fair market value of \$15,787,409. Income distributions from the DAF will fund expenditures categorized by the Association as noncore activities, within the context of Bill 32, the *Restoring Balance in Alberta's Workplaces Act* (see Legislation, page 26).

During the year, \$834,305 was charged to the SEF. Investment earnings from the fund totalled \$1,954,861 (not inclusive of unrealized gains or loss). Finally, on authority of Provincial Executive Council, \$4,289,000 of operating cash was directed into the SEF. The market value of the SEF, impacted by the transfer into the DAF noted above, at 2022 08 31 was \$18,177,929.

The Capital Fund was established to fund the costs of furniture, equipment and major renovations. As budgeted, \$1,117,500 was allocated to the fund, plus investment earnings of \$129,609 (not inclusive of unrealized gains or loss). During the year, the fund was charged \$216,227 to reflect annual furniture and fixtures purchases. The market value of the fund at 2022 08 31 was \$2,001,603.

The Southern Alberta Regional Office (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 2021 08 31 was \$2,994,745.



FINANCIAL STATEMENTS

Year ended August 31, 2022





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Edmonton AB T5J 3N9 Canada

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, 2022, 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, 2022, 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 16, 2022

THE ALBERTA TEACHERS' ASSOCIATION
Statement of Financial Position

Year ended August 31, 2022

| | Special Emergency | Defence and Advocacy | Capital | SARO Lease | Property and Equipment | Office Staff Pension Plan (Note 2) | Unappropriated | TOTAL |
|--|-------------------|----------------------|--------------|--------------|------------------------|------------------------------------|----------------|----------------|
| | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 |
| ASSETS | | | | | | | | |
| CURRENT | | | | | | | | |
| Cash and Cash Equivalents | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 11,011,189 | \$ 11,514,064 |
| Fees Receivable | - | - | - | - | - | - | 1,742,056 | 2,266,962 |
| Other Receivables | - | - | - | - | - | - | 459,735 | 459,735 |
| Prepaid Expenses | - | - | - | - | - | - | 476,249 | 476,249 |
| Due from (to) Other Funds | (16,332,252) | (5,539) | 4,585,274 | (1,124,320) | - | - | 12,876,837 | 645,772 |
| | (16,332,252) | 497,336 | 4,585,274 | (1,124,320) | - | - | 26,566,066 | 14,192,104 |
| ACCRUED PENSION ASSET (Note 9) | - | - | - | - | - | 12,416,000 | - | 12,416,000 |
| INVESTMENTS (Note 3) | 18,177,929 | 15,787,409 | 2,001,603 | 2,994,745 | - | - | - | 38,961,686 |
| PROPERTY AND EQUIPMENT (Note 4) | - | - | - | - | 32,890,649 | - | - | 32,890,649 |
| | \$ 1,845,677 | \$ 16,284,745 | \$ 6,586,877 | \$ 1,870,425 | \$ 32,890,649 | \$ 12,416,000 | \$ 26,566,066 | \$ 98,460,439 |
| | | | | | | | | \$ 101,009,333 |
| LIABILITIES | | | | | | | | |
| CURRENT | | | | | | | | |
| Accounts Payable and Accrued Liabilities | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 3,941,836 | \$ 3,131,013 |
| Fees Payable to Locals | - | - | - | - | - | - | 2,374,509 | 2,561,179 |
| Current Portion Capital Lease Obligations (Note 5) | - | - | - | - | 149,522 | - | - | 149,522 |
| Current Portion Mortgages Payable (Note 6) | - | - | - | - | 1,514,952 | - | - | 1,514,952 |
| Deferred Grant Revenue | - | - | - | - | - | - | 326,572 | 190,848 |
| | - | - | - | - | 1,664,474 | - | 6,642,917 | 8,307,391 |
| POST RETIREMENT BENEFITS (Note 9) | - | - | - | - | - | - | 6,104,000 | 7,782,000 |
| MORTGAGES PAYABLE (Note 6) | - | - | - | - | 13,088,598 | - | - | 13,088,598 |
| CAPITAL LEASE OBLIGATIONS (Note 5) | - | - | - | - | 419,690 | - | - | 419,690 |
| | - | - | - | - | 15,172,762 | - | 12,746,917 | 27,919,679 |
| | | | | | | | | \$ 30,502,276 |
| COMMITMENTS (Note 7) | | | | | | | | |
| CONTINGENCIES (Note 8) | | | | | | | | |
| MEMBERS' EQUITY | | | | | | | | |
| Appropriated | 1,845,677 | 16,284,745 | 6,586,877 | 1,870,425 | 17,717,887 | 12,416,000 | - | 56,721,611 |
| Unappropriated | - | - | - | - | - | - | 13,819,149 | 13,819,149 |
| | 1,845,677 | 16,284,745 | 6,586,877 | 1,870,425 | 17,717,887 | 12,416,000 | 13,819,149 | 70,540,760 |
| | \$ 1,845,677 | \$ 16,284,745 | \$ 6,586,877 | \$ 1,870,425 | \$ 32,890,649 | \$ 12,416,000 | \$ 26,566,066 | \$ 98,460,439 |
| | | | | | | | | \$ 101,009,333 |

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

Approved and signed by:

Jason Schilling, Director
8AC6F3B3DD39401...

DocuSigned by:

Dennis Huobald, Director
518C13FFA72F487...

THE ALBERTA TEACHERS' ASSOCIATION

Statement of Operations

Year ended August 31, 2022

| | Special Emergency | | Defense and Advocacy | | Capital | | SARO Lease | | SUBTOTAL |
|---|-----------------------|---------------------|----------------------|-------------|------------------|-------------------|---------------------|-------------------|-----------------------|
| | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | |
| REVENUE | | | | | | | | | |
| ATA Membership Fees | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Advertising | - | - | - | - | - | - | - | - | - |
| TQS Evaluations | - | - | - | - | - | - | - | - | - |
| Registration Fees | - | - | - | - | - | - | - | - | - |
| Rentals | - | - | - | - | - | - | - | - | - |
| Printing | - | - | - | - | - | - | - | - | - |
| Publications | - | - | - | - | - | - | - | - | - |
| Food Services | - | - | - | - | - | - | - | - | - |
| Public Education Action Sales | - | - | - | - | - | - | - | - | - |
| Gain on Disposal of Equipment | - | - | - | - | - | - | - | - | - |
| Grants | - | - | - | - | - | - | - | - | - |
| Miscellaneous | - | - | - | - | 180,000 | 180,000 | - | - | 180,000 |
| Realized Investment Earnings (Loss) | 1,954,861 | 1,537,002 | (3,553) | - | 129,609 | 97,864 | 194,299 | 165,637 | 2,275,216 |
| Unrealized Gain (Loss) on Investments | (3,369,699) | 2,524,402 | (212,591) | - | (232,269) | 161,121 | (348,999) | 235,408 | (41,63,558) |
| TOTAL REVENUE | (1,414,838) | 3,861,404 | (216,144) | - | 77,340 | 438,985 | (154,700) | 401,045 | (1,708,342) |
| EXPENDITURES - Schedule 1 | | | | | | | | | |
| Government | - | - | - | - | - | - | - | - | - |
| Teacher Employment Services | - | - | - | - | - | - | - | - | - |
| Professional Development | - | - | - | - | - | - | - | - | - |
| Building | - | - | - | - | - | - | - | - | - |
| Operations | - | - | - | - | - | - | - | - | - |
| Food Services | - | - | - | - | - | - | - | - | - |
| Information and Technology | - | - | - | - | - | - | - | - | - |
| Non-departmental | - | - | - | - | - | - | - | - | - |
| Other (Non-rebatable) | 834,315 | 82,148 | - | - | - | - | - | - | 834,315 |
| TOTAL EXPENDITURES | 834,315 | 82,148 | - | - | - | - | - | - | 834,315 |
| Excess (Deficiency) of Revenue Over Expenditures | \$ (2,249,153) | \$ 3,779,256 | \$ (216,144) | \$ - | \$ 77,340 | \$ 438,985 | \$ (154,700) | \$ 401,045 | \$ (2,542,657) |
| | | | | | | | | | \$ 4,619,286 |

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

THE ALBERTA TEACHERS' ASSOCIATION
Statement of Operations (Continued)
Year ended August 31, 2022

| | SUBTOTAL (Continued) | | Property and Equipment | | Office Staff Pension Plan (Note 9) | | Unappropriated | | TOTAL |
|---|-----------------------|---------------------|------------------------|-----------------------|------------------------------------|-----------------------|---------------------|---------------------|---------------------|
| | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 |
| REVENUE | | | | | | | | | |
| ATA Membership Fees | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 41,722,828 | \$ 41,980,437 | \$ 41,980,437 |
| Advertising | - | - | - | - | - | - | 159,371 | 123,035 | 123,035 |
| TQS Evaluations | - | - | - | - | - | - | 336,516 | 360,765 | 360,765 |
| Registration Fees | - | - | - | - | - | - | 56,900 | 52,200 | 52,200 |
| Rentals | - | - | - | - | - | - | 1,148,059 | 1,186,358 | 1,186,358 |
| Printing | - | - | - | - | - | - | 31,202 | 42,823 | 42,823 |
| Publications | - | - | - | - | - | - | 4,720 | 4,183 | 4,183 |
| Food Services | - | - | - | - | - | - | 74,366 | 17,819 | 17,819 |
| Public Education Action Sales | - | - | - | - | - | - | 14,310 | 16,837 | 16,837 |
| Gain on Disposal of Equipment | - | - | 2 | - | - | - | - | 3,800 | 3,800 |
| Grants | - | - | - | - | - | - | 117,947 | 162,462 | 162,462 |
| Miscellaneous | 180,000 | 180,000 | - | - | - | - | 106,157 | 86,738 | 266,738 |
| Realized Investment Earnings (Loss) | 2,275,216 | 1,800,503 | - | - | - | - | 108,610 | 53,669 | 1,854,172 |
| Unrealized Gain (Loss) on Investments | (4,163,558) | 2,720,931 | - | - | - | - | - | - | 2,720,931 |
| TOTAL REVENUE | (1,708,342) | 4,701,434 | 2 | 3,800 | - | - | 43,880,986 | 44,087,326 | 48,792,560 |
| EXPENDITURES - Schedule 1 | | | | | | | | | |
| Government | - | - | - | - | - | - | 9,732,113 | 6,830,621 | 7,001,910 |
| Teacher Employment Services | - | - | - | - | - | - | 7,454,421 | 8,956,891 | 8,785,602 |
| Professional Development | - | - | - | - | - | - | 4,184,282 | 3,800,765 | 3,800,765 |
| Building | - | - | - | - | - | - | 2,729,661 | 2,735,577 | 2,735,577 |
| Operations | - | - | - | - | - | - | 5,840,016 | 5,836,994 | 5,836,994 |
| Food Services | - | - | - | - | - | - | 89,424 | 110,546 | 110,546 |
| Information and Technology | - | - | - | - | - | - | 2,133,169 | 2,099,417 | 2,099,417 |
| Non-departmental | - | - | - | - | - | - | 2,012,603 | 4,997,589 | 5,680,887 |
| Other (Non-rebatable) | 834,315 | 82,148 | 1,961,986 | 2,072,201 | 1,023,000 | 1,368,000 | 3,698,953 | 3,447,363 | 3,529,511 |
| TOTAL EXPENDITURES | 834,315 | 82,148 | 1,961,986 | 2,072,201 | 1,023,000 | 1,368,000 | 37,874,642 | 36,038,860 | 41,693,943 |
| Excess (Deficiency) of Revenue Over Expenditures | \$ (2,542,657) | \$ 4,619,286 | \$ (1,961,984) | \$ (2,068,401) | \$ (1,023,000) | \$ (1,368,000) | \$ 6,006,344 | \$ 8,028,466 | \$ 9,211,351 |

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, 2022

| | Special Emergency | | Defense and Advocacy | | Capital | | SARO Lease | | SUBTOTAL | |
|---|-------------------|---------------|----------------------|------|--------------|--------------|--------------|--------------|---------------|---------------|
| | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 |
| MEMBERS' EQUITY, BEGINNING OF YEAR | \$ 20,094,830 | \$ 17,519,576 | \$ - | \$ - | \$ 5,617,285 | \$ 4,325,608 | \$ 2,144,231 | \$ 1,785,645 | \$ 27,856,346 | \$ 23,630,829 |
| EXCESS (DEFICIENCY) OF REVENUE OVER EXPENDITURES | (2,249,153) | 3,779,256 | (216,144) | - | 77,340 | 438,985 | (154,700) | 401,045 | (2,542,657) | 4,619,286 |
| INTERFUND TRANSFERS (NOTE 10) PENSION RE-MEASUREMENTS AND OTHER ITEMS (NOTE 9) | (16,000,000) | (1,204,002) | 16,500,889 | - | 892,252 | 852,692 | (119,106) | (42,459) | 1,274,035 | (393,769) |
| MEMBERS' EQUITY, END OF YEAR | \$ 1,845,677 | \$ 20,094,830 | \$ 16,284,745 | \$ - | \$ 6,586,877 | \$ 5,617,285 | \$ 1,870,425 | \$ 2,144,231 | \$ 26,587,724 | \$ 27,856,346 |

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

THE ALBERTA TEACHERS' ASSOCIATION
Statement of Changes in Members' Equity (Continued)
Year ended August 31, 2022

| | SUBTOTAL (Continued) | | Property and Equipment | | Office Staff Pension Plan | | Unappropriated | | TOTAL | |
|--|----------------------|---------------|------------------------|---------------|---------------------------|---------------|----------------|--------------|---------------|---------------|
| | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 |
| MEMBERS' EQUITY, | | | | | | | | | | |
| BEGINNING OF YEAR | \$ 27,856,346 | \$ 23,630,829 | \$ 16,829,349 | \$ 16,769,147 | \$ 15,952,000 | \$ 5,025,000 | \$ 9,869,362 | \$ 3,709,730 | \$ 70,507,057 | \$ 49,134,706 |
| EXCESS (DEFICIENCY) OF REVENUE OVER EXPENDITURES | (2,542,657) | 4,619,286 | (1,961,984) | (2,068,401) | (1,023,000) | (1,368,000) | 6,006,344 | 8,028,466 | 478,703 | 9,211,351 |
| INTERFUND TRANSFERS (NOTE 10) | 1,274,035 | (393,769) | 2,850,522 | 2,128,603 | - | - | (4,124,557) | (1,734,834) | - | - |
| PENSION REMEASUREMENTS AND OTHER ITEMS (NOTE 9) | - | - | - | - | (2,513,000) | 12,295,000 | 2,068,000 | (134,000) | (445,000) | 12,161,000 |
| MEMBERS' EQUITY, END OF YEAR | \$ 26,587,724 | \$ 27,856,346 | \$ 17,717,887 | \$ 16,829,349 | \$ 12,416,000 | \$ 15,952,000 | \$ 13,819,149 | \$ 9,869,362 | \$ 70,540,760 | \$ 70,507,057 |

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, 2022

| | Special Emergency | Defense and Advocacy | Capital | SARO Lease | Property and Equipment | Office Staff Pension Plan | Unappropriated | 2022 | TOTAL | 2021 |
|---|-------------------|----------------------|-------------|--------------|------------------------|---------------------------|----------------------|----------------------|-----------|-------------------|
| Net Inflow (Outflow) of Cash Related to the Following Activities | | | | | | | | | | |
| OPERATING | | | | | | | | | | |
| Excess (Deficiency) of Revenue Over Expenditures Items Not Affecting Cash | \$ (2,249,153) | \$ (216,144) | \$ 77,340 | \$ (154,700) | \$ (1,961,984) | \$ (1,025,000) | \$ 6,006,344 | \$ 478,703 | \$ | 9,211,351 |
| Depreciation | - | - | - | - | 1,961,986 | - | - | 1,961,986 | | 2,072,201 |
| Unrealized (Gain) Loss on Investments | 3,369,699 | 212,591 | 232,269 | 348,999 | - | - | - | 4,163,558 | | (2,720,931) |
| Gain on Disposal of Equipment | - | - | - | - | (2) | - | - | (2) | | (3,800) |
| Net Change in Employee Future Benefits | - | - | - | - | - | 1,025,000 | 390,000 | 1,413,000 | | 1,600,000 |
| Interfund Transfer | (15,021,843) | 16,506,428 | (168,807) | 16,720 | 2,850,522 | - | (4,183,020) | - | | - |
| Investment Transfer | 16,000,000 | (16,000,000) | - | - | - | - | - | - | | - |
| | 2,098,703 | 502,875 | 140,802 | 211,019 | 2,850,522 | - | 2,213,324 | 8,017,245 | | 10,158,821 |
| Changes in Non-Cash Operating Working Capital Items | | | | | | | | | | |
| Fees Receivable | - | - | - | - | - | - | 524,906 | 524,906 | | (617,795) |
| Other Receivables | - | - | - | - | - | - | (223,288) | (223,288) | | 119,120 |
| Prepaid Expenses | - | - | - | - | - | - | 169,523 | 169,523 | | 40,985 |
| Accounts Payable and Accrued Liabilities | - | - | - | - | - | - | 810,823 | 810,823 | | 645,042 |
| Fees Payable to Locals | - | - | - | - | - | - | (186,670) | (186,670) | | (23,247) |
| Deferred Grant Revenue | - | - | - | - | - | - | 135,726 | 135,726 | | (162,463) |
| | 2,098,703 | 502,875 | 140,802 | 211,019 | 2,850,522 | - | 3,444,344 | 9,248,265 | | 10,160,463 |
| INVESTING | | | | | | | | | | |
| Additions to Property and Equipment | - | - | - | - | (1,254,579) | - | - | (1,254,579) | | (513,947) |
| Proceeds on Disposal of Equipment | - | - | - | - | 68,531 | - | - | 68,531 | | 32,459 |
| Purchase of Investments | (6,387,703) | - | (140,802) | (211,019) | - | - | - | (6,739,524) | | (3,275,151) |
| | (6,387,703) | - | (140,802) | (211,019) | (1,186,048) | - | - | (7,925,572) | | (3,756,639) |
| FINANCING | | | | | | | | | | |
| Interfund transfer | 4,289,000 | - | - | - | - | - | (4,289,000) | - | | - |
| Mortgage Payments | - | - | - | - | (1,514,952) | - | - | (1,514,952) | | (1,514,955) |
| Capital Lease Payments | - | - | - | - | (149,522) | - | - | (149,522) | | (132,161) |
| | 4,289,000 | - | - | - | (1,664,474) | - | (4,289,000) | (1,664,474) | | (1,647,116) |
| NET CASH OUTFLOW | - | 502,875 | - | - | (844,656) | - | (4,289,000) | (341,781) | | 4,756,708 |
| CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR | - | - | - | - | - | - | 11,855,845 | 11,855,845 | | 7,099,137 |
| CASH AND CASH EQUIVALENTS, END OF YEAR | \$ - | \$ 502,875 | \$ - | \$ - | \$ - | \$ - | \$ 11,011,189 | \$ 11,514,064 | \$ | 11,855,845 |

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, 2022

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 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. 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, 2022

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) Defense and advocacy

In 2022, with the approval of Provincial Executive Council, the Association established this fund as an integral part of its response strategy to Bill-32 (Restoring Balance in Alberta's Workplaces Act). Financial resources for this fund were provided via a transfer of \$16,000,000 from the Special Emergency Fund. The primary purpose of this fund is to hold a portion of legacy assets accumulated through to July 31, 2022 and utilize annual investment income derived from these legacy assets to pay for specific activities determined by the Association to be non-core, as per its interpretation of Bill-32.

d) 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.

e) Property and equipment

This appropriation represents the investment in property and equipment.

f) Office staff pension plan

Beginning with the year ended August 31, 2022, management has elected to change the presentation of the financial statements of the Association by presenting the office staff pension plan, which has historically been included with the Unappropriated fund, as a separate fund. The defined benefit pension plan is established for eligible Association employees classified as professional or support staff, see also Notes 2 and 9. 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 operating results or members' equity.

g) Unappropriated

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

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2022

2. BASIS OF PRESENTATION AND ACCOUNTING POLICIES (continued)

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 \$326,572 (2021 - \$190,848) 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. Related party financial instruments quoted in an active market or those with observable inputs significant to the determination of fair value or derivative contracts are recorded at fair value at initial recognition.

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

Property and equipment

Property and equipment are stated at cost. Buildings, building improvements, equipment, tenant inducements and automobiles are depreciated using the rates described in Note 4 on a straight-line basis over the useful life of the asset. 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 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 year 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 year, while remeasurements and other items are charged directly to members' equity as they occur.

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2022

2. BASIS OF PRESENTATION AND ACCOUNTING POLICIES (continued)

a) *Office staff 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, 2019, and extrapolated to August 31, 2022 for accounting purposes. The next actuarial valuation for funding purposes must be effective no later than December 31, 2022 and will be completed for filing prior to the December 31, 2023 due date.

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, 2022.

Revenue recognition

The Association follows the restricted fund method of revenue recognition related to contributions. Restricted contributions are recognized as revenue of the appropriate restricted fund when received or receivable if the amount to be received can be reasonably estimated and collection is reasonably assured. However, if no appropriate restricted fund is presented, then the restricted contribution is recognized as revenue of the Unappropriated Fund in the year in which the related expenses are incurred. 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. Investment earnings consist of dividends, interest income and realized gain (loss), net of related expenditures. Unrealized gain (loss) on investments consists of changes in fair value of the investments. Investment earnings and unrealized gain (loss) on investments are allocated to appropriations based on the investments held in each appropriation.

THE ALBERTA TEACHERS' ASSOCIATION
Notes to the Financial Statements
Year ended August 31, 2022

2. BASIS OF PRESENTATION AND ACCOUNTING POLICIES (continued)

Use of estimates

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.

3. INVESTMENTS

| | 2022 | | 2021 | |
|----------------------|----------------------|---------------------|----------------------|----------------------|
| | Fair Value | Cost | Fair Value | Cost |
| Allocated to: | | | | |
| Special emergency | \$ 18,177,929 | \$19,066,874 | \$ 31,159,925 | \$ 29,356,227 |
| Defence and advocacy | 15,787,409 | 16,000,000 | - | - |
| Capital | 2,001,603 | 2,131,537 | 2,093,071 | 1,990,736 |
| SARO lease | 2,994,745 | 3,184,759 | 3,132,726 | 2,973,740 |
| | \$ 38,961,686 | \$40,383,170 | \$ 36,385,722 | \$ 34,320,703 |

The investments are held in the Franklin Templeton Institutional Balanced Fund and the Franklin Global Real Assets Fund, with an asset mix as follows:

| | | |
|--------------------------|---------------|---------------|
| | <u>2022</u> | <u>2021</u> |
| Cash | 5.4% | 2.0% |
| Fixed Income | 37.1% | 31.2% |
| Canadian Equities | 26.2% | 26.5% |
| US Equities | 18.5% | 20.5% |
| International Equities | 9.7% | 14.8% |
| Emerging Market Equities | 3.1% | 5.0% |
| | <u>100.0%</u> | <u>100.0%</u> |

THE ALBERTA TEACHERS' ASSOCIATION
Notes to the Financial Statements
Year ended August 31, 2022

4. PROPERTY AND EQUIPMENT

| | Rates | 2022 | | | 2021 |
|-------------------------------|------------|----------------------|--------------------------|----------------------|----------------------|
| | | Cost | Accumulated Depreciation | Net Book Value | Net Book Value |
| Buildings | 2% | \$ 38,416,390 | \$ 9,569,142 | \$ 28,847,248 | \$ 29,386,760 |
| Building improvements | 10% | 19,156,193 | 19,156,193 | - | - |
| Equipment | 10%-33% | 6,322,425 | 5,247,645 | 1,074,780 | 1,256,313 |
| Tenant inducements | lease-term | 2,167,069 | 684,017 | 1,483,052 | 1,273,813 |
| Automobiles | 20% | 1,787,768 | 1,029,340 | 758,428 | 873,036 |
| | | 67,849,845 | 35,686,337 | 32,163,508 | 32,789,922 |
| Land | | 157,930 | - | 157,930 | 157,930 |
| Equipment under capital lease | lease-term | 894,190 | 324,979 | 569,211 | 718,734 |
| | | \$ 68,901,965 | \$ 36,011,316 | \$ 32,890,649 | \$ 33,666,585 |

Additions to property and equipment include non-cash capital lease additions of \$nil (2021 -\$787,737). As well, included in equipment is \$nil (2021 - \$16,215) of assets that are not yet in use, therefore, no depreciation is recorded on those amounts.

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:

| | |
|--|-------------------|
| 2023 | \$ 149,522 |
| 2024 | 132,249 |
| 2025 | 114,976 |
| 2026 | 114,976 |
| 2027 | 57,489 |
| Total minimum lease payments | 569,212 |
| Less current portion | 149,522 |
| Long-term obligations under capital lease | \$ 419,690 |

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2022

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 the line of credit was not used during the fiscal year ending August 31, 2022.

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

| | <u>2022</u> | <u>2021</u> |
|--|---------------------|----------------------|
| Scotiabank Banker's Acceptance, bearing interest at 1.15% and increasing to 1.45% when no swap rate is in place, requiring monthly principal payments of \$38,745 plus interest, maturing on March 31, 2023 | \$ 1,666,050 | \$ 2,131,002 |
| Scotiabank Banker's Acceptance, bearing interest at 1.10% and increasing to 1.40% when no swap rate is in place, requiring monthly principal payments of \$25,000 plus interest, maturing on June 30, 2023 | 875,000 | 1,175,000 |
| Scotiabank Banker's Acceptance, bearing interest at 2.91% per annum reset monthly, with an interest rate swap agreement in place, requiring monthly principal payments of \$62,500, maturing September 30, 2022 and then bearing interest at 1.10% and increasing to 1.40% when no swap rate is in place, requiring the same monthly principal payments, maturing September 20, 2023 | 12,062,500 | 12,812,500 |
| | 14,603,550 | 16,118,502 |
| Less current portion | 1,514,952 | 1,514,952 |
| Long-term portion | \$13,088,598 | \$ 14,603,550 |

As at August 31, 2022, there is no swap rate in place for the first two outstanding mortgages.

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:

| | |
|------|----------------------|
| 2023 | \$ 1,514,952 |
| 2024 | 13,088,598 |
| | \$ 14,603,550 |

THE ALBERTA TEACHERS' ASSOCIATION
Notes to the Financial Statements
Year ended August 31, 2022

6. CREDIT FACILITIES (continued)

The above minimum annual payments reflect the current financing agreements and maturity dates as of August 31, 2022.

7. COMMITMENTS

The Association is committed under an operating lease with third parties on a leased premise 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 current lease has approximate future minimum annual payments, excluding operating costs, property taxes and other charges, as follows for the fiscal years ending in:

| | | |
|-------------------------|-----------|------------------|
| 2023 | \$ | - |
| 2024 | | - |
| 2025 | | - |
| 2026 | | 197,336 |
| 2027 | | 263,115 |
| <u>Subsequent years</u> | | <u>855,124</u> |
| | <u>\$</u> | <u>1,315,575</u> |

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 year 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, 2022

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>2022</u> | <u>2021</u> | <u>2022</u> | <u>2021</u> |
| Benefit obligations | | | | |
| Discount rate | 4.8% | 3.0% | 4.8% | 2.7% |
| Rate of compensation increase | 3.0% | 3.0% | 3.0% | 3.0% |
| Benefit costs | | | | |
| Discount rate | 4.8% | 3.0% | 4.8% | 2.7% |
| Rate of compensation increase | 3.0% | 3.0% | 3.0% | 3.0% |
| Rate of inflation on health benefits | | | | |
| Dental Care | - | - | 4.0% | 3.0% |
| Extended health care | - | - | 5.0% | 5.0% |
| Vision care | - | - | 0.0% | 2.0% |
| Average remaining service life of employees | | | | |
| | 10 years | 11 years | 9 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, 2022, is as follows:

| | |
|-----------------|-------------|
| Equities | 58.0% |
| Debt Securities | 32.9% |
| Cash and other | 9.1% |
| | 100% |

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

| | <u>Pension Plan</u> | | <u>Other Benefit Plans</u> | |
|---------------------------|---------------------|-------------|----------------------------|-------------|
| | <u>2022</u> | <u>2021</u> | <u>2022</u> | <u>2021</u> |
| Association contributions | \$ 839,000 | \$ 898,000 | \$ - | \$ - |
| Benefits paid | - | - | 351,000 | 554,000 |
| Total benefits | \$ 839,000 | \$ 898,000 | \$ 351,000 | \$ 554,000 |

THE ALBERTA TEACHERS' ASSOCIATION
Notes to the Financial Statements
Year ended August 31, 2022

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, the following transfers were made:

| | Special Emergency | Defense and Advocacy | Capital | SARO Lease | Property and Equipment | Office Staff Pension Plan | Unappropriated | Total 2022 | Total 2021 |
|---|----------------------|-------------------------|--------------|---------------|---------------------------|------------------------------|----------------|---------------|---------------|
| Members' equity, beginning of year | \$ 20,094,830 | \$ - | \$ 5,617,285 | \$ 2,144,231 | \$ 16,829,349 | \$ 15,952,000 | \$ 9,869,362 | \$ 70,507,057 | \$ 49,134,706 |
| Excess (deficiency) of revenue over expenditures | (2,249,153) | (216,144) | 77,340 | (154,700) | (1,961,984) | (1,023,000) | 6,006,344 | 478,703 | 9,211,351 |
| | 17,845,677 | (216,144) | 5,694,625 | 1,989,531 | 14,867,365 | 14,929,000 | 15,875,706 | 70,985,760 | 58,346,057 |
| Transfer for property and equipment additions | - | - | (216,227) | - | 216,227 | - | - | - | - |
| Transfer representing proceeds on disposition | - | - | - | - | (68,531) | - | 68,531 | - | - |
| Transfer to offset leasing costs | - | - | - | (119,106) | - | - | 119,106 | - | - |
| Transfer related to property and equipment additions | - | - | - | - | 2,702,826 | - | (2,702,826) | - | - |
| Transfer for capital allocation | - | - | 1,108,479 | - | - | - | (1,108,479) | - | - |
| Transfer to set up Defence and Advocacy Fund | (16,000,000) | 16,500,889 | - | - | - | - | (500,889) | - | - |
| Pension remeasurements (Note 9) | - | - | - | - | - | (2,513,000) | 2,068,000 | (445,000) | 12,161,000 |
| | (16,000,000) | 16,500,889 | 892,252 | (119,106) | 2,850,522 | (2,513,000) | (2,056,557) | (445,000) | 12,161,000 |
| Members' equity, end of year | \$ 1,845,677 | \$ 16,284,745 | \$ 6,586,877 | \$ 1,870,425 | \$ 17,717,887 | \$ 12,416,000 | \$ 13,819,149 | \$ 70,540,760 | \$ 70,507,057 |

THE ALBERTA TEACHERS' ASSOCIATION

Notes to the Financial Statements

Year ended August 31, 2022

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 as well as heightened levels of inflationary pressures and impacts from the war in Ukraine on financial markets has caused 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 \$513,956 (2021 - \$457,412) from the controlled entities. This revenue is included in the respective accounts as reported in the statement of operations. Accounts receivable include \$113,395 (2021 - \$99,170) due from the above related parties.

The Association paid grants and seminar costs totaling \$1,653,771 (2021 - \$1,199,310) to the controlled entities. These expenditures are included in various expense accounts reported in Schedule 1. Accounts payable and fees payable to Locals include \$2,374,509 (2021 - \$2,561,179) 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, 2022

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, as well as heightened levels of inflationary pressures and impacts from the war in Ukraine, there could be further impact on the Association and its members. Management is actively monitoring the effect on its financial condition, liquidity and operations.

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

SCHEDULE 1

EXPENDITURES

Year ended August 31, 2022

| | 2022 | 2021 |
|------------------------------------|------------------|------------------|
| GOVERNMENT | | |
| Annual Representative Assembly | \$ 530,418 | \$ 185,131 |
| Committees | 367,905 | 225,934 |
| Conferences | 22,327 | 194 |
| Education | 296,236 | 97,897 |
| Elections | - | 68,135 |
| Library | 147,490 | 134,933 |
| Local Presidents' Meetings | 7,293 | 746 |
| President | 197,980 | 193,656 |
| Provincial Executive Council | 1,354,603 | 1,288,290 |
| Public Education Promotion | 262,870 | 273,344 |
| Publications | 491,185 | 365,628 |
| Publicity | 351,115 | 234,200 |
| Representation | 288,431 | 139,551 |
| Research | 225,421 | 248,075 |
| Salaries and Benefits | 5,188,839 | 3,546,196 |
| | 9,732,113 | 7,001,910 |
| TEACHER EMPLOYMENT SERVICES | | |
| Bargaining | 731,257 | 1,011,619 |
| Committees | 9,626 | 2,160 |
| Conferences | 32,524 | 33,795 |
| Education | 689,745 | 218,005 |
| Member Assistance | 1,978,122 | 2,320,862 |
| Publications | 4,414 | 6,506 |
| Representation | 13,361 | 17,449 |
| Salaries and Benefits | 3,971,640 | 5,152,109 |
| Travel Insurance | 23,732 | 23,097 |
| | 7,454,421 | 8,785,602 |
| PROFESSIONAL DEVELOPMENT | | |
| Committees | 37,838 | 27,242 |
| Conferences | 5,927 | 1,229 |
| Conventions | 43,500 | 17,315 |
| Education | 902,543 | 731,810 |
| Evaluations | 52,196 | 16,512 |
| Publications | 23,051 | 2,071 |
| Representation | 234 | 648 |
| Research | 11,398 | 13,994 |
| Salaries and Benefits | 3,094,352 | 2,988,043 |
| Specialist Councils | 13,243 | 1,901 |
| | 4,184,282 | 3,800,765 |

THE ALBERTA TEACHERS' ASSOCIATION**SCHEDULE 1****EXPENDITURES**

Year ended August 31, 2022

| | 2022 | 2021 |
|-----------------------------------|------------------|------------------|
| BUILDING | | |
| Operating Costs - Barnett House | 1,637,083 | 1,616,113 |
| Operating Costs - SARO | 85,934 | 122,422 |
| Salaries and Benefits | 1,006,644 | 997,042 |
| | 2,729,661 | 2,735,577 |
| OPERATIONS | | |
| Audit | 70,030 | 91,408 |
| Equipment Maintenance | 8,075 | 189 |
| Equipment Rental | 126,834 | 148,457 |
| External Services | 22,357 | 18,180 |
| General | 119,647 | 84,527 |
| Human Resources | 141,974 | 128,593 |
| Interest and Bank Charges | 30,208 | 27,942 |
| Mortgage Interest | 615,255 | 613,247 |
| Office Staff Pension Plan | 117,727 | 121,345 |
| Postage and Delivery | 152,006 | 151,779 |
| Salaries and Benefits | 4,295,664 | 4,280,459 |
| Stationery and Supplies | 140,239 | 170,868 |
| | 5,840,016 | 5,836,994 |
| FOOD SERVICES | | |
| Food Purchases | 31,872 | 4,791 |
| Salaries and Benefits | 53,083 | 99,709 |
| Supplies | 4,469 | 6,046 |
| | 89,424 | 110,546 |
| INFORMATION AND TECHNOLOGY | | |
| Salaries and Benefits | 1,205,277 | 1,354,813 |
| Technical Services | 927,892 | 744,604 |
| | 2,133,169 | 2,099,417 |

THE ALBERTA TEACHERS' ASSOCIATION
EXPENDITURES
Year ended August 31, 2022

SCHEDULE 1

| | 2022 | 2021 |
|---|----------------------|----------------------|
| NON-DEPARTMENTAL | | |
| Contingency | - | 1,500 |
| Deferred Pension Adjustment | 1,023,000 | 1,368,000 |
| Depreciation | 1,961,986 | 2,072,201 |
| Employee Benefits | 922,071 | 1,062,436 |
| Future Benefits Adjustment | 390,000 | 232,000 |
| Grants and Awards | 582,585 | 652,211 |
| Public Grants | 117,947 | 162,462 |
| Salaries and Benefits | - | 130,024 |
| Specialist Council Grants | - | 53 |
| | 4,997,589 | 5,680,887 |
| OTHER (NON-REBATABLE) | | |
| Accountability Action Plan | - | 30,000 |
| Canadian Teachers' Federation Fees | 1,075,032 | 1,084,426 |
| IT Project | 709,051 | 427,173 |
| Public Relations Campaign | 1,051,870 | 1,043,764 |
| Special Emergency Expenditures (Schedule 2) | 834,315 | 82,148 |
| Specialist Council Grants | 863,000 | 862,000 |
| | 4,533,268 | 3,529,511 |
| TOTAL EXPENDITURES | \$ 41,693,943 | \$ 39,581,209 |

THE ALBERTA TEACHERS' ASSOCIATION
Special Emergency Appropriation Expenditures
Year ended August 31, 2022

SCHEDULE 2

| | 2022 | 2021 |
|---------------------------------------|-------------------|------------------|
| Election Initiatives and Preparedness | \$ 29,977 | \$ 54,600 |
| Defend Advertising Campaign | 714,813 | - |
| Public Interest Alberta Contribution | 81,900 | 27,548 |
| Telephone Townhalls 2022 | 7,625 | - |
| | \$ 834,315 | \$ 82,148 |



The Alberta
Teachers' Association

