

RTO/ERO CHARITABLE FOUNDATION: CREATING A LEGACY

TAKING RTO/ERO TO THE NEXT LEVEL

The birth of STO/ERO in 1968 was an historic effort by a group of farsighted retirees and the Ontario Teachers Federation to ensure that retired teachers were not left behind in the changes being made to the Canada Pension Plan and to the formula for computing teachers' pensions. The beginning years were focused on getting a fair share for retirees, culminating in the Superannuation Adjustment Fund on September 1, 1975, that allowed for the annual escalation of pensions, including those of teachers who had retired prior to 1975.

Our founding members were visionaries, initiating extended health and travel insurance plans within the first decade. In 1986 the Health Services and Insurance Committee was tasked with supervising all insurance plans. That year the STO and Future Report to the 32nd Senate contained recommendations relating to the aging population, health care for senior citizens and an informed membership. "Adopted recommendations include that STO/ERO urge the Ontario government to create a Ministry of Senior Citizens, protect seniors against abuse and require more training in geriatrics and gerontology." How prescient at the time. Today, there does exist a Seniors' Secretariat within the Ontario government, with a Minister responsible for seniors, and awareness of seniors' abuse is at a new high with recent legislation targeting the treatment of seniors in nursing homes and retirement homes. However, both in Ontario and across Canada, there is a long way to go to address the needs for training in both geriatrics and gerontology.

THE CASE FOR IMPROVED TRAINING FOR HEALTH CARE PROFESSIONALS RE SENIORS' CARE

The most recent and comprehensive report on seniors' care in Canada was completed last year by a Senate Committee and is entitled "*Canada's Aging Population: Seizing the Opportunity.*" In the introduction to the report the following observation is made: "The challenge of an aging population goes far beyond the responsibility of the federal level of government as defined in the Constitution. It must be a concern for every Canadian, for every province, territory and municipality, for every business large and small, for every volunteer organization and NGO."

The report goes on to identify a problem that concerns RTO/ERO as an organization, particularly with respect to our Goodwill Program, namely that the voluntary sector, a critical component in supporting an aging population, is suffering as volunteers themselves are aging. The data provided in the report as well as its recommendations speak to the shortage of trained professionals, and the report will be quoted liberally to emphasize the message.

"Early in its hearings, the Committee heard evidence about the current shortage of geriatric specialists. Although the number of geriatricians almost doubled from 111 to 211 between 1995 and 2007, this was still far short of the 538 that were estimated to be

needed in 2006. The number of employed nurses whose area of responsibility is geriatric or long-term care has remained relatively stable from 1995 to 2006.

Of the 211 geriatricians, however, the Committee heard that many have other responsibilities, reducing the number of active full-time equivalencies to probably less than 150. Even more alarming, the number of internal medicine residents entering geriatric medicine programs has decreased dramatically over the last ten years. The Canadian Geriatric Society reports that in 2007 there were only five trainees in English-speaking programs for the entire country. Likewise, Care of the Elderly family medicine training programs have many vacancies and there are only 140 physicians with this training in Canada.”(pp.142-143).

“Further compounding the challenge of the existing human resource shortage and the anticipated increase in demand is that the current healthcare workforce is itself aging, and recruitment numbers are not keeping pace. The Canadian Association on Gerontology reported to the Committee that the “average age of a registered nurse in this country is close to 50.”(p.143).

The report acknowledges the need across the country for education of health care professionals about elder issues with the following observation: “Beyond gerontological and geriatric specialists, the reality is that almost all health professions are dealing with an increasingly aging population.”(p.147).

“Traditionally, the health care system has been based on dealing with one condition at a time. Frailty, however, is the result of multiple interacting medical and social problems. When someone is frail, they do not need the same style of healthcare.

The healthcare system’s response to complex cases has tended to take the form of inter-professional teams. As the pan-Canadian Health Human Resource Strategy points out, this approach requires parallel modifications to educational programs:

‘Changing the way we educate health care providers is key to achieving system change and to ensuring that health care providers have the necessary knowledge and skills to work effectively in interprofessional teams within the evolving health care system.’

The social aspects of frailty, not to mention the social aspects of well-being, necessitate an approach based on the empowerment of the individual within her or his broader support network. Training on the ability to enter into dialogue with a broader spectrum of stakeholders becomes more important.

Similarly, training to help the broad spectrum of stakeholders understand the dynamics of, and their role in, a multi-faceted response is also important.”(p.148).

Recommendation 27 of the report urges “That the federal government support education and outreach campaigns promoting geriatric and gerontological health care professionals as career choices, including the funding of residency positions in geriatrics.”

Recommendation 28 proposes “That the federal government work with the provinces and the territories to address the training, recruitment and retention of home care and home support workers as part of the FPT Health Human Resource Strategy.”

ACTIONS OF THE PROVINCIAL EXECUTIVE

At both the 2007 and 2008 Planning Meetings of the new RTO/ERO Provincial Executive, there was some discussion on RTO/ERO undertaking a major project to give tangible and concrete expression to RTO/ERO’s Vision and Mission Statements as well as its Strategic Goals. At the 2009 November Planning Meeting, the Provincial Executive gave extended deliberation to the concept. Among the criteria attached to such a project were: (a) To identify a project so intrinsically worthy and easily understood that it will appeal intellectually and emotionally to a significant majority of our members. (b) To build our brand and raise our profile with governments, organizations, active teachers, and the wider community. (c) To be a magnet that attracts funding, participation and engagement from multiple sources, but with RTO/ERO as the lead organization.

Examples of the types of projects proposed for consideration were the following:

1. Creation of a Chair in cross-disciplinary Geriatric Studies at an Ontario university with courses that are shared across universities and colleges for healthcare professionals;
2. Commitment to fund a major research project on the physical and psychological health of seniors;
3. Commitment to a major project to create more senior friendly communities;
4. Bringing Monkey Business to Ontario – a project, akin to one in the U.S.A., that supports handicapped seniors and adults in their daily living.

After listening to presentations from two representatives of the University of Toronto - Dr. Gary Naglie and Mr. Mike den Haan, the Provincial Executive unanimously supported, in principle and subject to further study, the establishment and support for an RTO/ERO Endowed Chair in Geriatrics at the University of Toronto, with an emphasis on the promotion of interdisciplinary training among healthcare professionals. This project met the criteria set out above and certainly was consistent with our focus on service to our members and to seniors. At its November 2009 Planning Meeting the Provincial Executive also heard from Tony Rosato of the law-firm Keel, Cottrelle, on the procedure for establishing a charitable foundation, a process that could take up to six months.

The Provincial Executive has twice discussed at length the pursuit of this project and particularly the challenges it presents. These include the approval by Senate; if approved, building support for the project across RTO/ERO, identifying innovative, flexible and easily manageable strategies to allow our members and Districts to fundraise a minimum of \$3 million and a possible stretch goal of \$5 million over a three year period, and completing the requisite legal, administrative and organizational framework to support the effort. At its regular March meeting, the Provincial Executive also heard from Gordon Cressy - a former Executive Director of the United Way of

Greater Toronto, former Vice-President of Advancement for both the U of T and Ryerson University – about the current philanthropic environment in Canada as well as strategies for fundraising.

WHY THE UNIVERSITY OF TORONTO?

Since this proposed project was first announced in *Liaison*, there have been about a half a dozen queries to the Provincial Office from individual members and one District asking why the choice of the University of Toronto, and not one of about four other universities named. There are essentially four reasons which we believe justify this decision.

Firstly, the U of T has the largest Regional Geriatric Program in Ontario with a network of 28 participating institutions whose services span the continuum of hospital and community based care. These include the Peterborough Civic Hospital and Regional Health Centre, The Royal Victoria Hospital in Barrie, the Southlake RHC in Newmarket, the Brampton Memorial Site, The Georgetown Site, The Mississauga Site, as well as sites in Markham, Ajax, Lakeridge, Oshawa, and Whitby. (For full list go to <http://rgp.toronto.on.ca>)

Secondly, having given consideration to other initial options, the Provincial Executive has come to the conclusion that beginning with support for the establishment of an RTO/ERO Chair in Geriatrics at the U of T provides the widest reach to a significant proportion of our members. The population area serviced by the Regional Geriatric Centre of Toronto is over 5 million or 40% of the 12.13 million persons in Ontario (2006 census). Moreover, approximately 34% of RTO/ERO members resident in Ontario live in this geographical region. There are four other Regional Geriatric Centres – Hamilton, Kingston, London, and Ottawa – serving the rest of the province.

Thirdly, there is another advantage to the choice of the University of Toronto for an initial project. It is a research focused university with a wealth of research infrastructure support and an impressive diversity of investigators from multiple disciplines conducting research with a geriatric/aging focus and who are available for collaboration. This provides the best environment to support and ensure the success of the Chair holder with respect to research productivity which will have a global impact, as well as outreach to hospitals, institutions, doctors, and potential e-health networks in the future.

Fourthly, the Provincial Executive has been assured by representatives of the Faculty of Medicine at the U of T that RTO/ERO will have a say in the general direction to be pursued by the RTO/ERO Endowed Chair of Geriatrics at the University. This undertaking will be included in the language of any future agreement.

It needs to be emphasized that this recommendation of the U of T is not an either/or proposition. We have the assurances of the medical staff at the U of T that research at the University is shared with other universities across Ontario and Canada, and will benefit seniors in all parts of the province.

Over the long term, the proposed Objects of the RTO/ERO Charitable Foundation, once approved by the Senate, envisage support for other institutions that undertake research

aimed at improving the quality of life for seniors. In short, over time, RTO/ERO's legacy of direct service to our members and to seniors through geriatric research and interdisciplinary/interprofessional training will extend across this province.

OTHER CONSIDERATIONS

RTO/ERO as an organization has a long history of giving to others – Project STO, the Annual Charitable Donation, donations in response to catastrophic events and natural disasters, and more recently 25 \$1,000 scholarships awarded annually to those pursuing studies in education. Our history of helping our own members via Goodwill and the Emergency Assistance Program goes back to 1977. President Gabrielle Levasseur wrote in 1979 that “Since beginning in November 1977, the Good Will Committee responds to 124 applications for financial assistance. By fall 1979, \$22, 670 is disbursed to 73 members. Districts establish Good Will Committees to assist beyond financial needs.”

Over the years, improvements to teachers' pensions would appear to have somewhat reduced the need for emergency financial assistance to members and in 2007 and 2008 under \$10,000 were spent in each year. Sensing that the economic downturn may have affected some of our members, the Executive Director made reference to EAP in the Winter 2008 issue of *Renaissance*. Disbursements in 2009 to members exceeded \$20,000. This caught the attention of our auditors at Grant, Thornton who informed us that Canada Revenue Agency regulations governing not-for-profit organizations do not allow them to give funds exclusively to their members. Given RTO/ERO's commitment to giving and to its members, and in order not to violate CRA regulations, the Provincial Executive recommends that all funds for charitable purposes – Project STO, the Annual Charitable Donation, donations for natural disasters, and EAP be handed over to the Proposed RTO/ERO Charitable Foundation for disbursement in accordance with previously approved Senate resolutions.

ESTABLISHMENT OF THE RTO/ERO CHARITABLE FOUNDATION

Legal counsel has advised the Provincial Executive that the first steps in applying to set up a Foundation involve the determination of its Name, the Objects of the Foundation and identifying the names and addresses of a minimum of three incorporators who will act as the initial Directors of The Charitable Foundation. The establishment of this Foundation and its Objects will be a legacy achievement in raising the profile of RTO/ERO as the pre-eminent organization serving retired teachers and the broader community in Ontario.

If Senate approves the establishment of the RTO/ERO Charitable Foundation, a further report will be provided to the fall Senate setting out parameters, potential fundraising strategies and budget proposals for initial logistical and administrative supports required to implement the Objects of the Foundation.

Legal Counsel has advised that when seeking approval of the Objects from Senate, it should be noted that the Objects may be subject to required amendments by:

1. Ministry of Government Services (Companies Branch)
2. Office of the Public Guardian and Trustee (Ontario)
3. Charities Directorate of Revenue Canada

OBJECTS OF THE RTO/ERO CHARITABLE FOUNDATION

The Objects of *The Charitable Foundation of the Retired Teachers of Ontario/les enseignantes et enseignants retraites de l'Ontario* are as follows:

- To establish, maintain and support *The RTO/ERO Endowed Chair in Geriatrics at the University of Toronto* with an emphasis on the promotion of interdisciplinary training among health care professionals;
- To develop and promote public health and wellness by supporting research endeavours in geriatrics and/or gerontology at Ontario post-secondary institutions where the focus is to improve the quality of life of seniors and of older Canadians;
- To provide one-time financial and/or other support to seniors and aging members of the public who are in distress;
- To provide one-time support to community projects that enhance the quality of life for seniors or for children living in poverty;
- To provide the necessities of life to victims of natural disasters in Canada and abroad.

DIRECTORS OF THE RTO/ERO CHARITABLE FOUNDATION

Names and addresses of three (3) incorporators who will be the first directors of the Foundation e.g. President, Vice-President, Executive Director.