SIMON FRASER UNIVERSITY
RETIREES ASSOCIATION
1998 – 2008
As part of its preparations for celebrating the Tenth Anniversary of SFURA, the SFURA Executive Board decided to gather and publish information about the Association’s history. To begin, they invited the original steering committee and all former and present boards to a storytelling session on January 23, 2008. The people who came are on the cover in this order:

John Walkely, John Walkley and Harry Evans*, Harry Evans, Lionel Funt, Bob Horsfall, Marilyn Cairns
Marvin Wideen, Evelyn Palmer, Roy Carlson
Norman Swartz, Doreen Badgero, Len Evenden
Margaret Jones, Len Evenden and Bob Horsfall, Elizabeth Michno

Some of the information they provided appears in this booklet. All of it will be kept on file by SFURA. Their stories were recorded and a transcript of the session will be made available to members.

For articles about the formation of the SFURA see:

Cover design by Leigh Palmer

© Simon Fraser University Retirees Association, Burnaby, BC V5A 1S6 Canada

* Picture courtesy of SFU News. All other pictures by Leigh Palmer.
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message from the President of SFU</td>
<td>2</td>
</tr>
<tr>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>Historical Reflections</td>
<td></td>
</tr>
<tr>
<td>I &quot;The Beginning&quot; by John Walkley</td>
<td>4</td>
</tr>
<tr>
<td>II &quot;The Early Days&quot; by John Walkley</td>
<td>6</td>
</tr>
<tr>
<td>III &quot;The Expansion Years&quot; by Janet Blanchet</td>
<td>8</td>
</tr>
<tr>
<td>IV &quot;Extending the Mandate&quot; by Marvin Wideen</td>
<td>9</td>
</tr>
<tr>
<td>V &quot;Where Do We Go From Here?&quot; by Norman Swartz and Marvin Wideen</td>
<td>10</td>
</tr>
<tr>
<td>Board Members, Supporting Positions,</td>
<td>12</td>
</tr>
<tr>
<td>and the Steering Committee</td>
<td></td>
</tr>
<tr>
<td>Member Services</td>
<td>13</td>
</tr>
<tr>
<td>Acknowledgements</td>
<td>15</td>
</tr>
</tbody>
</table>
A MESSAGE FROM SFU PRESIDENT MICHAEL STEVENSON

Congratulations to the Simon Fraser University Retirees Association on its 10th Anniversary. You can be justifiably proud of your success in providing social and intellectual programming and activities that engage, inform, and encourage our retirees to stay active and involved. SFURA’s activities not only reinforce the University’s commitment to inclusion and to lifelong learning, they make a valuable contribution to the cultural life of SFU and to the well-being of its members. I wish you every success in your next 10 years.

Michael Stevenson

President and Vice-Chancellor
INTRODUCTION

Eleven years ago, when a small group of people met to discuss forming an association for SFU retirees, they weren't the first to do this. SFU President Saywell had launched a discussion in 1990, but not enough people had retired to make it happen. In 1997 the people who came together decided the time had come. SFU was almost 32 years old and had 42 eligible retirees. In less than a year, these founding members recruited a steering committee, wrote a constitution, and established the Simon Fraser University Retirees Association.

Since then SFURA has grown to 385 members and developed a wide range of events, benefits and activities for members to enjoy. In 2008, as the executive board prepared to celebrate the Association's tenth anniversary, we decided steps should be taken to preserve the organization's history. This booklet is a modest product of that goal and represents considerable digging, recalling, and recording of information. Behind it lies a new storehouse of information that will be available in the future. We offer our thanks to the many people who contributed to the booklet and helped us expand SFURA's historical records.

You will find here reflections, lists of members who have served on executive boards and in other positions, and short pieces about SFURA's current services and recreational programs. The historical reflections, which come first, appear in five sections by four SFURA members who were major players during the periods they discuss. John Walkley wrote parts one and two on the founding process and the early days. No one knows this part of our history better than John; he was president of the steering committee and served as president of the Association for the first six years. In the third section Janet Blanchet discusses how the Association developed and expanded under presidents Donna Laws and Bill Yule. Janet acted first as secretary, then editor of the newsletter, from 1998 to 2007. Next Marvin Wideen, who began serving the board as vice-president in 2003, tells us what happened during his term as president, 2005 to 2007. Finally Marvin and Norman Swartz, our current president, speak to us about challenges during the past year and what lies ahead.

We welcome your support of the SFURA. You can find our constitution and other historical and current information on our website, http://www.sfu.ca/retirees. You may also write us at SFU Retirees Association, TC2002, 8888 University Drive, Burnaby, BC V5A 1S6.

THE 2007-2008 SFURA EXECUTIVE BOARD

Len Evenden, Bob Horsfall, Margaret Jones, Elizabeth Michno, Evelyn Palmer, Tom Poiker, Norman Swartz, Marvin Wideen, Dorothy Wilson-Arnett
   by John Walkley

During the summer of '97, a group of SFU retirees talked over lunch about putting
together a retiree association. It was, after all, some 31 years since the opening of SFU,
and several of our colleagues had achieved the status of being retired or were about to
achieve that stature. Harry Evans said he had talked to Thelma Finlayson and Bryan
Beirne, who had been to the annual meeting of the Canadian Academic Emeritus
Retiree Association (CAERA). After hearing what they had to say, we realized we had
an advantage over retiree groups at aged institutions. Those of us now retiring had
been early-years builders of SFU, and central to that was a tremendous and very real
respect among all involved. Harry also said we had a good example to encourage us.
The retiree association at the University of Victoria, which had been formed in 1994,
encircled all retirees, was thriving and had a very active social program. They
would be an important resource for us.

The moment was appropriate, so in true SFU fashion a committee was formed. This
steering committee came together on Sept. 15th, 1997 with Doreen Badgero, Tom Bell,
Marilyn Cairns, Roy Carlson, Harry Evans, Tom Mallinson, George Stuart and John
Walkley, chairman. How did one go about forming a retiree association? Well, over the
past thirty years had we all not heard questions like that before!

Harry had already done some homework. He had found that there was no place
in the University Act for a retiree association to be recognized, and that the Province
required all such associations to register their constitution under the Society Act.
The steering committee quickly agreed that being independent from SFU meant we
would not have to report to the board, or the president, or the senate . . . a relief to
all. But being separate from the university posed a question as to whether we could
use Simon Fraser University in our name. Also, registering our association with the
province would cost money. We had none, though the protection this would give to our
Association was certainly worth having.

The steering committee talked to SFU president Jack Blaney. To our delight he
welcomed our idea, he let us use the name we wanted, and he provided some start-up
monies to allow our eventual registration.

Registration as an association had many requirements. For example, we had to have
an elected board and a named president, secretary and treasurer. As we addressed these
conditions our constitution gradually took shape. We agreed that the elected executive
board should be small (six people) and that it should be elected each year at the annual
general meeting, with only those attending the AGM allowed to vote. We limited the
president’s term of office to two years and kept the past president on the board for another term. Realizing members could elect a board with no one willing or capable to be secretary or treasurer, we allowed the board to appoint two others to the executive.

People from the University of Victoria and University of British Columbia retiree boards provided many useful insights. Like UVic, we decided we wanted an association open to all retirees—staff, administration and faculty. We found that using the university’s list of retirees was a good way to determine who would qualify and to prevent a possible argument. When we learned that the UVic and UBC associations took care to look after the concerns of their members, we endorsed the intention of having committees with talents appropriate to those committees.

The role retirees would play within the university was a difficult matter. They had useful experience, but as the Association was not a part of the university we could not expect to place them on university committees. And being an association of and for all retirees, it was incumbent upon us not to get involved in university professional or union issues. We thought it better, perhaps, to follow the adage that the young have visions and the old have dreams, even if we couldn’t put it into the constitution and didn’t believe it anyway!

The steering committee was lucky to have the multi-university experience of Harry Evans, the real-world experience of George Suart, and the legal eye of Marvin Stark, who was always ready to read what we had written. And so with the hard work of all members of the committee, we crafted a constitution that recognized the requirements of the province, our position within the university, and the best interests of future retirees.
HISTORICAL REFLECTIONS

II. THE EARLY DAYS (1998-2001)

by John Walkley

The first general meeting of the SFU Retirees Association, held April 23, 1998, was a test for the work the steering committee had done over the past six months. We had sent the constitution we had drafted to retirees with the help of Alan Black of SFU’s Human Resources Department. Since we could not be given the addresses of the retirees he had us put our material into envelopes that he arranged to address and mail. This gift to the Association illustrates the sort of arm’s-length support the Association has always received from Human Resources and the President’s office.

We wondered whether retirees would like an association that included all retirees (unlike those at most other universities), and whether they would like the proposed independence from the university. Would they even want to come to the meeting and socialize with those they had battled with for 20 years or so?

Forty-eight people came to the meeting, almost all the then retirees. They ratified the constitution unanimously and suggested many things the Association could do. At last we were ready to be recognized as an official association under the BC Society Act.

Incorporation under the Society Act was achieved in June 1998 and the election of our first executive board took place on October 20, 1998. At our dinner meeting that evening at the Diamond University Club we agreed that this first elected executive would operate until April 1999, when we would elect our subsequent executive. Thus we would establish our year as running from April to April. The first executive consisted of John Walkley (president), George Suart (vice president), Janet Blanchet (secretary), Harry Evans (treasurer), Donna Laws (events), Norman Swartz (communications), Lionel Funt and Tom Mallinson (benefits).

The executive elected in April of 1999 was similar to the previous one except for Marg Jones becoming treasurer. These early executive committees achieved much that is part of the Association today. In the first six months we started a newsletter and website, we met with the retiree associations of both UVic and UBC, and gained perhaps the most wonderful reward possible for a $20 membership-free (occasional) parking on campus, won for us by George Suart. Lunchtime and evening talks at the Diamond University Club became popular occasions. We later met for these at the Coquitlam Best Western Inn, but soon we started using the Halpern Centre, thanks to Penny Southby.

The election in 2000 saw Donna Laws, Don Kirschner and Bill Yule come onto the executive board. With the program of the Association established, the membership
continued to grow. In April 2001 the university gave us some office space shared with Linda Denley (Back-to-Work Coordinator). For this the Association bought some office furniture, so now we had a home. The 2001–2002 executive had Donna Laws as Association president, ably assisted by Marvin Stark, Marvin Wideen and the rest of the executive board, and Penny Spagnolo, who agreed to run our open-one-day-a-week office.

Janet Blanchet and Bev Carlson expanded the social program. Retirees enjoyed a Saturday at the Hastings Park Race Track, morning hikes along the Steveston shore with lunch at a tasty fish-and-chip restaurant, matinee performances at local theatres, and even a lunchtime barbecue at the student pub. Because dark evenings and bad weather made parking on campus difficult, we moved the two annual Association dinners to the Eagle Creek Golf Course Restaurant. We added an Ides of March afternoon party to our regular entertainment calendar, a free event with appetizers and wine. This reflected the fact that the Association enjoyed a healthy bank balance, thanks to the efforts of Marg Jones.

Even as the social life of SFURA expanded, the executive committee grew increasingly aware of serious matters facing the membership. Questions arose concerning medical plans, dental plans, travel medical insurance and the ability of retirees to have support from their departments for their continuing research. Bill Yule, Lionel Funt, Marvin Wideen, Marvin Stark, Bill de Vries, and Don Ramsay worked hard on these issues. Alan Black and Julia Zima of Human Resources gave us considerable support.

In our meetings with the retiree associations from UBC and UVic, we discovered they were addressing similar concerns. Together with these two associations we achieved a beneficial travel insurance medical plan. The same issues appeared as important topics for the CAERA Conference (May 2002). With the generosity of the President’s office John Walkley and Marvin Stark attended this conference in Toronto, which spawned a useful new organization called CURAC (College and University Retiree Associations of Canada).

In these first five years the membership grew from approximately 50 to around 200, these being the years over which the largest yearly percentage of staff and faculty would retire. The original vision of the Association had been a good one. It had become a vigorous and well-supported entity and reflected well the enthusiasm and energy of those who had put SFU together some 35 years earlier.
HISTORICAL REFLECTIONS

III. THE EXPANSION YEARS (2001-2005)
by Janet Blanchet

John Walkley has outlined the process of setting up the steering committee for a retirees association for Simon Fraser University and of writing its constitution. In the beginning, in 1997, the Simon Fraser University Retirees Association (SFURA) essentially functioned as a network that allowed individuals who had spent their working years at the university to keep in touch, both with their colleagues and with the university. SFURA was mainly a social organization, and it was very successful. The SFURA executive board met once a month, there was an annual general meeting and dinner, and as well an annual reception.

In 2001 Harry Evans recruited me to be a member of the executive board and I always enjoyed the meetings. At first I worked as the secretary of the executive board and later as the editor of the SFURA Newsletter. Besides business items this usually contained interesting accounts of travels and expeditions undertaken by retirees. In my capacities I had the pleasure of working with Bev Carlson, Marg Jones, Donna Laws, Bill Yule and many others, all of whom contributed notably to the success of SFURA.

Bev Carlson, a member of the original executive board, organized a fine series of entertainments for us. Members attended concerts, toured the watershed behind the Capilano Dam, and visited a cannery at Steveston and the Granville Island Brewery. In addition to enjoying these events we liked keeping in touch. We also liked being able to express our interests and contribute ideas for excursions. The success of SFURA could be measured by the gradual increase in membership numbers.

More serious topics raised at the board meetings from time to time included concerns related to travel insurance for seniors, reciprocal membership arrangements with other universities, and the need for and function of a proposed retirees centre on the Simon Fraser campus. Regarding travel insurance, we learned always to read the fine print and to watch for subrogation and expenses not covered. Another topic that surfaced was liability insurance for events organized by SFURA. As such serious topics reached the executive board, the role of SFURA gradually changed. The board also saw the need to establish a more visible presence on campus, not only by means of the proposed retirees centre, but also by taking positions on issues that might be considered political, such as medical care in BC.

Along with growth in our membership, our expanding role has begun to change the orientation of our Association. No longer simply a social club for retirees, the Simon Fraser University Retirees Association has become a distinctive and viable presence on the university campus.
HISTORICAL REFLECTIONS

IV. EXTENDING THE MANDATE (2005-2007)

by Marvin Wideen

The two-year period of my term as president of SFURA saw the consolidation of programs that had been earlier introduced, along with new opportunities and plenty of debate. Beverly Carlson continued to nurture the social program before passing the job to Elizabeth Michno during the second year. They arranged activities in locations all over the Lower Mainland and trips to a variety of cultural events. Janet Blanchet carried on as editor of the newsletter; Margaret Jones remained in charge of money and membership, and University liaison. Marvin Stark and John Walkley continued to advise the executive board on legal and administrative issues. The monthly seminar series established by Evelyn Palmer in 2004 drew audiences from all areas of the university. Topics ranged from hobbies and travel to science and finance.

SFURA had a table at the SFU open house in 2005. Also that year CURAC, the College and University Retiree Associations of Canada, met in Vancouver. Bill Yule led an SFURA committee that planned the conference jointly with UBC. After hearing discussions at the conference about retiree centres, we developed a proposal for one at SFU. The idea prompted plenty of debate about the viability of such a structure, as well as a trip for some board members to see the University of Washington retirees centre. The SFU administration reviewed our proposal for a centre favourably and increased our office space on campus. As stated below, our next challenge will be to provide staff and infrastructure to support our activities.

By chance SFU’s 40th anniversary in 2005 opened a new enterprise for the Association. In a simple conversation with SFU President Stevenson, I happened to mention our interest in creating an oral history, a concept raised earlier by Bev Carlson. Shortly after that he referred me to SFU Vice-President Warren Gill to pursue the idea in relation to coming celebrations. We followed up with a winning proposal to the Anniversary Committee to record stories of early staff, administration and faculty about their experiences in building SFU. Soon we had produced a DVD: The Excitement of the Early Years. After this came The Instant University (2006–2007) and Thelma Finlayson—A Conversation with John Webster (2007). Francis Campbell and Joel Schwarz of SFU’s Learning and Instructional Development Centre provided the help we needed to make our DVD projects a success.

Another project the executive undertook was to survey the membership. The 125 responses we received have given us data for planning. We also examined the notion of liability insurance for people working for SFURA and discussed ways to enable members to make charitable donations to the Association.

This busy two-year period proved to be enjoyable and productive for SFURA.
V. WHERE DO WE GO FROM HERE?

by Norman Swartz and Marvin Wideen

To a certain extent we can easily see some [aspects, directions, points?] of how this Association will continue. Our many, and varied, social events — lunches, dinners, tours, outings, theatre-attendance, concerts, and the like — will endure. So, too, will our extremely well-received noontime seminar series. Indeed that series has become so popular and so well-attended, that we may have to increase the frequency of offerings. Even now, we have a number of speakers keen and committed for next year.

And we are looking into some ‘projects’ that are larger than any we have attempted to date. Some members, for example, have expressed an interest in working with travel agents to create group tours to places fairly distant from Burnaby, e.g., to Las Vegas, to Hawaii, to Mexico, to Asia, and to Europe.

And we will be discussing with you the possibility of creating a Retirees Centre at SFU, as has been done on many other campuses in Canada and the US.

We have enjoyed an explosive growth in our membership, from about 50 in the beginning to now close to 400. We will likely pass 400 members in this calendar year. Welcoming ALL retirees at SFU, not just from a select cohort (e.g., just senior professors), we have become one of the largest university retirees’ associations in Canada. But our very size poses certain problems that were not foreseen at the outset.

- Some changes in our Constitution may well be wise in the next year or two. It would be good to design, and formalize, a method that is guaranteed to bring some new members onto the Executive each year.

- We need to rethink the daily operation of this Association. It is becoming increasingly more difficult to run such a large association using only volunteers.

The hours upon hours each week that the members of the Executive put into managing our finances, fielding questions from our membership, planning events, writing the newsletter, preparing our mailings, maintaining our website, applying for grants, and ... and ... is invisible to the wider membership. But this mode of operation cannot continue.

We need to look to secure a stable financial base so as to be able to hire part-time staff to look after the routine affairs of the Association. An expert consultant has told us that very few volunteer organizations that were active in the Twentieth Century have endured as such today. Those that have endured have done so only because they have remunerated staff to attend
to the day-to-day operations. As it is, the dues charged by this Association will not even buy us a telephone line to our offices, or let us hire someone to answer a phone.

- Another challenge facing the Association is the clear need to purchase liability insurance.

- Our newly-created Benefits Committee has a number of issues to deal with, not least of which is to explore how the Association can be most effective in securing the medical benefits to which we are entitled - faced with a provincial medical system which is severely stressed (too few doctors and nurses, long wait times, etc.)

We want to preserve everything that we have all so very much enjoyed in belonging to this Association: the socializing, the free occasional on-campus parking, the food (always our most well-attended events!), the getting to meet and coming to know persons whom we never seemed to have met as employees, the camaraderie, and the like. But to preserve and expand these successes and to address the challenges facing us, we will have to discuss with, and enlist from you — our members — your wellsprings of ideas and experience.
MEMBERS OF THE SFURA EXECUTIVE BOARD 1998 - 2008

C. Rod Day 2002–2003
Len Evenden 2008 VICE-PRESIDENT 2008
Lionel Funt 1998–2001
Tom Mallinson 1998–1999
Marvin Stark 2001–2007

SUPPORTING POSITIONS

Penny Spagnolo maintained the email forum 2001–2008 to distribute SFURA news and enable members to exchange ideas.

Norman Swartz was webmaster 1998–2004.
Leigh Palmer was webmaster 2005–2008.

THE STEERING COMMITTEE

The Steering Committee served from September 1997 until the first executive board was elected in October 1998. The members were: Doreen Badgero, Tom Bell, Marilyn Cairns, Roy Carlson, Harry Evans, Tom Mallinson, George Suart, and John Walkley, President.
MEMBER SERVICES

The story of SFURA began with a small, ambitious group of people with a large goal. Once they succeeded in setting up the Association, they went on to fulfill their purpose through a broad range of activities. In 2008 these are organized in five categories of member services and arranged by respective committees.

Social Events
Throughout the years SFU retirees have participated in a wide variety of social activities, such as:

- sporting events like Hastings park horse racing and baseball, football and basketball games
- tours of museums, farms, breweries, wineries, places of worship and gardens
- cultural events like the theatre, concerts, operas and choral performances
- boat cruises, outdoor barbecues and bowling
- dining out at twice-a-year catered dinners, an annual Ides of March celebration, drop-in lunches at various restaurants, and noontime concerts and lunch

Seminars
The SFURA offers a popular seminar program open to the entire university community. About once a month during the fall and spring semesters SFURA members showcase their interests. Since the series began in September 2004, topics have included travel, photography, the history of SFU, politics in BC and the USA, investing, mathematics, astronomy, biology and climate science. The talks take place in Room 126 of the Halpem Centre on selected days.

Communication
The SFURA Newsletter, the major means of communication for the Association, is mailed to members several times a year. It announces SFURA activities as well as other events that may appeal to our group. The president of SFURA writes a column for the newsletter and committees submit regular reports. The editor of the newsletter welcomes contributions from members.

SFURA sends members with email addresses announcements about SFURA activities and news of SFU events that may interest them.

The SFURA also maintains a web page, www.sfu.ca/retirees, which contains our constitution, a statement of our purpose, lists of past and coming events, links to our benefits, and several other links. We can be reached by mail at SFU Retirees Association, TC2002, 8888 University Drive, Burnaby, BC V5A 1S6.
**Interest Groups**

In 1997 SFURA launched the first of its interest groups, with more to be set up in the future. The groups formed so far focus on financial planning and computers. We anticipate groups for art, crafts, music, photography, sports or any other recreation that interests members. Members are encouraged to form and lead groups and will receive assistance from the board in setting them up. Meetings can be held at the SFURA office (AQ 3048), in other campus facilities or off campus.

**Benefits**

Recently the board established a Benefits Committee to tackle issues that concern our members. While they continue to work out their mandate, the committee has identified two ways they can probably be of service to SFURA:

- collecting information on benefits issues
- comparing our situations with those of other universities

The committee has begun to gather material on these topics with help from other members.
ACKNOWLEDGEMENTS

The Retirees Association wishes to acknowledge the generous support of Simon Fraser University Presidents Jack Blaney and Michael Stevenson, of Vice-President Warren Gill, and of Miranda Brown and Alan Black of the Human Resources Department.

Thanks to the SFURA Tenth Anniversary Committee: Elizabeth Michno, Evelyn Palmer and Marvin Wideen.