

# 2023

Annual Report



The Alberta  
Teachers' Association



The Alberta Teachers' Association



ALBERTA  
TEACHERS'  
ASSOCIATION

# MISSION STATEMENT

The Alberta Teachers' Association, as the professional organization of teachers, promotes and advances public education, supports teachers' 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, and
  - f. by advising, assisting and protecting members in the discharge of their professional duties and relationships;
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.

# TABLE OF CONTENTS

Message from the President / 4

Message from the Executive  
Secretary / 6

Provincial Executive Council / 9

Membership / 11

Operating Expenditures by Program  
Area / 12

Committee Members / 13

Awards / 17

## > **Government**

Governance / 20

Annual Representative Assembly / 21

Summer Conference / 22

Local Presidents' Meetings / 25

Regulatory Affairs / 25

Professional Conduct and Practice  
Review / 26

Legislation / 27

Representation to the Government of  
Alberta and Other  
Political Bodies / 28

Liaison with Alberta Organizations / 28

Liaison with Canadian Educational  
Organizations / 29

Canadian Teachers' Federation / 29

International Cooperation and  
Partnerships / 30

Educator Exchange Programs / 30

Support for External Projects and  
Initiatives / 31

External Communications / 31

Advocacy, Communications and Public  
Education / 33

Political Engagement / 34

Diversity, Equity and Human  
Rights / 35

Women in Leadership / 35

Strategic Planning Initiatives / 36

Research / 37

Library Services / 40

French Services / 41

## > **Teacher Employment Services**

Local Associations / 44

School Representative Program / 45

Member Assistance / 47

Staff Relations Service / 47

Healthy Interactions Program / 47

Teacher Growth, Supervision  
and Evaluation / 47

Program for Substitute Teachers / 48

Collective Bargaining / 49

Grievances / 49

Appeals to Alberta School Employee  
Benefit Plan and Other  
Insurance Matters / 50

Teacher Welfare Education and  
Communication / 51

Pensions and Retirement / 52

Field Service / 53

## > Professional Development

Professional Practice Standards / 56

Curriculum / 56

Inclusive Education / 56

Indigenous Education / 57

Teacher Education and Certification / 58

Teacher Qualifications / 58

University Liaison / 59

Inductions / 59

Program for Beginning Teachers / 60

Mentorship Program / 60

School Leadership Programs / 61

Specialist Councils / 62

Teachers' Conventions / 64

Professional Development  
Facilitators / 65

Indigenous Education Professional  
Development Facilitators / 66

Association Instructors and Association  
Administrator Instructors / 67

Online Professional Development / 68

Field Service / 68

## > Operations

Human Resources / 72

Document Production and  
Distribution / 73

Publications / 74

Information Technology Services / 75

Records Management / 75

Archives / 75

Regulation Compliance/Privacy and  
Canada's Antispam Legislation / 75

Buildings / 76

Funds and Expenditures / 76

## > Financial Statements

Auditor's Report / 78

Financial Statements / 80

## MESSAGE FROM THE PRESIDENT



The year 2023 has been filled with both adversity and success for the teachers of Alberta. Throughout 2023, the Alberta Teachers' Association continued to advocate for teachers and students in several key areas, including curriculum development, collective bargaining, human rights, the Association's regulatory function and publicly funded public education.

First, the Association continued to address the development and implementation of new curriculum at the elementary level and successfully halted the social studies curriculum. The government committed to revising the curriculum and to working cooperatively with the Association to create this new iteration.

➤ ***In our work, we endeavour to protect not only our teachers but also the students in this province.***

Even though the advocacy efforts in the area of curriculum had some positive outcomes, teachers were still left without resources to navigate through new curriculum and without an implementation plan from the government. Into the new year, the Association will continue to engage in advocacy in this area.

The Association, along with local bargaining committees, also continued to pursue improved working conditions through local collective bargaining. Many bargaining units reached local agreements. This, however, was not the case for all. Many locals went as far as taking a strike vote to get an agreement that was satisfactory to the teachers in the division. The work that local bargaining units went through is valued and impressive. Finally, locals were introduced to the member organizing strategy for teachers in the province to participate in, which will be implemented over the next two years as central bargaining continues.

Advocacy efforts continue on behalf of teachers after the government introduced and passed Bill 15, the *Education (Reforming Teacher Profession Discipline) Amendment Act* in May 2022. The bill removed the regulatory function from the Association and placed it with the Department of Education (Government of Alberta). The regulatory function was transitioned to the government in 2023, and the Association is working to ensure that teachers are provided fair process. The Association will continue its work to uphold the teaching profession and to support its members into the future.

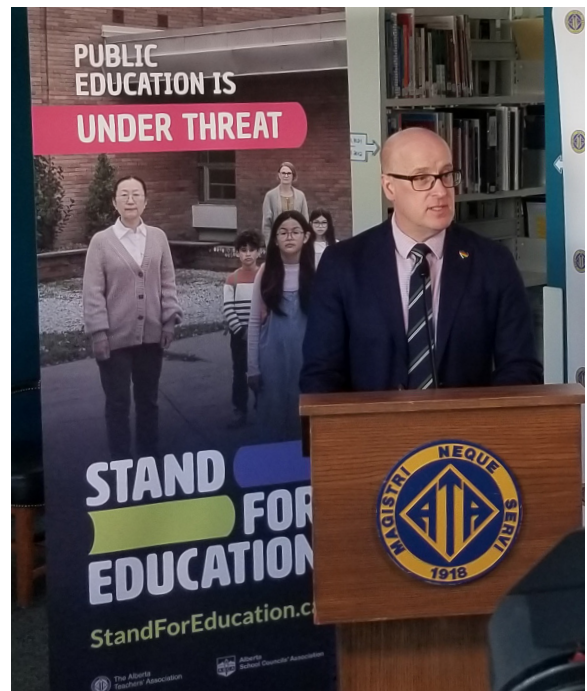
After the 2023 Annual Representative Assembly, it was noted that a policy on human rights was required to articulate the expectations for member conduct during Association events and a process for dealing with harassment or discriminatory conduct. As a result, a human rights statement was developed and implemented. This statement, read at the outset of all Association events, serves as an important reminder of the expectations at Association events. It also serves to communicate the values of the Association as an advocate for human rights.



In our work, we endeavour to protect not only our teachers but also the students in this province. On September 20, 2023, a rally protesting education related to gender and sexual minorities was held outside of Barnett House. It was a very difficult day for both Association staff members and teachers in our province. The incident culminated with our Pride flag being torn down, shredded and left on the ground. It took great resolve to move forward in the face of such hate, but as teachers, we did. Even in the face of intolerance, we will continue to support all teachers and students in Alberta.

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



One challenge of producing the Association's annual report is that, however comprehensive it may be, the narrative is never complete. There are events, trends and issues not adequately captured in the rather institutional prose that appears in the following pages. I would like to make mention of several of those here.

A significant development affecting teachers and the Association in the past year is the erosion in our province of citizens' shared sense of community and the impact on schools, teachers and students. Albertans have become more polarized, with the result that much discourse around public education has become truly rancorous. Symptomatic of this rancor are uninformed attacks on teachers and public education. Stoked by social media, encouraged by cynical politicians and amplified by small but vocal special interest groups, these attacks are part of a larger effort to undermine public confidence in our community-based schools and to create support for private alternatives that have little commitment to the civic values of inclusion and equity that characterize public education.

The erosion of public education is also material. Over the years, funding for public education has failed to keep pace with inflation and enrolment growth—to the point that Alberta's per-student funding of

education is now the lowest in the country. The effects of this are entirely predictable: class sizes continue to increase, support for students with special learning needs continues to be diminished, and the construction of new schools to support our burgeoning student population is falling short. Teachers struggling to do their work in such circumstances are demoralized, frustrated and increasingly angry. The growing shortage of qualified teachers across the province is exacerbated by the difficulty of recruiting and retaining good people to work in such bad conditions.

There are, however, always signs of hope and resilience, even in difficult circumstances.

One source of my admittedly battered optimism is the commitment of Association staff to upholding the highest standards of service to teachers and to the profession. One of many examples in the last year is the herculean effort of staff throughout the organization (assisted by retired colleagues, contractors and legal counsel) to clear all remaining professional discipline cases under way, in the process of transitioning to the Alberta Teaching Profession Commission. Regrettably, the commissioner's record thus far is unimpressive, typified by administrative errors, delays and a failure to effectively exercise the discretion afforded to her. The result is a process that is unfair to teachers, the profession and those members of the public who are attempting to raise legitimate concerns. Despite this, the Association continues to collaborate with the commission in order to improve its process and to represent members caught up in it.

Another source of hope is the government's gradual re-engagement with the Association. With the appointment of the Honourable Demetrios Nicolaides as minister of education, Alberta Education seems to be more willing to consult with teachers and the Association on critical issues facing education, including recruitment and retention, certification, curriculum, and policy. The government appears to be listening and is learning that the Association can draw upon the expertise of its members and its deep understanding of the education system to inform decision-makers.





Above all, I draw hope from the fundamental goodness of the teachers who make up this Association. An odd but compelling example that comes to mind is the response mounted by Alberta teachers when a wildfire forced the emergency evacuation of the city of Yellowknife in August. Within a day of the order, the call to help went out. Association staff constructed a website and a registry to organize billets for displaced teachers and their families. By the end of the week, over 300 members had volunteered to welcome their colleagues from the Northwest Territories into their homes. I see this as a demonstration of who we are. Teachers understand the value of community and citizenship and recognize the imperative to help others whenever we can; we try to instill these values in our students, and we live them.

The challenges we are facing are not going to go away. Indeed, I am concerned about the prospects of teachers and the profession in the year ahead. We will be facing more of the same, as well as new challenges around central table collective bargaining. We will be called upon again to exercise professional judgment and courage in order to safeguard our students and ensure that our schools remain safe and caring places for all students, despite external threats and pressures.

But we are not facing the future individually. We will stand united as teachers and in solidarity with the vast majority of Albertans who support teachers and the cause of public education. We will, in the face of all our frustrations, continue to find moments of joy in the act of teaching and encouragement in those moments of classroom magic that fill our hearts and remind us of why we chose this profession.

Dennis Theobald  
Executive Secretary



# PROVINCIAL EXECUTIVE COUNCIL

## Table Officers



Jason C Schilling  
*President*



Greg P Carabine  
*Vice-President*



Peter F MacKay  
*Vice-President*



Greg A Jeffery  
*Past President*



Dennis E Theobald  
*Executive Secretary*

## District Representatives

### Calgary City



Kevin L Kempt



Darren J Moroz



Allison L Scott Davies

### Calgary District



Karen M Nakaska

### Central



Brenton J Baum

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

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

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



Brice J Unland

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



Carmen N Glossop

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



Greg G Meeker



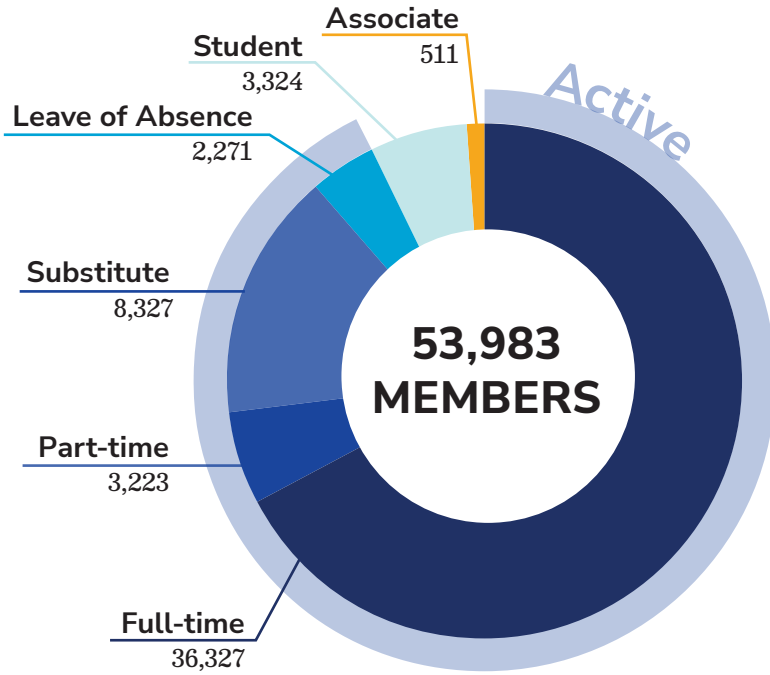
J Jay Procktor



Rhonda A Kelly

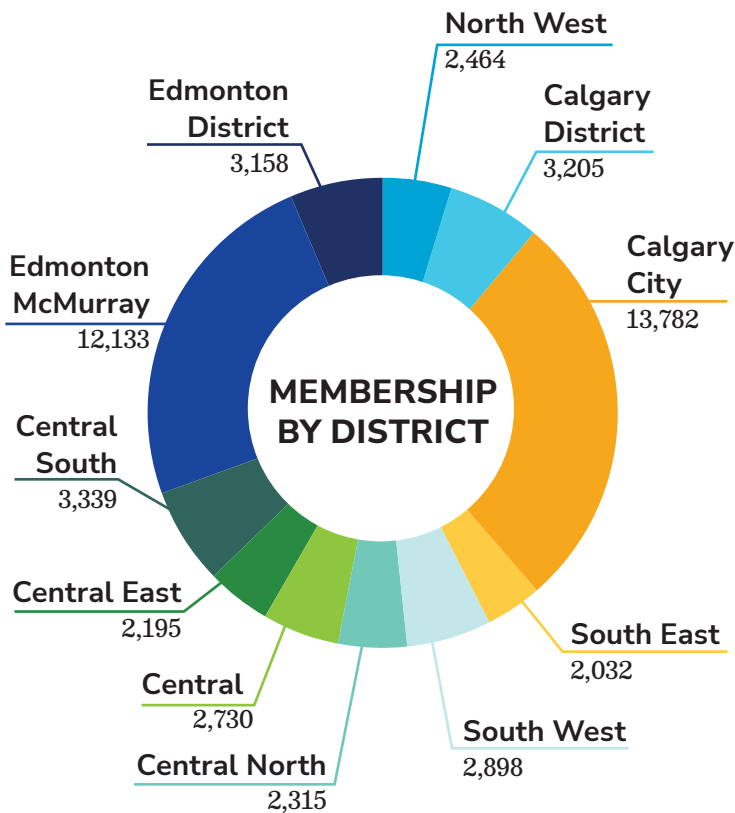
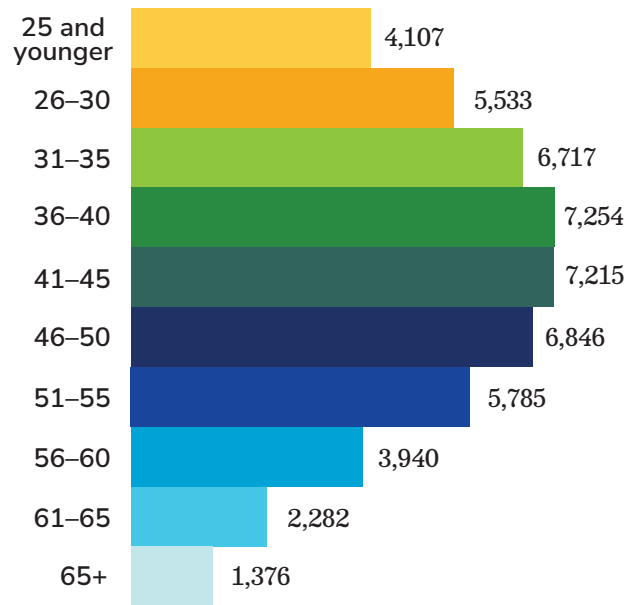
Fort Vermilion Local No 77, Grande Prairie and District Catholic Teachers Local No 42, Greater Peace Local No 13, High Prairie Local No 62, Northern Spirit Local No 6, Northland Local No 69, Trumpeter Local No 26

# MEMBERSHIP

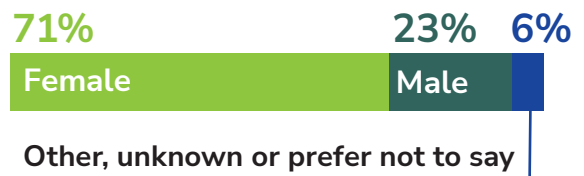


In 2023, the total membership was 53,983. The *Teaching Profession Act* gives certain central office teachers the right to elect active membership, associate membership or nonmembership in the Association. At year-end, 61 per cent of the central office teachers eligible to make an election of membership status had elected active membership, 11 per cent had elected associate membership and 28 per cent had elected nonmembership.

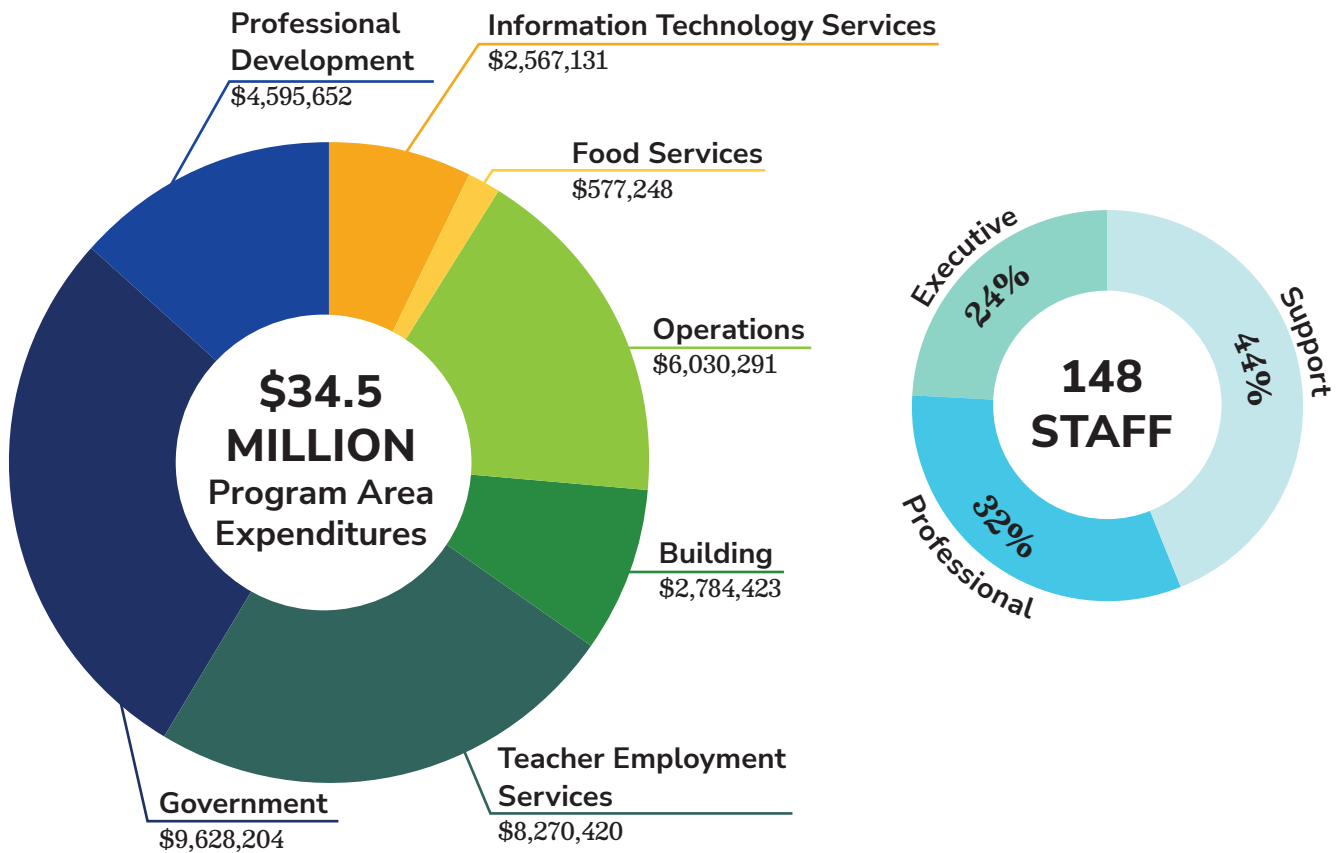
## MEMBERSHIP BY AGE



## MEMBERSHIP BY GENDER



# OPERATING EXPENDITURES BY PROGRAM AREA



Note: Nondepartmental and nonrebatable expenses not included.



**197 days**  
on average worked by each executive staff officer



**7,157 participants**  
attended 200 workshops by Association instructors



**14,656 km**  
travelled by each executive staff officer, on average, on Association business



**432,603 visits**  
to the Association's new website



**15,742**  
contacts with members by Teacher Employment Services staff



**4,122 research and information questions**  
answered by ATA library staff

# COMMITTEE MEMBERS

## Standing Committees

Membership as of 2023 12 31

### Benefits, Insurance and Pension Committee

Kevin Kempt (Chair)  
Brenton Baum  
Sean Brown  
Marjorie Charles  
Jay Duffett  
Eve Godin  
Erica Good  
Anne-Marie Huizing  
Stefane Kreiner  
Waishing Lam  
Luigi Pollio  
TBD (Alberta Retired Teachers' Association [ARTA])  
Myra Rybotycki (Secretary)  
Sue Beyer (Administrative Secretary)

### Central Table Bargaining Committee

Peter MacKay (Chair)  
Rick Kremp  
Robert Mazzotta  
Heather McCaig  
Allison Scott Davies  
Brice Unland  
Sean Brown (Secretary)  
Debbie McAvoy (Administrative Secretary)

### Communications, Advocacy and Public Education Committee

Brenton Baum (Chair)  
Melanie Buckley  
Murray Lalonde  
Joshua Overland  
Allison Scott Davies  
Melanie Stevenson  
Jonathan Teghtmeyer  
Andrea Berg (Secretary)  
Karen Gill (Administrative Secretary)

### Canadian Teachers' Federation (CTF) Committee

Jason Schilling (Chair)  
Brenton Baum  
Greg Carabine  
Greg Jeffery  
Rhonda Kelly  
Murray Lalonde  
Peter MacKay  
Darren Moroz  
Karen Nakaska  
Katherine Pritchard  
Jay Procktor  
Dennis Theobald  
Brice Unland  
Genevieve Blais (Secretary)  
Debbie McAvoy (Administrative Secretary)

### Curriculum Committee

Heather McCaig (Chair)  
Satinder Dhillon (Alberta Education)  
Craig Findlay  
Teresa Fowler  
Shelley Gartner  
Naomi Herriman  
Terra Kaliszuk  
Cheyenne Kopinsky  
Rick Kremp  
Joshua LaFleur  
Lorrie Makepeace (College of Alberta School Superintendents [CASS])  
Richelle Marynowski  
Ryan McFarland (Alberta Education)  
Philip McRae  
Jade Oldfield  
Jay Procktor  
Megan Senechal  
Nancy Luyckfassel (Secretary)  
Cheryl O'Brien (Administrative Secretary)



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### **Diversity, Equity and Human Rights Committee**

Rick Kremp (Chair)  
Sibin Ammanethu  
Ying Cui (University of Alberta [U of A], Faculty of Education)  
Christy Haggarty  
Rhonda Kelly  
Sarjenka Kuryliw  
James Mcrae Hwang  
Amrit Rai Nannan  
Erin Reid (University of Lethbridge [U of L], Faculty of Education)  
Kristine Wilkinson  
John Williamson  
Gail-Ann Wilson Mitchell  
TBD (Alberta Education)  
Andrea Berg (Secretary)  
Jessica Grayson (Administrative Secretary)

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### **Finance Committee**

Greg Carabine (Chair)  
Paul Froese  
Greg Jeffery  
Kevin Kempt  
Greg Meeker  
Katherine Pritchard  
Dennis Theobald  
Pedro Carriel (Secretary)  
Caroline Inacio (Administrative Secretary)

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### **Indigenous Education Committee**

Dusty Sage (Chair)  
Linda Doyle  
Preston Huppie  
Julia Mcdougall  
Darren Moroz  
Karen Nakaska  
Rod Armstrong (Alberta Education)  
Lisa Cruickshank (Rupert's Land Institute)  
Phillip Campiou (Indigenous Advisory Circle)  
Jeannette MacInnis (Alberta Native Friendship Centre)  
Melissa A Purcell (Secretary)  
Jessica Grayson (Administrative Secretary)

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### **Political Engagement Committee**

Karen Nakaska (Chair)  
Andrew Boylan  
Stephen Gibbings  
Carmen Glossop  
Kevin Kempt  
Jenny Regal  
Kristine Wilkinson  
Jonathan Tegtmeyer (Secretary)  
Kim Clement (Administrative Secretary)

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### **Resolutions Committee**

Peter MacKay (Chair)  
Heather McCaig  
Jay Procktor  
Brice Unland  
Robert Mazzotta (Secretary)  
Shelley Svidal (Administrative Secretary)

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### **School Leaders Issues and Concerns Committee**

Katherine Pritchard (Chair)  
Loretta Bieche  
Dan Coles  
José da Costa (U of A, Faculty of Education)  
Andrew Doyle  
Nella Funaro (Council for School Leadership [CSL] Representative)  
Owen Holloway  
David Hurley  
Lynn Leslie (CSL President)  
Stephen MacGregor (Werklund School of Education)  
Greg Meeker  
Krimsen Sumners (CASS)  
Anthony Warren (Alberta Education)  
Leanne Watson  
Meghan Wiens  
Konni deGoeij (Secretary)  
Sudeep Dua (Administrative Secretary)



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### Strategic Planning Group

Paul Froese (Chair)  
Lisa Everitt  
Rhonda Kelly  
JJ Ondrus  
Jason Schilling  
Dennis Theobald  
Patrick Tomczyk  
Katrina Zack  
Philip McRae (Secretary)  
Shelley Svidal (Administrative Secretary)

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### Substitute Teachers Committee

Murray Lalonde (Chair)  
Kate Cerezo  
Kevin Forney  
Christine Harris  
Christina Jones  
Kara Kuang  
Steven Navratil  
Danny Maas (Secretary)  
Michelle Caron (Administrative Secretary)

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### Table Officers Committee

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

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### Teacher Education and Certification Committee

Darren Moroz (Chair)  
Youssra Badr  
Natalie Townshend  
Ted Wheat  
Rania Eshak (Campus Saint-Jean Area Field Experiences Committee [AFEC] Chair)  
Norma Jani (Edmonton AFEC Chair)  
Larry Neville (Calgary AFEC Chair)

Daphne Sander (Lethbridge AFEC Chair)  
Reggie San Jose (Mount Royal University Student)  
Henry Algera (The King's University)  
Amy Burns (Werklund School of Education)  
Doug Checkley (U of L, Faculty of Education)  
Taran Chohan (Mount Royal University)  
Tim Cusack (Concordia University of Edmonton)  
Maryanne Doherty (U of A, Faculty of Education)  
Dave Elwood (Red Deer Polytechnic)  
Tim Jeffares  
Eva Lemaire (U of A, Campus Saint-Jean)  
Crystal Pelletier (Ambrose University)  
Julia Rheume (Red Deer Polytechnic)  
Susan Wilson  
Amanda Jackman (Alberta Education)  
Eric Dohei (Advanced Education)  
Brice Unland  
Dan Grassick  
TBD (Concordia University of Edmonton Student)  
TBD (St Mary's University)  
Monique Gravel (Secretary)  
Tracee McFeeters (Administrative Secretary)

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### Women in Leadership Committee

Carmen Glossop (Chair)  
Allison Scott Davies  
Sarah Adomako-Ansah  
Adrienne Peoples-Sprecker  
Sana Waseem  
Anne-Marie Huizing  
Lisa Everitt (Secretary)  
Margaret Shane (Administrative Secretary)

# Professional Conduct and Practice

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### Professional Conduct Appeal Committee

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

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### Professional Conduct Committee

Grant Barron  
Corey Borys  
Meagan Kuik  
Heather Quinn  
Wade Westworth  
Sudeep Dua (Administrative Secretary)

# Ad Hoc Committee

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### Committee to Review Summer Conference

Karen Nakaska (Chair)  
Jesse Atkinson  
Greg Carabine  
Kerrie-Ann Dalstra  
Allison McCaffrey  
Greg Meeker  
Michelle Savoie  
Elissa Corsi (Secretary)  
Marianne Moffatt (Administrative Secretary)

## Other ATA-Supported Bodies

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### Advisory Committee on Teacher Education

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

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### Alberta Advisory Committee for Educational Studies

Jody Dennis  
Philip McRae  
Sudeep Dua (Administrative Secretary)

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### ATA Educational Trust, Board of Trustees

Melissa Morton (Chair)  
Stephen Hart  
Sheila Hobday (Public Member)  
Leon Lau  
Kari Morgan  
Violet Oko (ARTA)  
TBD (ATA Staff)  
Neil Hepburn (Administrative Secretary)

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### Returning Officers

Dave Matson  
Kyle McIntosh

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### Teacher Qualifications Committee

Dan Coles (Chair)  
Daniel Balderson (U of L, Faculty of Education)  
Jennifer Branch (U of A, Faculty of Education)  
Angelo Delli Santi  
Jenn Hummel  
Amanda Jackman  
Natalie Townshend  
Ian Winchester  
Susan Wilson (Secretary)  
Lesley Smith (Administrative Secretary)

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### Teacher Salary Qualifications Board

Jason Schilling (Chair)  
Maryanne Doherty (U of A, Faculty of Education)  
Tammy Henkel (Alberta School Boards Association [ASBA])  
Greg Jeffery  
Theodora Kapoyannis (Werklund School of Education)  
Dan Karas (Alberta Education)  
Carmen Mombourquette (ASBA)  
Lisa Starr (U of L, Faculty of Education)  
TBD (Alberta Education)  
Dennis Theobald (Secretary)  
Sudeep Dua (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.*

Richard Rand, KC  
Jacqueline Skytt

Presented at the J W Marriott in Edmonton on Saturday, May 20, 2023

### 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.*

No award presented in 2023

### Educational Research Award

Robbin Gibb, PhD (University of Lethbridge)

### Doctoral Fellowship

David Hurley  
Jacqueline Yu

### Nadene M Thomas Graduate Research Bursary

No award presented in 2023

### John Mazurek Memorial–Morgex Insurance Scholarship

Mélanie Samson-Cormier

### University of Alberta Milton Ezra LaZerte Gold Medal

Emily Hoven

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

Julie Dewilde

### University of Calgary Clarence Sansom Gold Medal in Education

Samantha Bell

### University of Lethbridge William Aberhart Gold Medal in Education

Mahaliah Peddle





# The Alberta Teachers' Association



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2

DENNIS THEOBALD

JENNY REGAL

Philip Campbell

JOHN BROWN

HELEN

NANCY BALL

DARRIN BAUER

BRENTON BAUM

DON BROCKWELL

PAUL FROESE



# 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.

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## Governance

The business of the Association is transacted by an executive committee, known as the Provincial Executive Council (PEC), 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 2023, Council continued to divest itself of responsibility for receiving, reviewing and, if necessary, appealing decisions of the Professional Conduct Committee, as the professional regulatory processes previously undertaken by the Association were transferred to the Government of Alberta (see Professional Conduct and Practice Review, page 26).

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 related to public education with representatives of major political parties and interest groups. The table officers also constitute the Steering Committee for ARA.



In 2023, Council continued to refine its governance processes by participating in professional development on effective governance.

In June, the Association concluded the budget review initiated at the direction of the 2019 ARA. The main objective of the review was to improve the budget process based on the guiding principles of alignment, flexibility, transparency and stakeholder engagement, and efficiency. The findings of the budget review will inform future improvements to the budget process.

Also in June, the Association developed a human rights statement in response to an emergent resolution adopted unanimously by the 2023 ARA. The statement commits the Association to respecting human rights and fostering a safe, secure and healthy environment for all by ensuring that those who are present at or participating in Association programs and events are protected from violence and harassment. The Human Rights Statement is to be read aloud, distributed electronically or provided in print at the outset of all Association meetings, events and activities, including those organized by subgroups, and an appropriate person in authority is to be identified to receive related complaints.

In March 2023, a Council election was held. In the election, J C Schilling was elected president by ballot. G P Carabine and P F MacKay were elected vice-presidents by ballot. G A Jeffery remained in the position of past president.

District representatives elected by ballot were K L Kempt (Calgary City), D J Moroz (Calgary City), A L Scott Davies (Calgary City), K M Nakaska (Calgary District), B J Unland (Central South), P A Froese (Edmonton District), C N Glossop (Edmonton McMurray), G G Meeker (Edmonton McMurray) and J J Procktor (Edmonton McMurray).

Acclaimed district representatives were B J Baum (Central), M M Lalonde (Central East), R C Kremp (Central North), R A Kelly (North West), H D McCaig (South East) and K D Pritchard (South West).

All members of Council were elected for a two-year term commencing 2023 07 01.

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## 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 106th Annual Representative Assembly was held at the J W Marriott Edmonton Ice District in Edmonton on 2023 05 20–22.

Virtual ARA 101 sessions were hosted in advance of ARA to provide delegates with information and an opportunity to participate in a question-and-answer period. In 2023, the following ARA 101 sessions were offered to delegates attending the Assembly:

- Purpose of the Annual Representative Assembly
- Rules of Order and Procedure
- Budget/Finance 101

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

The Assembly was attended by 417 delegates from 55 locals, 2 representatives from the Alberta Retired Teachers' Association Special Local No 1, 3 specialist council observers, 6 student local observers, 6 local observers, members of Provincial Executive Council, staff and invited guests.



The Assembly dealt with 263 resolutions, approving 208 and defeating 42. Five resolutions were referred for study and report, three resolutions were declared as action taken, and five resolutions were not moved.

In addition to debating resolutions, delegates received the annual report of the Association, which included the auditor's report and financial statements for 2022/23, and heard reports from President J C Schilling and Executive Secretary D E Theobald.

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## Summer Conference

Summer Conference, the premier training event for Association leaders, was first held in 1949 in Banff. The 2023 Summer Conference was held in Banff on 2023 08 14–18. Summer Conference was attended by 381 delegates. R T Mazzotta served as director of the conference.

### ➤ ***381 delegates attended the 2023 Summer Conference in Banff.***

The following programs were offered at Summer Conference.

#### Local Association Programs

Fifty-four of the 55 local associations, as well as two Association members from charter schools, were represented at the 2023 local association programs, which are captured below:

- The Introduction to Collective Bargaining Course introduced the collective bargaining process to teachers 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 subgroup representation, communications, duty of fair representation and how bargaining is organized with the Association. K L Wilkinson served as director.
- The Advanced Collective Bargaining Course continued the development of bargaining skills necessary to conduct negotiations on behalf of teachers. Participants had an opportunity to further develop the skills introduced in the Introduction to Collective



Bargaining Course, exploring a more refined model of negotiation theory, analysis of data, preparation of collective agreement language and costing procedures. The course also provided an opportunity for delegates to practise the skills acquired during the week in a bargaining simulation. M J Rybotycki served as director.

- The Initiatives in Leadership Course offered members interested in learning about leadership opportunities a chance to examine key aspects of the work of the Association and encouraged participants to become involved in Association work both as professionals and as citizens of the community. Sessions featured a range of skill-development processes focused on sharpening communication, decision-making, goal-setting, planning, problem-solving and team-building skills. Critical reflective activities helped participants identify their leadership styles, strengths and weaknesses. Further, several leadership frameworks were introduced to identify a leadership strategy appropriate to the challenges facing the profession. L M Everitt served as director.
- The Local Communications Officers' Seminar offered local communications officers professional development (PD) opportunities in areas of communications, public relations, publicity and media relations. Course content was tailored to address the diverse needs of both rural and urban locals. The seminar provided a rich environment for networking and exchanging ideas and materials. A L Berg 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 Course supported local PD chairs and PD committee members in meeting the current professional learning 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 A Gravel and N J Luyckfassel served as directors.

Due to the mediator's recommendation, which was ratified by teachers and the Teachers' Employer Bargaining Association in May 2022, the Bargaining Advisory Committee Seminar was not offered in 2023.

Table 1 (page 24) details participation in the local association programs in 2023.

**Table 1. Participation in Local Association Programs at Summer Conference**

Course	Number of Local Participants	Number of Locals Represented
Advanced Collective Bargaining Course	55	31
Introduction to Collective Bargaining Course	43	28
Initiatives in Leadership Course	34	26
Local Communications Officers' Seminar	32	31
Local Presidents' Seminar	47	47
Local Program Course	37	26
Professional Development Course	58	36

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

Course	Number of Participants (not including PEC)
Convention Seminar	14
Specialist Council Seminar	29
Association Instructors' Seminar	28
Professional Development Facilitators' Seminar	4

### Convention Association and Specialist Council Programs

- The Convention Seminar provided new members of convention association executive committees and boards with an opportunity to discuss upcoming teachers' conventions. Sessions addressed convention finances, privacy laws and best practices in managing information and working with PD subgroups. D W Maas served as director.
- The Specialist Council Seminar—an amalgamation of the specialist council presidents' and conference directors' seminars for 2023—provided opportunities for specialist council executives to hone skills and gain insights in order to meet the professional growth needs of their members. Participants engaged in a series of collaborative and interactive activities on vision setting and strategic planning, governance and operations, member engagement and recruitment, online and print communications, and PD event planning. D R Grassick served as director.

## Association Corps Programs

- The Association Instructors' Seminar provided Association instructors with an opportunity to review the community website and handbook for the corps, learn facilitation skills, and receive training on delivering workshops. T G Kaliszuk served as director.
- The Professional Development Facilitators' Seminar was held in conjunction with the Professional Development 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 and N J Luyckfassel served as directors.

Table 2 (page 24) details participation in other programs and seminars at Summer Conference.

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## Local Presidents' Meetings

In 2023, meetings of local presidents were convened on three occasions.

The first meeting was held in Edmonton on 2023 02 10(eve)–11, with 53 of the 55 local associations, as well as a representative from the Alberta Retired Teachers' Association Special Local No 1, represented. The meeting included an address from President J C Schilling, the Provincial Table Officers Candidates' Forum, a finance and budget presentation, a session on emerging local issues, a question period, a provincial update, and a round-table discussion session.

Participants from 53 of the 55 local associations attended the meeting of local presidents held on 2023 05 19 in Edmonton, in advance of the 106th 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 of the 55 local associations were represented at the meeting of local presidents held in Edmonton on 2023 10 27(eve)–28. The meeting included an address from President Schilling, a provincial update, a session on emerging local issues, a question period, a general session, and a presentation on member organizing and engagement. Participants were also able to attend an issues session of their choice and two round-table discussion sessions.

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## Regulatory Affairs

The proclamation of Bill 15, the *Education (Reforming Teacher Profession Discipline) Amendment Act*, on 2022 05 31, set into motion a process for creating the Alberta Teaching Profession Commission (ATPC) to oversee teacher and teacher leader conduct and competency complaints for the profession. In response to this legislative change, the Association created the Regulatory Affairs and Membership Support (RAMS) unit. The primary function of the regulatory affairs component of the unit is to assist members who find themselves the subject of conduct or competence complaints submitted to the ATPC. During 2023, the Association received 209 requests for representation in relation to such complaints. Table 3 (page 26) summarizes the status of each case at year-end.

**Table 3. Representation of Members in Conduct/Competence Complaints to the ATPC**

Stage	Number
Investigations in progress at year-end	164
Investigations with outcomes/decisions	45
—Member declined representation	3
—Withdrawn	8
—No further action	19
—Dispute resolution	5
—Mediation	8
—Hearing	1
—Prescribed offence	1

## 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, after which Alberta Education assumed responsibility for complaints alleging unprofessional conduct or professional incompetence of all teaching certificate holders in the province of Alberta. The transition legislation required the Association to complete investigations that fell into two categories: (1) those investigations that were under way and could be completed by the Association within a reasonable timeline and (2) those investigations meeting certain criteria under the new regulatory system. Of the 59 requests received by the Association under the new legislation, only 5 fell into the second category.

In total, the Association completed 143 investigations during 2023. While Association staff carried out these investigations under the transitional legislation, each case was commuted to the Alberta Teaching Profession Commission (ATPC) for disposition. The Association completed the final transmission of documents to the ATPC in December 2023 and has no further obligations pertaining to discipline investigations of its members.

For those investigations completed in 2022 where the executive secretary made a decision, final steps for several cases carried over into 2023. Eleven invitations were held in 2023, all of which were resolved to the satisfaction of the Association.

A complainant dissatisfied with the executive secretary's decision that no hearing was warranted could appeal to the Complainant Appeal Committee (CAC), composed of two Association members and one public member. Within the CAC's mandate was the ability to order a hearing or dismiss the matter. In 2023, one CAC review was completed, in which the decision for no hearing was upheld.

In 2023, nine Professional Conduct Committee (PCC) hearings were completed, with each of the investigated members being found guilty of one or more charges. One last PCC case remained in abeyance pending the outcome of court proceedings.

PCC hearing outcomes could be appealed by either the investigated member or Provincial Executive Council to the Professional Conduct Appeal Committee (PCAC), a group composed of four Association members and one public member. Two PCAC appeals were submitted by investigated members in 2023 and are complete, with the required reports to be issued to the parties in early 2024. Two other appeals that had been adjourned in 2022 were submitted by investigated members and are complete. The PCAC committees upheld all PCC findings of guilt in three cases and in two of those cases reduced the fines. In the fourth case, findings of guilt in two of three charges were quashed, while the finding of guilt and the penalty for the third charge were upheld.

Tables 4 and 5 outline unprofessional conduct convictions and penalties in 2023.

**Table 4. Unprofessional Conduct Convictions in 2023**

Nature of Offence	Frequency*
Conduct judged unprofessional	46
—In relation to students	20
—In relation to school authorities	4
—In relation to colleagues	14
—In relation to the profession	8
Conviction on an indictable offence	0
Conviction on other criminal charges	0

\* Some cases involved multiple charges. Nine individual members were found guilty of unprofessional conduct.

**Table 5. Unprofessional Conduct Penalties Imposed in 2023**

Type of Penalty	Frequency*
Reprimand (oral)	0
Reprimand (written)	2
Severe reprimand (written)	9
Fine	25
Course	1
Treatment	0
Recommendation for suspension of certificate	3
Recommendation for cancellation of certificate	4
Suspension from the Association	3
Expulsion from the Association	4

\* Some cases involved multiple charges, multiple penalties or both. Nine members were penalized for unprofessional conduct.

## Legislation

The following bills with implications for the Association or for public education were passed or debated by the Legislative Assembly of Alberta in 2023.

Bill 1—the *Alberta Taxpayer Protection Amendment Act, 2023*, passed in the assembly on 2023 11 07, prohibits the government from increasing personal or corporate income tax rates without Albertans' approval through a referendum. It also prohibits reducing personal income tax bracket thresholds and basic personal, spousal and equivalent-to-spouse credit amounts without a referendum. The bill is of interest to teachers as it could have an impact on education funding in the future if government revenues fall because of economic and market fluctuations.

Bill 2—the *Alberta Pension Protection Act*, passed in the assembly on 2023 12 06, requires the province to hold a referendum before withdrawing from the Canada Pension Plan (CPP) and creating an Alberta Pension Plan (APP). The bill would also guarantee that the APP provided the same or better benefits and lower or equal contribution rates. Teachers, as current contributors to and beneficiaries of the CPP, would be affected should the province withdraw from the CPP, particularly as the design of teachers' pension benefits is based on their being “decked” on top of the CPP entitlements to approximate the 2 per cent per year benefit that other defined benefit pension plans strive to provide their beneficiaries.

Bill 5—the *Public Sector Employers Amendment Act, 2023*, passed in the assembly on 2023 12 07. The bill was intended to address transparency and accountability in public sector compensation, with particular focus on nonunionized public sector employees. The bill does not affect teacher collective bargaining (central or local), because teacher collective agreements are covered by separate legislation, the *Public Education Collective Bargaining Act*.

Bill 202—the *Education (Class Size and Composition) Amendment Act*, sponsored by Calgary-Beddington New Democratic Party member of the legislative assembly Amanda Chapman, called for a return to public reporting of Alberta class size and composition data; the establishment of provincial standards for class size and composition; and the establishment of a Commission on Learning Excellence to look at class size, class composition and other educational issues. The bill was defeated on 2023 11 27.

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## 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 2023 include safety and mental health needs for teachers, students and staff; staff and teacher shortages; class size and classroom complexity; implementation of the draft K-6 curriculum; the impact of assessments on students and teachers; the new professional conduct processes and the Alberta Teaching Profession Commission; safety and supports for the 2SLGBTQA+ community; and bargaining and related matters.

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## 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, 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.

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## 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 contact with their leaders. In 2023, Association representatives attended the Canadian Teachers' Federation/Fédération canadienne des enseignantes et des enseignants (CTF/FCE) annual general meeting, the CTF/FCE Canadian Forum on Public Education, and the CTF/FCE National Staff Conference. Association representatives also attended the virtual Education International 9th World Congress and liaised with Canadian educational organizations as occasions arose.

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## 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. The 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, learning and best practices and engage in collective problem solving. 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. Additionally, the CTF/FCE engages in research through data collection, analyses and reports on issues impacting teachers and teachers' organizations.

In 2023, 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. The Association continues to be represented nationally by J L Regal, who was re-elected for another two-year term as one of five vice-presidents of the CTF/FCE. In her role as CTF/FCE vice-president, Regal served on the Advisory Committee on the Teaching Profession as a CTF/FCE executive liaison in 2023.

The CTF/FCE's 103rd annual general meeting took place in Ottawa 2023 07 12–14. Twelve voting delegates from Alberta attended.

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## International Cooperation and Partnerships

The Association contributes to international cooperation projects organized by the Canadian Teachers' Federation/Fédération canadienne des enseignantes et des enseignants (CTF/FCE) and by other international cooperation partners. In 2023, approximately 69 per cent of the Association's international cooperation funds were earmarked for CTF/FCE initiatives, while 31 per cent of funds were allotted to other international cooperation initiatives.

In 2023, the Association contributed financial support to several international cooperation initiatives, including the following:

- ATA Dominica IT Project Summer Institute—Alberta teachers shared their expertise in information technology in person with teachers in the Commonwealth of Dominica, with a focus on using Chromebooks and Google resources.
- Tools for Schools Africa Foundation—The scholarship program continued to provide access to education for many Ghanaian girls not able to afford schooling on their own.
- Canadian Women for Women in Afghanistan—The Technology for Education program team continued producing, recording and uploading digital teacher training resources to provide access to education for Afghan teachers, women, girls and families within Afghanistan and in other places in which they have taken refuge.
- CoDevelopment Canada—The Nonsexist and Inclusive Pedagogy Project continues with teacher organizations in El Salvador and Honduras. This learning and teaching process addresses issues of gender stereotyping, sexism and exclusion in the classroom and other arenas of students' lives.
- Canadian Organization for Development Through Education—Sponsorship continued for the Girls Accelerated Learning Initiative in Liberia, an after-school remedial learning program about life skills for over-age adolescent girls who are at high risk for not completing schooling.
- Change for Children—A cohort of Alberta teachers were sent to Guatemala and Nicaragua in summer 2023.

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## Educator Exchange Programs

In 2023, the Educator Exchange Programs, funded by Alberta Education and administered by the Association, made 33 short-term in-person and virtual placements across Iceland, Germany, Spain, Australia, Mexico and the Alberta Accredited International Schools.

E-exchanges, launched in response to the pandemic, continue to offer a co-learning environment for participants to explore a shared focus area for a six-week period. In 2023, E-exchanges expanded to the Alberta Accredited International Schools and to Jalisco, Mexico. The virtual format has proven to have many benefits, including enhanced program reach, reduced barriers related to more rural and remote locations, decreased cost and increased ease of participation.

Short-term in-person exchanges were relaunched with European partners in 2023, with interest in these exchanges growing. The year-long exchanges in Australia remained paused in 2023, but short-term in-person exchanges were successfully launched as pilots in Queensland and in South Australia. The in-person exchanges continue to provide deep professional learning and allow participants to bring new strategies and worldviews into the classroom.





## 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 2023, the Association provided financial contributions to Friends of Medicare, the Canadian Mental Health Association, Ever Active Schools and the Parkland Institute; in-kind support to the Alberta Assessment Consortium and the Fyrefly Institute for Gender and Sexual Diversity; 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.

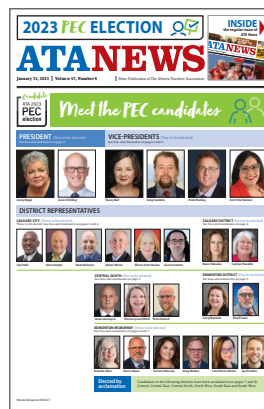
## External Communications

**ATA Magazine**—The Association published three issues of the *ATA Magazine* in 2023, with Indigenous experiences, teacher mental health and women in leadership as the featured topics, respectively, in the winter, spring and fall issues. The Association continued a contract with Trevor Battye Advertising Sales to book advertisements for the magazine. Revenue from advertisement sales helped offset the cost of design, printing and distribution. The average circulation per issue in 2023 was approximately 35,000 copies.

➤ **At the 2023 Alberta Magazine Awards, hosted by the Alberta Magazine Publishers Association, the ATA Magazine received a silver award for best illustration.**

Following the completion of the 2022/23 school year, the magazine ceased publishing an electronic version via the digital platform Digimag, instead concentrating its digital publication efforts on the Association's website.

**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 2023, with an average circulation of 35,000 copies per issue. Following the completion of the 2022/23 school year, the *ATA News* ceased publishing an electronic version of via the digital platform Digimag, instead concentrating its digital publication efforts on the Association's website. The *ATA eNews*, which provides recipients with a sampling of *ATA News* content via e-mail, continued to be produced throughout 2023.



During 2023, 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 2023, *The Learning Team* continued as a digital-only publication, with three issues produced on the following themes: a hopeful vision for public education, election readiness and nurturing strong teacher-parent relationships. 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.

**The ATA Website**—The website is the Association's primary tool for communicating and engaging with its internal and external stakeholders. In 2023, the Association finished the second phase of website improvements, which included enhancements such as modifications to the search function and streamlined navigation based on demographic data and user research. Staff collaborated with industry experts to ensure the site conformed to best practices, including modern accessibility and user experience standards. Most of the public content was moved from the legacy site in 2023; however, the legacy site continued to house Members Only/My ATA functions such as voting and profile updates. In 2023, the new website received a total of 432,603 visits, with an average of 2,022 page views per day.

**Social Media**—The Association has an active presence on X (formerly 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 2023, the Association's X feed had 35,100 followers, and its posts had generated 2.8 million impressions. The Association's Facebook page has 22,000 followers, a reach of 730,183 and generated 64,288 profile visits. The Association's Instagram page has 8,770 followers.



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## 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 2023.

The Association conducted public opinion polling on perceptions of public education in Alberta, including phone surveys, focus group and individual interviews, to inform the development of its next campaign.

The Association continued its Stand for Education campaign with the continuation of provincial round-table events on the issues facing public education, publishing the results from the round tables in a research report (see Research, page 37). The Association also worked with Tag Advertising to create a public relations campaign aimed at continuing the work of the Stand for Education campaign and increasing the sense of urgency about class size and complexity. The campaign included a television commercial, social media advertisements, radio advertisements and billboards, with a media event hosted in front of one of the billboards in Calgary.

For World Teachers' Day, which is celebrated every year on October 5, the Association contracted Tag Advertising to create a newspaper advertisement and radio advertisement to celebrate teachers as superheroes. In addition, as part of the Association's World Teachers' Day campaign, Morgex Insurance (now belairdirect) sponsored a contest for students and the public to nominate their teacher heroes. The contest received 80 submissions.

The Association marked Education Week on 2023 05 01–05 with items promoting the week on its website, social media and internal digital signs, as well as a video message. Social media graphics, posters and PowerPoint slides for Education Week were also made available for download.

The Association produced videos for such occasions and holidays as the National Day for Truth and Reconciliation, Remembrance Day, #paintitpurple, National Indigenous Peoples' Day, Pride Month, National Indigenous History Month, Hats on! for Mental Health Day, Substitute Teachers Week, International Women's Day and Black History Month. Videos related to the bargaining process were also produced (see Teacher Welfare Education and Communication, page 51).

The Association continued to support the Can We Talk? campaign, an annual promotion made in partnership with the Alberta division of the Canadian Mental Health Association that communicates that teachers are often able to act as early intervenors in students' mental health struggles. In 2023, public service announcements were carried by Global Television. Schools were also encouraged to participate in Hats On! for Mental Health Day in early May to demonstrate support for mental health. Social media graphics, PowerPoint slides and posters related to the campaign were made available for download.

The Association sponsored the CTV Edmonton and CTV Calgary morning weather forecasts, which featured photos teachers shared of various activities in Alberta classrooms. For 2023, the theme was "Great things happening in Alberta's public schools."

The Stars of the ATA Local Showcase program highlights the work locals have done over the year in the areas of diversity, equity and human rights; public relations; Indigenous education and reconciliation; political engagement; and other engagement activities. This work is shared in a video presentation at Summer Conference. In 2023, five locals were acknowledged in the Stars of the ATA Local Showcase.

In 2023, 20 new releases were sent out to media and posted online. The topics included teacher convention announcements, curriculum concerns, government funding, and classroom size and complexity.

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. In 2023, three grants were awarded.

The Association's communications efforts also include the work of local communications officers (LCOs). In 2023, two LCO meetings were held jointly with local political engagement officers in June and October (see Political Engagement below). The LCOs also attended training at Summer Conference (see Summer Conference, page 22) .

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## Political Engagement

In 2023, the Association's political engagement program focused on enhancing teachers' awareness of and active engagement with the political process.

The Political Engagement Seminar, held in March, was attended by more than 100 local representatives. The seminar included a keynote presentation, an environmental scan, an overview of the Association and the political landscape and a presentation on election spending rules.

Local political engagement officer (LPEO) meetings were held jointly with local communications officers in June and October. The June meeting 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 October meeting included an environmental scan, a provincial update, a presentation on polling research, a presentation on teacher mobilization and a presentation on the Association's political and communications action plan.

In 2023, the Association developed a Member Organizing Strategy, which was presented to LPEOs at their fall meeting. The strategy will be refined and developed over the course of the 2023/24 year and shared with LPEOs and other local executives.

At year-end, the corps of LPEOs stood at 55 out of a possible 55 members. At the provincial level, the Association's Political Engagement Committee met five times in 2023.



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## Diversity, Equity and Human Rights

The Association's Diversity, Equity and Human Rights (DEHR) program includes a grant program, an annual conference, support for local DEHR committees, policy review and recommendations, and studies and reports on DEHR topics. Further, the program provides resources and supports and undertakes initiatives responding to a range of DEHR issues that relate to the teaching profession, including addressing discrimination, racism and oppression; advocating for students and teachers from visible minorities and sexual and gender minorities; promoting cultural responsiveness and inclusivity; and safeguarding the well-being of children and youth.

Highlights of the Association's DEHR work in 2023 include the following:

- Providing ongoing assistance to local associations in establishing and developing local DEHR committees
- Providing \$30,000 in grants to support 18 DEHR-related projects completed by individual schools and local associations across the province
- Continuing the work of the Status of Racialized Teachers (SORT) Working Group
- Conducting Guided Listening Circles for racialized teachers to better understand the professional experiences of racialized teachers in Alberta
- Reporting recommendations of SORT to Provincial Executive Council
- Conducting a cross-Canada survey of diversity work in member organizations
- Providing dedicated support to the online Association's Gay-Straight Alliance network for teachers
- Updating the Association's DEHR information and resources on the website

At the annual DEHR Conference, keynote and breakout sessions provided delegates with the opportunity to challenge their perceptions of oppression and racism, hear from racialized teachers in Alberta, understand the impacts of the Indian Act, build supports for sexual and gender diverse teachers and consider strategies 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.

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## 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 2023, the WIL Summit was held in Edmonton, with approximately 140 teachers, school leaders and school jurisdiction leaders in attendance. The summit included breakout sessions, as well as keynote speaker sessions.

The committee also hosted two WIL Sharing Circles, during which 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.



In 2023, the WIL Speakers Series continued, with D Fulwiler Volk and G P Wilson Mitchell featured. Planning for the 2024 WIL Speaker Series also took place.

Throughout the year, the committee benefitted from the work of the WIL Advisory Council, which provides the committee with information, advice and suggestions from communities throughout Alberta.

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## 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 2023, the group considered research briefs, monitored matters related to education in Alberta, 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 short-, medium- and long-range planning of the Association and its subgroups.

In 2023, the Association, guided by the SPG, continued to mobilize the Foundational Framework for Long-Term Direction, a strategic framework designed to guide the Association over the long term. During 2023, the framework was updated, primarily to eliminate references to legislated assurance functions and the Code of Professional Conduct.

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 2023, two locals and four specialist councils 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. In partnership with the Social Studies Council and local women in leadership committees, the Association hosted a salon-style conversation about artificial intelligence in Lethbridge in June 2023.

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## 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, global experts and with the support of Alberta's teachers through the Association's locals and other subgroups. During 2023, the following major research projects were completed or under way.

### Five Solutions to Strengthen Public Education in Alberta: Stand for Education Public Forums 2023

In 2023, the Association published a research report that drew on insights from the Stand for Public Education engagement round-table process conducted in the fall 2022 and winter 2023. More than 800 participants convened for round tables in communities across rural and urban Alberta, or through a virtual round table for those unable to attend in person. Together, participants identified five priority solutions that they believed would strengthen Alberta's public education system now and into the future. These solutions, articulated in the report, form the core of a vision for the future of public education in Alberta.



### **ATA Pulse Research Study**

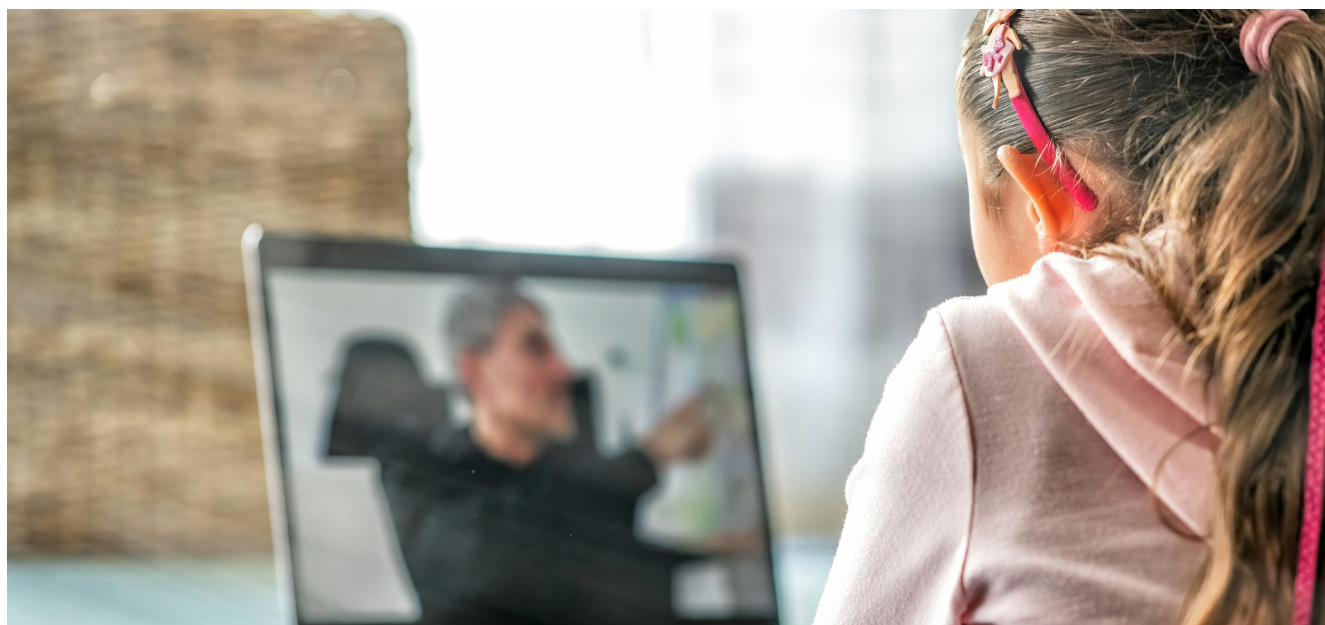
In December 2023, the Association conducted a pulse research study using a random stratified and derived snowball sampling of more than 2,100 teachers and school leaders. This research was conducted to better understand the educational landscape in three key areas: (1) class sizes and complexity of student needs, (2) well-being and aggression in schools and school communities and (3) artificial intelligence (AI). Overall, the study underscores the need for immediate and sustained action to address significant challenges in Alberta's education system.

### **Exiting the Teaching Profession: A Qualitative Research Study with Actionable Opportunities**

In 2023, several Association research studies noted that one-third of Alberta teachers reported plans to either leave the teaching profession, migrate out of Alberta or retire. To better understand why teachers leave their profession early and ways to foster retention and offer support, an exit interview research study was conducted in June 2023. Key findings from the exit interviews emphasize teachers' desire for reduced class sizes, increased supports for complex and diverse student needs and guaranteed preparation time.

### **Hope: Resilience and Recovery Study and Development of Measurement Instruments**

In 2023, the Association built upon its research into the sense of hope/hopelessness of teachers in K-12 education systems. The Hope: Resilience and Recovery Project was launched in response to findings from a pulse study conducted by the Association in fall 2021 that showed high hopelessness among Alberta teachers and school leaders, with a high percentage of respondents indicating a plan to leave the profession within five years. Survey data were collected to investigate experiences of hope in the contexts of teaching and school leadership. The detailed research report—including novel instruments to measure hope-filled education spaces, the findings and field-relevant recommendations—was published in 2023.







## 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 and utilized within Alberta's faculties of education as an informative data set. This research activity tracks baseline data each year on beginning teachers' experiences through a survey and focus groups. It continues to explore the province's needs in terms of supporting early career teachers, and remains the only large data set collected systematically and specifically on beginning teachers' experiences before, during and after the pandemic in North America.

The findings from the latest survey were shared across the faculties of education, included in peer-reviewed research publications, and shared with education partners through the Association's Teacher Education and Certification Committee.

## Artificial Intelligence and K–12 Education: Moral Passivity, Cognitive Atrophy and Ethical Framework

In 2023, the Association continued its partnership with the University of Alberta, Faculty of Education and the Kule Institute for Advanced Study (KIAS), specifically to explore the continued emergence of artificial narrow intelligence (ANI) tools in education. In particular, ANI was examined in relation to issues of moral passivity and cognitive atrophy, and an ethical framework for AI in education.

## Member Opinion Survey

The Association administers the Member Opinion Survey on an annual basis. Each year, the survey seeks feedback from a large random stratified sample of full- and part-time members on a range of topics. In 2023, the survey was conducted online, with 2,527 teacher and school leader respondents. The responses allow the Association to track trends and issues to ensure its programs and services meet the needs of members and advance the profession of teaching. Among the topics broached in the 2023 survey were classroom and school complexity, principals' membership in the Association, the mediator's recommendation for a provincial collective agreement, engagement with the Association, the new Alberta curriculum, plans for the future (attrition and retention), and well-being.

## Collaboration and Knowledge Mobilization

The Association continued to collaborate with scholars, policymakers, nongovernmental organizations and youth on the eQuality Project. The Association also continued its partnership with Boston Children's Hospital and Harvard Medical School through the Digital Wellness Lab and The GUD Project—Growing Up Digital in Alberta. Further, in 2023, discussions with both scientists and technology industry leadership took place on design and social impact considerations of their various technologies and platforms to track AI's reach and implications.

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 2023, the Association's research was highlighted in multiple Alberta newspapers, international media, and teacher federations. The Canadian Teachers' Federation/Fédération canadienne des enseignantes et des enseignants and Saskatchewan Teachers' Federation worked with the Association on keynote addresses regarding AI and the profession of teaching.

The Association also supports research activities undertaken by other organizations, including the Alberta Advisory Committee on Education Studies and the KIAS Signature Collaborations Grant Programme.

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## Library Services

The ATA Library offers Association members access to a large collection of materials in English and French to support their professional practice. In 2023, 3,714 items were circulated to teachers and 4,122 member questions were answered by library staff. The library continues to bring in new and innovative materials for teachers. In 2023, 936 new items were purchased and added to the library catalogue.

The library's web guides continue to serve as a way for members to access high-quality online resources. In 2023, the guides were viewed 280,917 times. Library staff created 19 new guides, including 10 in French. Throughout the guides, 4,558 links to high-quality online resources were added and/or updated by library staff.



In 2023, library presentations were delivered to the Campus Saint-Jean Student Local No 7, the Edmonton Catholic Teachers Local No 54 executive, St Mary's University Student Local No 14, and the Student Local Conference. The library also hosted tables at the Beginning Teachers' Conferences in Calgary and Edmonton, and the English as a Second Language Council Conference.

Throughout the year, the library engaged in career mentoring programs for university students, with two students enrolled in the School of Library and Information Studies at the University of Alberta completing their practicums in the library.

Tables 6 and 7 show statistics related to library use in 2023.

**Table 6. Library Service Statistics**

		2023
Circulation Services	Physical materials loaned	3,714
	E-books loaned	25
	Online reservations	2,517
Research Services	Information and research questions	4,122
	Searches in journal databases	2,034
	Searches in e-book database	302

**Table 7. Web Guide Statistics**

Top 5 Library Web Guides in 2023	Views
Sciences, Grades 10–12	14,549
Search engines	12,888
English language learners	12,463
Black History Month	12,303
Makerspaces	11,022

## 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 2023, 22 French publications and workshops were updated, and 40 new documents and workshops were created in French. New substantial publications or considerably revised publications available in French are listed in Publications (see page 74).

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 assist the library with maintaining 55 existing French resource guides (see Library Services, page 40) as well as French catalogue records. Further, in partnership with the Canadian Teachers' Federation/Fédération canadienne des enseignantes et des enseignants, French Services staff provide 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.

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## 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, Table Officers Committee ratified amendments to the standard constitution for locals, student locals and five local constitutions, including two student local constitutions. Amendments included the addition of the new Human Rights Statement, as adopted by Provincial Executive Council at its 2023 09 14-15 meeting.

The Local Secretaries' Seminar was held in person on 2023 06 02, with 18 local secretaries in attendance. Local secretaries received 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 for in-person, virtual and hybrid models. In addition, the program included an overview of the role and functions of the Association, small group discussions and a question-and-answer session with Association staff.

The Local Treasurers' Seminar was held at Barnett House on 2023 05 26-27, with 39 local treasurers representing 37 locals in attendance (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 2023/24 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 2023 09 22(eve)–23, with representation from Ambrose University, Campus Saint-Jean, Concordia University, Keyano College, Northwestern Polytechnic, Medicine Hat College, St Mary's University, The King's University, the University of Alberta and the University of Calgary. The 35 participants attended a keynote on the teaching vocation and its importance in today's society, a session on planning and marketing student local events and a presentation on the history of the Association. Participants also received information on student local financial and other processes, and received information about and a tour of the ATA library. Further, the PD program area delivered sessions on the Association's specialist councils, workshops and presentations.

TES staff presented 40 preservice and other information sessions to a total of 1,179 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 for Teachers and Teacher Leaders.

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## 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 online *School Representative Toolkit*, a resource that enables school representatives to familiarize themselves with their roles and maximize their effectiveness.

In 2023, the toolkit was updated in English and French. It was shared with school representatives through the Association's School Representative collaboration site.

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

Issue	2023	
	Number	Percentage of Total
Bargaining	227	1.44
Benefits/Insurance	110	0.70
Collective Agreement	1,193	7.58
Criminal/Assault	93	0.59
Employer Action	2,452	15.58
Employment Information	2,584	16.41
Grievance/Arbitration/Human Rights	250	1.59
Interpersonal Relations/Staff	1,441	9.15
Issue with Parent/Student	907	5.76
Leaves	3,436	21.83
Legal Issues	245	1.56
Liability Matters	147	0.93
Medical	657	4.17
Other—Collective Bargaining	395	2.51
Other—Employment Services	249	1.58
Pension/Retirement	177	1.12
Professional Competence	411	2.62
Professional Conduct	315	2.00
<b>SUBTOTAL</b>	<b>15,289</b>	
No Category Assigned	453	2.88
<b>TOTAL</b>	<b>15,742</b>	<b>100</b>

Note: For the purposes of this report, a contact is a unique and substantive live interaction with the member. If call-backs (messages left for the member) are included, the total contact count rises to 23,283.



Additionally, a webinar was held on 2023 11 06, with 481 participants, to provide school representatives with information pertaining to the school representative role. The 2024 Summer Conference Local Program course will be revised to address the crucial role that school representatives play in liaising between members and the Association on issues pertinent to teachers, including conditions of practice, employment rights and responsibilities and collective bargaining.

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## Member Assistance

Teacher Employment Services 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 had with members in 2023 and the issues involved are reported in Table 8 (page 46).

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## Staff Relations Service

The Staff Relations Service (SRS) is a mediation/facilitation service that provides 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 2023, there were nine requests for the SRS. The SRS is a confidential program between the involved parties and the mediator. No reports are made to the employer. The Association is only informed whether there was successful resolution to the conflict.

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## Healthy Interactions Program

The Healthy Interactions Program, a communications and conflict-resolution program that the Association offers in collaboration with individual school divisions, was not held in 2023 as work continued on revisions to the program. The program is being changed to a one-day workshop that can be delivered in schools and school divisions upon request. The new program will be piloted in Edmonton and Calgary in 2024.

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## 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 2023, an open-enrolment, two-day workshop on the TGSE Policy was held two times, once on a virtual platform, and once in person with school and district office leaders. These

offerings allow members 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 2023, with many divisions requesting the workshop for their aspiring leadership cohorts and their division leadership teams.

Condensed versions of the workshop were provided 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 2023, the French version of the full two-day workshop was also made available and was delivered on one occasion.

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## 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 and provides professional development tailored to those members. In 2023, the committee reviewed and updated its action plan and work plan to offer additional professional development to substitute teachers throughout the year. Noting shortages of substitute teachers across the province, the committee continued to advocate for substitute teachers in recognition of their vital contributions to the education system. In addition, the committee hosted a local substitute teacher chair meeting in October.

The Substitute Teachers' Conference was held 2023 10 20–21 in Calgary, with 123 attendees from across the province. The conference focused on wellness and included 15 sessions related to wellness and workplace matters, curricular subjects and pedagogical topics in alignment with the *Teaching Quality Standard*.



## Collective Bargaining

Collective bargaining for teachers whose employer is one of the 61 public, Catholic or francophone school divisions occurs within the framework established by the *Public Education Collective Bargaining Act* and takes place at a central table, as well as between the Association and the respective employer school divisions. 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). All but one of these charter/private school(s) had reached collective agreements during 2023.

### Central Table Bargaining

The new round of central bargaining is scheduled to commence early in 2024.

### Local Collective Bargaining

Local bargaining in the 2020–24 round commenced shortly after ratification of the Mediator's Report in June 2022, and continued into the fall. By the end of 2022, few bargaining units had opened and commenced bargaining. Divisions seemed reluctant to commit to bargaining prior to the 2023 provincial election. By the end of May 2023, only 20 bargaining units had reached memoranda of agreement.

By mid-December 2023, 50 bargaining units had reached memoranda of agreement with their divisions and 11 bargaining units remained unsettled (two had voted in favour of a government-supervised strike vote and five were in mediation; the remaining four were still in negotiations).

Local bargaining intensified in fall 2023 in an effort to complete local bargaining prior to the next round of central bargaining, which is scheduled to open in January 2024.

Averages of collective agreements in effect 2023 09 01 are reported in Table 9.

**Table 9. Averages of Collective Agreements in Effect 2023 09 01**

Years of Teacher Education	Minimum	Maximum
4	\$62,062	\$97,834
5	\$65,544	\$101,390
6	\$69,409	\$105,292

## 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 under a new central grievance procedure which involves the school division, Teacher Employer Bargaining Association (TEBA) and the Association.

Twenty grievances arising from alleged violations of collective agreements were initiated in 2023. Of these, 16 remained outstanding at year-end. Four were resolved at the initial stage, while 11 remain in the early stages of the process and 5 proceeded to arbitration. In addition, 51 grievances remained outstanding from previous years and were in various stages

of arbitration or possible settlement at year-end. A summary of the status of grievances and arbitrations in progress at year-end is presented in Table 10.

Seven grievances remain outstanding since 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 value in 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 have, the arbitrators are likely to award the Association or teachers damages based on the value of the extra time spent on unnecessary tasks by teachers.

**Table 10. Status of Grievances and Arbitrations**

	Grievances			Arbitrations			
	Ongoing	In Abeyance	Resolved Initial Stage 2023	Ongoing	Decision Received	Agreement Reached	In Abeyance
<b>2023</b>	11	0	4	5	0	0	0
<b>Previous Years</b>	23	0	20	28	0	20	0

## 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 with the Alberta School Employee Benefit Plan and long-term disability with other carriers such as Canada Life, Manulife and Desjardins. The Association also assists with policy appeals regarding insurance plan document issues. In 2023, the Association received 832 teacher calls and e-mails raising concerns in these areas. Nine teachers had disability appeal hearings and three had policy appeal hearings in 2023.

Other matters often brought to the Association for assistance relate to employment insurance, Canada Pension Plan disability, and occupational health and safety issues. Advice was sought by many teachers in one or more of these areas in 2023; however, those teachers experiencing difficulty with such matters were able to resolve their issues promptly and without higher-level hearings or reviews.

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## Teacher Welfare Education and Communication

### Education

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 2023, 69 Level 1 and 54 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 (NSC). To achieve each level of the certificate, a member must complete all core courses and a number of electives. Courses are usually offered at Summer Conference and Collective Bargaining Conferences (CBCs). Occasionally, courses are also offered at meetings of the bargaining unit, the local, school staff or the TWC.

The spring CBC was held in Calgary on 2023 04 14–15 with 179 attendees. Attendees heard a presentation on the Mediator's Recommendations Influences Research Report and held table discussions concerning the report. The fall CBC was held in Edmonton on 2023 11 17–18 with 245 attendees. Attendees heard a presentation about getting “Your Financial House” in order. Each conference also included updates on collective bargaining, school division finances and other issues of note for TWC members. Further, 15 TWEP workshops were offered at the spring CBC and 14 were offered during the fall CBC.

### Communications

To support members in their understanding of the bargaining process for Alberta teachers, the Association produced a Bargaining for Beginners video series. The series introduces the central and local processes of negotiations and discusses the roles, including those of individual members, of all those involved in the processes.

Further, during 2023 the Association produced articles in the *Worth Talking About* series, which offers information on and insight into current issues important to teachers. In 2023, articles published in the series included “Duty-Free Lunch,” “Criminal Record and Vulnerable Sector Checks” and “Instructional and Assignable Payback Time.”



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## 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. The Alberta Teachers' Retirement Fund (ATRF) also provides consultations virtually and by telephone, in-person education, and materials and resources through its website and the MyPension portal.

During 2023, the Association conducted virtual preretirement workshops for members nearing retirement, as well as other pension information sessions and financial wellness workshops for teachers in the field. Invited to present at these sessions are the ATRF, along with the Alberta Retired Teachers' Association (ARTA), the Alberta School Employee Benefit Plan (ASEBP), Blue Cross, Capital Estate Planning and other relevant presenters as required.

Since the Alberta Investment Management Corporation (AIMCo) was mandated as the sole investment manager for the teacher pension funds, the ATRF has been closely monitoring the investment management services that AIMCo provides through regular meetings between the parties. The ATRF board continues to set investment strategy that AIMCo must implement as part of the Investment Management Agreement.

The ASEBP maintains a retirement benefits plan, the MyRetiree Plan, similar to that of ARTA. Teachers may choose to remain with ASEBP throughout their retirement years, purchase benefits through ARTA or locate a plan outside the education sector.



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## Field Service

Throughout the year, Teacher Employment Services (TES) staff made 119 presentations to a total of 3,797 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 for Teachers and Teacher Leaders; 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 roles of teachers and educational assistants; the Association's work; how to deal with difficult people; and ways to address parent concerns. Staff from the program area also supported and presented at the Association's Leadership Essentials for School Leaders conference and other activities for school leaders (see School Leadership Programs, page 61).

Throughout the year, TES staff also met with bargaining units or teacher welfare committees on nonbargaining matters, including providing workshops on matters of interest to those groups. Many meetings with various division officials also occurred during 2023. Each bargaining unit held at least two bargaining unit general meetings (BUGMs), one that presented the opening proposal and one that presented the memorandum. Some bargaining units held additional BUGMs when no memorandum could be reached or the group required an application for mediation or an application for a strike vote.



**WE NEED  
BLACK TEACHERS**

**Fitz Sherman**  
Chair, SCRT Working Group

STAND FOR EDUCATION  
STAND FOR EDUCATION





# 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.

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## Professional Practice Standards

In 2023, the Association continued to support Alberta's professional practice standards for the teaching profession. All workshops and presentations developed and facilitated in the program area align with the *Teaching Quality Standard (TQS)* and the *Leadership Quality Standard (LQS)*. The Association also provided support to the nine teachers' convention boards as they continued to ensure that their program offerings aligned with the *TQS* and *LQS*. Further, the Association provided support to faculties of education in their work with preservice students and the professional practice standards.

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## Curriculum

After effectively shutting out the Association from curriculum consultation that has a direct effect on the professional lives of teachers, in 2023 Alberta Education began to engage in limited consultation with the Association on a variety of issues, including curriculum. The Association encouraged these efforts and worked to extend these opportunities to members, facilitating cooperation and collaboration between Alberta Education and the Association.

On 2023 05 29, the Association hosted a Curriculum Circle to examine the recently released version of the following curriculum: K-3 French Immersion Language Arts and Literature, K-3 Science, 4-6 Mathematics and 4-6 Language Arts and Literature.

Members from eight specialist councils impacted by the new curriculum were invited to provide feedback on it and discuss implementation.

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## Inclusive Education

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

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*
- Developed the *Regulation and Resilience: Supporting Students with Challenging Behaviour* workshop series



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## Indigenous Education

Gaining proficiency related to the Indigenous-focused competencies and indicators in the *Teaching Quality Standard* and the *Leadership Quality Standard* continues to be a priority for 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 2023, the Indigenous Advisory Circle, consisting of 10 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 Indigenous education workshops, resources and publications and to provide advice on Association policies, events and administrative regulations.

The mentorship program for Indigenous teachers and school leaders, *wicihtotân* (Cree for “let’s help each other”), continued in 2023. More than 70 participants registered for the *wicihtotân* program in 2023, and three virtual events were held. The *wicihtotân* gatherings are an opportunity to connect with colleagues across the province, share learnings and experiences, and support each other.

In 2023, the Association produced a set of five land acknowledgement videos for use at Association events.

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## Teacher Education and Certification

The Association undertook the following activities regarding teacher education and certification in 2023:

- Monitored the ongoing effects of the pandemic on teacher education programs, especially in regard to the preservice teacher mental health, readiness for field experience programs and program completion
- 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 the ability to attend teachers' conventions at no cost
- Completed a review of the Association's gold medal in education program

In 2023, 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.

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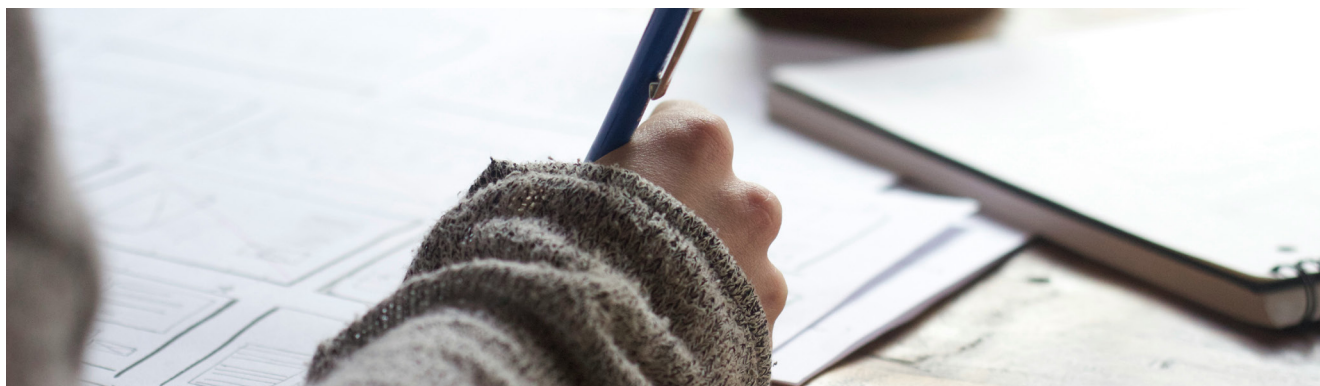
## Teacher Qualifications

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 11 (page 59)

In 2023, TQS's microfiche digitization project was completed, resulting in the preservation of over 90,000 records. TQS also continued to utilize the online application tool implemented in 2022. The tool supported the submission and delivery of over 3,600 applications and statement of qualifications to members and other stakeholders in 2023.

The Teacher Qualifications Committee, to which a teacher can request a reassessment if dissatisfied with an evaluation, considered six requests in 2023. 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.



**Table 11. Statements of Qualifications Issued**

	<b>2023</b>
Based on In-Province Documents	1,749
Based on Out-of-Province Documents	1,667
Duplicate	280
<b>TOTAL</b>	<b>3,696</b>
Fees Received	\$391,676

## University Liaison

One aspect of the Association's liaison with universities is representation on a variety of committees and boards. In 2023, 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, the University of Alberta, the University of Calgary and the University of Lethbridge. In turn, universities named representatives to several standing committees of the Association.

In 2023, staff delivered workshop programs to preservice teachers at various stages of their teacher education programs. Among the topics covered in university presentations are developing a professional identity; understanding professional competence and conduct; establishing inclusive learning environments; fostering effective relationships with parents and students; understanding the impacts of technology and social media use on teaching and learning; navigating legal and ethical contexts; promoting the Association's policies and professional supports; and applying for teacher certification, salary evaluation and employment.

## 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 2023, a total of 895 new members were welcomed into the profession at 32 locally hosted induction ceremonies.



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## Program for Beginning Teachers

In 2023, the Beginning Teachers' Conference was held in Edmonton on 2023 09 22–23, and in Calgary on 2023 10 13–14, with 389 and 315 beginning teachers, respectively, 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.

In October 2023, the Association implemented a pilot program to provide mentorship support directly to beginning teacher membership. This pilot program, called the Beginning Teacher Network, consisted of no-cost virtual learning sessions focused on timely topics. The Association monitors and evaluates the pilot program on an ongoing basis to inform the direction of mentoring supports offered.

To further support teachers new to the profession, the Association produced 12 videos (in English and in French) in the Beginning Teachers video series. The videos provide information on such topics as types of teaching contracts, evaluations, professional growth plans and policy beliefs.

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## Mentorship Program

The Association continued to provide 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, local priorities and areas of interest, the number of experienced teachers able to serve as mentors, and competing school division mentorship program offerings that may not reflect the Association's mentorship 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 2023, the Association continued to implement its new mentorship program (introduced in 2022 to address current research and provincial needs). The Association also continued to maintain formal mentoring partnerships with the following districts and locals: the Peace Wapiti School Division and Northern Spirit Local No 6, the Grande Prairie 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 Local No 24.

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.

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## 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 2023, the Association held a virtual school leader speaker series that featured leadership experts in a variety of disciplines. Each session was held via Zoom and had between 50 and 100 participants.

In April, the Association's Council for School Leadership hosted its annual international leadership conference, uLead. This year's event featured two preconferences (Women in Leadership and Leadership for Reconciliation). More than 1,100 leaders and aspiring leaders from across Canada and around the world came together for three days of conversations, collaboration and learning.

In November, the Association hosted the annual Leadership Essentials for School Leaders conference, with 121 new school leaders within the first five years of service in their roles in attendance. The conference aimed to provide relevant and diverse sessions to support and enhance leadership practice. The two-day conference, in Edmonton, included keynote speakers, a plenary session and 23 breakout sessions.



In December 2023, three speaker series sessions were held in Medicine Hat, Red Deer and Grande Prairie. With 228 registrants, the series focused on advancing leadership excellence.

In addition, the Association 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.

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

Legal Issues for System and School Leaders (LISL) is a biennial, two-day seminar for system administrators that focuses on the exchange of information about a particular subject of study. The 2023 iteration of the seminar was cancelled due to low registration. The next seminar is scheduled for fall 2025.

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## Specialist Councils

The Association has 21 specialist councils that improve the teaching profession by generally increasing members' pedagogical and leadership knowledge and abilities, particularly in their defined specialty areas. In 2023, the Association provided a total of \$841,329.27 in grants to support the councils' programs and services. Annual membership statistics for the specialist councils are presented in Table 12 (page 63).

The Second Languages and Intercultural Council changed its name to the Additional Languages and Intercultural Council to reflect the focus of the council more accurately.

Throughout the year, the councils hosted 13 conferences, with more than 3,010 teachers in attendance. These conferences offered targeted professional development to meet the needs of Alberta's diverse teaching population. In addition, councils hosted symposia, workshops and learning sessions. These events spanned the geography of the province, working to support teachers in every region.

Specialist councils continue to contribute to professional and educational research literature through the publication of curated book lists, newsletters and academic journals. Content for these publications come 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 2023 annual representative assembly.

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

**Table 12. Regular and Student Memberships in Specialist Councils**

<b>Council (Inaugural Year)</b>	<b>Membership in 2023</b>
Additional Languages and Intercultural Council (1998)	605
Alberta School Learning Commons (1975)	82
Career and Technology Education Council (1997)	680
Council for Inclusive Education (1970)	1,539
Council for School Leadership (1961)	2,504
Council of School Counsellors (1961)	415
Early Childhood Education Council (1966)	2,503
Educational Technology Council (1982)	370
English as a Second Language Council (1992)	697
English Language Arts Council (1961)	1,436
Fine Arts Council (1963)	829
Global, Environmental and Outdoor Education Council (1976)	380
Health and Physical Education Council (1962)	1,604
Indigenous Education Council (2008)	473
Le Conseil français (1970)	556
Mathematics Council (1961)	1,330
Middle Years Council (2005)	793
Outreach Education Council (2002)	125
Religious and Moral Education Council (1974)	257
Science Council (1961)	1,302
Social Studies Council (1961)	842
<b>TOTAL</b>	<b>19,322</b>

## Teachers' Conventions

Nine teachers' conventions were held in 2023, with all conventions returning to in-person events after two years of online conventions during the COVID-19 pandemic. The approximate attendance of each convention is shown in Table 13.

As the 2023 conventions occurred in advance of the provincial election, the Association sponsored Democracy Bootcamps at four conventions. Offered by CIVIX Canada, these bootcamps provided opportunities for teachers to work with political scientists, journalists and elected officials to discuss essential skills required by citizens in the modern digital age, learn about the development of party platforms and campaign strategies, and identify useful tools and best practices for engaging Alberta students in the Student Vote program.

Convention sessions addressed curricular subjects, pedagogical topics and leadership strategies in alignment with the *Teaching Quality Standard (TQS)* and the *Leadership Quality Standard (LQS)*. Further, convention programs focused on a number of common themes, including teaching and learning strategies, preparation for new Alberta curricula, Indigenous education, social emotional learning, mental health and wellness for students and staff, and the *TQS* and the *LQS*.

**Table 13. 2023 Convention Attendance**

Convention	Attendance
Calgary City	10,493 (from 2 locals)
Central Alberta	2,051 (from 5 locals)
Endless Skies	2,165 (from 9 locals)
Greater Edmonton	9,040 (from 3 locals)
Mighty Peace	1,518 (from 5 locals)
North Central	6,367 (from 18 locals)
Palliser District	3,964 (from 10 locals)
Southeastern Alberta	1,075 (from 5 locals)
South Western Alberta	2,005 (from 7 locals)

Throughout the year, the Association held meetings for convention association executives to train members new to their executive roles, to develop and share new ideas for meeting members' professional development (PD) needs through convention programs, to increase their expertise as PD experts, and to offer role-specific training to improve individual and collective efficacy.

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## Professional Development Facilitators

The Association's professional development (PD) facilitator corps, consisting of 12 teachers, helps staff deliver programs by

- providing a triannual 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 2023, 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.

During 2023, PD facilitators participated in the PD Course at Summer Conference (see page 22) and the PD Conferences (see Professional Development, Field Service, page 68), as well as PD facilitator meetings.

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.

In 2023, PD facilitators provided 13 workshops to 587 members.

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## Indigenous Education Professional Development Facilitators

A subgroup of the professional development (PD) facilitator corps, the Indigenous education PD facilitator corps has been active since 2019. 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 2023, 117 Indigenous education workshops were facilitated by 16 Indigenous education PD facilitators in person and through online platforms, with a total of 4,800 participants attending. The most requested Indigenous education workshops were Engaging in Numeracy and Connections Through First Nations, Métis and Inuit Traditional Games; Full Circle—Understanding the Social Implications of Indigenous Realities; and Finding Our Way in Indigenous Education—Connecting Hearts and Minds.

During the year, Indigenous education PD facilitators attended the PD Conferences (see Professional Development, Field Service, page 68), as well as Indigenous education PD facilitator meetings.



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## Association Instructors and Association Administrator Instructors

Association instructors—58 teachers and school leaders—deliver Association workshops at schools, locals, conventions and conferences. Workshops in French are offered by 7 members of the corps. In 2023, Association instructors presented 200 workshops to 7,157 participants at schools, local professional development days, teachers' conventions and specialist council events. Over the course of the year, the following new workshops were developed: Let's Get Talking—Conversation Skills for Learning; Let's Talk Text! Choosing and Using Great Resources (K–6); Regulation and Resilience: Supporting Students with Challenging Behaviour; Supporting Gender and Relationship Diversity in School Communities; Taking a LEAP: Unlearning Racial Bias; and Tend the Garden—Starting and Sustaining Change in Schools. Further, two workshops were revised and one workshop 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 2023, Association administrator instructors delivered 37 workshops to 1,415 participants.

In January and May, 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. In August 2023, Association instructors and Association administrator instructors attended the Association Instructors' Seminar at Summer Conference (see Summer Conference, page 22).

Throughout the year, the instructor corps facilitated workshops to support teachers in meeting the *Teaching Quality Standard* competencies.

➤ ***Association administrator instructors delivered 37 workshops to 1,415 participants***



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## Online Professional Development

The Association continued to offer online professional development in 2023. 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 Facebook, YouTube and Instagram. Professional Development staff and Association instructors also offered virtual learning sessions for groups upon request.

In 2023, online sessions for the newly established Beginning Teacher Network (see Program for Beginning Teachers, page 60) were offered by Association staff.

In addition, the Association continued to offer an online web-based service for professional growth planning.

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## Field Service

Staff provided 183 workshops and presentations to 7,492 members on several topics at conferences, conventions, universities, schools and local meetings throughout 2023. Workshops were also delivered by the instructor corps (see Association Instructors and Association Administrator Instructors, page 67; Professional Development Facilitators, page 65; and Indigenous Education Professional Development Facilitators, page 66). In 2023, 21,451 members attended 550 workshops and presentations. Statistics on the workshops and presentations provided are shown in Table 14 (page 69).

The Association held two Professional Development Conferences (PDCs) in 2023. The spring PDC was held on 2023 04 28–29 in Edmonton and hosted 119 attendees from across the province. The event focused on planning PD events. The fall PDC was held on 2023 11 24–25 in Calgary and hosted 149 attendees from across the province. Delegates to both PDCs 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 14. Professional Development Workshops and Presentations**

2023		
	Number of Workshops and Presentations Delivered	Number of Participants in Attendance
PD Facilitators	13	587
Indigenous Education PD Facilitators	117	4,800
Association Instructors	200	7,157
Association Administrator Instructors	37	1,415
PD Staff	183	7,492
<b>TOTAL</b>	<b>550</b>	<b>21,451</b>









# 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.



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## 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. Specifically, this includes supporting the Association's service to members by maintaining appropriate staffing levels, handling matters related to employee and labour relations, ensuring health and safety compliance, facilitating and coordinating staff training and development, and assisting the coordination of the organization's pension and benefit administration functions.

Key initiatives and accomplishments for 2023 include the following:

- Selected as one of Alberta's Top 75 Employers of 2023
- Implemented an advanced human resources information and payroll system for all staff members to improve internal business processes relating to staff pay and onboarding
- Completed formal diversity awareness education and launched a one-year program called the Employee Working Inclusion Group, which will help plan educational and diversity recognition events for staff
- Completed an in-depth occupational health and safety program review to ensure the security and safety of its employees and operations
- Supported and facilitated the work of ATA Pathways, an initiative that is working to define an operational vision and strategy for the Association to better serve members in new and innovative ways

The Association has 148 employees, encompassed in the following staff groups: 36 executive staff, 47 professional staff and 65 support staff.

In 2023, 27 recruitment competitions were conducted. Other changes included 7 additional promotions and 7 retirements.

Taking into account leaves, on average, executive staff officers worked 197 days and travelled 14,656 kilometres in 2023.

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## 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 2023, editorial and graphic design work continued to focus on specialist council newsletters and journals, research monographs, the *ATA News* and the *ATA Magazine*. Other work undertaken in 2023 comprised the editing, creative design and development of internal and external publications, banners, brochures, postcards and communications to support the activities of the Association, including the Stand for Education multiphase campaign. DP staff provided complete visual identity redesigns for the Science Council and the Additional Languages and Intercultural Council and their publications. DP staff also provided editorial, graphic design, printing and/or distribution services for all specialist council publications, the mentorship program and communications. Additionally, DP staff are part of the Association's website team, providing services in design, content governance, functionality and user experience design. Designers also supported the local communications officers at Summer Conference and at their fall meeting.

The distribution of school mailings continued in 2023. 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 2023 Provincial Executive Council election; specialist council activities; information for Beginning Teachers' Conferences; Walking Together resources; issues of *The Learning Team* and *Leadership Update*; information from Ever Active Schools; materials related to Education Week, Hats On! for Mental Health Day, Substitute Teachers' Appreciation Week and Stand for Education campaigns; Association library brochures; materials advertising the Leadership Speaker Series, school leader professional development opportunities, mentorship programs and Educator Exchange Programs.

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## Publications

The Association produces many types of documents, ranging from monographs to brochures to workshop materials. New substantial publications produced in 2023, or those which were considerably revised, are captured below.

### ATA Membership and Services

*Members' Handbook; School Representative Toolkit; Student Locals; Welcome to the Profession; Membership Matters; Teachers' Rights, Responsibilities and Legal Liabilities; Teachers and Educational Assistants: Roles and Responsibilities; Substitute Teachers: Professional Replacements Integration into the School System*

### Teacher Resources

*Can We Talk? Creating a Compassionate Classroom; Supporting Ukrainian Newcomer Students and Their Families in Alberta Schools*

### Research

*Hope: Resilience and Recovery A Report for the Alberta Teachers' Association; Five Solutions to Strengthen Public Education in Alberta*

### Professional Development

*Professional Development Program and Services Guide*

### French Publications

*Présentation Le nouveau code de conduite professionnelle des enseignants et les nouvelles procédures disciplinaires; Directives pour organiser une cérémonie d'assermentation professionnelle; Atelier Se soucier des autres et établir des liens; Présentation Gravir les échelons; Présentation Compter les heures; Présentation Congrès des enseignants débutants; Présentation Gestion des personnes difficiles et des questions délicates; Présentation Gestion des situations difficiles; Présentation Place aux jeux!; Présentation Les enseignants et la loi (types de contrats); Présentation Les enseignants et la loi (mutation, suspension et résiliation de contrat); Présentation Enseigner en milieu minoritaire : l'importance de transmettre l'amour de la langue; Présentation Enseignants suppléants rôles et responsabilités; Présentation Vous avez fait quoi?; Présentation Programme d'échanges en éducation; Présentation Plan de croissance professionnelle; Présentation Les compétences interculturelles; Livret L'adhésion compte; Atelier sur le perfectionnement, la supervision et l'évaluation des enseignants; Favoriser la santé mentale des élèves réfugiés de l'Alberta; Manuel HEARTcare pour les enseignants en formation initiale; Brochure L'ABC des négociations; Politiques administratives et éducatives de l'ATA; Présentation Santé et sécurité au travail : retour vers un avenir sûr et positif; Échanges virtuels ou en personne de courte durée – formulaires et guides; Bienvenue dans la profession : petit guide de référence de l'ATA; Enseignants et assistants en éducation : rôles et responsabilités; Atelier de mentorat; Trousse des représentants d'école; Livret Services en français de l'ATA; Petit guide Diversité, équité et droits de la personne*

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## Information Technology Services

In 2023, the Association's Information Technology Services (ITS) focused on improving and maturing IT services and processes.

A project manager was recruited and will be supporting major ITS projects such as the Alinity replacement project and the cloud migration project over the next several years.

Four new policies were developed to improve remote work guidelines and cyber security practices. The ITS team and the information and records manager/privacy officer provided training to the entire organization on these new best practices and guidelines.

Legacy website content was reviewed, updated and moved to the new website. Increased traffic to the new website indicates positive results of the new website, but also requires a higher level of website hosting performance. Improvements to functionality and content will continue in 2024.

An automated workflow process for requesting print services from Document Production was implemented and will be used for future process automation throughout the Association.

Online membership services duties were successfully transitioned to the new Regulatory Affairs Membership Support unit to improve integration with program areas.

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## Records Management

During 2023, Records Management continued all services to staff and members including life-cycle management, secure on-site shredding services and shredding truck services. Training presentations were made to Association subgroup executives at virtual and in-person events. The process of selecting an electronic document records management system continued throughout 2023.

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## Archives

The Archives completed 512 new accessions in both print and electronic format in 2023. 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 continued.

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## Regulation Compliance/Privacy and Canada's Antispam Legislation

In 2023, 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*. The Association also responded to the Office of the Information and Privacy Commissioner on matters before the Commissioner. In 2023, 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. Additionally, the Association monitored proposed changes to Canada's federal privacy regime under Bill C-27, the Digital Charter, and planned for updates to the Association's privacy compliance efforts.

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## Buildings

In 2023, the following major repairs and upgrades to Barnett House were undertaken: renovated the vacant space on the second level to create a new meeting space, changed access point to an office on the seventh floor, and upgraded the controls on the air handling equipment on the north tower roof.

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

The cafeteria and food services resumed full operations in 2023, though room rentals and catering were still not at the prepandemic levels.

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## Funds and Expenditures

The Defence and Advocacy Fund (DAF) was set up to fund expenditures categorized by the Association as Non-Core, within the context of Bill 32, the *Restoring Balance in Alberta's Workplaces Act*. During 2023, \$1,104,746 was charged to the DAF. The fund ended the year at 2023 08 31 with a fair market value of \$15,813,527 (2022: \$15,787,409). Investment earnings from the fund totalled \$779,040 (not inclusive of unrealized gains or loss).

During the year, \$874,693 was charged to the Special Emergency Fund (SEF). Investment earnings from the fund totalled \$894,381 (not inclusive of unrealized gains or loss). The market value of the SEF at 2023 08 31 was \$19,069,629 (2022: \$18,177,929).

The Capital Fund was established to fund the costs of furniture, equipment and major renovations. As budgeted, \$940,700 was allocated to the fund, plus investment earnings of \$98,722 (not inclusive of unrealized gains or loss). During the year, the fund was charged \$86,054 to reflect annual furniture and fixtures purchases. The market value of the fund at 2023 08 31 was \$2,102,433 (2022: \$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 2023 08 31 was \$3,146,289 (2022: \$2,994,745).



# Financial Statements

Year ended August 31, 2023



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## Independent Auditor's Report

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### 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, 2023, 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, 2023, 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.





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## Independent Auditor's Report (continued)

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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 10, 2023

**THE ALBERTA TEACHERS' ASSOCIATION**  
**Statement of Financial Position**  
 Year ended August 31, 2023

	Special Emergency	Defense and Advocacy	Capital	SARO Lease	Property and Equipment	Office Staff Pension Plan (Note 9)	Unappropriated	2023	2022
<b>ASSETS</b>									
<b>CURRENT</b>									
Cash and Cash Equivalents	\$ -	\$ 94,904	\$ -	\$ -	\$ -	\$ -	14,227,687	\$ 14,322,591	\$ 11,514,064
Fees Receivable	-	-	-	-	-	-	1,919,526	1,919,526	1,742,056
Other Receivables	-	-	-	-	-	-	749,087	749,087	459,735
Prepaid Expenses	-	70,000	-	-	-	-	556,927	626,927	476,249
Due from (to) Other Funds	(17,283,047)	-	5,603,403	(1,213,415)	63,311	-	12,829,748	-	-
	(17,283,047)	164,904	5,603,403	(1,213,415)	63,311	-	30,382,975	17,618,131	14,192,104
ACCRUED PENSION ASSET (Note 9)	-	-	-	-	-	24,117,000	-	24,117,000	12,416,000
INVESTMENTS (Note 3)	19,069,629	15,813,527	2,102,433	3,146,289	-	-	-	40,131,878	38,961,686
PROPERTY AND EQUIPMENT (Note 4)	-	-	-	-	32,807,861	-	-	32,807,861	32,890,649
	\$ 1,786,582	\$ 15,978,431	\$ 7,705,836	\$ 1,932,874	\$ 32,871,172	\$ 24,117,000	\$ 30,282,975	\$ 114,674,870	\$ 98,460,439
<b>LIABILITIES</b>									
<b>CURRENT</b>									
Accounts Payable and Accrued Liabilities	\$ -	\$ 53,800	\$ -	\$ -	\$ -	\$ -	3,657,746	\$ 3,711,546	\$ 3,941,836
Fees Payable to Locals	-	-	-	-	-	-	3,892,637	3,892,637	2,374,509
Current Portion Capital Lease Obligations (Note 5)	-	-	-	-	206,658	-	-	206,658	149,522
Current Portion Mortgages Payable (Note 6)	-	-	-	-	1,514,952	-	-	1,514,952	1,514,952
Deferred Grant Revenue	-	-	-	-	-	-	320,338	320,338	326,572
	-	53,800	-	-	1,721,610	-	7,870,721	9,646,131	8,307,391
POST RETIREMENT BENEFITS (Note 9)	-	-	-	-	-	-	7,856,000	7,856,000	6,104,000
MORTGAGES PAYABLE (Note 6)	-	-	-	-	11,573,646	-	-	11,573,646	13,088,598
CAPITAL LEASE OBLIGATIONS (Note 5)	-	-	-	-	930,950	-	-	930,950	419,690
COMMITMENTS (Note 7)	-	53,800	-	-	14,226,206	-	15,726,721	30,006,727	27,919,679
CONTINGENCIES (Note 8)									
<b>MEMBERS' EQUITY</b>									
Appropriated	1,786,582	15,924,631	7,705,836	1,932,874	18,644,966	24,117,000	-	70,111,889	56,721,611
Unappropriated	1,786,582	15,924,631	7,705,836	1,932,874	18,644,966	24,117,000	14,556,254	14,556,254	13,819,149
	\$ 1,786,582	\$ 15,978,431	\$ 7,705,836	\$ 1,932,874	\$ 32,871,172	\$ 24,117,000	\$ 30,282,975	\$ 114,674,870	\$ 98,460,439

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

Approved by:

*K. D. Pritchard*  
 Director

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DocuSigned by:

*Greg Carlsone GC*  
 Director

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**THE ALBERTA TEACHERS' ASSOCIATION**  
**Statement of Operations**  
**Year ended August 31, 2023**

	<u>Special Emergency</u>		<u>Defense and Advocacy</u>		<u>Capital</u>		<u>SARO Lease</u>		<u>SUBTOTAL</u>	
	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022
<b>REVENUE</b>										
ATA Membership Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Advertising	-	-	-	-	-	-	-	-	-	-
TQS Evaluations	-	-	-	-	-	-	-	-	-	-
Registration Fees	-	-	-	-	-	-	-	-	-	-
Rentals	-	-	-	-	-	-	-	-	-	-
Printing	-	-	-	-	-	-	-	-	-	-
Publications	-	-	-	-	-	-	-	-	-	-
Food Services	-	-	-	-	-	-	-	-	-	-
Public Education Action Sales	-	-	-	-	-	-	-	-	-	-
Gain on Disposal of Equipment	-	-	-	-	-	-	-	-	-	-
Grants	-	-	-	-	-	-	-	-	-	-
Miscellaneous	-	-	-	-	180,083	180,000	-	-	180,083	180,000
Realized Investment Earnings (Loss)	894,381	1,954,861	779,040	(3,553)	98,722	129,609	147,767	194,299	1,919,910	2,275,216
Unrealized Loss on Investments	(78,783)	(3,369,699)	(34,408)	(212,591)	(6,192)	(232,269)	(8,621)	(348,999)	(128,004)	(4,163,558)
<b>TOTAL REVENUE</b>	<b>815,598</b>	<b>(1,414,838)</b>	<b>744,632</b>	<b>(216,144)</b>	<b>272,613</b>	<b>77,340</b>	<b>139,146</b>	<b>(154,700)</b>	<b>1,971,989</b>	<b>(1,708,342)</b>
<b>EXPENDITURES - Schedule 1</b>										
Government	-	-	-	-	-	-	-	-	-	-
Teacher Employment Services	-	-	-	-	-	-	-	-	-	-
Professional Development	-	-	-	-	-	-	-	-	-	-
Building	-	-	-	-	-	-	-	-	-	-
Operations	-	-	-	-	-	-	-	-	-	-
Food Services	-	-	-	-	-	-	-	-	-	-
Information and Technology	-	-	-	-	-	-	-	-	-	-
Non-departmental	-	-	-	-	-	-	-	-	-	-
Other (non-rebatable)	874,693	834,315	-	-	-	-	-	-	874,693	834,315
Defense and Advocacy	-	-	1,104,746	-	-	-	-	-	1,104,746	-
<b>TOTAL EXPENDITURES</b>	<b>874,693</b>	<b>834,315</b>	<b>1,104,746</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,979,439</b>	<b>834,315</b>
<b>Excess (Deficiency) of Revenue Over Expenditures</b>	<b>\$ (59,095)</b>	<b>\$ (2,249,153)</b>	<b>\$ (360,114)</b>	<b>\$ (216,144)</b>	<b>\$ 272,613</b>	<b>\$ 77,340</b>	<b>\$ 139,146</b>	<b>\$ (154,700)</b>	<b>\$ (7,450)</b>	<b>\$ (2,542,657)</b>

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

**THE ALBERTA TEACHERS' ASSOCIATION**  
**Statement of Operations**  
 Year ended August 31, 2023

	SUBTOTAL (Continued)						Office Staff Pension Plan (Note 9)		Unappropriated		TOTAL	
	2023		2022		2023		2022		2023		2022	
	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	
<b>REVENUE</b>												
ATA Membership Fees	-	-	-	-	-	-	-	-	42,173,577	41,722,828	42,173,577	41,722,828
Advertising	-	-	-	-	-	-	-	-	147,114	159,371	147,114	159,371
TOS Evaluations	-	-	-	-	-	-	-	-	382,373	336,516	382,373	336,516
Registration Fees	-	-	-	-	-	-	-	-	55,092	56,900	55,092	56,900
Rentals	-	-	-	-	-	-	-	-	1,160,135	1,148,059	1,160,135	1,148,059
Printing	-	-	-	-	-	-	-	-	24,765	31,202	24,765	31,202
Publications	-	-	-	-	-	-	-	-	5,517	4,720	5,517	4,720
Food Services	-	-	-	-	-	-	-	-	570,644	74,366	570,644	74,366
Public Education Action Sales	-	-	-	-	-	-	-	-	15,722	14,310	15,722	14,310
Gain on Disposal of Equipment	-	-	-	-	2	-	-	-	-	-	2	-
Grants	-	-	-	-	-	-	-	-	6,234	117,947	6,234	117,947
Miscellaneous	180,083	-	180,000	-	-	-	-	-	102,254	106,157	282,337	286,157
Realized Investment Earnings (Loss)	1,919,910	-	2,275,216	-	-	-	-	-	476,551	108,610	2,396,461	2,383,826
Unrealized Loss on Investments	(128,004)	-	(4,163,558)	-	-	-	-	-	-	-	(128,004)	(4,163,558)
<b>TOTAL REVENUE</b>	<b>1,971,989</b>	<b>(1,708,342)</b>	<b>28,473</b>	<b>2</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>45,119,978</b>	<b>43,880,986</b>	<b>47,120,440</b>	<b>42,172,646</b>
<b>EXPENDITURES - Schedule 1</b>												
Government	-	-	-	-	-	-	-	-	9,628,204	9,732,113	9,628,204	9,732,113
Teacher Employment Services	-	-	-	-	-	-	-	-	8,270,420	7,454,421	8,270,420	7,454,421
Professional Development	-	-	-	-	-	-	-	-	4,595,652	4,184,282	4,595,652	4,184,282
Building	-	-	-	-	-	-	-	-	2,784,423	2,729,661	2,784,423	2,729,661
Operations	-	-	-	-	-	-	-	-	6,030,291	5,840,016	6,030,291	5,840,016
Food Services	-	-	-	-	-	-	-	-	577,248	89,424	577,248	89,424
Information and Technology	-	-	-	-	-	-	-	-	2,567,131	2,133,169	2,567,131	2,133,169
Non-departmental	-	-	-	-	-	-	-	-	425,000	1,023,000	425,000	1,023,000
Other (Non-rebatable)	874,693	-	834,315	-	-	-	-	-	2,933,182	2,012,603	5,245,470	4,997,589
Defense and Advocacy	1,104,746	-	-	-	-	-	-	-	3,210,779	3,698,953	4,085,472	4,533,268
<b>TOTAL EXPENDITURES</b>	<b>1,979,439</b>	<b>834,315</b>	<b>1,887,288</b>	<b>1,961,986</b>	<b>425,000</b>	<b>1,023,000</b>	<b>425,000</b>	<b>37,874,642</b>	<b>40,597,330</b>	<b>44,889,057</b>	<b>41,693,943</b>	
<b>Excess (Deficiency) of Revenue Over Expenditures</b>	<b>\$ (7,450)</b>	<b>\$ (2,542,657)</b>	<b>\$ (1,858,815)</b>	<b>\$ (1,961,984)</b>	<b>\$ (425,000)</b>	<b>\$ (1,023,000)</b>	<b>\$ (425,000)</b>	<b>\$ 6,006,344</b>	<b>\$ 4,522,648</b>	<b>\$ 2,231,383</b>	<b>\$ 478,703</b>	

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, 2023**

	Special Emergency		Defense and Advocacy		Capital		SARO Lease		SUBTOTAL	
	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022
MEMBERS' EQUITY,										
BEGINNING 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
EXCESS (DEFICIENCY) OF REVENUE OVER EXPENDITURES	(59,095)	(2,249,153)	(360,114)	(216,144)	272,613	77,340	139,146	(154,700)	(7,450)	(2,542,657)
INTERFUND TRANSFERS (NOTE 10)	-	(16,000,000)	-	16,500,889	846,346	892,252	(76,697)	(119,106)	769,649	1,274,035
PENSION REMEASUREMENTS AND OTHER ITEMS (NOTE 9)	-	-	-	-	-	-	-	-	-	-
MEMBERS' EQUITY, END OF YEAR	\$ 1,786,582	\$ 1,845,677	\$ 15,924,631	\$ 16,284,745	\$ 7,705,836	\$ 6,586,877	\$ 1,932,874	\$ 1,870,425	\$ 27,349,923	\$ 26,587,724

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, 2023**

	SUBTOTAL (Continued)		Property and Equipment		Office Staff Pension Plan		Unappropriated		TOTAL	
	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022
MEMBERS' EQUITY:										
BEGINNING 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
EXCESS (DEFICIENCY)										
OF REVENUE OVER										
EXPENDITURES	(7,450)	(2,542,657)	(1,858,815)	(1,961,984)	(425,000)	(1,023,000)	4,522,648	6,006,344	2,231,383	478,703
INTERFUND										
TRANSFERS (NOTE 10)	769,649	1,274,035	2,785,894	2,850,522	-	-	(3,555,543)	(4,124,557)	-	-
PENSION REMEASUREMENTS AND										
OTHER ITEMS (NOTE 9)	-	-	-	-	12,126,000	(2,513,000)	(230,000)	2,068,000	11,896,000	(445,000)
MEMBERS' EQUITY,										
END OF YEAR	\$ 27,349,923	\$ 26,587,724	\$ 18,644,966	\$ 17,717,887	\$ 24,117,000	\$ 12,416,000	\$ 14,556,254	\$ 13,819,149	\$ 84,668,143	\$ 70,540,760

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, 2023**

	Special Emergency	Defense and Advocacy	Capital	SARO Lease	Property and Equipment	Office Staff Pension Plan	Unappropriated	2023	TOTAL
Net Inflow (Outflow) of Cash Related to the Following Activities									2022
<b>OPERATING</b>									
Excess (Deficiency) of Revenue Over Expenditures	\$ (59,095)	\$ (360,114)	\$ 272,613	\$ 139,146	\$ (1,858,815)	\$ (425,000)	\$ 4,522,648	\$ 2,231,383	\$ 478,703
Items Not Affecting Cash									
Depreciation	-	-	-	-	1,887,288	-	-	1,887,288	1,961,986
Unrealized Loss on Investments	78,783	34,408	6,192	8,621	-	-	-	128,004	4,163,558
Gain on Disposal of Equipment	-	-	-	-	(28,473)	-	-	(28,473)	(2)
Net Change in Employee Future Benefits	950,795	(145,538)	(171,783)	12,397	-	425,000	1,522,000	1,947,000	1,413,000
Interfund Transfer	970,483	(471,244)	107,022	160,164	2,783,194	-	(3,429,065)	-	-
								6,165,202	8,017,245
Changes in Non-Cash Operating Working Capital Items									
Fees Receivable	-	-	-	-	-	-	(177,471)	(177,471)	524,906
Other Receivables	-	-	-	-	-	-	(289,352)	(289,352)	(223,288)
Prepaid Expenses	-	70,000	-	-	-	-	(220,678)	(150,678)	169,523
Accounts Payable and Accrued Liabilities	-	53,800	-	-	-	-	(223,478)	(169,678)	810,823
Fees Payable to Locals	-	-	-	-	-	-	1,518,128	1,518,128	(186,670)
Deferred Grant Revenue	-	-	-	-	-	-	(6,234)	(6,234)	135,726
	970,483	(347,444)	107,022	160,164	2,783,194	-	3,216,498	6,889,917	9,248,265
<b>INVESTING</b>									
Additions to Property and Equipment	-	-	-	-	(1,066,238)	-	-	(1,066,238)	(1,254,579)
Proceeds on Disposal of Equipment	-	-	-	-	44,102	-	-	44,102	68,531
Proceeds on Sale of Investments	-	785,882	-	-	-	-	-	785,882	-
Purchase of Investments	(970,483)	(846,409)	(107,022)	(160,164)	-	-	-	(2,084,078)	(6,739,524)
	(970,483)	(660,527)	(107,022)	(160,164)	(1,022,136)	-	-	(2,320,332)	(7,925,572)
<b>FINANCING</b>									
Mortgage Payments	-	-	-	-	(1,514,952)	-	-	(1,514,952)	(1,514,952)
Capital Lease Payments	-	-	-	-	(246,106)	-	-	(246,106)	(149,522)
	-	-	-	-	(1,761,058)	-	-	(1,761,058)	(1,664,474)
<b>NET CASH INFLOW (OUTFLOW)</b>	-	(407,971)	-	-	3,216,498	-	-	2,808,527	(341,781)
<b>CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR</b>	-	502,875	-	-	11,011,189	-	-	11,514,064	11,855,845
<b>CASH AND CASH EQUIVALENTS, END OF YEAR</b>	\$ -	\$ 94,904	\$ -	\$ -	\$ -	\$ -	\$ 14,227,687	\$ 14,322,591	\$ 11,514,064

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, 2023

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### 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, 2023

---

### 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*

The defined benefit pension plan is established for eligible Association employees classified as professional or support staff, see also Notes 2 and 9.

*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, 2023**

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#### **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 \$320,338 (2022 - \$326,572) 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. All other related party financial instruments are recorded at cost 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.

# THE ALBERTA TEACHERS' ASSOCIATION

## Notes to the Financial Statements

### Year ended August 31, 2023

---

#### 2. BASIS OF PRESENTATION AND ACCOUNTING POLICIES (continued)

##### *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.

##### *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, 2021, and extrapolated to August 31, 2023 for accounting purposes. The next actuarial valuation for funding purposes must be effective no later than December 31, 2024 and will be completed for filing prior to the December 31, 2025 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, 2023.

##### *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, 2023

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#### 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

	2023		2022	
	Fair Value	Cost	Fair Value	Cost
Allocated to:				
Special emergency	\$ 19,069,629	\$20,037,358	\$ 18,177,929	\$ 19,066,874
Defense and advocacy	15,813,527	16,033,584	15,787,409	16,000,000
Capital	2,102,433	2,238,558	2,001,603	2,131,537
SARO lease	3,146,289	3,344,924	2,994,745	3,184,759
	<b>\$ 40,131,878</b>	<b>\$41,654,424</b>	<b>\$ 38,961,686</b>	<b>\$ 40,383,170</b>

The amounts above do not include amounts due from (to) other funds, as outlined on the Statement of Financial Position.

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

	2023	2022
Cash	5.0%	5.4%
Fixed Income	39.2%	37.1%
Canadian Equities	24.2%	26.2%
US Equities	17.5%	18.5%
International Equities	10.7%	9.7%
Emerging Market Equities	3.4%	3.1%
	<b>100.0%</b>	<b>100.0%</b>

**THE ALBERTA TEACHERS' ASSOCIATION**  
**Notes to the Financial Statements**  
Year ended August 31, 2023

**4. PROPERTY AND EQUIPMENT**

	Rates	2023		2022	
		Cost	Accumulated Depreciation	Net Book Value	Net Book Value
Buildings	2%	\$ 38,561,269	\$ 10,333,382	\$ 28,227,887	\$ 28,847,248
Building improvements	10%	19,280,740	19,156,193	124,547	-
Equipment	10%-33%	6,050,763	5,185,127	865,636	1,074,780
Tenant inducements	lease-term	2,167,069	980,627	1,186,442	1,483,052
Automobiles	20%	1,899,100	791,289	1,107,811	758,428
		<b>67,958,941</b>	<b>36,446,618</b>	<b>31,512,323</b>	<b>32,163,508</b>
Land		157,930	-	157,930	157,930
Equipment under capital lease	lease-term	1,239,950	102,342	1,137,608	569,211
		<b>\$ 69,356,821</b>	<b>\$ 36,548,960</b>	<b>\$ 32,807,861</b>	<b>\$ 32,890,649</b>

Additions to property and equipment include non-cash capital lease additions of \$1,239,949 (2022 -\$nil).

**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:

2024	\$ 206,658
2025	206,658
2026	206,658
2027	206,658
2028	206,658
Subsequent years	104,317
<b>Total minimum lease payments</b>	<b>1,137,608</b>
<b>Less current portion</b>	<b>206,658</b>
<b>Long-term obligations under capital lease</b>	<b>\$ 930,950</b>

## THE ALBERTA TEACHERS' ASSOCIATION

### Notes to the Financial Statements

Year ended August 31, 2023

#### 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, 2023.

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

	<u>2023</u>	<u>2022</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 17, 2024	<b>\$ 1,201,098</b>	\$ 1,666,050
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, 2024	<b>575,000</b>	875,000
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 \$62,500 plus interest, maturing on September 30, 2024	<b>11,312,500</b>	12,062,500
	<b>13,088,598</b>	14,603,550
Less current portion	<b>1,514,952</b>	1,514,952
Long-term portion	<b>\$11,573,646</b>	\$ 13,088,598

As at August 31, 2023, there are no swap rate arrangements in place.

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:

2024	\$ 1,514,952
2025	11,573,646
	<b>\$ 13,088,598</b>

**THE ALBERTA TEACHERS' ASSOCIATION**  
**Notes to the Financial Statements**  
**Year ended August 31, 2023**

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**6. CREDIT FACILITIES (continued)**

The above minimum annual payments reflect the current financing agreements and maturity dates as of August 31, 2023.

**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:

2024	\$	-
2025		-
2026		197,336
2027		263,115
2028		263,115
<u>Subsequent years</u>		<u>592,009</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, 2023

**9. EMPLOYEE BENEFIT PLANS**

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

	<u>Pension Plan</u>		<u>Other Benefit Plans</u>	
	<u>2023</u>	<u>2022</u>	<u>2023</u>	<u>2022</u>
Accrued benefit obligations	\$ (52,483,000)	\$ (59,352,000)	\$ (7,856,000)	\$ (6,104,000)
Fair value of plan assets	76,600,000	71,768,000	-	-
Accrued benefit asset (liability)	\$ 24,117,000	\$ 12,416,000	\$ (7,856,000)	\$ (6,104,000)

The net benefit plan expenditure is as follows:

	<u>Pension Plan</u>		<u>Other Benefit Plans</u>	
	<u>2023</u>	<u>2022</u>	<u>2023</u>	<u>2022</u>
Current service costs	\$ 1,296,000	\$ 2,272,000	\$ 562,000	\$ 522,000
Interest cost on accrued benefits	2,884,000	2,119,000	304,000	219,000
Expected return on plan assets	(3,407,000)	(2,529,000)	-	-
Net benefit plan expenditure	\$ 773,000	\$ 1,862,000	\$ 866,000	\$ 741,000

The total expenditure from the two plans is \$1,639,000 (2022 - \$2,603,000) which has been included in salaries and benefits in the department to which it relates, see Schedule 1.

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

	<u>Pension Plan</u>		<u>Other Benefit Plans</u>	
	<u>2023</u>	<u>2022</u>	<u>2023</u>	<u>2022</u>
Difference between actual return and expected return	\$ 3,022,000	\$ (14,108,000)	\$ -	\$ -
Actuarial gain (loss)	9,104,000	11,595,000	(230,000)	2,068,000
Pension remeasurements and other items	\$ 12,126,000	\$ (2,513,000)	\$ (230,000)	\$ 2,068,000

The total remeasurements credited (2022 – debited) to members' equity from the two plans during the year is \$11,896,000 (2022 – (\$445,000)).



**THE ALBERTA TEACHERS' ASSOCIATION**  
**Notes to the Financial Statements**  
Year ended August 31, 2023

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**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>2023</u>	<u>2022</u>	<u>2023</u>	<u>2022</u>
Benefit obligations				
Discount rate	5.2%	4.8%	5.2%	4.8%
Rate of compensation increase	3.0%	3.0%	3.0%	3.0%
Benefit costs				
Discount rate	5.2%	4.8%	5.2%	4.8%
Rate of compensation increase	3.0%	3.0%	3.0%	3.0%
Rate of inflation on health benefits				
Dental Care	-	-	5.0%	4.0%
Extended health care	-	-	5.0%	5.0%
Vision care	-	-	0.0%	0.0%
Average remaining service life of employees	10 years	10 years	10 years	9 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, 2023, is as follows:

Equities	58.9%
Debt Securities	31.4%
Cash and other	9.7%
	<u>100%</u>

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

	<u>Pension Plan</u>		<u>Other Benefit Plans</u>	
	<u>2023</u>	<u>2022</u>	<u>2023</u>	<u>2022</u>
Association contributions	\$ 348,000	\$ 839,000	\$ -	\$ -
Benefits paid	-	-	649,000	351,000
Total benefits	\$ 348,000	\$ 839,000	\$ 649,000	\$ 351,000

**THE ALBERTA TEACHERS' ASSOCIATION**  
**Notes to the Financial Statements**  
**Year ended August 31, 2023**

**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 2023	Total 2022
Members' equity, beginning 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
Excess (deficiency) of revenue over expenditures	(59,095)	(360,114)	272,613	139,146	(1,858,815)	(425,000)	4,522,648	2,231,383	478,703
	1,786,582	15,924,631	6,859,490	2,009,571	15,859,072	11,991,000	18,341,797	72,772,143	70,985,760
Transfer for property and equipment additions	-	-	(86,054)	-	86,054	-	-	-	-
Transfer representing proceeds on disposition	-	-	-	-	(44,102)	-	44,102	-	-
Transfer to offset leasing costs	-	-	-	(76,697)	-	-	76,697	-	-
Transfer related to property and equipment additions	-	-	-	-	2,743,942	-	(2,743,942)	-	-
Transfer for capital allocation	-	-	932,400	-	-	-	(932,400)	-	-
Pension remeasurements (Note 9)	-	-	-	-	-	12,126,000	(230,000)	11,896,000	(445,000)
	-	-	846,346	(76,697)	2,785,894	12,126,000	(3,785,543)	11,896,000	(445,000)
Members' equity, end of year	\$ 1,786,582	\$ 15,924,631	\$ 7,705,836	\$ 1,932,874	\$ 18,644,966	\$ 24,117,000	\$ 14,556,254	\$ 84,668,143	\$ 70,540,760

# THE ALBERTA TEACHERS' ASSOCIATION

## Notes to the Financial Statements

Year ended August 31, 2023

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### 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, in particular, the cost of renewal for the mortgages coming due subsequent to year-end.

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 very significant rise in interest rates experienced this fiscal period as well as the impacts of inflation and regional wars has caused significant volatility on financial markets and there is ongoing uncertainty on how this could impact the Association's investment portfolio and pension assets 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 \$354,664 (2022 - \$513,956) from the controlled entities. This revenue is included in the respective accounts as reported in the statement of operations. Accounts receivable include \$133,752, (2022 - \$113,395) due from the above related parties.

The Association paid grants and seminar costs totaling \$1,794,511 (2022 - \$1,653,771) to the controlled entities. These expenditures are included in various expense accounts reported in Schedule 1. Accounts payable and fees payable to Locals include \$4,041,269 (2022 - \$2,374,509) due to the above related parties.

**THE ALBERTA TEACHERS' ASSOCIATION**  
**EXPENDITURES**

**SCHEDULE 1**

**Year ended August 31, 2023**

	<b>2023</b>	<b>2022</b>
<b>GOVERNMENT</b>		
Annual Representative Assembly	\$ 490,743	\$ 530,418
Committees	378,086	367,905
Conferences	67,114	22,327
Education	423,713	296,236
Elections	116,195	-
Library	153,593	147,490
Local Presidents' Meetings	61,959	7,293
President	202,180	197,980
Provincial Executive Council	1,737,929	1,354,603
Public Education Promotion	170,199	262,870
Publications	505,903	491,185
Publicity	238,497	351,115
Representation	87,384	288,431
Research	253,783	225,421
Salaries and Benefits	4,740,926	5,188,839
	<b>9,628,204</b>	<b>9,732,113</b>
<b>TEACHER EMPLOYMENT SERVICES</b>		
Bargaining	720,640	731,257
Committees	30,971	9,626
Conferences	66,403	32,524
Education	981,442	689,745
Member Assistance	2,307,795	1,978,122
Publications	1,439	4,414
Representation	(3,893)	13,361
Salaries and Benefits	4,142,901	3,971,640
Travel Insurance	22,722	23,732
	<b>8,270,420</b>	<b>7,454,421</b>
<b>PROFESSIONAL DEVELOPMENT</b>		
Committees	95,265	37,838
Conferences	14,521	5,927
Conventions	53,079	43,500
Education	1,231,041	902,543
Evaluations	67,702	52,196
Publications	52,673	23,051
Representation	9,300	234
Research	23,627	11,398
Salaries and Benefits	2,971,632	3,094,352
Specialist Councils	76,812	13,243
	<b>4,595,652</b>	<b>4,184,282</b>

**THE ALBERTA TEACHERS' ASSOCIATION**  
**EXPENDITURES**  
**Year ended August 31, 2023**

**SCHEDULE 1**

	<b>2023</b>	2022
<b>BUILDING</b>		
Operating Costs - Barnett House	<b>1,686,396</b>	1,637,083
Operating Costs - SARO	<b>77,652</b>	85,934
Salaries and Benefits	<b>1,020,375</b>	1,006,644
	<b>2,784,423</b>	2,729,661
<b>OPERATIONS</b>		
Audit	<b>106,928</b>	70,030
Equipment Maintenance	<b>10,184</b>	8,075
Equipment Rental	<b>121,385</b>	126,834
External Services	<b>21,257</b>	22,357
General	<b>126,334</b>	119,647
Human Resources	<b>244,970</b>	141,974
Interest and Bank Charges	<b>32,796</b>	30,208
Mortgage Interest	<b>837,404</b>	615,255
Office Staff Pension Plan	<b>173,660</b>	117,727
Postage and Delivery	<b>157,386</b>	152,006
Salaries and Benefits	<b>3,991,157</b>	4,295,664
Stationery and Supplies	<b>206,830</b>	140,239
	<b>6,030,291</b>	5,840,016
<b>FOOD SERVICES</b>		
Food Purchases	<b>193,906</b>	31,872
Salaries and Benefits	<b>347,740</b>	53,083
Supplies	<b>35,602</b>	4,469
	<b>577,248</b>	89,424
<b>INFORMATION AND TECHNOLOGY</b>		
Salaries and Benefits	<b>1,268,475</b>	1,205,277
Technical Services	<b>1,298,656</b>	927,892
	<b>2,567,131</b>	2,133,169

**THE ALBERTA TEACHERS' ASSOCIATION  
EXPENDITURES**
**SCHEDULE 1**
**Year ended August 31, 2023**

	2023	2022
<b>NON-DEPARTMENTAL</b>		
Deferred Pension Adjustment	425,000	1,023,000
Depreciation	1,887,288	1,961,986
Employee Benefits	945,165	922,071
Future Benefits Adjustment	1,522,000	390,000
Grants and Awards	459,783	582,585
Public Grants	6,234	117,947
	<b>5,245,470</b>	<b>4,997,589</b>
<b>OTHER (NON-REBATABLE)</b>		
Canadian Teachers' Federation Fees	985,028	1,075,032
IT Projects	365,108	709,051
Public Relations Campaign	996,643	1,051,870
Special Emergency Expenditures (Schedule 2)	874,693	834,315
Specialist Council Grants	864,000	863,000
	<b>4,085,472</b>	<b>4,533,268</b>
<b>DEFENSE AND ADVOCACY</b>		
Advertising	588,437	-
Canadian Teachers' Federation Fees	98,589	-
International Cooperation	170,000	-
Representation	247,720	-
	<b>1,104,746</b>	<b>-</b>
<b>TOTAL EXPENDITURES</b>	<b>\$ 44,889,057</b>	<b>\$ 41,693,943</b>

**THE ALBERTA TEACHERS' ASSOCIATION**
**SCHEDULE 2**
**Special Emergency Expenditures**
**Year ended August 31, 2023**

	2023	2022
Election Readiness	\$ 478,566	\$ 29,977
Rally 2022	396,126	-
Defend Advertising Campaign	-	714,813
Public Interest Alberta Contribution	-	81,900
Telephone Townhalls 2022	-	7,625
	<b>\$ 874,693</b>	<b>\$ 834,315</b>





The Alberta  
Teachers' Association

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