

# Pension Investment & Governance Basics Course



**GARY GODDARD, Pension Officer, Public Service Alliance of Canada**

Gary is the Pension Officer with the Public Service Alliance of Canada (PSAC). He is responsible for all aspects of design, funding, regulation, administration, governance and communication of the PSAC's internal staff pension plan. Prior to joining the PSAC in 2001, Gary spent twenty years in the actuarial field, the last 15 of which were with various international consulting firms, to whom he provided advice to clients in the areas of both pension and health benefits. His specialties were in the areas of actuarial funding, legislation, investment and mergers and acquisitions. Gary has an honours Bachelor of Science degree from Carleton University in Ottawa. He also holds the designations of Fellow of the Canadian Institute of Actuaries and Fellow of the Society of Actuaries. He has been a member of the Society of Actuaries' Education and Examination Committee for more than twenty years and has served as an instructor for SHARE's pension leadership training courses for many years.



**DARLENE HIMICK, Professor of Accounting, University of Ottawa**

Darlene is a Senior Research Fellow with SHARE, who assists in advising its members on responsible investing issues, and conducts research related to SHARE's mandate. Darlene is also an Associate Professor at the Telfer School of Management at the University of Ottawa. Previously, she worked for Mercer Investment Consulting, advising on investment policy and investment monitoring and held a teaching post at the John Molson School of Business at Concordia University.



**STEVEN MARTIN, Business Manager/Financial Secretary International Brotherhood of Electrical Workers Local 353**

Steven is a Principal Officer of IBEW Local 353, who is in charge of the daily operations of a membership of 11,000 active members and 2,500 retiree members within the local union. Steven has also been an employee trustee for Local 353 since 2006. He is the chair of the Investment Committee and a member of the Governance committee within the board of trustee. He is also a fully trained and certified trustee and has vast knowledge of multi-employer pension plans.



**ALEX D MCKINNON, Department Leader, Research, Public Policy & Bargaining Support, United Steelworkers**

Alex McKinnon has been on staff with the Union for over 30 years. In 1991, he became the first rank and file member to go into the Unions National Office Research Department and in 2013 became the first rank and file member to be promoted to the Research Director. He serves as a pension trustee on the Steelworkers Pension Plan, a USW multi-employer pension plan. He also serves as a Trustee on the Canadian Energy and Related Industries Pension Plan. Additionally, Alex is currently Chair of the University of Toronto Pension Plan as well as the Secretary Treasurer of MEBCO. Recently, he was appointed as Chair of the Financial Services Commission of Ontario (FSCO) Multi-Employer Pension Committee. He also serves as a Labour Co-Chair of the Ontario University Pension Project (UPP). He is a graduate of Sir Wilfred Laurier University with a Bachelors' in Economics, and holds a variety of certifications in Advanced Trustee Management. He also volunteers as a peer support worker for Spinal Cord Injury of Ontario.



**CHRIS ROBERTS, National Director of the Social and Economic Policy Department, Canadian Labour Congress**

Chris joined the Canadian Labour Congress in 2011, and assumed the role of National Director in 2014. In addition to managing the work of the department, he is responsible for research in the areas of fiscal and monetary policy, labour market policy, pensions and investments, and labour law reform. Chris is a Fellow with the Comparative Research in law and Political Economy Forum at Osgoode Hall Law School, and is a member of the Board of Directors of the Canadian Foundation for Labour Rights. He participates in the work of the Trade Union Advisory Committee to the Organisation for Economic Co-operation and Development and the Global Unions Committee on Workers' Capital. Between 1994 and 2002, Chris studied political economy at York University in Toronto, where he received his M.A. (1996) and Ph.D. (2002). His doctoral dissertation examined the divergent experience of autoworkers and their unions in the Canadian and United States automotive industries in the post-World War II era. After graduating, Chris conducted post-doctoral research on the southern Ontario automotive industry at McMaster University in Hamilton, Ontario, before going on to teach in the Department of Social Science at York University. Chris is a pension trustee and advisory committee member for several pension plans, and is the author of *Pension Confidential* (Lorimer, 2012), with Robert Drummond.



**ELIZABETH SHILTON, Senior Fellow, Centre for Law in the Contemporary Workplace, Queen's University Faculty of Law**

Elizabeth was appointed the Law Foundation of Ontario Senior Fellow at the CLCW in February 2011. Her postdoctoral work in gender and pension reform contribute vitally to CLCW's current research programme. Elizabeth holds an LLM from Harvard and an SJD from the University of Toronto. She was a founding partner of Cavalluzzo Hayes Shilton McIntyre & Cornish, a Toronto-based law firm specializing in union-side labour law. She practiced there for many years, advising unions in both the public and private sector on labour and employment law issues, including human rights and constitutional law. She also appeared before administrative tribunals and courts, including the Supreme Court of Canada, in significant cases involving employment and equality rights. She was one of the first lawyers certified by the Law Society of Upper Canada as a Labour Law Specialist. She taught labour, employment and collective bargaining law as an adjunct professor at the University of Toronto Faculty of Law and Osgoode Hall Law School, and has been a Visiting Scholar at Osgoode's Institute for Feminist Legal Studies. Elizabeth is also a member of the Ontario Financial Services Tribunal.



**RANDY SLOAT, President, OPSEU Local 201, Trustee, OPTrust**

OPSEU named Randy Marie Sloat to the Board of Trustees in January 2012. Randy is currently a customer care representative with the Ministry of Government and Consumer Services in Hamilton. She has more than 20 years' experience in human resources and labour relations, working with various trade unions and industry. A union activist, she is the President of OPSEU Local 201 in Hamilton and also serves on several local Executive Committees. Randy holds an Industrial Relations Certificate (Honours) from Mohawk College and an Advanced Trustee Management Standards certificate from the International Foundation of Employee Benefits Plans. She obtained the Chartered Director designation from The Directors College (a joint venture between McMaster University and The Conference Board of Canada) in 2015.



**KEVIN THOMAS, Director of Shareholder Engagement, SHARE**

Kevin joined SHARE in 2013 as a Senior Analyst on social issues. Previously, he was the Director of Advocacy for the Maquila Solidarity Network, a labour and women's rights organization, where he advised companies, governments, and public institutions on the development and implementation of policies and practices to improve respect for worker rights in global supply chains. From 1998 to 2009 Kevin served as a political advisor to the Chief and Governing Council of the Lubicon Lake First Nation in Alberta, and as Chief Negotiator for treaty negotiations with the Federal and Provincial governments. He also negotiated land use, environmental protection and economic benefit agreements

with oil, gas and forestry corporations. Kevin holds an LLM in international business law (with a focus on securities law, corporate governance, taxation, trade, and arbitration) and an Honours BA in Environment and Resource Management from the University of Toronto.