



The Association of Treasurers
of Religious Institutes
Presents the 32nd Annual Conference

*“Make it happen ,
make it matter”*

September 27-30, 2019

**The Westin Calgary Hotel
320 4th Avenue SW
Calgary, AB T2P 2S6**

Hotel call-in Registration number: 1-888-627-8417

Web Registration

Book your reservation at The Westin Calgary by [clicking here](#)

Dear Registrant:

Welcome to ATRI's 32nd Annual Conference: This year we will be exploring the theme—

"Make it happen, make it matter". This theme draws us to identify what is the "it" for us at this present time? The "it" will be different for each of us. "Making it matter" will guide us as we travel the road ahead of us. Sister Janet Mock, CSJ will ground our conference by highlighting how in our various roles we need to be open and aware of what direction we are heading in and continue to be people of faith and hope.

We will also offer practical workshops to assist and challenge us in our various ministries as treasurers, leadership and financial people in our religious communities.

This year the following will be included in your registration fee thanks to the generosity of the many sponsors of our conference:

- 1 Substantial Social (**this will be on Friday night so please eat a "Lite" supper**)
- 3 Breakfasts
- 4 Nutrition Breaks
- 2 Lunches
- Banquet & Entertainment
- Box lunches available on Monday for those who request them (see registration form)

Conference Registration Fees:

Before August 6, 2019:	\$ 350.00 (for the 1st person)
	\$ 300.00 (for the 2nd person)
	\$ 275.00 (for any additional people)
After August 6, 2019:	\$ 375.00
Non-Member:	\$ 400.00

Deadline for Registration: August 6, 2019

EARLY BIRD DRAW!!!!

EARLY BIRD SPECIAL!!! "Those who reserve their guestroom at The Westin Calgary Hotel before July 8, 2019 will have their names placed in a draw to receive 1 night stay free & room upgrade for the 2019 conference. So book your hotel room early!"

So book your hotel room early!!



Conference Speakers

Sister Janet Mock, CSJ—is a Sister of St. Joseph of Baden, Pennsylvania, near Pittsburgh, PA in the United States. Her formal education is in the areas of Music Education from Carlow University, Pittsburgh, PA and Formative Spirituality from St. Louis University, St. Louis, MO. She counts her life as a Sister of St. Joseph and her encounters with countless women, men, children she has met along the way as the most transformative education. She has been an elementary school teacher, a formation director for the Sisters of St. Joseph and served in congregational leadership in her religious congregation. Following congregational leadership, Janet worked in Community Outreach at Carlow Hill College in Pittsburgh's Hill District, a program that made it possible for African American women to engage in a baccalaureate degree program designed from the African American perspective of history, literature, and the sciences. Her job description at Carol Hill College was to "go where women gather and listen to them, then bring their needs to the University to see how that institution could be of

assistance in the neighborhood." In 1997, Janet relocated to Silver Spring, MD where she served as executive director of the Religious Formation Conference. In 2008 she became director of Leadership and Mission at Washington Theological Union and in 2011 became executive director of the Leadership Conference of Women Religious. Janet now lives in Aliquippa PA and is available to assist religious congregations and other groups through presentations, facilitation and retreat ministry. She welcomes this opportunity to engage you in conversation about matters that matter in life in general and your ministry in particular and is grateful for this opportunity to be with you.

Janet will lead us on a spiritual journey as she explores: **"What in the World is Going On: A Reflection on Making Meaning in the Chaos that Inaugurates a New Creation"**. Using the thesis presented by Scripture scholar, Walter Brueggemann in his book: *Reality, Grief, Hope: Three Prophetic Tasks for our Time*, this presentation will attempt to engage participants in contemplating the power and the challenge of facing our reality today as a People of God, particularly as stewards of the spiritual and temporal patrimony of religious congregations, grieving what must be let go and embracing the call of God who always comes to us from the future – a future full of hope.

"Make it happen, make it matter"

WORKSHOP PRESENTERS

MELANIE BLUE—is a Partner at 18 Asset Management and the firm's Head of Investments. In her role, Melanie is responsible for the day-to-day management of all 18 AM's portfolios, including security selection, portfolio construction, monitoring markets, buy/sell decisions, research, trade cost analysis and trade execution. As a Partner, Melanie is actively involved in setting and executing 18 Asset Management's strategic plan. Over a 24-year career, Melanie has built a solid investment management pedigree, attaining both her Chartered Professional Accountant and CFA designation as well as gaining valuable experience in portfolio management, security selection and risk management. Her considerable portfolio management experience includes an emphasis on quantitative research into factor investing. Melanie is a natural leader with strong team orientation.

THOMAS BOUCHARD, MD—After completing three years doing research on dementia in Parkinson's disease at the University of Alberta, Dr. Bouchard completed medical school and residency in Calgary. He is the medical director at Fr. Lacombe and Providence Care Centres.

TERRY CARTER—is the Managing Partner of Carters, Mr. Carter practices in the area of charity and not-for-profit law, and is counsel to Fasken on charitable matters. Mr. Carter is a co-author of Corporate and Practice Manual for Charitable and Not-for-Profit Corporations (Thomson Reuters), a co-editor of Charities Legislation and Commentary (LexisNexis, 2019), and co-author of Branding and Copyright for Charities and Non-Profit Organizations (2014 LexisNexis). He is recognized as a leading expert by Lexpert, The Best Lawyers in Canada and Chambers and Partners, and is a Past Chair of the Canadian Bar Association and Ontario Bar Association Charities and Not-for-Profit Law Sections. He is editor of www.charitylaw.ca, www.churchlaw.ca and www.antiterrorismlaw.ca.

KAREN COOPER—practices charity and not-for-profit law with an emphasis on corporate and tax issues. In addition to her considerable legal experience, Ms. Cooper has extensive speaking and teaching experience and is a contributing author to The Management of Charitable and Not-for-Profit Organizations in Canada. She is currently serving on the Board of Directors of the Canadian Land Trust Alliance, the Duke of Edinburgh's Award, and the Kemptville District Hospital, and on the Executive of the Charity and Not-for-Profit Law Sections of the Ontario Bar Association and the Canadian Bar Association.

AL JINA—is a lawyer and health service executive. Since 1993 he has been the President and CEO of Park Place Seniors Living which provides seniors care and housing in British Columbia and Alberta. His commitment to providing quality health services to its residents is reflected in the accreditation award by Accreditation Canada. Al is the past Vice Chair and a current member of the Multi Generational Housing Board. He was elected Chair of SafeCare BC since 2014 for 5 consecutive years to help improve occupational health and safety in continuing care in B.C. In 2010, he was appointed by the B.C. Law Institute as an advisor to its 3 year project to review and strengthen legislation with respect to seniors assisted living in B.C. The Project Committee developed the BCLI Report on Assisted Living, BC, which was published in October, 2013. Earlier, in 2008, Mr. Jina was presented the Member of the Year Award by the BC Care Providers Association. In 2006, Altaf was appointed by the Government of B.C. to the Board of Examiners in Optometry and assisted its transitioning under the Health Professions Act to become the College of Optometrists. When making the appointment, the government sought a member with legal and health care experience. Also in 2006, Altaf was jointly appointed by the Law Society of B.C. and the Canadian Bar Association to the Board of the Continuing Legal Education Society of B.C. to assist with implementation of mandatory continuing education for the legal profession in B.C. Altaf currently serves on the Boards of Alberta Continuing Care Association, Jubilee Multi Generational Housing Society, and MCYH Multi Generational Housing Society. He has previously served on the Boards of the BC Care Providers Association, and Health Employers Association of B.C.

Conference Speakers continued

KIMBERLEY—has an educational background in psychology with an emphasis on crisis and trauma. She has worked in a variety of settings from law enforcement and National Defense to working with youth with severe, persistent mental illness. Fourteen years ago she joined the Canadian Mental Health Association - Calgary Region Mental Health prevention and promotion team as a teaching specialist. Kimberley is passionate about increasing literacy around mental illness, stress management, and increasing individual's help seeking as well as suicide prevention.

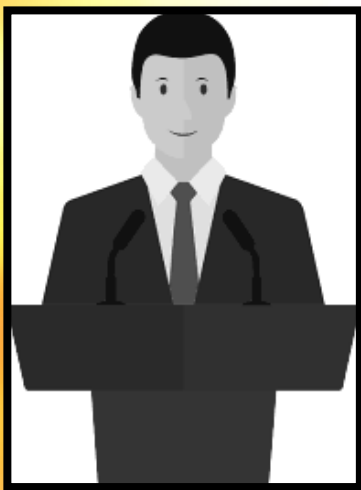
BRETT LANGILL & ADAM MCHENRY—are Investment Advisors at Manulife Securities Incorporated. Brett and Adam along with their four talented associates have over 50+ years of investment experience working with religious organizations. Brett & Adam are both active volunteer members of the finance committee of the Toronto Central chapter of the St. Vincent de Paul.

KRISTA MCINTOSH—is a highly adaptable professional who likes to inspire others by envisioning the future and what could be. She is able to go with the flow and uses her ability to see connections and interrelationships to generate ideas and make things happen. Her interest in human behaviour led to her attaining a Master's degree in Human Factors, specializing in human error. Her professional background has brought her success at major organizations such as ENMAX and Canadian Pacific Railway, where her leadership role allowed her to implement programs around compensation, performance management and succession planning. She has applied her knowledge of human behaviour successfully in Human Resources, helping making people and organizations successful. Krista is a highly personable, effective Human Resources expert that enjoys workplace investigations and working through workplace situations to determine why behaviours are occurring. This allows her to quickly and effectively identify practical and effective solutions. Her empathetic and knowledgeable spirit makes it easy for her to create and maintain great relationships with her clients. When Krista isn't helping identify root causes of issues to create meaningful, practical and workable solutions, she can be found volunteering with animal rescues, creating fibre art or spending quality time with her husband, teen daughter and their three dogs.

LOUISE RIOUX – is an Accounting Clerk at Despins Charities Inc. and the Respectful Workplace trainer for the Catholic Health Corporation of Manitoba. Louise has over 10 years' experience as an instructor delivering corporate training on various topics with Université de Saint Boniface, Swarovski of North America and the Economic Development Council for Manitoba Bilingual municipalities. Louise has volunteered for the community by sharing her jewelry skills with the "lifers" inmates at the Stoney Mountain Penitentiary through the Menonite Central Committee social enterprise initiative, has served two terms as treasurer to the Old St. Boniface Residents Association, and was a volunteer for Art in the Cart at the St. Boniface General Hospital as well as work with other local charities/community groups.

Conference speakers continued

TRACEY ZEHL, FCPA, FCA, CPA (IL, USA), FEA (Family Enterprise Advisor) Tracey has over 19-years' experience providing assurance and business advisory services to clients in a variety of industries including not-for-profit, charities, schools and private business. Before joining Grant Thornton, she spent seven years as a partner in the Private Company Services group and Not-for-Profit Sector Leader of a big four firm. Tracey has significant audit experience with a variety of industries including sports entertainment, consumer business, hospitality, transportation, manufacturing, real estate and not-for-profit. She is a dynamic business advisor who understands the wide variety of challenges not for profit organizations often face. She works closely with each of her clients, building customized solutions to ensure they see measurable results and reach their full potential. Tracey is committed to the community. She currently sits on the Board of Directors and is the Finance and Audit Committee Chair of Tourism Calgary where she is passionate about promoting all this great City has to offer. She is the vice chair of the Stampede Royalty Committee and a member of the Nominations and Shareholder Relations Committee of Calgary Exhibition and Stampede. She is a past 6 year board member and president (3 years) of Ronald McDonald House of Southern and Central Alberta. She has helped several NPOs conduct an organizational risk assessment that has brought forth areas of concern and focus to be addressed by the respective entities.



WORKSHOPS

1. "RESPECTFUL WORKPLACE"—LOUISE RIOUX

Respectful Workplace training is one of the ways to ensure your workplace is an environment where people feel safe and can thrive.

Key points:

- Describe why a respectful workplace is important for the organization's success
- Identify violent, harassing and abusive behaviours that are inappropriate in the workplace
- Identify your options if you feel someone has been subject to inappropriate behavior
- Understand your role in promoting, building & maintaining a respectful and positive work place culture

2. "UNDERSTANDING YOUR INVESTMENT FEES AND RESPONSIBILITY AS A TREASURER"—BRETT LANGILL AND ADAM MCHENRY

This presentation will address the most important questions Treasurers need to answer when managing an organization's investments. These questions include: How Treasurers can ensure that they have the appropriate tendering process, due diligence and oversight of their investments? Prove that the investment portfolio is managed in compliance with the organization's values? Investment fees are competitive? Is the investment portfolio structured to provide the clergy with financial security, and carry on the organization's mission? Are your investments being delegated in a way that exposes you to legal liability?

3. "CRA AND LEGAL ISSUES THAT MATTER"—KAREN COOPER

An update on CRA and legal issues of importance to religious institutes including a review of the enforceability of Memorandums of Understanding (MOUs,) a primer on donations, and an update on the new rules for public policy dialogue.

4. "WHEN GOOD INVESTIGATIONS GO BAD"—KRISTA MCINTOSH

When workplace investigations are required, many organizations are faced with having them completed by employees who are not experienced or skilled in this area and doing it off the side of their desks. This can result in errors which turn an unfortunate situation into a nightmare. In this session, we will review common mistakes, talk about consequences of getting it wrong, and cover tips and tricks for staying out of trouble in this tricky to navigate area.

5. "STATE OF THE NPO SECTOR & USING FINANCIAL STATEMENTS TO SHARE YOUR STORY"—TRACEY ZEHL

This presentation will cover some of the key trends we are seeing in the NPO sector and how organizations are coping and tackling the ever-changing environment. I will also focus on how you can use financial information to clearly articulate your need and impact. Specific areas that will be addressed include the difference between gifts and endowments, focused fundraising, fund versus deferral method of accounting, reserves to plan for the future and contributions of gifts and services.

(workshop choices continued on next page)

WORKSHOPS continued

6. "WHAT IS AN APPROPRIATE RESPONSE TO MAID (MEDICAL ASSISTANCE IN DYING) IN A CATHOLIC INSTITUTION?"—DR. THOMAS BOUCHARD, M.D.

This workshop will discuss the communication tools to respond to questions about MAID and a compassionate Catholic response. This involves addressing the underlying care needs with such compassion and creativity so that such requests are rare or easily resolved.

7. "ALIGNING YOUR PORTFOLIO WITH YOUR VALUES WHEN USING PASSIVE INVESTMENTS"—MELANIE BLUE

The focus of this presentation is to provide the audience with three things:

- an understanding of what passive and ethical investing are and how can you do both at the same time
- an appreciation for the products that are currently available and how they function
- an awareness that your unique ethical considerations can be looked after

8. "THE MEDICAL MARIJUANA BATTLEGROUND IN RESIDENTIAL CARE: ETHICAL ASPIRATIONS AND LEGAL CONTEXTS"—AL JINA

With the Cannabis Act coming into force in Canada, there is much to learn about the regulation of marijuana by federal, provincial, and municipal governments going forward. In this presentation, Al Jina will review the impact on seniors care of the new laws permitting cannabis use and sale. More importantly, he will review the balancing of rights that will be called for in safely providing access to medical and recreational marijuana while respecting the rights, safety, health and comfort of other residents, staff, and volunteers within the resident's community. The presentation will also discuss the importance of supporting residents to make a fully informed decision, to discuss treatment options including alternative formulary medications, explain associated risks, and the importance of having strong protocols in place. The presenter will also focus on navigating the confusing regulatory framework that has become a battleground between the federal, provincial and municipal governments.

9. "MENTAL HEALTH—KIMBERLEY

This session aims to increase participants awareness surrounding mental illness. It includes examining what is mental health verses mental illness, causes of mental illness, some of the more common types of mental illnesses, pathways to recovery, where to get help, and how to help someone living with a mental illness.

(workshop choices continued on next page)

WORKSHOPS continued

10. "MENTAL HEALTH" (REPEAT OF WORKSHOP #9)—KIMBERLEY

This session aims to increase participants awareness surrounding mental illness. It includes examining what is mental health verses mental illness, causes of mental illness, some of the more common types of mental illnesses, pathways to recovery, where to get help, and how to help someone living with a mental illness.

11. "LEGAL CHALLENGES AND OPTIONS FOR BOARDS IN TRANSITION"—TERRY CARTER

The boards of religious institutes are facing increasing challenges as a result of decreasing membership within their organizations. This session will look at the legal challenges that need to be faced when boards are having to transition as a result of this new reality, including the involvement of lay people on the board at the board level and options concerning how to ensure that control remains with the religious.

12. "RESPECTFUL WORKPLACE"(REPEAT OF WORKSHOP #1)—LOUISE RIOUX

Respectful Workplace training is one of the ways to ensure your workplace is an environment where people feel safe and can thrive.

Key points:

- Describe why a respectful workplace is important for the organization's success
- Identify violent, harassing and abusive behaviours that are inappropriate in the workplace
- Identify your options if you feel someone has been subject to inappropriate behavior
- Understand your role in promoting, building & maintaining a respectful and positive workplace culture



Discount for travel provided by Air Canada



Eligible Tickets: A ticket is eligible for the discount provided it has been purchased on aircanada.com, and the provided Promotion Code has been applied at time of purchase. Any ticket **not purchased** on aircanada.com for the purposes of travel to an Event will not qualify for any benefits provided by the Meetings and Conventions Product. A ticket purchased on aircanada.com but for which the applicable Promotion Code was not entered or was entered incorrectly will not be eligible for the Discount. **Discount is 10%.** You must enter the code:

CN9EQBM1

Discount for travel provided by Westjet



Westjet is able to offer **5% off Econo*** and **10% off EconoFlex and Premium fares for travel within Canada and 2% off Econo*, 5% off EconoFlex and 10% off Premium base fares for guests travelling Trans-border** into and out of **Calgary**. To take advantage of this offer, you will need the discount code listed. Please visit www.westjet.com/conventions to make a booking online.

Travel from: September 20, 2019 to October 6, 2019

Coupon code:	D39KB34
<small>*Guest web/Travel Agent web</small>	
Promo code:	WLL64
<small>*Travel Agent GDS only</small>	

**Travel Information from the Calgary Airport
(the hotel is about 25 minutes away depending on traffice)**



Limo approximately \$46.50 a car



Taxi cost approx. \$40.00 – \$45.00

Microsite for more information about Calgary:
<http://choosecalgary.ca/atri2019>

Deadline for Registration: August 6, 2019

Withdrawal: If you are unable to attend, substitution is accepted with a written or fax notice to the ATRI Office by **September 6, 2019**

Cancellation: Registration Fee less \$75.00 administration fee will be refunded if a written notice of cancellation is received in the ATRI Office no later than **September 6, 2019.**

Please send to:

ATRI

101 Thorncliffe Park Drive, #151

Toronto, ON M4H 1M2

Tel: (416) 429-7331 Fax: (416) 429-7356

E-mail: atris@look.ca Website: www.atri.on.ca

Hotel Information

YOU MUST REGISTER WITH

Westin Calgary Hotel

Hotel Guestroom phone-in number: 1-888-627-8417

When booking by telephone please use “Association of Treasurers of Religious Institutes - 32nd ATRI Conference 2019” guestroom block

to ensure you receive the appropriate rate and are included in the guestroom block

OR

You can also register via the internet at this link:

Book your reservation at The Westin Calgary by [clicking here](#)

If you are arriving early or staying later for the conference please contact the hotel directly at the number above or register on-line so that you can receive a conference rate for the extra days.

This hotel is “smoke-free.”

The Westin Calgary Hotel offering a Conference rate of:

Standard Room (single or double): \$149.00 (plus taxes)

(Complimentary internet access in all of the bedrooms)

“A deposit equal to one night's stay and tax will be charged at the time you make a room reservation. Deposit will be applied as payment on your guestroom bill. Deposits are refundable if notice is received at least 3 days (72 hours) prior to arrival. Deposit will be forfeited if cancellation notice is received within 3 days of arrival.”

All reservations must be made **by August 6, 2019** in order to guarantee a room at the Conference rate.

PLEASE NOTE: ALL RESERVATIONS MUST BE MADE THROUGH THE REGISTRATION NUMBER OR INTERNET INFORMATION PROVIDED ABOVE.

Check-in Time is 3:00 p.m. and Check-out Time is 12 noon. Guests arriving before 4:00 p.m. will be accommodated as soon as rooms become available.

PARKING: see attached sheet for information on hotel parking and other parking options in the area.

Conference 2019 Schedule

Friday, September 27, 2019

4:00-6:00 p.m.	Registration
7:00-8:00 p.m.	Welcome and Opening Ritual Social

Saturday, September 28, 2019

7:00-8:30 a.m.	Breakfast
8:40-8:50 a.m.	Announcements
8:50-9:15 a.m.	Prayers
9:15-10:15 a.m.	General Session--Sister Janet Mock, CSJ
10:15-10:45 a.m.	Nutrition break
10:50-11:50 a.m.	<u>Workshops</u>
12:00-2:00 p.m.	LUNCH
2:00-3:00 p.m.	<u>Workshops</u>
3:00-3:30 p.m.	Nutrition break
3:30-4:30 p.m.	AGM
5:00-6:00 p.m.	Mass in the Hotel—Presider Bishop Wm. McGratton Supper on your own

Sunday, September 29, 2019

7:00-8:30 a.m.	Breakfast
8:40-8:50 a.m.	Announcements
8:50-9:10 a.m.	Prayers
9:10-10:15 a.m.	General Session—Sister Janet Mock, CSJ
10:15-10:40 a.m.	Nutrition Break
10:45-11:45 a.m.	<u>Workshops</u>
12:00-2:00 p.m.	Lunch and Lay Collaborators Lunch
2:00-3:00 p.m.	<u>Workshops</u>
3:00-5:45 p.m.	Touring the city and free time are on your own
6:00-8:30 p.m.	Banquet and Entertainment in the hotel

Monday, September 30, 2019

7:00-8:30 a.m.	Breakfast
8:40-8:55 a.m.	Announcements
8:55-9:55 a.m.	General Session--Sister Janet Mock, CSJ
9:55-10:25 a.m.	Presentations and expressions of gratitude Closing Ritual
10:25 a.m.	Nutrition break and box lunches for those who are travelling

Departure and safe journey to all!!

Our Sponsors

Our Annual Conference has been sponsored by a number of companies and individuals who very generously supported our event. We are very grateful for their contributions and wish them well in all of their future endeavours.

18 Asset Management
Addenda Capital Inc.
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Jarislowsky Fraser Limited
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