



CANADIAN PENSION & BENEFITS INSTITUTE

# VOLUNTEERING WITH THE CPBI



## The Institute

Founded in 1960, the Canadian Pension & Benefits Institute is a national, not-for-profit organization that provides industry-related educational sessions across Canada in the pensions, employee benefits and institutional investment sectors as well as networking possibilities.

### MISSION

To provide the opportunity to participate in high quality, high value and cost effective education and networking forums focused on the exchange of information and best practices related to pensions, employee benefits and investments across Canada.

### VISION

To be a recognized leader in providing quality education and networking programs and services, which are solutions-oriented and promote professional growth and development across Canada.

### VALUES

In its governance and programs, the CPBI adheres to the following values:

- Balance between National and Regional Focus
- Collaboration
- Innovation
- Accountability

**BECOME THE DRIVING FORCE OF THE CPBI**

# FACTS

**1** The CPBI is registered federally as one single entity with Industry Canada and operates under the Canadian Not-For-Profit Act. The CPBI is governed by the federal law and its by-laws.

**2** The CPBI is an open forum to share and discuss ideas; a national gathering point for the presentation of all views through open membership. The CPBI is a non-lobbying organization.

**3** CPBI offers individual memberships in 4 classes: Regular, Plan sponsor, Associate and Student. Plan sponsor employers can enroll their employees under a group membership.

## STRUCTURE

### CPBI NATIONAL BOARD OF DIRECTORS

12 Directors

Comprised of 12 volunteers representing the CPBI Regions and the expertise within the industry;

Provides framework and governance for the CPBI as a whole and authority to the Regional Councils;

Has legal and fiduciary responsibility for CPBI decisions and finances;

### CPBI NATIONAL OFFICE

Staff team led by the CEO

Manages national operations and finances;

Delivers members' services;

Maintains official records;

Supports the operations of the 8 CPBI Regional Councils;

### CPBI REGIONAL COUNCILS

8 Regions

Formed by CPBI members, who volunteer to represent the CPBI across Canada and execute its mission;

Responsible for regional programming in accordance to established CPBI by-laws and policies;

## CPBI HISTORY

The first meeting of the Canadian Pension Conference (CPC) is held on June 6, 1960 in the *King Edward Hotel, Toronto, ON* and is attended by 150 people.

1960

The CPC adopts a constitution and defines its mission.

1961

The CPC first Annual Conference is held in Montreal on May 7-8, 1969 attended by a record crowd of 341.

1969

Ontario and Quebec Regional Councils are established.

1970

The "Canadian Pension Conference - Institut canadien de la retraite" is incorporated as a not-for-profit federal corporation on December 18<sup>th</sup>. Atlantic Regional Council is established.

1978

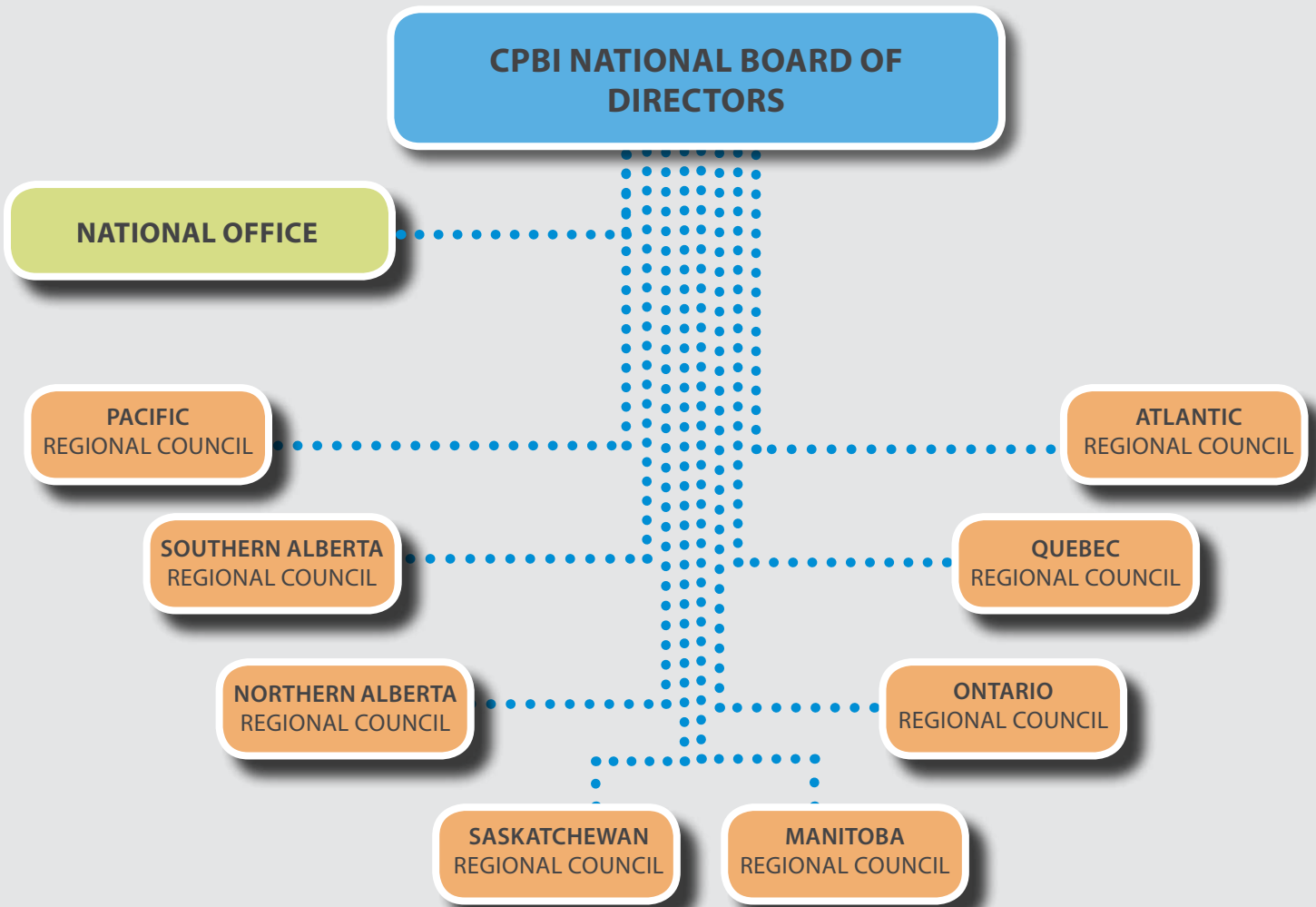
Alberta, Pacific, and Manitoba Regional Councils are established.

1979

Saskatchewan Regional Council is established.

1981

# CPBI ORGANIZATIONAL CHART



*Regional council members include: Chairperson; Vice-Chair; Treasurer; Secretary-members.*

## FINANCIAL YEAR

The CPBI financial year begins on January 1<sup>st</sup> and ends on December 31<sup>st</sup>.

## MEMBERSHIP YEAR

The CPBI Membership year begins on January 1<sup>st</sup> and ends on December 31<sup>st</sup>.

## AGM

The CPBI Annual General Meeting takes place in the Spring during FORUM.

1991

By supplementary Letters Patent, CPC becomes CPBC-ICRA.

1994

On August 8, the name Canadian Pension and Benefits Conference (CPBC) is changed to Canadian Pension and Benefits Institute (CPBI).

2003

The Alberta office splits into 2; the Northern Alberta Region serving members in Edmonton and surroundings and the Southern Alberta Region serving Calgary and surroundings.

2013

CPBI holds its annual national conference, FORUM, outside of Canada for the first time in Chicago, IL.

# VOLUNTEER TOOLS & RESOURCES

## COMMUNICATION



- Online communication module
- Online discussion forum
- Members' directory
- Conference bridge
- Webconferencing



## MARKETING



- Dynamic web pages
- Online maillist module - mass emails
- Marketing collaterals and templates
- National staff, marketing
- Regional admin help



## EVENTS



- Event management module
- Online registration and payment module
- Online maillist module
- Online library (Doc + video)
- Speakers' database
- Regional admin help



CPBI Volunteers benefit from the support of the national office staff, and regional administrators, as well as, a robust web platform that hosts CPBI documents and records and propels its activities to the membership and beyond.

## FINANCE

- Online transactions reporting system
- PayPal gateway
- Online banking
- National staff, finance
- CEO



## GOVERNANCE



- By-Laws
- MVV, strategic goals
- Policies & Guidelines
- Roles & Responsibility
- Meeting minutes
- CEO



## MEMBERSHIP



- Online membership module
- Members' directory
- National staff, membership
- Regional admin help



## WWW.CPBI-ICRA.CA

Robust Web platform featuring:



Online secure repository: Media library, Speakers' data base, Discussion forum, Members' directory.



Management modules: Membership, Events, Finance, Dynamic Web Content, Maillist modules.

### CORPORATE INTRANET:



Login with your user ID and password to access CPBI governance resources:

<https://www.cpbi-icra.ca/Tools-Resources/Intranet> 



National office staff & CEO  
514-288-1222 - info@cpbi-icra.ca



Regional admin help, by Region:  
*atlantic@cpbi-icra.ca*  
*quebec@cpbi-icra.ca*  
*ontario@cpbi-icra.ca*  
*manitoba@cpbi-icra.ca*  
*saskatchewan@cpbi-icra.ca*  
*albertanorth@cpbi-icra.ca*  
*albertasouth@cpbi-icra.ca*  
*pacific@cpbi-icra.ca*