From: ADRIC - Janet McKay [mailto:janetmckay@adric.ca]
Sent: August-09-16 2:49 PM
To: Paul Conway
Cc: ADRIC - Morgan Horst; Truus Souman; Tammy Borowiecki; Jocelyn Christian; Karen Sommerfeld; kkelly@kpkellylaw.com; Wendy Hassen; Stan Galbraith
Subject: RE: Certificates/Designations (ADRIC pro-rating policy)

Correct! Thanks, Paul.

Janet
416-487-4733 ext 105
877-475-4353 ADRIC.ca

From: Paul Conway [mailto:paul@adralberta.com]
Sent: Tuesday, August 09, 2016 4:47 PM
To: ADRIC - Janet McKay
Cc: ADRIC - Morgan Horst; Truus Souman; Tammy Borowiecki; Jocelyn Christian; Karen Sommerfeld; kkelly@kpkellylaw.com; Wendy Hassen; Stan Galbraith
Subject: RE: Certificates/Designations (ADRIC pro-rating policy)

So my understanding now is that commencing 2017, applicants whose designations are approved by ADRIC in the Q2 window of 1 April through end-June will have their fees prorated at 75% (ie their annual designation fees will be discounted by 25%). Q3 and Q4 discounts or 50% and 75% will remain as-is.

That's very equitable formula, and terrific news - many thanks.

Paul Conway | ***Executive Director***
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From: ADRIC - Janet McKay [mailto:janetmckay@adric.ca]
Sent: August-09-16 2:13 PM
To: Paul Conway
Cc: ADRIC - Morgan Horst
Subject: RE: Certificates/Designations (ADRIC pro-rating policy)

I have learned that the issue that led to no Q2 prorating was with MemberNation: If members were late renewing they could easily get the prorated "discount".

That will not be an issue with iMIS, so newly designated members can receive a prorated amount in Q2 in 2017 and going forward.

Janet

416-487-4733 ext 105
877-475-4353 ADRIC.ca

From: Paul Conway [mailto:paul@adralberta.com]
Sent: Tuesday, August 09, 2016 1:50 PM
To: ADRIC - Janet McKay
Cc: Truus Souman; ADRIC - Morgan Horst; ADRIC - Mena Sestito; Wendy Hassen; kkelly@kpkellylaw.com; Tammy Borowiecki
Subject: RE: Certificates/Designations (ADRIC pro-rating policy)

Due to ADRIA Board orientation, this item was deferred until September.

Any feedback from the ADDRIC Finance Committee? We are preparing now for the September applications.

Paul Conway | ***Executive Director***
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From: Paul Conway
Sent: May-10-16 1:58 PM
To: 'ADRIC - Janet McKay'
Cc: Truus Souman; Chuck Smith; ADRIC - Morgan Horst; ADRIC - Mena Sestito; Wendy Hassen; Stan Galbraith
Subject: RE: Certificates/Designations (ADRIC pro-rating policy)

Thanks Janet

Truus - please make an informational note on the Board's June agenda

Paul Conway | ***Executive Director***
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From: ADRIC - Janet McKay [mailto:janetmckay@adric.ca]
Sent: May-05-16 12:41 PM
To: Paul Conway
Cc: Truus Souman; Chuck Smith; ADRIC - Morgan Horst; ADRIC - Mena Sestito
Subject: RE: Certificates

I will bring to ADRIC Finance committee, thanks.

Janet
416-487-4733 ext 105
877-475-4353 ADRIC.ca

From: Paul Conway [mailto:paul@adralberta.com]
Sent: Thursday, May 05, 2016 1:24 PM
To: ADRIC - Janet McKay
Cc: Truus Souman; Chuck Smith; ADRIC - Morgan Horst; ADRIC - Mena Sestito
Subject: RE: Certificates

My question pertained only to the **designation fees** since, as you know, we already submit membership fees on a quarterly basis (based on anniversary date renewals).

Janet - We still face challenges explaining why they pay 100% for a 7-8 month period. Do you need our Board to raise the question formally, or is this an operational decision?

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From: ADRIC - Morgan Horst [mailto:morgan@adric.ca]
Sent: May-05-16 11:19 AM
To: Paul Conway; ADRIC - Janet McKay; ADRIC - Mena Sestito
Cc: Truus Souman; Chuck Smith
Subject: RE: Certificates

National does not prorate the national dues portion of full memberships until after July 1 and designations follow the same logic.

This of course would be a National board decision to change.

Morgan Horst
Accountant/CRM Manager
Commis comptable/administrateur de l'informatique

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ADRIC 2016 Conference - October 12-14, 2016
IMI Global Pound Conference - October 12, 2016
Ritz-Carlton, Toronto

From: Paul Conway [mailto:paul@adralberta.com]
Sent: Thursday, May 05, 2016 1:16 PM
To: ADRIC - Janet McKay; ADRIC - Mena Sestito; ADRIC - Morgan Horst
Cc: Truus Souman; Chuck Smith
Subject: RE: Certificates

Janet/Mena/Morgan - Since the fees are already prorated for Q3 and Q4, would ADRIC consider further prorating the designation fee for Q2? (ie 75% after April 1st).
It is proving difficult to explain to our members why they are paying 100% when their applications are only approved in the May/June timeframe.

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From: Truus Souman
Sent: May-05-16 11:10 AM

To: Paul Conway
Subject: FW: Certificates

From: ADRIC - Morgan Horst [mailto:morgan@adric.ca]
Sent: May-05-16 11:08 AM
To: Truus Souman
Subject: RE: Certificates

Jan 1 100%
Jul 1 50%
Oct 1 25%

Morgan Horst
Accountant/CRM Manager
Commis comptable/administrateur de l'informatique

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Ritz-Carlton, Toronto

From: Truus Souman [mailto:membership@adralberta.com]
Sent: Thursday, May 05, 2016 12:49 PM
To: ADRIC - Morgan Horst
Cc: Paul Conway
Subject: RE: Certificates

Good morning Morgan,

How do you break this down?
Is it from the 1 of July prorated on a sliding scale, or is it just 50% after July 1st?
Can you please explain?

Truus.

From: ADRIC - Morgan Horst [mailto:morgan@adric.ca]
Sent: May-05-16 8:22 AM
To: Truus Souman
Subject: FW: Certificates

Truus:

Designation annual fees are not prorated until after July 1.

Morgan Horst
Accountant/CRM Manager
Commis comptable/administrateur de l'informatique

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Ritz-Carlton, Toronto

From: ADRIC - Mena Sestito
Sent: Thursday, May 05, 2016 9:24 AM
To: ADRIC - Morgan Horst
Subject: FW: Certificates

M., please let Truus know about our designation fee structure.
Thanks,
Mena

From: Truus Souman [mailto:membership@adralberta.com]
Sent: Wednesday, May 04, 2016 11:13 AM
To: ADRIC - Mena Sestito
Subject: Certificates

Good morning Mena,

Can you tell me if Don Schapira and Tegan received their designation certificates? They separated. She is not even living in Alberta anymore at this time.

Also, did Kristian Hawkins and Deborah Kay pay for the QArb designation fee?

Leanne Young was charged the full year designation fee. Should hers not be pro rated, since she got her designation in May?

Looking forward to your answers.

Cheers,

Truus Souman | *Executive & Membership Coordinator (part-time)*

ADR Institute of Alberta

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