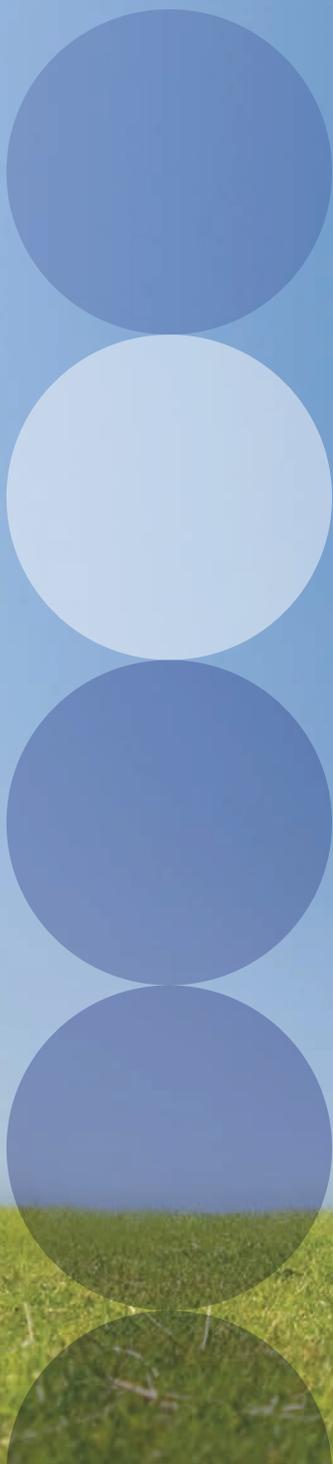


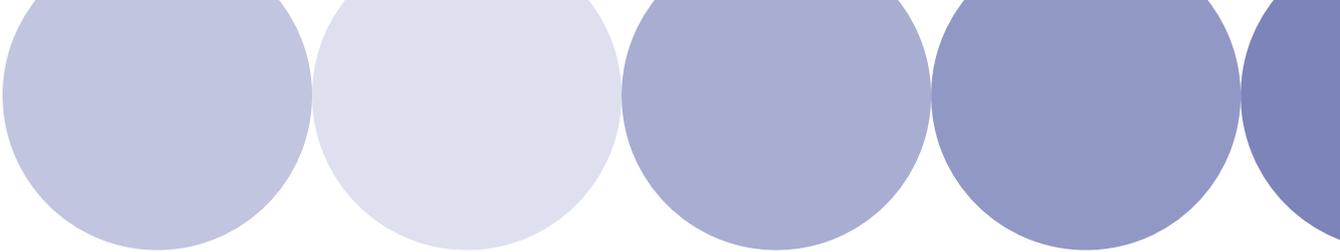


LOOKING AHEAD.

ARTA's Strategic Plan 2013 to 2020







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Alberta Retired Teachers Association (ARTA)

Strategic Plan 2013 to 2020

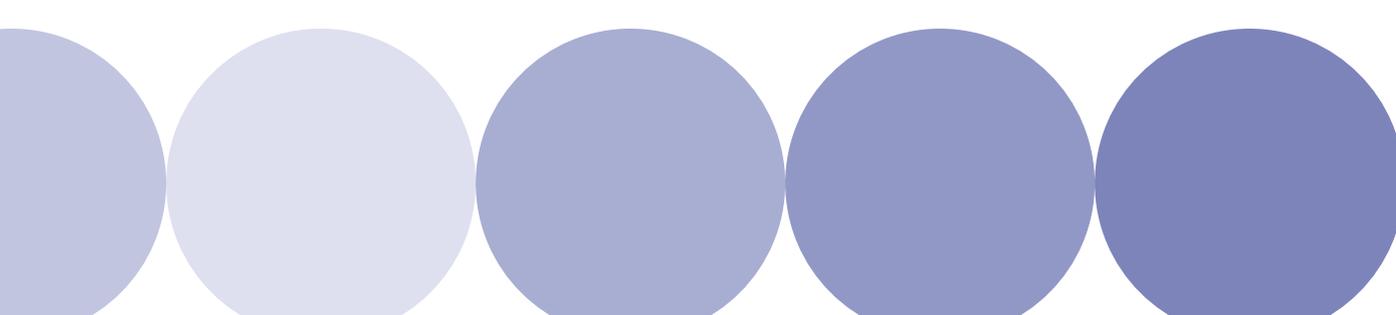
Credits

The development and writing of the 2013 – 2020 Strategic Plan is the result of commitment, inspiration, and participation of many people. Thanks are extended to ARTA members and staff and specifically to the Board of Directors and the Strategic Planning Committee.

Introduction to the Plan

The 2013 to 2020 ARTA Strategic Plan creates a bold and inspiring future for ARTA. The Plan is a comprehensive and forward-looking document that recognizes and builds upon the values and strengths of ARTA and responds to trends and issues in the current and emerging environment.

The Strategic Plan points ARTA towards its 2020 vision and lays out the broad picture of the services and operations for the well-being of current and affiliate members, for potential members, for other retirees and for affiliate and similar organizations. The Strategic Plan is ARTA's foundational document upon which other plans will be formulated. Three-year outcomes (2013 to 2016) start to translate the vision into action and lay the foundation for the development of performance measures.





Message from the ARTA President

Congratulations, and thanks to all of you who have contributed to the genesis of this plan, and the vibrancy of our organization.

The following pages capture our passion for service and commitment to our colleagues. They articulate a vision for our organization, as well as establish immediate priorities as part of that long-term plan. In it, we have a set of common understanding that will prove invaluable as we welcome new members, and foster partnerships to enhance opportunities for Retired Teachers and friends.

There is an old adage, “Teachers may retire, but they never lose their class.” I would add that in this document we are advantaged by the countless ‘lesson plans’ we prepared over our careers. Our ability to focus the activities of today into the legacy of tomorrow, now serves us well.

Thanks again to those who participated in our retreat, the Strategic Planning Committee for leadership, and particularly Daniel Mulloy and Barb Peterson for their guidance, focus and ownership of this activity. Together they have ensured we are not only “Looking Ahead”, but are well into our journey to a preferred future.

Gordon Cumming
ARTA President

Message from the ARTA Executive Director

Looking Ahead is the collective wisdom from members and officers of the Alberta Retired Teachers' Association (ARTA) who came together to imagine a common vision for ARTA's future.

This document has inspired us to take a new look at the future of our association. We are currently finding new ways to ensure a healthy, vibrant and informed retirement for our members and our community. We can better capitalize on new opportunities and adapt to challenges because we have a clear view to our long term horizon.

The plan helps us prioritize and adjust resources to make sure programs and projects serve our members and balance affordability with long-term sustainability. The goals and outcomes reflect what members want from the association. They keep us accountable as leaders to our members and our staff who will be able to clearly see how we measure up to our commitments.

Looking Ahead is a bold plan and unique to an association like ours. I am confident it will help us create the association envisioned by the members we serve.

Daniel Mulloy
Executive Director





Executive Summary

This is the first comprehensive strategic plan for the Alberta Retired Teachers' Association (ARTA). We have been an active association since 1963, and it is time for fresh planning, new thinking, and focused goals to move us well beyond what we have been and to lead us into the future.



About Alberta Retired Teachers' Association

The Alberta Retired Teachers' Association was established in 1963 as a province-wide organization. Its goal was to offer social activities to its members and to look at issues affecting retired teachers. In 1995 the ARTA Health Care plan was added to its list of services to retired teachers.

Since then, ARTA has grown to provide such services to its members as: health care, insurance, wellness information and activities, advocacy, retirement planning, technology information, scholarship awards as well as travel plans, social activities and other benefits.

We continue to experience tremendous growth. Currently ARTA has over 12,000 members within the education, public and private sectors. ARTA has seventeen Branches throughout Alberta and one Satellite Branch in British Columbia.

ARTA's Vision: Looking Ahead

A creative description of ARTA's future, this vision guides decisions, helps set direction and encourages us to align our priorities as we work to make ARTA the association we want it to become in 2020.

From the classrooms and beyond, the Alberta Retired Teachers' Association and its members are linked by a common purpose — to ensure a healthy, active, engaged and vibrant lifestyle after retirement. We are all part of something special, a bond that unites us and our community; a continuation of fellowship in our profession that now continues in retirement.

ARTA is a vibrant association. Our membership is engaged and informed; the true strength behind our association is the passion of its members.

ARTA and its members have an enhanced quality of life; healthy, active members enjoy the benefits of being a member of our association. The broader community also benefits from the work ARTA has done in ensuring personal wellness.

ARTA and its members have a unified voice. Issues that affect our current and future members are understood and our opinions are expressed and promote action.

ARTA's Mission

ARTA supports an engaged lifestyle after retirement through member-centered services, advocacy, communication, wellness and leadership.



ARTA's Strategic Goals and Outcomes

The strategic goals outline the direction that ARTA will take from 2013 to 2020 to achieve its vision, direct long-term planning, and help set priorities for the delivery of services and programs. Outcomes are short-term; describing the desired accomplishments under each goal for the three year period of 2013 to 2016.

ARTA's strategic goals are:

ARTA fosters vibrant, engaged, and informed members

ARTA is a member-centred organization, proactively researching the needs of its present and future membership and providing information about programs and services to meet these needs.

Outcomes 2013-2016

- ARTA is a resource centre for its members, branches and affiliates; providing information about ARTA and its services, as well as links to other sources.
- ARTA, utilizes sound research and data to understand the needs and interests of its current and potential members.
- ARTA is knowledgeable about the services and resources available to meet the needs and interests of its current and potential members.
- ARTA provides the most comprehensive insurance and benefits programs to meet the needs of its members.

ARTA promotes a healthy, active and enhanced quality of life for retired people

ARTA is a leader and advocate in the promotion of wellness for retirees. ARTA develops and implements strategies to enhance the quality of the life of its members and retired people in the community.

Outcomes 2013-2016

- ARTA provides a forum for stakeholder groups to address, coordinate and evaluate wellness activities.

- ARTA coordinates the identification of needs related to wellness for ARTA's members.
- ARTA coordinates and facilitates an action plan to address current wellness needs as identified.
- ARTA provides a system for communicating, maintaining and promoting wellness activities within ARTA.

 **ARTA ensures a unified voice is heard on issues affecting current and future retired individuals**

ARTA is an effective advocate for its members and retirees with similar interests and concerns. ARTA is recognized as a valued and respected spokesperson on behalf of its members and those in the broader community.

Outcomes 2013-2016

- ARTA's Board and staff and appropriate Branch representatives are knowledgeable and skilled in advocacy.
- ARTA is strategically linked with ARTA branches, retiree groups and government agencies to gain information and to establish a unified voice.
- ARTA has well-researched and articulated positions on the most important issues affecting retired teachers and individuals.

Organizational Excellence

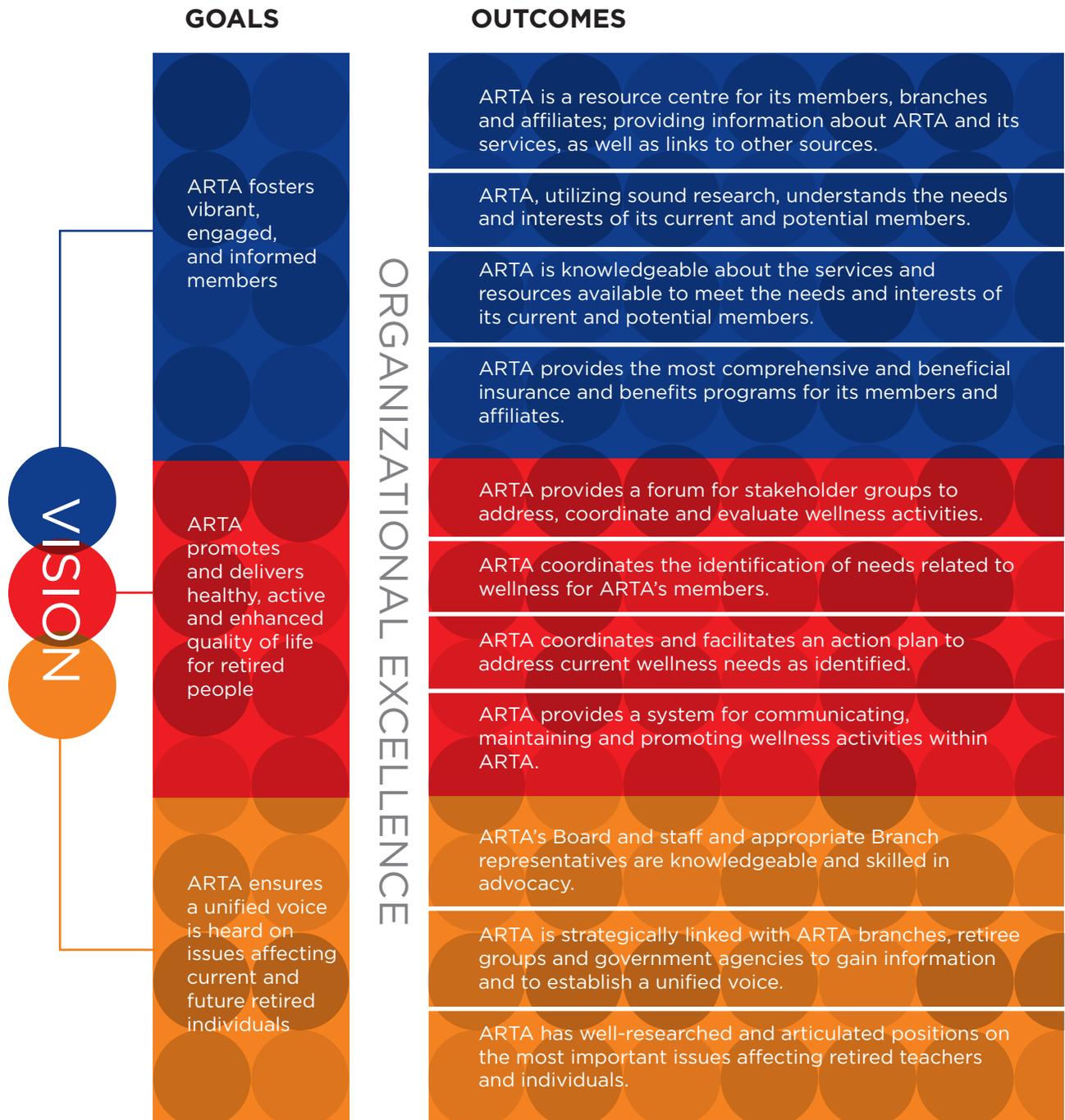
Because much of the success of this Strategic Plan depends on ARTA's organizational excellence, the association will work to enhance the following areas:

- Leadership
- Organizational capacity (e.g. fiscal and human)
- Sound management
- Ethical practices and process
- Support throughout its associated Branch Network
- Enabling infrastructure (e.g. information technology)
- Effective communication; and
- Transparent reporting.

Transforming ARTA through Organizational Excellence is the framework for enhancing the association's environment that will deliver on the achievement of the vision and goals.

Strategic Planning Framework

The following graphic best illustrates the linkages between ARTA's 2020 vision, long-term goals, organizational excellence, three-year outcomes, and the operational aspects of actions and responsibilities.





Measuring Success

The relationship between planning and outcome achievement is focused through the performance measurement process and setting targets for short-term (3 years) and long-term (10 years) performance.

Performance measures indicate how well ARTA is progressing towards the outcomes. These measures are being developed in two phases. In the first phase, ARTA will set measures for outcomes within their three long term goals. The second phase will establish targets for these measures. The targets identify how far and how fast ARTA will proceed to deliver on each of the goals.

Performance targets will facilitate decision-making by ARTA related to the prioritization of resources, allocation for programs, services, infrastructure and development.

Performance measurement, with reporting starting in 2014, will be used to adjust planning and budgeting.

How This Plan was Developed

From late 2011 to November 2012, ARTA implemented a planning process to create a strategic plan to guide the association over the next five years. A Strategic Planning Committee spearheaded the planning process.

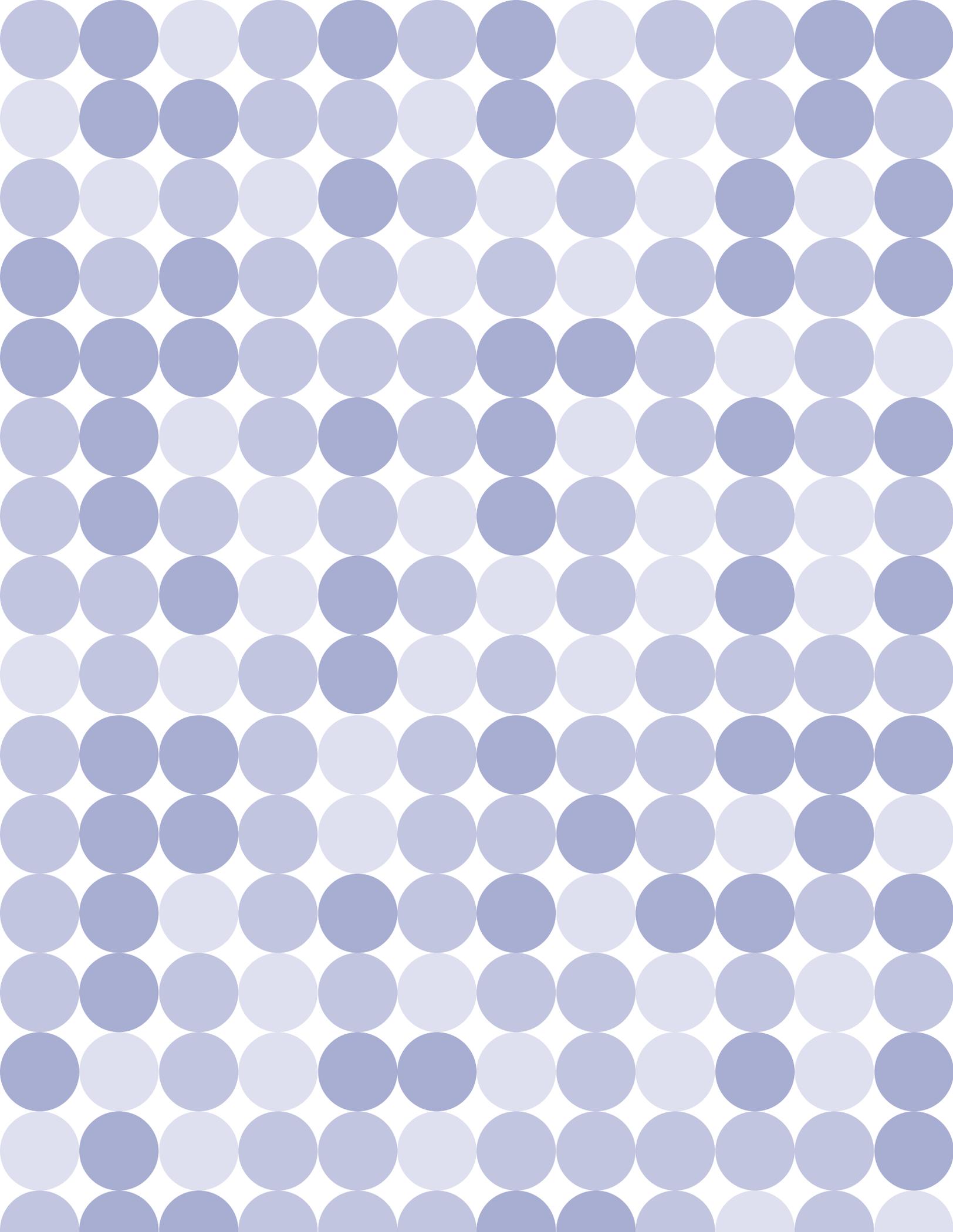
The planning process consisted of the following components:

- Ongoing involvement, direction, and communication by the Strategic Planning Committee
- Development of a strategic planning process
- Using information derived from a 2012 environmental scan including
 - Population Outlook/Growth Projections
 - Life Expectancy Outlook
 - Economic Outlook
 - Trends in Alberta's Education Sector
- Planning Retreat with ARTA Board, Committee Chairs, and Branch Presidents
- Meetings involving the Board of Directors, Strategic Planning Committee, and Committee Chairs to discuss the future of ARTA
- Writing the draft Strategic Plan
- Reviewing the draft plan with the Strategic Planning Committee
- Endorsement of the Strategic Plan by the ARTA Board

ARTA Strategic Planning Process Diagram

This planning process details the process by which ARTA engages its organizational structure to effect change. Through sound research, a well thought out vision and strategic direction, the organization works through its board and committee structure to develop business plans that ensure we are moving toward the goals that drive success within our association.







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