

LOOKING AHEAD



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ARTA'S STRATEGIC PLAN 2017 – 2020



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Strategic Planning Process Diagram

Alberta Retired Teachers' Association (ARTA)

Strategic Plan 2017 to 2020

Credits

The development and writing of the 2017 to 2020 Strategic Plan is the result of the commitment, inspiration and participation of many people. Thanks are extended to ARTA members and staff and especially to the Board of Directors and the Strategic Planning and Advocacy Committee.

Introduction to the Plan

The 2013 to 2016 ARTA Strategic Plan laid the foundation for a bold and inspiring future for ARTA. The plan was a comprehensive and forward-looking document that recognized and built upon the values and strengths of ARTA. It responded to trends and issues in the environment at the time and set projections for the future.

The Strategic Plan for 2017 to 2020 takes that initial foundation and guides ARTA towards its 2020 vision. It 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. This is the final three-year outcome that translates the vision into action and details the continued development — and previous success — against performance measures.

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LOOKING

Message from the ARTA President



Our long-range Strategic Plan 2013 to 2020: Looking Ahead has had an incredible influence on the development and progress of ARTA in the past three years. It reflects our clear and intentional actions and the path to what will really matter by 2020. It has guided us to collectively see, plan and achieve the long-term possibilities.

Our members reviewed the scheduled triennial evaluation of the strategic plan. They were asked if the goals and vision are still meaningful and important to our members; are they being well served?

The results were overwhelming! The critical success indicators and performance measures are published later in this update. They will create the template for reflection, evaluation and measurement again in 2020.

Organizational excellence has been added to our goals of member services, wellness and advocacy. The long-term focus remains the same; these goals are tangible and meaningful. Beginning goals have morphed into advanced ones, reflecting a higher order vision for our ARTA members. This collective vision will support even more valuable growth and progress.

In retired teacher terms, the long-range plans have developed into practical and effective daily lesson plans. Our members and the seniors' community are well served indeed.

A thank you is extended to all of the volunteers who comprise the committees and executive. Their commitment and the endless work hours were crucial in making the strategic plan come alive, resulting in the vibrant, successful organization ARTA has become. In three years we will conduct another major evaluation of our vision and goals, which will set the direction for us to continue on our path of excellence.

Looking Ahead 2020 serves us well.

Juanita Knight
ARTA President

AHEAD

Message from the ARTA Executive Director



Since beginning the journey in 2013, Looking Ahead continues to be the collective wisdom of ARTA's members and officers who came together to imagine a common vision for ARTA's future.

This strategic document has inspired us to take a new look at the future of our association. We are continually 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 of 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. Performance measures set the standards by which we operate and ensure that we are meeting and exceeding our objectives in meeting the association's strategic goals.

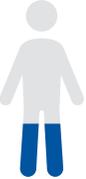
Looking Ahead continues to be a bold plan and unique to a vibrant association like ours. I am confident it will continue to be the roadmap to success in helping us create the association envisioned by the members we serve.

Daniel Mulloy
Executive Director & CAO

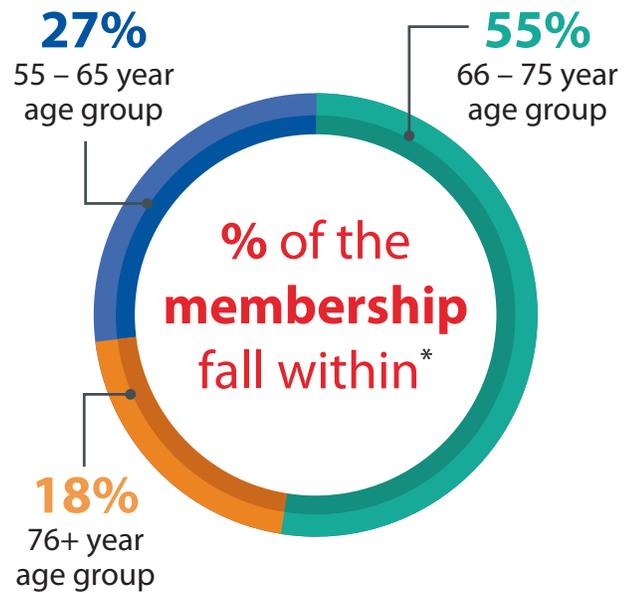
LOOKING

19,200 members and **growing***

69.8* Average age of the **membership**

 **38%**
male*

 **62%**
female*



Executive Summary

An active association since 1963, the 2013 to 2016 Strategic Plan set the framework for fresh planning, new thinking, and focused goals for the Alberta Retired Teachers' Association. Now in the next three years, this 2017 to 2020 Strategic Plan is the continuation, evolving the organization from where we have been to move us into the future.

About the 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 address issues affecting retired teachers. In 1995 the ARTA Benefit plan was added to its list of services to retired teachers.

Since then, ARTA has grown to provide such services to its members as: 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 19,000 members within the education, public and private sectors. ARTA has seventeen branches throughout Alberta and one satellite branch in British Columbia.

* source: ARTA's membership database as of May 1, 2017.

** source: ARTA Health Survey, August 2016

AHEAD



96%
always have
access to
**healthy food
choices****

83%

enjoy regular
**physical
activity****



88%

have one or more
**university or
college degrees****

ARTA's Vision: Looking Ahead

A comprehensive 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

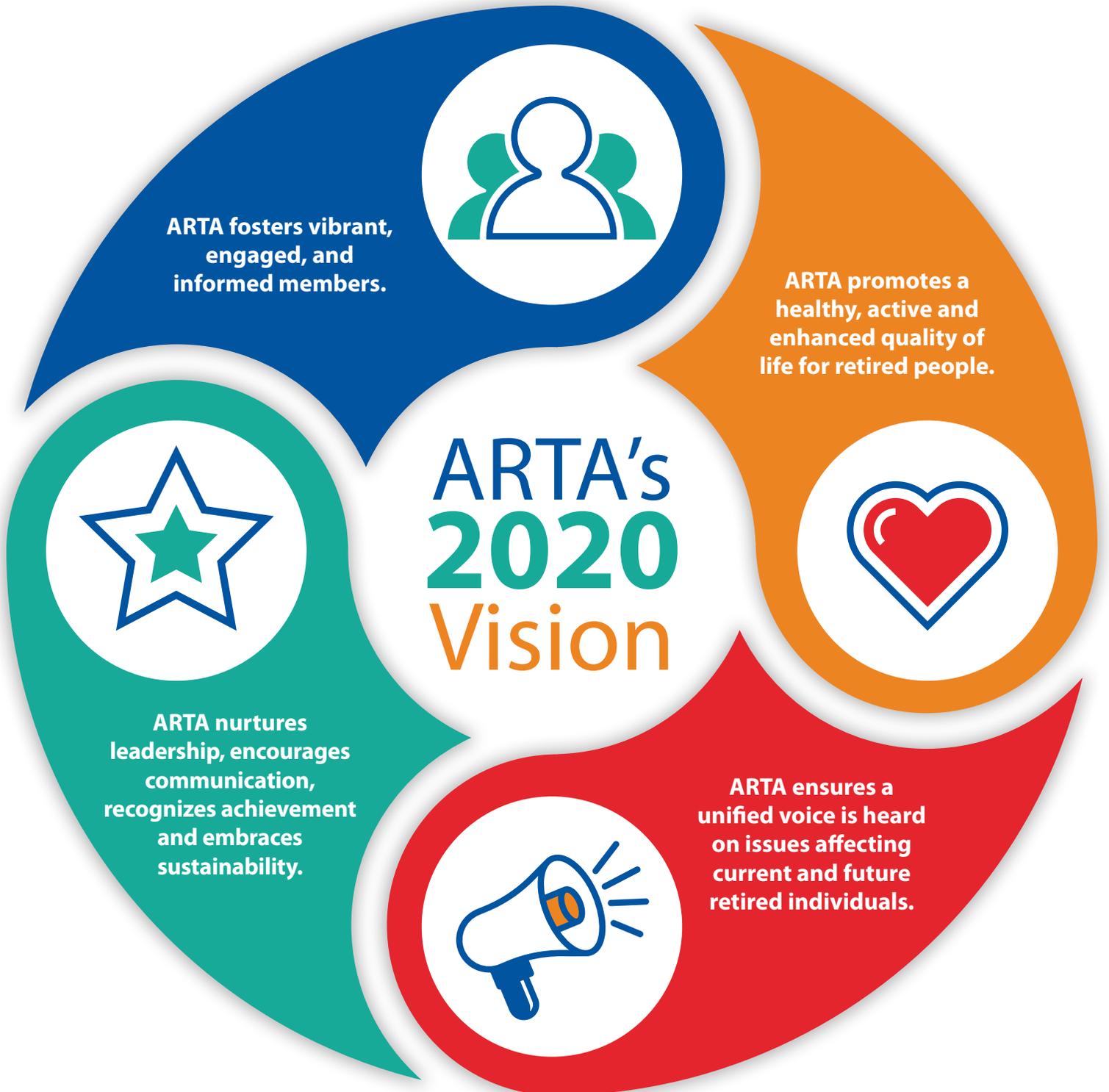
ARTA supports an engaged lifestyle after retirement through member-centered services, advocacy, communication, wellness and leadership.

LOOKING

ARTA's Strategic Goals and Outcomes

The strategic goals were initially developed to outline the direction that ARTA would 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 final three-year period of 2017 to 2020.

AHEAD



ARTA fosters vibrant, engaged, and informed members.



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



ARTA's 2020 Vision

ARTA nurtures leadership, encourages communication, recognizes achievement and embraces sustainability.



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

LOOKING A

GOAL



ARTA fosters vibrant, engaged, and informed members.

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

OUTCOMES 2017 – 2020

- ARTA is a resource centre for its members and the branches, providing information about ARTA and its services, as well as links to other sources.
- ARTA utilizes sound research and data to determine 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 benefit programs to meet the needs of its members.

GOAL



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 2017 – 2020

- ARTA provides a forum for stakeholder groups to address, coordinate and evaluate wellness activities.
- ARTA coordinates the identification of needs related to wellness for its 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 the association.

NEW! In the previous iteration of the strategic plan, organizational excellence was identified as a key component necessary for the success of all three goals. It has since been determined that it is so integral to the success of the association that ARTA is now positioning it as a fourth strategic goal.

GOAL



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 2017 – 2020

- ARTA's board members and staff and appropriate branch representatives are knowledgeable and skilled in advocacy.
- ARTA is strategically linked with its branches, retiree groups, and government agencies to acquire information and to establish a unified voice.
- ARTA has well-researched and articulated positions on the most important issues affecting retired teachers and other retirees.

GOAL



ARTA nurtures leadership, encourages communication, recognizes achievement and embraces sustainability.

ARTA is an effective, ethical and transparent organization that provides services, resources and advocacy in the pursuit of an engaged lifestyle after retirement for its members. ARTA is recognized as an employer of choice by the business and non-profit community in the province of Alberta.

OUTCOMES 2017 – 2020

- ARTA operates an infrastructure of communications tools to ensure the accurate, timely dispersal of information to its members.
- ARTA's board members, staff and appropriate branch representatives are offered opportunities for continued education and skills training to succeed in their roles.
- ARTA has a sustainable model for operations, governance, fiscal planning and human resources that is adaptable for fluctuations in capacity and continued membership growth.
- ARTA provides strong leadership for staff, the branches and members through its Executive Director & CAO and Executive Committee.

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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 identified outcomes. These measures will be established in two phases. In the first phase, ARTA set performance measures for outcomes and set a baseline for future results. In the second phase, targets will be established using baseline data; these targets, both from qualitative and quantitative measures, identify how far and how fast ARTA delivers on each of the goals.

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

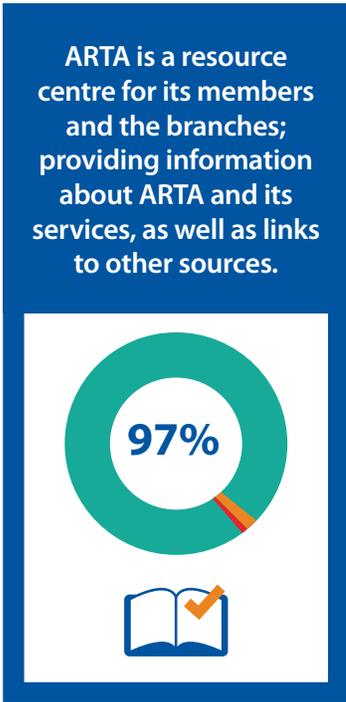
Survey Results

In December 2016, ARTA surveyed its active membership for insights into how well the organization is progressing towards achieving the goals set out in the 2013 to 2020 ARTA Strategic Plan. ARTA members participated in the survey, providing valuable feedback and establishing a baseline for future measurement to be tracked. These measurements will be used to adjust planning and budgeting to ensure ARTA is doing all that is necessary in order to achieve its vision by 2020.

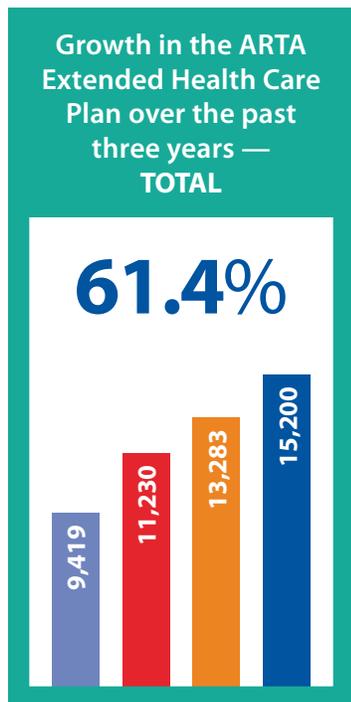
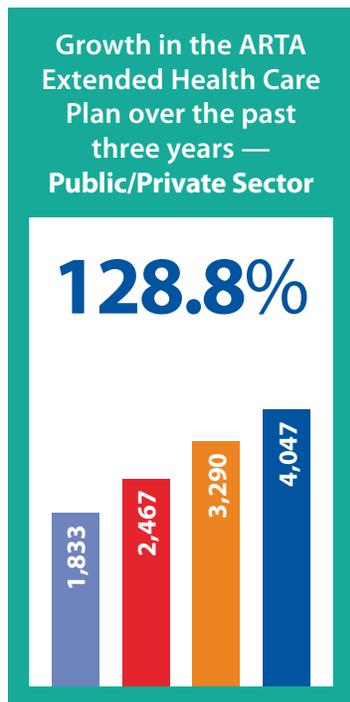
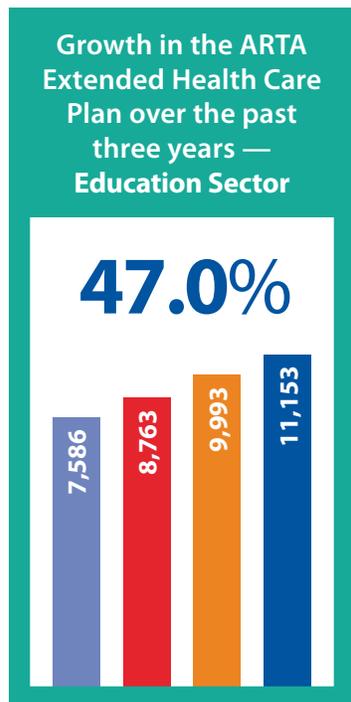
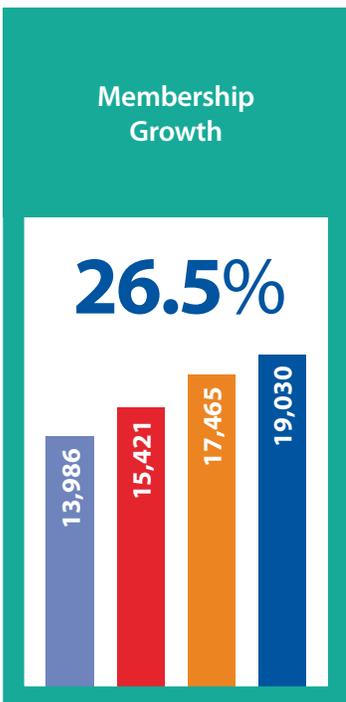
AHEAD

Survey Results | Member Services

● AGREE or STRONGLY AGREE
 ● NEITHER AGREE or DISAGREE
 ● DISAGREE



● 2013
 ● 2014
 ● 2015
 ● 2016



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Survey Results | Wellness

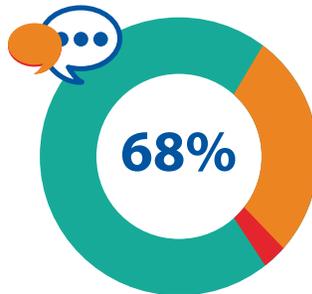
● AGREE or STRONGLY AGREE ● NEITHER AGREE or DISAGREE ● DISAGREE

Wellness Spend
(2013–2016)

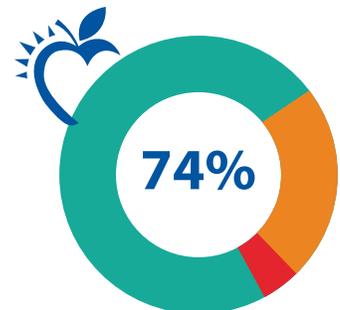
\$14.23
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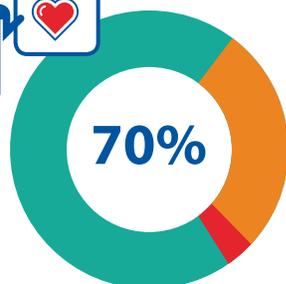
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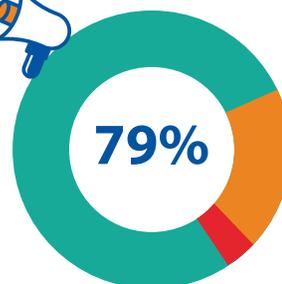
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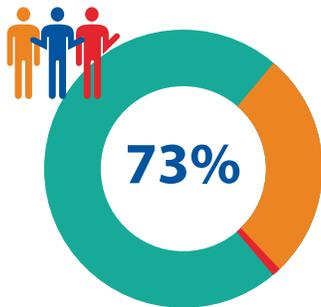


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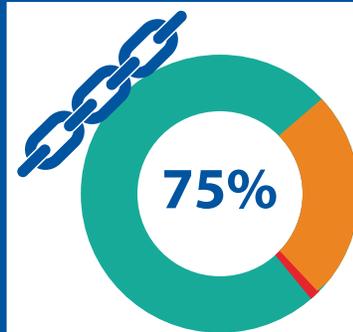
Survey Results | Advocacy

● AGREE or STRONGLY AGREE ● NEITHER AGREE or DISAGREE ● DISAGREE

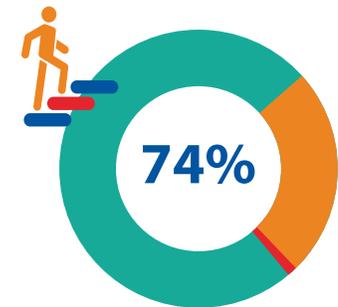
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“ ARTA supports an engaged lifestyle after retirement through member-centred services, advocacy, communications, wellness and leadership. ”

LOOKING

Evolution of ARTA's Strategic Plan

A Strategic Planning Committee spearheaded the planning process for ARTA's 2013 to 2020 Strategic Plan. From late 2011 to November 2012, ARTA implemented a planning process that consisted of several components, including an environmental scan, a planning retreat with ARTA board members, committee chairs and branch presidents, the writing of the draft Strategic Plan, and a review and endorsement by the Strategic Planning Committee.

With the evaluation and performance measurement of the first three years (2013 to 2016) complete, ARTA reviewed the strategic direction initially set out, as well as the short-term outcomes. It was during this process that organizational excellence was identified as a fourth strategic goal, rather than a component of the initial three strategic goals. Tasks and action steps are revisited and revised as needed to ensure that we are moving towards the 2020 vision.

This planning process illustrates how ARTA engages its organizational structure to effect change. Through sound research, and 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 towards the goals that drive success within our association.

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AHEAD

Thank you

ARTA would like to take this opportunity to extend a sincere thank you to our members and partners for their ongoing support. We look forward to continuing along our path of excellence, ensuring a healthy, active, engaged and vibrant lifestyle after retirement.

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