



2016-2018 STRATEGIC PLAN

(adopted by the Board of Directors – December 2015)

ABOUT MROO

The Municipal Retirees Organization Ontario (MROO) is a not-for-profit corporation with Letters Patent issued by the Province of Ontario in 1977. Life membership is open to any retired member of the OMERS pension plan receiving an OMERS pension or the surviving spouse of a retired member.

As of December 2015, MROO has over 18,000 members across Ontario, drawn from all walks of local government life, including municipalities, police and fire services, libraries, non-teaching school board positions, public health units, children's aid societies, conservation authorities, and OMERS itself.

MROO is governed by a Board of Directors, who are OMERS retirees and MROO members, elected at general membership meetings on a triennial basis in one of nine zones across Ontario. Each zone also has an alternate director. Directors may also appoint MROO ambassadors to assist them and to help make all OMERS retirees aware of MROO's objectives and services.

In keeping with our Letters Patent, MROO's mission is to protect the pensions and enhance the quality of life for all OMERS pensioners. Since 1977, MROO has been an effective advocate for OMERS pensioners on matters not only related to OMERS and the OMERS plan, but also related to pensions and retirement income more generally. Over the years we have made a growing variety of services available to our members, including health and dental insurance, travel emergency medical insurance, home and auto insurance, and scholarships for relatives of members. We also communicate with our members in a growing variety of ways, including annual member meetings in each zone, printed newsletters, our website mroo.org, and e-mail bulletins. We survey our members regularly to evaluate our services and determine their interest in other potential services.

While MROO carries on its business with a skeleton group of paid personnel, each on a part-time, contracted basis, the Board remains committed to its mission and regularly seeks to ensure that it looks ahead to new opportunities. We are pleased to present our fourth strategic plan covering the three-year period 2016-2018.

2016-2018 STRATEGIC PLAN

1. *Continue to improve our current services to members and develop new services identified in our member survey.*

DECEMBER 2018 GOALS	DECEMBER 2018 INDICATORS
Continue to survey our members every three years re existing services and potential new services	<ul style="list-style-type: none"> • 2018 survey completed
Continue to use all available methods to increase attendance at Spring and Fall zone meetings	<ul style="list-style-type: none"> • 10% of members attend annual zone meetings
Organize local coffee/muffin morning meetings for members and prospective members	<ul style="list-style-type: none"> • 1 coffee/muffin meeting per 1,000 members per year, per zone
Regular monthly broadcast emails to members with links to educational or advocacy content	<ul style="list-style-type: none"> • periodically
Arrangements with one or more travel/tour firms to offer travel discounts to MROO members and/or arrange trips for MROO members	<ul style="list-style-type: none"> • one or more proposal(s) accepted and advertised to members
Sponsor or arrange local special interest programs / courses / events in partnership with other local organizations	<ul style="list-style-type: none"> • 1 co-sponsored local special interest program /course /event per year per zone
Based on advice from ENCON Group and Mitchell Abbott Group, continue to seek affordable improvements to MROO-sponsored retiree insurance programs	<ul style="list-style-type: none"> • potential MROO insurance benefit improvements considered annually
Continue to promote retirement planning seminars and provide current retirement planning information	<ul style="list-style-type: none"> • 20 seminars per year • 400 new members per year via seminars • triennial updates of Retirement Planning Guide • two articles or presentations per year related to retirement planning

2. Continue our advocacy on behalf of OMERS retirees

DECEMBER 2018 GOALS	DECEMBER 2018 INDICATORS
Maintain current level of advocacy with OMERS	<ul style="list-style-type: none"> • Meet more frequently with OMERS representatives • Support OMERS' initiatives in support of DB pensions • Mandatory inclusion in OMERS Plan of part-time employees • Complete processes re Retiree Groups representation on OMERS Boards
Non-partisan participation in federal and provincial elections	<ul style="list-style-type: none"> • Comparative party positions provided to members on pensions and other MROO advocacy issues • MROO advocacy summary periodically updated and posted on website
Advocate on behalf of defined benefit pension plans and expansion of the CPP	<ul style="list-style-type: none"> • Active in key networks • Effective, timely response to issues and consultations
Survey MROO members on advocacy and retirement issues	<ul style="list-style-type: none"> • One member e-survey per year • At least two MROO articles, submissions, or presentations generated from each survey

3. *Increase our membership and improve membership communication methods.*

DECEMBER 2018 GOALS	DECEMBER 2018 INDICATORS
Increase membership	<ul style="list-style-type: none"> • 23,000 members by 2018
Improve website	<ul style="list-style-type: none"> • members and website users report satisfaction with new site
Improve newsletter delivery methods (email, website, snail mail)	<ul style="list-style-type: none"> • By 2018, newsletters will be provided to those members whose e-addresses we have ONLY by e-mail. Other members will continue to receive paper issues
Make more HR departments aware of MROO	<ul style="list-style-type: none"> • 100% of HR departments have MROO package • Presentations made to HR Associations of OMERS employers aside from OMHRA
Continue to work with OMERS to make OMERS members aware of MROO	<ul style="list-style-type: none"> • Attend 100% of OMERS' member information sessions • Presence and Presentations at OMERS' info sessions for active members • OMERS channels used to notify OMERS retirees about zone meetings
Make and retain contact with the largest OMERS employers	<ul style="list-style-type: none"> • annual contact with appropriate manager in each OMERS employer with 500+ employees in Zones 3 & 4

4. Increase support for our representatives to better serve our members and promote MROO.

DECEMBER 2018 GOALS	DECEMBER 2018 INDICATORS
Increase usage of existing MROO tools and develop new tools & guidelines as needed	<ul style="list-style-type: none"> • MROO reps know what tools are available • All MROO reps use tools effectively • MROO-branded, professional format retained
Improve training for MROO reps at the Zone level	<ul style="list-style-type: none"> • Every MROO rep has had face-to-face training and materials supplied • External training resources and personnel identified and used by Zone Directors • Provide Board minutes to alternates and ambassadors • At least one zone-level “team meeting” per year
Provide director training in areas of identified priority	<ul style="list-style-type: none"> • at least annual training session in one of the training priorities identified by the Board • in-depth orientation provided to each new director • high level of confidence by directors re their effectiveness
Share successes, ideas, issues and resources with other Zone Directors	<ul style="list-style-type: none"> • Zone directors produce annual “work plans” for discussion each fall in conjunction with MROO annual budget/work plan • Resources/people shared across zones
Increase the number of Ambassadors to assist Directors to arrange local services, events, and partnerships; and to provide zone coverage	<ul style="list-style-type: none"> • 1 active Ambassador in every major community within each zone • at least one active ambassador or alternate from each major employee association and union in OMERS Plan
Ensure that adequate resources/ support service personnel are in place as needed to achieve preceding goals and in keeping with available funds	<ul style="list-style-type: none"> • MROO Annual budgets and MROO annual strategic work plans developed in synch each fall • Succession plans adopted for support services