

# RTAM Strategic Plan 2024-2028

## Table of Contents:

- Welcome to RTAM
- RTAM Core Pillars
- Mission, Vision & Values
- Long Term Goals Within Each Pillar

## Welcome to the Retired Teachers' Association of Manitoba (RTAM)

We are a group of retirees who have come from the education community in Manitoba. We aim to represent our members needs while also keeping them connected with their community and engaged through retirement.

We run monthly seminars, programs and events for our members, we have fantastic partners who help deliver member services and we advocate on our members behalf. As of 2022, we are the official voice of retired teachers in the Province of Manitoba as recognized by all three major parties who voted to acknowledge RTAM in the unanimous passing of Bill 208.

## RTAM Mission, Vision and Values

- **Mission:** The mission of the Retired Teachers' Association of Manitoba (RTAM) is to serve and advocate for all retired teachers.
- **Vision:** The vision of The Retired Teachers' Association of Manitoba (RTAM) is the well-being of retired teachers through appropriate member services and strong partner relationships.
- **Values:** The Retired Teachers' Association of Manitoba (RTAM) values belief in mutual respect, diversity of opinion, tolerance of different viewpoints, integrity and transparency while working collaboratively towards a common goal.

## RTAM Core Pillars

RTAM's Core Pillars are guiding principles and values that form a solid foundation of what we are, what we believe, and what we want to be going forward. Core Pillars are principles, values or standards of behavior that represent our organization's highest priorities, deeply held beliefs, and fundamental driving forces. They're at the heart of what our organization, volunteers and employees stand for from an ethical perspective. Core values are intrinsic to the organizational vision that defines what our business believes and presents to the external world and are fundamental to attracting and retaining the best, most capable members and volunteers who contribute to our organization.

Information & Communication - RTAM aims to keep their current members and potential new members informed and engaged through consistent, clear and inclusive language and methods. We do this to promote member services and partnerships, to promote our advocacy on behalf of members, to help our community stay connected and to help members stay informed on updates and the history of our organization.

Member & Community Advocacy - RTAM promotes the concerns of our members and partners in a pro-active and non-partisan manner. We inform and support conversation on community and committee concerns in addition to the health of COLA and the teacher's pension. RTAM also stands by our partners and the education community as an inclusive and safe space for all.

Organizational Growth & Governance - We work to ensure a safe and consistent future for our organization and for our members through long term planning, recruitment strategies for staff, volunteers and stable expansion. We work to become more inclusive and representative of the incredible diversity of our membership while also working to improve transparency and accountability. As we continue to plan growth, integrity is the cornerstone of our work.

Member Services & Partnerships - We work to deliver strong partnerships, programs and events to our members which allow them to stay engaged in retirement and promote a healthy "Active for Life" mentality and lifestyle.

## ***RTAM Long Term Goals Within Each Pillar***

### **Information and Communication:**

**RTAM Website** - In 2023, RTAM began the work to learn what needs our organization, volunteers and members had for a website. We knew the current website had flaws and we wanted something that was secure, able to process payments and memberships, something that was easy to use and multi-linguistic moving forward. With the research completing in 2023, 2024 marks the start of the formal build process.

**Customer Relationship Management (CRM)** - A customer relationship management (CRM) system will improve member interactions with the organization by allowing for AI to manage certain aspects of members profiles. This could mean reminding you about upcoming events based on your likes, reminding you about memberships about to need renewal or even new discounts connected to membership cards.

**French Inclusion** - Starting with the new RTAM website, our Francophone and bilingual members will be able to expect services and communication in French. We will be working through 2024 and into 2025 to ensure that documents, forms and files are also offered to our members in French and we are looking into the cost of offering KIT in French as well.

Once we can deliver RTAM services and information in both formal languages of the Province and Country, we will then begin to look at adding additional linguistic needs to operations.

**Print and Digital Growth** - RTAM has been working to update the way we communicate with our members. We are working to look at new delivery systems for KIT, which would enhance the readers access and interaction with the magazine.

We have recently started a monthly electronic newsletter (e-news) this past year, and we would like to grow that resource in coming years. If KIT is our seasonal communication and the e-news is our monthly communication, we are hoping we can develop social media in the coming years to be our daily and weekly system of updates.

**Consistent Assets** - One of the early elements to come back from our website analysis and member surveys are the problems created from inconsistent asset management.

As an example, our website has files in Word, PDF and various file formats, while being written in several sizes and types of font. This makes things difficult for members looking to get information in a consistent way and it's a roadblock for members using apps to help with assimilation of content information.

Over the next 4 years, we hope to standardize how we present information and content and make our website and other platforms accessible to support apps and devices for members in need.

### **Organizational Growth and Governance:**

**Board and Committee Recruitment** - Ensuring we offer RTAM volunteer opportunities to all our members and well in advance of our organizational needs is something we are looking to create a framework for and improve on in future years.

All organizations are commenting that it is becoming more and more difficult to find and retain volunteers. By ensuring we have a group in charge of recruitment and creating a recruitment plan which will be continuously implemented will ensure our organization has the volunteers it needs moving forward.

**Bylaw and Policy Maintenance** - The RTAM Bylaws and Policies are tasked to the Board of Directors for review. The organization is working on creating a large set of updates for the 2024 AGM which will update any out-of-date wording or inaccurate commentary within the two documents.

Moving forward, it will be up to the Board to review a section of the bylaws and policies at their monthly meetings. By allowing for small reviews one month at a time, the Board will be able to ensure they have kept the two living documents up to date heading into each year's AGM.

**Increase and Diversify Membership** - The RTAM Board of Directors has set the long-term goal of increasing membership size and diversifying membership for the organization.

By 2027 we are aiming to have doubled the membership in RTAM (from 10,500 to 21,000 members). By 2027 we are hoping to be more than a bi-lingual organization and one that is leading in Indigenous, Multicultural and Special Needs members as well.

**Increase Revenues** - Part of any organizations successful growth is tied to their financial flexibility. As of 2023, RTAM is in a financially healthy position, however COVID, COLA and other influences are showing us very clearly that the world is becoming more expensive and that our organization will be paying more for all our services and costs moving forward.

To ensure we can continue to deliver programs and advocate for our members, we should have a plan to grow revenues to stay healthy and protected in the future.

**Winnipeg Foundation** - We are currently giving money to our community twice per year, each time to a specific group as part of our planned philanthropy. We give \$4,000 worth of scholarships to students through the RTAM student awards. This money comes from the Winnipeg Foundation, where we invested \$60,000 with them, and the profits from that pay for the scholarships each year.

We also give money to University College of the North so they can disperse up to \$4,000 in scholarships. We take that money out of our budget each year, which means if we ever had financial problems or budget problems, the UCN partnership would be frozen.

We should attempt to protect all our partners through the Winnipeg Foundation, so they aren't budget reliant.

**Increase Staffing** - Denise and Dianne are the two who currently manage incoming phone calls and incoming emails on behalf of our members and future members. They field questions on members, programs and events, payments and refunds, insurance, pension and from people who think we're MTS, TRAF or Johnson. If even 1% of our members reach out on any given day with questions or concerns, that is 105 incoming emails and phone calls. This volume takes up a very large part of their day and time and keeps them from other functions and duties listed in their job description.

This also means we have members who aren't getting someone in the office when they call but are getting a call back within two hours of leaving a message (when volume is high). Without support and changes, there will be increased back-log and decreased service to our members.

Increased staffing resolves the backlog of member calls and emails, provides dedicated Board support, and allows for the staff to focus on growth and maintenance of the organization.

## **Member and Community Advocacy:**

**Cost of Living Allowance (COLA) Awareness and Support** - The Cost of Living has gone up significantly over the years and even more because of COVID and the pandemic. The cost-of-living allowance (COLA) is a cost that's tracked each year at the Provincial and Federal levels, so that we know the impact to our community, lives, and spending power.

Part of our advocacy at RTAM is to inform our members of COLA increases, what impacts those could have and strategies or methods of combatting COLA increases. We also advocate to ensure awareness goes beyond those who are directly affected to everyone in the education community.

**Teachers Pension Needs and Awareness** - TRAF, MTS and teachers have done an amazing job of keeping their side of the Teachers' Pension fully funded and in healthy condition for future generations. The province has not been able to meet their obligation in funding the pension, which means they are now several years and many millions of dollars behind in their commitment.

RTAM will begin to offer more suggestions to our Parliamentary partners, to get their side of the contributions caught up. RTAM will also begin to create awareness amongst all Manitobans that the teachers' pension is in jeopardy.

RTAM will also begin to look at strategies (in a proactive manner) to help retired teachers should the pension plan collapse in future years.

**RTAM Requests for Action** - RTAM maintains a key document known as the RTAM "Requests for Action". These are requests of our organization and our political partners on a provincial level. It is prudent that we act on these requests annually and also update the list annually, to ensure that we are always current with our requests and in reflecting our member needs.

Something we will look to do in the coming two years, is expand the Request for Action from a provincial guideline to a municipal and federal guidelines/request for action as well.

**Key Stakeholder and Community Partnerships** - RTAM is built off of many community partnerships and relationships with key stakeholders. Our political partnerships are part of this family as are MTS, TRAF, the Manitoba Seniors Coalition, UNESCO Schools and many more.

We will continue to grow our partnerships, define them in a formal manner and then work to create a consistent meeting and consultation schedule that can be repeated moving forward. We are also working to create a long term set of goals with each to define our future working relationships. This streamlines operations, and it gives our Board of Directors and all volunteers clear expectations on when we meet with our partners and what we hope to accomplish with them.

### **Member Services and Partnerships:**

**Webinars and Workshops** - The majority of RTAM online workshops and seminars are free for our members. Starting in 2024 we are hoping to offer a free online seminar each week throughout the year (other than summer months where member activity is decreased).

Once the weekly seminar program is running, we are hoping to increase paid and in-person events the following year, to help physical engagement and opportunities. The final step in the multi-year plan is to look at creating one or two major events per year starting in 2026.

**Increased Partnerships** - Partners who deliver incentives to our members are a key part of who we are and how we support our membership. We were successful in adding partners in 2023, which will enhance the quality of life of our member while saving them money (Hearing Life offers discounted hearing devices to members, the City of Winnipeg offers gym and program discounts to members etc.).

Adding new companies and services to our list of member partners and incentives is key to growing our reputation and member value.

**Facilitated Membership Interaction** - RTAM is undertaking two changes in the coming years to better deliver services and products to our members, while facilitating their interactions with each other and our programs.

- Starting in late 2024 or early 2025, there will be an RTAM membership card for our community. This will be available in physical and digital formats and allow our members to have easier access to partner benefits and perks.
- We are also looking at creating online forums and chat groups to facilitate planning and inclusion for RTAM events and programs. A great place to ask other teachers about their experiences or even share a ride to an event!

**In-Person Interactions and Opportunities** - COVID showed us how important it is for humans to be in contact with each other and to have personal interaction and connections. We are pleased to know that the pandemic has passed and that we can now work safely on bringing members together again in the future.

We are looking at new events and programs, the return of some of our most popular events from the past and social opportunities that allow all our members to come together regardless of age or ability.