

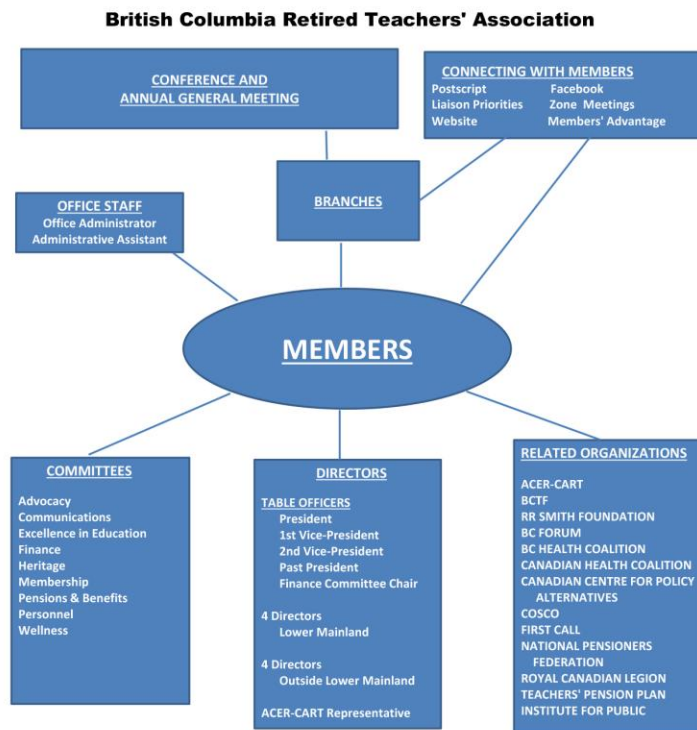


# BCRTA Strategic Plan

1. Introductory Statement
  - a. This strategic plan has been developed by the BCRTA Board in May 2017 to provide a disciplined approach to the desired growth and revitalization of the Association in the next 3 years.
2. Background Statement
  - a. The BCRTA was formed in 1945 initially to improve teachers' pensions. Over the years this goal has expanded to enable members to speak with one voice about the interests, concerns and well-being of its members.
  - b. The purposes of the organization were restated in 1997 and now are: (suggested changes in bold) agree to change for next year – 2018?
    - i. to promote the interests and to guard the welfare of its members;
    - ii. to provide information and advice to individual members and their beneficiaries on retirement programs and benefits;
    - iii. to communicate to **potential and current members and like-minded organizations** the activities of the Association and matters of common interest; and
    - iv. to promote and **defend** public education
  - c. The Annual General Meeting, elects the Board of Directors, approves the budget and makes other major decisions for the organization. The Board of Directors, consisting of members from around the province, generally meets six times a year. The Directors are advised by a number of standing committees that meet on the two days immediately preceding each Board meeting.
  - d. There are 48 branches across the province, with memberships ranging from 15 to several hundred. Branch activities may include providing speakers to inform members about issues of importance to seniors, advocating for improvements to government policies affecting seniors and organizing social activities for their membership.
  - e. The organization currently has 2 full-time staff.
  - f. The organization is funded by membership dues, space and other resources provided by the BCTF, and Johnson Insurance administrative payments.

- g. The Association has relationships with:
  - i. Canadian Association of Retired Teachers (ACER-CART)
  - ii. National Pensioners Federation (NPF)
  - iii. Council of Senior Citizens' Organizations of BC (COSCO)
  - iv. Canadian Centre for Policy Alternatives (CCPA)
  - v. BC Health Coalition (BCHC)
  - vi. First Call BC
  - vii. Federation of Retired Union Members (BC FORUM)
  - viii. Canadian Health Coalition (CHC)
  - ix. Institute for Public Education

3. Organizational chart:



9/7/2017

Copy of BCRTA\*Org Chart\*17-18.xlsx

4. Organizational Tenets

- a. Vision (What we want to become)  
BCRTA is a respected voice for retired educators and seniors

- b. Mission statement (The reason we exist)
  - i. The BCRTA supports an active and full lifestyle in retirement through member centered services, social networking, advocacy, communication, wellness, and leadership.
  - ii. We promote and defend the security of retired educators through their defined benefit pension plan and the provision of quality health insurance programs.
  
- c. Values (The important values we hold)
  - i. engaged and informed members
  - ii. a healthy active and enhanced quality of life for retired persons
  - iii. a unified voice on issues vital to members: pensions and benefits, advocacy for seniors' well being
  - iv. effective communication with retired educators
  - v. opportunities for social engagement through branches around the province
  - vi. affiliate connections with like-minded organizations to enhance the life of retired persons
  - vii. respectful, democratic processes
  - viii. a well-educated society
  - ix. transparency and accountability in relationships
  
- 5. Major goals for organizational growth and development as identified at Board Strategic Planning Session (November 27, 2016):
  - a. Increase membership by adding services to members with a focus on wellness
  - b. Develop a unified communications strategy that includes print, web and social media
  - c. Control our own insurance plans
  - d. Update our processes including committee structures
  - e. Increase staff including an Executive Director