

BCRTA Awareness Talk

BCRTA is guided by these principles:

- We provide services and partnerships for the financial benefit of our members, for their health and well-being, and we advocate to government for our members' best interests
- We advocate for the public education system in our province and for issues involving seniors

Over the past 70 years, BCRTA has functioned as a member-led association. Most of the activity has been done on a volunteer basis. As of a few years ago, BCRTA had reached a critical stage.

- office systems and procedures were patched together and out of date
- we were offering some services, but were unable to do so at a professional level
- there was a lack of engagement from almost all members
- some branches were failing, others not showing much life
- a lower percentage of retiring teachers were joining
- it was difficult to recruit new leadership

We saw other RTAs in Canada that were gaining strength, not losing it, so we studied the operations of RTO and ARTA.

President Patricia Clough initiated a strategic planning process. We did an analysis of our strengths and weaknesses, and looked at the opportunities and threats we faced. (SWOT)

We presented a first take of our strategic plan to our membership at the 2017 Annual Meeting and asked for feedback. We received many helpful and detailed responses and used that information to refine our goals.

The needs we have identified are:

1. to build strength in the organization
2. clarity and transparency for members, board and staff
3. take hold of strategic opportunities
4. preserve our member-led culture
5. improve our service through a more professional operation

Let's have a look at how each of those needs is being addressed through our current goals.

1. Need: Building Strength

Goal: Increase and maintain membership by adding services and improving the member experience.

Our Membership Committee is improving access to affinity programs that deliver real value. We have a significant number of Member Advantage partners. Did you know that you can get back your membership fees many times over each year in savings from these partners? There is tremendous value here for members.

Similarly, we have been working hard with Johnson insurance to develop the most comprehensive optional insurance packages for our members, fine-tuned for their needs in BC.

We improved our recruitment efforts. Each year about 1,500 teachers retire in BC. For a number of years we were only able to sign up about 500 of those. In the last year, we made a more concentrated effort to reach them through a marketing campaign, and offered their first year free. We had over 900 sign ups, which is an 80% jump. And yes, we can afford to offer the first year free. The average BCRTA member enjoys about 20 years of membership, so we cover the first year's fees many times over.

Expect us to do more work to connect with active educators as they approach retirement – we want them to understand the many benefits of being part of BCRTA.

2. Need: Improve Clarity and Transparency

Goal: Develop a unified communications strategy that includes print, web and social media.

For some time BCRTA communications became a series of individual silos. People worked hard to provide newsletters, a website and our magazine, but each of those areas became its own entity. The elected board was in charge of the organization, but not able to communicate directly with members. We decided it was important to develop a unified plan to get information out to members in a way that reflected the actual workings of our association.

We created a communication committee that includes BCRTA members and a number of Directors. We've hired a management professional to assist us with the renewal and professionalization of our communications plan. We have three sub-committees and you have likely already seen a number of the updates that we have made.

Website and IT Committee – Sterling Campbell, Floyd Smith and George Main

Our consultant has updated the website, making it much easier to use and easier to look at. We have newsworthy items and key information available to you 24/7, and make it easy for you to get in touch with us.

We have the capacity now to provide website services for each branch, and are in the process of developing clean and simple templates that will make setting up a site easy for small branches. Larger branches already have websites - we now have the capacity to help them migrate onto our platform, where they will have no hosting costs, access to the latest software, the ability to update content themselves or get assistance from our staff.

Previously, we got a lot of feedback from branches that our site was not current and difficult to use. Branches had started to make their own versions of BCRTA information and soon it was difficult to tell what was BCRTA policy and what was opinion. We want to have one clear and helpful voice for BCRTA, and at the same time give a platform for all branches to reach their own members with their local news and events. We are actively developing this.

This committee is also working to ensure that BCRTA has the technical office set up we require to give members professional 21st century service. This will mean some updates to our member's database systems, and eventually you will have the ability to manage your BCRTA membership and services through the website.

BCRTA Connections Committee – Gerry Tiede, Terry Green, Marion Hartley

The Liaisons Priorities newsletter has been succeeded by BCRTA Connections. This newsletter comes out shortly after board meetings, giving updates on BCRTA activity and other newsworthy items. The newsletter is available to read as a document, or you can read each article separately on our website. Key issues featured in the newsletter have included information on Green Shield Health benefits, Bill C27 pension changes, BCRTA News and information about the activities of parallel organizations.

We've been very pleased that the reaction to the new Connections branding and newsletter format has been overwhelmingly positive.

PostScript Committee – JoAnn Lauber, Libby Thornton, Leckie Reynolds

PostScript magazine is a very important publication for BCRTA – it reaches most of our members, and carries with it news, lifestyle and travel pieces, articles about important issues we face, updates on other members, and most importantly, the positive culture of BCRTA. Long-time editor Sheila Gair will continue to contribute as she is able. The editorial committee is guiding the publication with a more professional process, while preserving the favorite elements of the magazine. You can expect PostScript to begin to stretch out a bit more in terms of the number of articles to address the needs of our members more completely. We will accept some paid advertising from quality service providers that have proven to give real value to our members. We will especially highlight the special offers from Advantage partners that are already available to you as a member benefit. Other major RTA in Canada and the US uses this model for their publications.

PostScript will continue to be a BC-focused, full-colour, high-quality quarterly publication.

3. Need: Take Hold of Strategic Opportunities

Goal: Control Our Own Insurance Plans

One thing we discovered when researching other RTAs is that insurance programs controlled by their associations offer great value to their members and provide revenue to support their organizations. We have begun a process of researching the best way for BCRTA to take charge of our insurance offerings.

We currently offer Johnson Extended Health with Prestige Travel, and have over 1,400 people on that program in just two years of operation. 8,000 people have used our Medoc plan.

But we can do much more than this. Both RTO and ARTA don't just farm out their insurance services, they own the process, and have the insurance companies manage it for them. By doing that, they capture the profits of the program, and not just a small commission. This has amounted to a very significant revenue source for them.

We're looking at developing an alternative to the Green Shield plan that is the default offering of the TPP.

As we consider our next steps, we are seeking the advice of experienced consultants in the field who have put together and run these sorts of programs. They will help us understand all the technical and legal issues. We are looking to maximize the positive experience of people who sign up for our program.

Once we have our own program in place, it becomes attractive for other groups to join our program, making our insurance plans even more stable and benefiting our members with more program revenue.

This is a great opportunity, but is an important change, so it is being explored with a great deal of care.

4. Preserve Our Member-Led Culture

Goal: Further Develop Our Process Including Committee Structures

We have highlighted the need to professionalize our operations, but we do not want to undermine the culture of member participation and leadership that has defined BCRTA.

The board has reviewed our processes and committee structures. This has been an intense process, but one that is paying off.

We have our new, very active Communications committee, which has accomplished a great deal in just a few months.

We have strong, functioning committees in every other area of BCRTA operations.

Our new Well-being Committee replaces the Health and Housing and the Social Concerns Committees.

We've added a 3-term limit to the position of Board Director to ensure renewal.

Members now only need to serve on one committee, rather than the previous two, to allow more members to participate.

We consistently hear from members that what they care about is the stability of their pension and benefits, finding better insurance options, great deals for members, and advocacy for education and seniors. These priorities are being addressed by our committees.

5. Improve Service Through Professionalized Operations

Goal: Increase Staff, Including an Executive Director

BCRTA has over 16,000 members, but only two people on staff. As you can imagine, they are run off their feet some days.

Our staff levels are much lower than other RTAs, and this must be addressed if we want to provide a high level of service. Alberta has 15% more members than we do but they have 12 people on staff. Ontario has 25 employees.

Five of Canada's RTAs have an Executive Director, but BCRTA isn't one of them.

We have been consulting with BCTF and other RTAs as to the job descriptions they have for their staff, especially in the Executive Director position. When we hire our new Executive Director, our two existing staff members will continue with us, and they are very excited about this new model.

We have hired a professional communications consultant who has been working two or three days a week since November. The results have been very positive, and this confirms that this is the direction we need to go. We are currently crafting a job description for an Executive Director that will address the needs of the present and future.

Can we afford it? Yes, for several reasons:

- We **can't** afford to leave the office under-powered if we want to do the things members are asking us to do.
- We require stronger staffing to support our services to a growing membership – we don't want to expand into a state of bad service
- We have a significant cash reserve to get us going, some of which has already been authorized for this strategic transition by BCRTA members at the AGM
- Our upsurge in new member signups will be adding tens of thousands of new revenue each year
- Stronger professional staffing will support growing insurance and Advantage partner revenues

We want to emphasize that by hiring more staff we are not surrendering control of our association to hired hands. Quite the opposite – we're getting the qualified help we need to build a stronger BCRTA. Our staff will be working to help us serve our members and execute on our strategic plan. We will continue to be a member-led organization.

Summary

BCRTA is strong and getting stronger.

You are part of the future of BCRTA! Stay in touch and explore the benefits that meet your needs.

You can also help us grow. We ask you to get invite your retired friends to get involved and to make use of the tremendous value that is offered to all our members. Their first year is free – you can't get a better deal than that.

Questions?

Thank you.