




**ARTA**  
ALBERTA RETIRED  
TEACHERS' ASSOCIATION

ARTA'S STRATEGIC PLAN  
**2021 - 2025**

**LOOKING  
AHEAD**



A close-up photograph of a middle-aged man with short, light-colored hair, smiling broadly. He is wearing white swimming goggles with blue accents on his forehead. His face and arms are wet with water droplets. He is leaning on a blue tiled pool edge with his hands resting on a grey plastic slatted deck. On his left wrist, he wears a smartwatch with a green band. The background is a blurred view of a swimming pool with blue water and lane lines.

Rob M, member  
since April 2015



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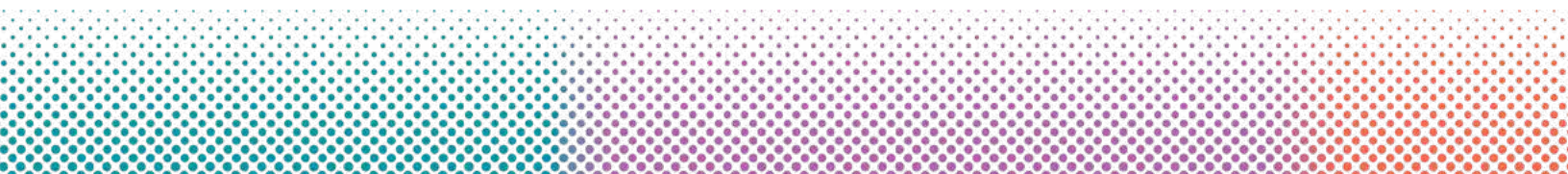


On the cover:  
Guy S,  
member since  
February 2015

Calvin L,  
member since  
June 2016



Cathy T,  
member since  
August 2018





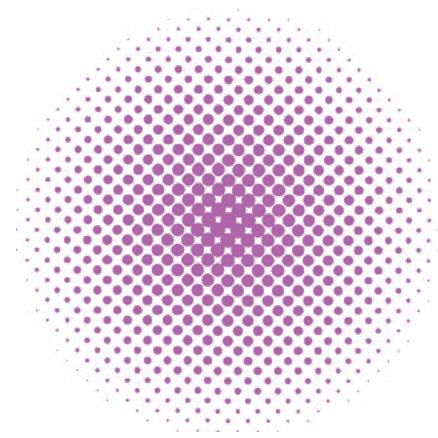
# Alberta Retired Teachers' Association (ARTA) Strategic Plan 2021 to 2025

## CREDITS

The development of the Strategic Plan 2021 to 2025 is the result of the inspiration, commitment and contribution of many people dedicated to the success of the Alberta Retired Teachers' Association. Thanks are extended to ARTA members and staff and, in particular, to the ARTA Board of Directors and the Strategic Planning and Advocacy Committee.

## EVOLUTION OF THE ARTA STRATEGIC PLAN

The 2013 to 2016 and 2017 to 2020 ARTA strategic plans laid the foundation for a bold and inspiring future for ARTA. These plans were comprehensive and forward-looking documents that recognized and built upon the values and strengths of ARTA. These plans responded to trends and issues in the environment at the time and set projections for the future. The strategic plan for 2021 to 2025 uses those initial foundations and guides ARTA toward its 2025 vision. It lays out the broad picture of the services and operations for the well-being of current and future members, for others in retirement, and for like-minded organizations. The strategic plan is ARTA's foundational document upon which other plans will be built. This document continues to guide ARTA as it translates its vision into action. It details the continued development — and previous success — against performance measures and provides further insight into our successes or the opportunities we have to achieve our vision.





## Message from the President

*Looking Ahead: The ARTA Strategic Plan 2021 - 2025* had a long incubation period. Dating back to 2005, yearly deliberations were held at St. Edouard (St. Paul), Caroline and Cochrane to establish goals for the association. A decade ago, ARTA was fortunate to acquire an executive director with expertise and experience in strategic planning.

Following a retreat in Cochrane, the first document *Looking Ahead, ARTA's Strategic Plan 2013 to 2020* was born, setting the framework for fresh planning, new thinking and focused goals for our association. ARTA's membership has doubled since 2013 and our strategic plan has enabled us to manage that growth responsibly.

The second iteration of ARTA's strategic plan 2017 to 2020 used results from a survey of members for evaluation and performance measures. The original plan was resoundingly affirmed and expanded. ARTA's Strategic Plan for 2021 to 2025 reports positive member survey results and reflects

minor clarifying wording changes and an additional outcome that better reflects our advocacy position concerning issues that affect current and future members.

We must acknowledge the members who took those early tentative steps toward a strategic plan so many years ago. A sincere thank you to the current volunteer committee members who realize that the strategic plan is the foundation for all other plans and make sure that yearly business plans accurately reflect the strategic outcomes.

The utmost appreciation is extended to ARTA staff members who effectively organized the information relayed to them and,

along with the addition of meaningful photographs of association members, produced this impressive document.

This strategic plan will keep us accountable, guide our decisions, set our direction and ensure that we properly align our priorities as we are *Looking Ahead* to 2025. It will also make it possible for us to capitalize on new opportunities and adapt to any challenges that arise.

**Lorna McIlroy**  
ARTA President



## Message from the CEO

ARTA is embarking on its next chapter in 2021. Since 2013, ARTA has been engaged in a strategic planning process, supported by research, environmental assessments and consultation that has inspired us to continue exploring the future of our association.

We have learned a great deal over the past few years, and we are eager to share our vision for the association for the next five years.

After consulting with the Board of Directors, standing committees and other stakeholders, we are pleased to announce that *Looking Ahead: The ARTA Strategic Plan 2021 - 2025* is ready to be shared with our members and partners.

The strategic plan for 2021 to 2025 remains focused on four key strategic goals:

**Member Services**

**Wellness**

**Advocacy**

**Organizational Excellence**

In this rapidly changing environment, our strategic direction must account for

change. With this in mind, the strategic plan was written with the intention to revisit it regularly to measure successes and to take into consideration an ever-changing world. We are continually finding new ways to ensure a healthy, vibrant and informed retirement for our members and our community. What will remain constant, however, is that our activities and initiatives will continue to support our members.

Through effective planning, we can better capitalize on new opportunities and adapt to challenges because we have a clear view of our long-term horizon. This plan helps us prioritize and adjust resources to make sure

programs and projects serve our members and balance affordability with long-term sustainability.

ARTA's strategic plan for 2021 to 2025 continues to be bold 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.

Thank you for your support. We look forward to ARTA's continual development as we work alongside our members, staff, partners and elected leaders to inspire innovation and pursue excellence.

**Daniel Mulloy, CEO**



# Executive Summary

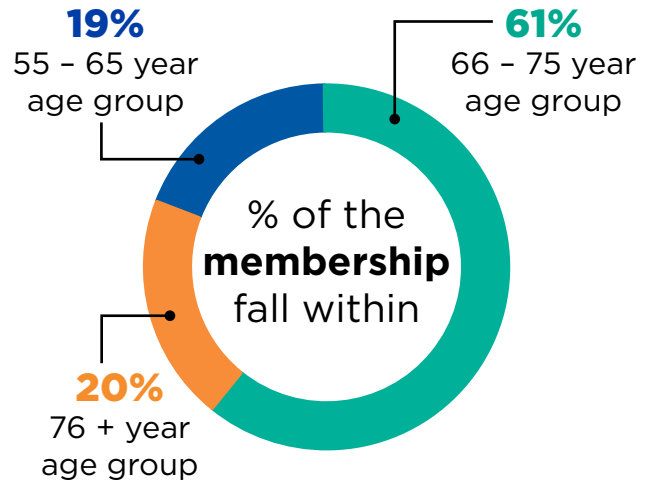
An active association since 1963, the 2013 to 2016 and 2017 to 2020 strategic plans set the framework for fresh planning, new thinking, and focused goals for the Alberta Retired Teachers' Association. The 2017 to 2020 strategic plan also sets the standard in measurement and results reporting.

The strategic plan for 2021 to 2025 will move the organization from where it has been to into the future.

## About the Alberta Retired Teachers' Association

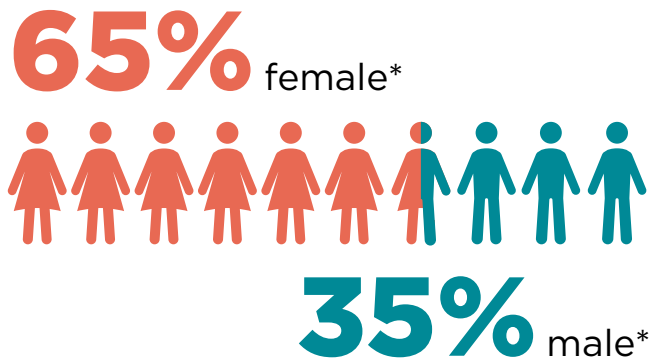
The Alberta Retired Teachers' Association was established in 1963 as a province-wide organization. Its goal was to offer social activities to its members and to address issues affecting retired teachers. In 1995, the ARTA Benefit Plan was added to its list of services to retired teachers. Since then, 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 24,000 members within the education, public and private sectors. The association has seventeen branches throughout Alberta and one branch in British Columbia.



**24,300**  
members and  
growing

**71.1**  
average age of  
membership\*





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



**68.7%**

enjoy **physical activity** at least 4 times per week\*\*



**55.5%**


**volunteer** for an organization in the community\*\*

From the classroom... and **beyond**

**73%**  
Education Sector\*



**27%**  
Public/Private Sector\*



## 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 2025.

From the classroom 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. Membership in the association facilitates the continuation of fellowship in our profession that now extends into retirement.

ARTA is a vibrant association. Our membership of retired educators and like-minded professionals is engaged and informed; the true strength behind our association is the passion of these 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.

\* source: ARTA's membership database as of March 2020

\*\* source: ARTA Member Survey, August 2019



Susan S,  
member since  
June 2019

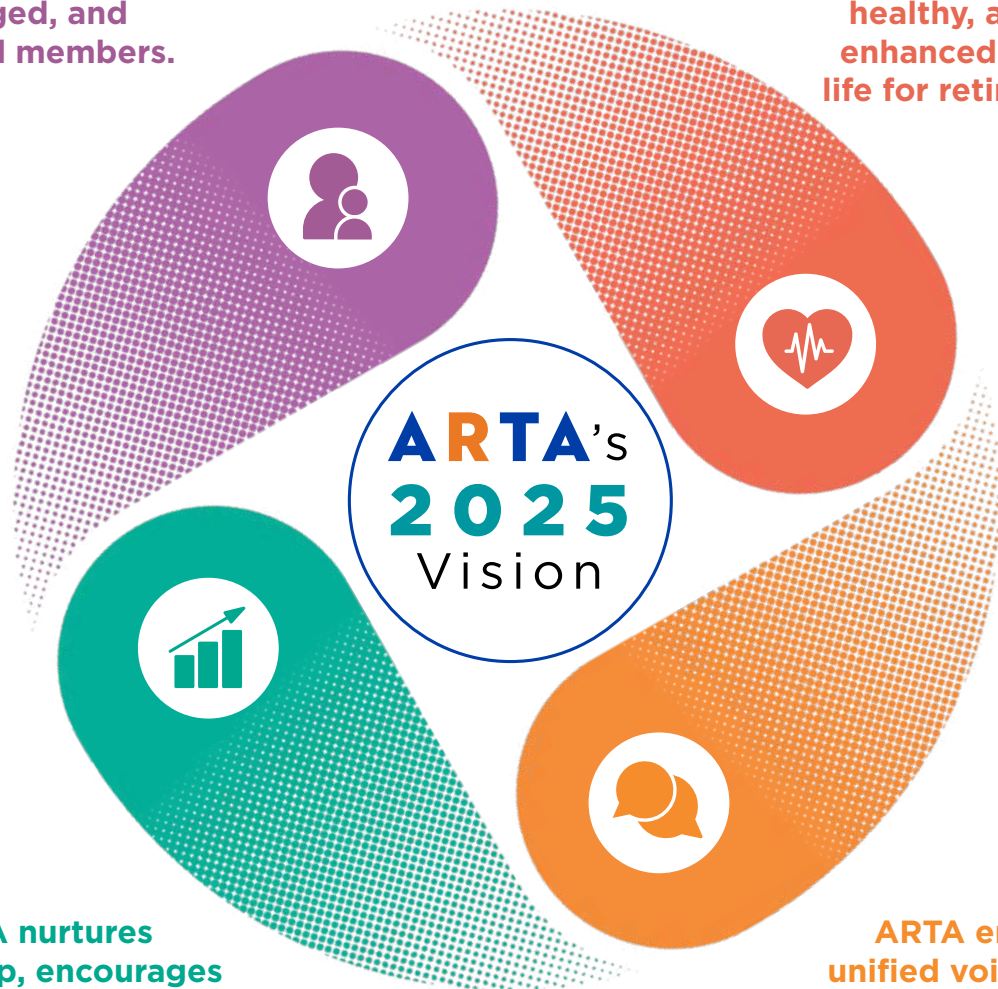
## ARTA's Strategic Goals and Outcomes

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 five-year period of 2021 to 2025.



**ARTA fosters vibrant, engaged, and informed members.**

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



**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.**



## **ARTA fosters vibrant, engaged, and informed members.**

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

### **OUTCOMES 2021 – 2025**

- 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 through effective administration and solid partner relationships.



## **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 2021 – 2025**

- 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.





**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 2021 – 2025**

- 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.
- ARTA supports the cause of education and the teaching profession in Alberta.



**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 nonprofit community in the province of Alberta.

**OUTCOMES 2021 – 2025**

- 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 CEO and Executive Committee.

# Measuring Success

The relationship between planning and outcome achievement is focused through the performance measurement process and setting targets to ensure we are meeting, or exceeding, expectations as outlined in our goals and outcomes.

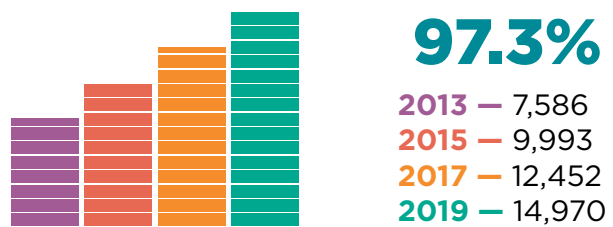
Performance measures were established in two phases. In the first phase, ARTA set performance measures for outcomes and set a baseline for future results. In the second phase, targets are being established using baseline data; these targets, both from qualitative and quantitative measures, identify how far and how fast ARTA has delivered on each of the goals.

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

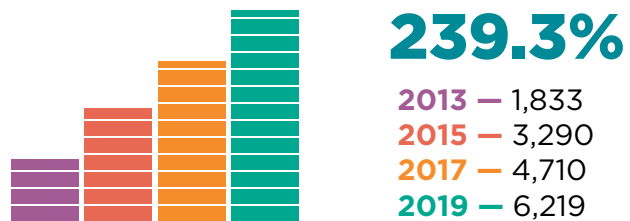
## Membership Growth\*



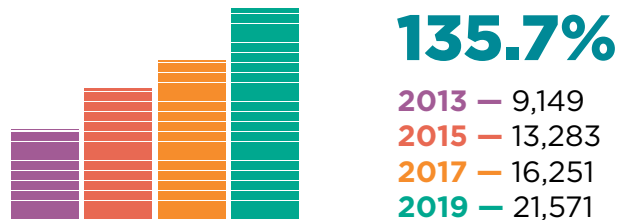
## Growth in the ARTA Extended Health Care Plan over the past seven years – Education Sector\*



## Public/Private Sector\*



## TOTAL\*



\* source: ARTA's membership database as of March 2020



## Survey Results

In December 2016, ARTA surveyed its active membership for insights into how well the organization was progressing toward achieving the goals set out in the *2013 - 2020 ARTA Strategic Plan*. ARTA members participated in the survey, providing valuable feedback and establishing a baseline for future measurement to be tracked.

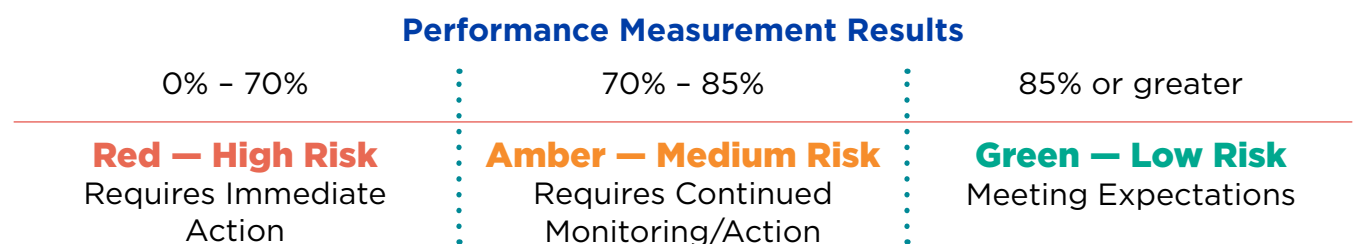
ARTA surveyed its active membership again in March 2020. These measurements will be used to adjust planning and budgeting to ensure ARTA is doing all that is necessary to achieve its vision by 2025.

## Target Setting

Performance targets are a powerful management tool that can help to deliver the kind of strategic changes that a growing association like ours needs to make. The objectives of our strategic plan can be implemented through setting goals, and setting targets based on key performance indicators is an ideal way of achieving those objectives. To begin the target setting process, we used past performance as a gauge to understand where we currently are, and where we need to be, to ensure we are meeting our members' expectations. We have started to set tolerance ranges for our performance measures to make certain we are heading in the right direction. These tolerance ranges also identify areas we need to keep focusing on to make sure we can meet our strategic goals. In the future, hard-set targets will be established.

## Tolerance Ranges

Using the initial performance measurement data gathered, we have set the following tolerance ranges to identify how we are progressing in the pursuit of delivering on our strategic vision.

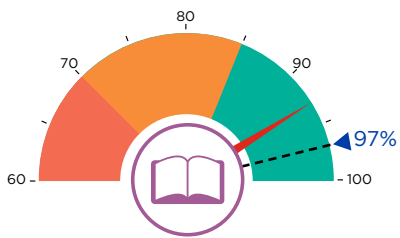


# Survey Results

## MEMBER SERVICES

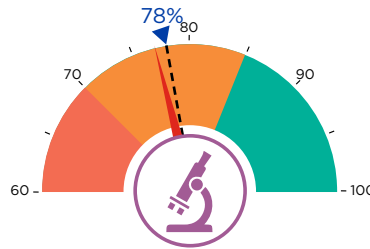


2016 Results: -----◀  
2020 Survey Results: —————▶



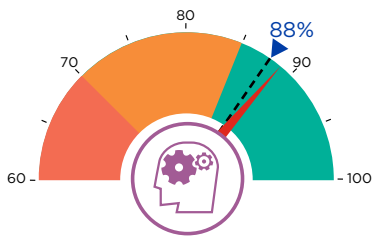
**93%** of survey respondents agree or strongly agree

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.



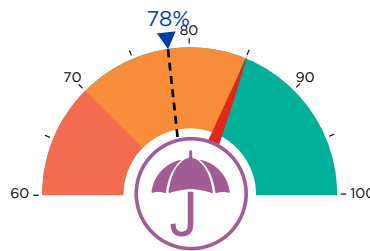
**77%** of survey respondents agree or strongly agree

ARTA utilizes sound research and data to determine the needs and interests of its current and potential members.



**89%** of survey respondents agree or strongly agree

ARTA is knowledgeable about the services and resources available to meet the needs and interests of its current and potential members.



**85%** of survey respondents agree or strongly agree

ARTA provides the most comprehensive insurance and benefit programs to meet the needs of its members.

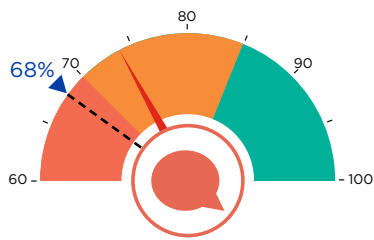




# Survey Results

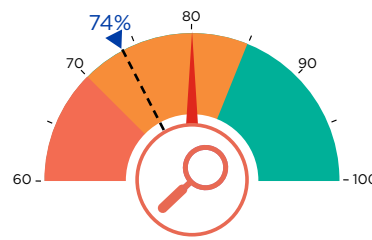
## WELLNESS

2016 Results: -----▶  
2020 Survey Results: —————▶



**74%** of survey respondents agree or strongly agree

ARTA provides a forum for stakeholder groups to address, coordinate and evaluate wellness activities.



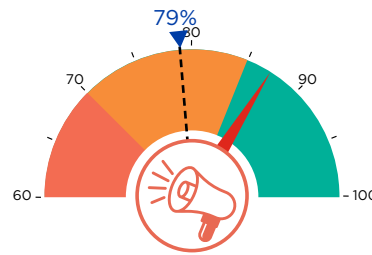
**80%** of survey respondents agree or strongly agree

ARTA coordinates the identification of needs related to wellness for its members.



**77%** of survey respondents agree or strongly agree

ARTA coordinates and facilitates an action plan to address current wellness needs as identified.



**87%** of survey respondents agree or strongly agree

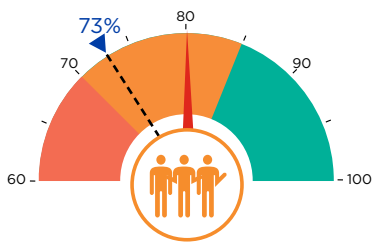
ARTA provides a system for communicating, maintaining and promoting wellness activities within the association.

# Survey Results

## ADVOCACY

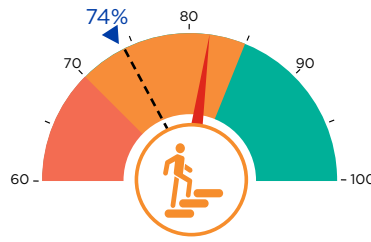


2016 Results: -----◀  
2020 Survey Results: —————▶



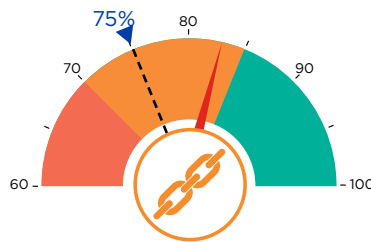
**80%** of survey respondents agree or strongly agree

ARTA's board members, staff and appropriate branch representatives are knowledgeable and skilled in advocacy.



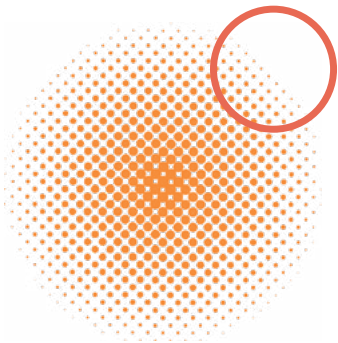
**82%** of survey respondents agree or strongly agree

ARTA has well-researched and articulated positions on the most important issues affecting retired teachers and other retirees.



**83%** of survey respondents agree or strongly agree

ARTA is strategically linked with its branches, retiree groups, and government agencies to acquire information and to establish a unified voice.





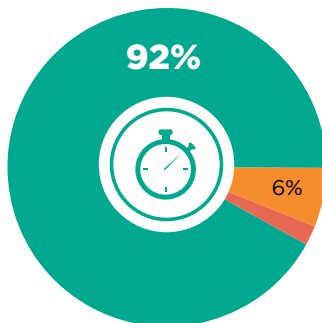


# Survey Results

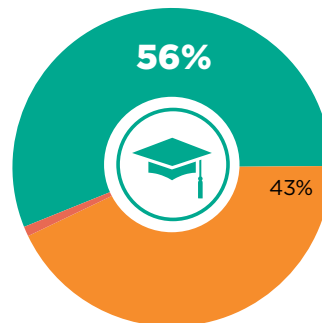
## ORGANIZATIONAL EXCELLENCE

In the first iteration of the strategic plan, organizational excellence was identified as a key component necessary for the success of the three strategic goals. As it was not a formal strategic goal, it did not have outcomes assigned to it, nor was it included in the December 2016 member survey. In 2017, it was determined that it is so integral to the success of the association that ARTA positioned it as a fourth strategic goal. 2020 was the first year that ARTA surveyed its members in relation to organizational excellence since many of the outcomes are not directly visible to the entire membership, the results are presented in a manner that displays the proportion of respondents who were neither able to agree nor disagree with the statement.

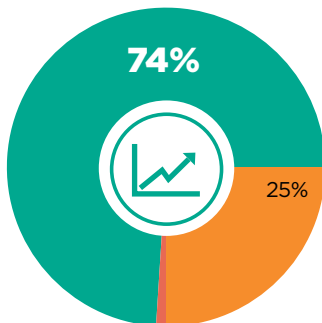
Perhaps the greatest indicator of ARTA's success in organizational excellence was through external recognition — ARTA was the proud recipient of the Canadian Nonprofit Employer of Choice award in 2017, 2018 and 2019, as well as two Capital Awards in communications in 2019, and an international Gold Quill award in communications in 2020.



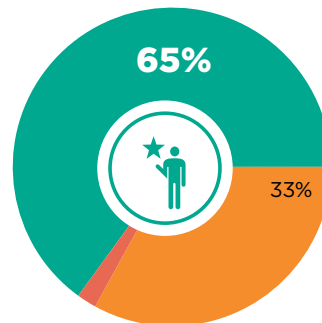
ARTA operates an infrastructure of communications tools to ensure the accurate, timely dispersal of information to its members.



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 CEO and Executive Committee.

● Agree
 ● Neither Agree nor Disagree
 ● Disagree

## Strategic Planning Process Diagram

### 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 - 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 were revisited and revised as needed to ensure that we were moving towards the 2020 vision.

In 2020, the Strategic Planning and Advocacy Committee spearheaded the planning process for the newest iteration of the strategic plan, spanning the years 2021 to 2025.





This planning process illustrates how ARTA engages its organizational structure to effect change. Through sound research, as well as 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.



### 1. Environmental Assessment (External & Internal)

- Trends (data, surveys)
- Strengths
- Weaknesses
- Opportunities
- Threats and barriers

### 2. Vision

- Shared
- Measurable
- Aims to future
- Easily remembered
- Powerful for action
- Challenging

### 3. Mission

- Purpose statement
- What we do
- Core business
- Inspires action
- Why we exist

### 4. Strategic Direction — Goals and Objectives

- Specific
- Measurable
- Attainable
- Relevant to vision and mission
- Time-oriented

### 5. Tasks and Action Steps: How do we get there?

- Assignments
- Resources
- Priorities
- Timelines

### 6. Measuring Results

- Performance measures
- Critical indications of success
- Setting targets



## Thank you

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



Rose T, member  
since March 2019







**arta.net**

 [facebook.com/AlbertaRetiredTeachersAssociation/](https://facebook.com/AlbertaRetiredTeachersAssociation/)

 [instagram.com/artabenefits/](https://instagram.com/artabenefits/)