



National Association
of Federal Retirees Association nationale
des retraités fédéraux

Strategic Plan

One Voice, Members, Excellence

Over the period between July 2019 and June 2024, the National Association of Federal Retirees will pursue the following three goals:

- 1. We will advocate in the best interest of our members and seek to be recognized as a respected national voice supporting secure, healthy and dignified retirement for federal retirees and all Canadians;**
- 2. We will promote membership retention and growth;**
- 3. We will pursue organizational excellence at all levels of the Association.**

The following document outlines more specific directions the Association will follow and, for each, as appropriate, sets out the expected contributions across the Association, at the Branch level and at the National level.

Approved by the AMM in June 2019.



Association Vision

All Canadians enjoys dignity and security in their retirement

Association Mission

To significantly improve the quality and security of retirement for our members and all Canadians through advocacy and the provision of services

Association Values

Integrity: We are honest, forthright and act at all times in the best interests of the people we represent. We adhere to high moral principles and consistently apply Association values in every action and decision.

Leadership: We employ a strong, coordinated and proactive approach to influencing and shaping the future in an effort to bring our mission and vision into a reality - informed by a thorough understanding of the issues, stakeholders and desired outcomes.

Accountability: We deliver on our promises and fulfill on our obligations - always. We are responsive to our members and to our volunteers, consulting with them when appropriate, addressing their concerns and keeping them informed all times.

Service: Just as our members dedicated themselves to the service of the public, we in turn dedicate ourselves to the service of our members and all Canadians in retirement. We are committed to providing compassionate, efficient and effective service that targets our clients' needs and brings clarity to complexity.

Respect: We respect our members - for their service to Canada, for their wisdom that comes with experience, and for the trust they have placed in the Association to protect their interests. We respect our volunteers at all levels of the organization for their selfless contribution to the Association's mission. We respect our staff for their support and commitment.

Service Philosophy

Service to others is the highest calling a person can have. The members of our Association have spent their working lives in service to our country. We honour that by providing them with services that is of the highest standard. This service will support the goals of the Association, improving the lives of our members, making retirement better for them, and directly contributing to member engagement, retention and growth.

Goal 1: We will advocate in the best interest of our members and seek to be recognized as a respected national voice supporting secure, healthy and dignified retirement for federal retirees and all Canadians

Directions	Association-wide role	Branch Role ¹	National Role
Direction 1.1 – Grow and strengthen Federal Retirees’ capacity for advocacy	Federal Retirees will work internally and with other like-minded organizations to enable effective advocacy representation and action/leadership from coast to coast to coast.	One pillar of our advocacy strength is our local presence in every part of the country.	The other pillar of our advocacy strength is the professionalism the Board of Directors, the National Advocacy Committee and staff bring to the identification of issues and the development of Federal Retirees’ position vis-à-vis these issues.
Direction 1.2 – Advance retirement income security policies and programs that respond to our members’ and other retirees’ needs	Working together, branches and the National Office will work towards identifying and supporting a network of constituency-based advocacy representatives (the ultimate goal being a person identified for each federal riding over the next 5 years).	Branches will continue to be the sounding board for their members and their input will continue to be invaluable in the identification and development of national positions.	Guided by the National Board of Directors, staff at the national office will continue to write and develop advocacy positions for Federal Retirees, based on the input and engagement of members and volunteers. Staff will continue to develop materials designed to help members and volunteers understand and engage in advocacy activity. This will also support and inform more formal advocacy activities such as one-on-one lobbying of politicians and other actors, representation of Federal Retirees on advisory committees (<i>e.g.</i> PSHCP, PSDP, PSPAC, etc.) appearances at Parliamentary Committees, etc.
Direction 1.3 – Advance policies that help to ensure our members and other older adults age in health and dignity, with the supports they and their families need	Tools and training will be provided to advance Federal Retirees’ interests at the local level before, during and after federal and provincial election campaigns.	Branches will also continue to be the visible presence of Federal Retirees in their territory making connections with local stakeholder and partners, and representing Federal Retirees in their communities. They will make connections with potential advocates and provide them with support. Branches will work with staff to recruit, train and support/guide local advocacy volunteers.	Staff will also identify and work with counterparts at other stakeholders/partners (<i>e.g.</i> other retiree organizations) to advance common goals. They will identify key government and non-government stakeholders to collaborate with and advance our goals. Staff will develop campaigns/tools to elevate, implement, grow support around for Directions 1.2-1.4. Working with branches, staff will recruit, train and support/guide advocacy practitioners (for example working with APOs to provide “regional” leadership) and other organizations to help raise awareness and support our goals.
Direction 1.4 – Collaborate with organizations working to improve the lives of veterans and their families	Federal Retirees will build communication and support among Veteran agencies in order to advance policies, programs based on the feedback/identified priorities of veterans.	They will continue to use tools provided by the national office to promote local delivery of national advocacy campaigns in order to generate local awareness and retain current and recruit new members.	Staff will develop communications tools to ensure members, advocacy practitioners and other volunteers are informed about what is being done to further support growing the advocacy team and create additional awareness. There will be a particular focus on collaborating with other stakeholders to build communication and support networks between agencies to meet the needs of Veterans and their families.

¹ All Branches have a role to play to support this plan, however the degree of support will vary depending on individual Branch capacity, including Branch budget, volunteer engagement and the geographic territory served by the Branch.

Goal 2: Promote membership retention and growth

Directions	Association-wide role	Branch Role ²	National Role
<p>Direction 2.1 – Maintain our focus on identifying and meeting the needs of our members and prospective members</p>	<p>All levels of Federal Retirees have a clear understanding of both the shared and particular (<i>e.g.</i> former PS, veteran members of the CAF and RCMP, former judges, spouses and survivors) needs and priorities of current and future members and be responsive to those needs in a way that is balanced and fair.</p> <p>Branches and the National Office will continue to seek out partners who can offer members products and services that enhance the value of membership in the Association.</p>	<p>Branches will continue to seek to reach out and engage members who do not traditionally attend branch meetings in order to ensure their needs and priorities are being met.</p>	<p>National Office will continue to engage all members through high-quality editions of Sage magazine, e-newsletters, a useful and informative website and through relevant social media channels.</p> <p>National Office will continue to support branch in their existing and enhanced communications and outreach to members.</p> <p>National Office will regularly survey members and subsets of members to ensure Federal Retirees identifies and understands their needs.</p>
<p>Direction 2.2 – Increase positive awareness of Federal Retirees to prospective members in order to achieve annual membership growth</p>	<p>All levels of the Association contribute in a coordinated manner to raising awareness of the existence, purpose and value of membership in Federal Retirees among prospective members in order to maximise recruitment efforts.</p>	<p>As the visible, local face of Federal Retirees, branches will work to establish a regular presence and visibility at main federal work sites in their territory.</p> <p>Branches will seek to organize activities geared towards prospective members and will participate in national recruitment campaigns and outreach activities.</p> <p>Branches which have the capacity to do so will engage in their own local recruitment activities.</p> <p>Where they are able to, branches will share their experiences with other branches.</p>	<p>The National Office will:</p> <ul style="list-style-type: none"> • work with branches and others, such as BSCs, to identify federal work sites with significant numbers of potential members; • coordinate and provide information for Pension Plan member seminars, SCAN seminars, RCMP Quarterly, and other communications with prospective members • provide standard recruitment presentation and marketing material to support branch outreach and recruitment events. • offer pre-retirement training seminars in partnership with others to build brand awareness. • build regular relationships with key government departments. • make strategic investments in digital marketing campaigns. • plan and execute annual membership drives in conjunction with National Public Service Week. • attend large conferences of current employees, engage in high visibility awareness and sponsorship opportunities and build database of prospective members. • identify other conferences and events where local branch participation could be of value and provide materiel and logistical support for such local participation.

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Goal 3: Pursue organizational excellence at all levels of the Association

Directions	Association-wide role	Branch Role ³	National Role
<p>Direction 3.1 – Federal Retirees has a clear and sustainable vision that is embraced by all levels of the organization</p>	<p>The Strategic Priorities of the organization are clearly defined, communicated and used for planning and decision making at all levels of the Association.</p> <p>The Annual Members Meeting focuses on the long-term vision and strategic priorities of the Association; both nationally- and Branch-initiated proposals reflect this focus.</p> <p>All levels of the Association have effective mechanisms for translating these priorities to action and monitoring progress.</p> <p>Governance practices support the whole Association in delivering its priorities.</p>	<p>Branch activities and priorities are based on Federal Retirees’ strategic priorities.</p> <p>Branch budgets ensure resources are allocated in a manner which supports local delivery of the strategic plan.</p> <p>Branches measure their performance against the Association’s strategic goals.</p>	<p>National Office communicates strategic priorities to Members, Branches, national volunteers, employees and external stakeholders.</p> <p>Decisions of the Board support the pursuit of the Association’s strategic priorities by staff and national volunteers. The national budget ensures resources are allocated in a manner which supports national delivery of the strategic plan.</p> <p>Based on monitoring by staff of national progress and changes in the environment that may impact the Association’s strategic priorities, the Board evaluates and determines necessary changes to the strategic direction as required.</p> <p>National Office performance is measured against Strategic goals.</p>
<p>Direction 3.2 – Members’ needs are met by capable volunteers and professional staff working collaboratively</p>	<p>The Association will remain mindful that it is a volunteer-based organization and will cultivate a culture that facilitates volunteer recruitment and retention as well as recognition of their contributions.</p> <p>The Association will continue to create and foster networks to encourage volunteers and staff at all levels to communicate and work collaboratively to ensure full delivery of the Association’s strategic goals.</p> <p>Resources allocated to national level are sufficient to ensure the Office’s ability to recruit and retain the staff it needs to function.</p>	<p>Branch volunteers provide effective leadership at the Branch level.</p> <p>Branches work cooperatively with National Office to achieve strategic goals.</p> <p>Branches use the tools and supports provided.</p> <p>Branches actively engage in identifying training needs for their volunteers and support them in participating in ongoing training activities.</p> <p>Branches continue to share best practices with each other and with National Office to improve branch effectiveness.</p>	<p>The National Board provides effective leadership to Federal Retirees.</p> <p>National Office provides professional information and support to the Board to assist in effective decision making.</p> <p>National Office works cooperatively with Branches to achieve strategic goals and provides volunteers with timely access to required tools, resources, and training to effectively support and manage the Association.</p> <p>Within the limits of its financial resources, Federal Retirees continues to ensure its financial and information technology procedures and platforms meet the needs of members, volunteers and staff while complying with applicable legislation and best practices.</p> <p>Federal Retirees explores and implements appropriate options aimed at increasing operational efficiency.</p> <p>The National Office is staffed by competent, engaged, professional staff who support members, volunteers and each other. Staff are committed to seeking continuous improvement in the way in which the office functions and in the way it supports branches and volunteers.</p>

Directions	Association-wide role	Branch Role ³	National Role
<p>Direction 3.3 – Federal Retirees’ reputation and future viability is assured</p>	<p>The Association, at all levels, is accountable to its membership through transparency and through compliance with all applicable federal, provincial and local legislation and regulations including, but not limited to, direct and indirect taxation, protection of privacy, lobbying, election activities, electronic communications, employment standards, etc.</p> <p>The Association is financially stable and members’ fees and other revenues are judiciously managed and rigorously accounted for.</p>	<p>Branches support directions adopted by the Annual Members Meeting or the Board of Directors.</p> <p>Branches proactively identify and manage risk at the branch level, including branch sustainability, and seek assistance from the national level as required.</p>	<p>In order to mitigate risk, policies and administrative processes are reviewed and updated on a regular basis to ensure compliance with applicable legislation, efficiency and accountability.</p> <p>National Office monitors the environment and reports on changes that may impact Federal Retirees’ future viability as well as developing strategies to address.</p> <p>Annual audited financial reports are made available on Federal Retirees web site.</p> <p>Federal Retirees engages with external professionals as required in order to address both specific and systemic risks or threats to the Association’s future viability.</p>
<p>Direction 3.4 – Federal Retirees will be recognized for its sound governance practices</p>	<p>The Association commits itself to ongoing improvement of its governance practices and processes.</p>	<p>Branches regularly review their bylaws to ensure they continue to meet the branch’s needs.</p> <p>Branches conduct themselves in a transparent manner for the members.</p> <p>Branches continue to contribute to the broader goals of the Association while supporting the interests of their members.</p>	<p>There is an ongoing practice of reviewing governance processes and structures to ensure they meet the needs of members and the long-term viability of the Association.</p> <p>The Board conducts business in as transparent a manner as possible.</p> <p>In advancing Association-wide goals, the National Board and the National Office, in collaboration with Branches, respect and reconcile, where possible, the diversity of members’ views.</p>

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