

# RTOERO Strategic Plan 2025



# Vision

Our vision is a healthy, active future for every member of the education retiree community in Canada.










# Mission

We are a bilingual trusted voice on healthy active living in the retirement journey. We deliver world-class programs, social engagement and political advocacy.



# Values

VALUE		WHY IT'S IMPORTANT TO RTOERO	WHAT IT LOOKS LIKE IN ACTION
<b>Accountability</b>		Offers financial stability and security, ethical and honest oversight, transparent decision making	<ul style="list-style-type: none"> <li>• Open communications that build trust</li> <li>• Budget that is responsive to members and aligned to strategic goals</li> </ul>
<b>Community Connection</b>		Represents the reason RTOERO was founded and continues to be respected	<ul style="list-style-type: none"> <li>• Volunteer service</li> <li>• Advocacy</li> <li>• Outreach activities</li> <li>• Social engagement</li> </ul>
<b>Giving Back/ Making a Difference</b>		Provides a meaningful purpose for our organization	<ul style="list-style-type: none"> <li>• Improving the lives of members and seniors</li> <li>• Grants, scholarships</li> <li>• RTOERO Foundation</li> <li>• Advocacy</li> </ul>
<b>Inclusion</b>		Creates a powerful community, where all members feel welcome and a sense of belonging	<ul style="list-style-type: none"> <li>• Outreach to future members in the broader education community</li> <li>• Diversity, equity and inclusion practices</li> <li>• Bilingual programs and services</li> <li>• Recognition for the full diversity represented in RTOERO membership</li> </ul>
<b>Leadership/ Vision</b>		Strong leadership helps RTOERO achieve its shared vision for the future	<ul style="list-style-type: none"> <li>• Strong trusted leadership at all levels of the organization – board of directors, districts, members, staff</li> <li>• Future focused</li> </ul>
<b>Service to members</b>		RTOERO's core mandate is to serve members	<ul style="list-style-type: none"> <li>• Value the voices of members</li> <li>• Programs, perks and privileges for members</li> <li>• Volunteer recognition and member appreciation</li> <li>• Engaging and caring communication</li> </ul>
<b>Well-being</b>		RTOERO supports members and seniors in their healthy, active retirement journey	<ul style="list-style-type: none"> <li>• World-class health benefits plans</li> <li>• Foundation funding for research</li> <li>• Social engagement</li> <li>• Member support</li> </ul>

# Who we are



**RTOERO** is a bilingual trusted voice for healthy, active living in retirement. With members in districts across Canada, we are the largest national provider of non-profit group health benefits for education community retirees. We welcome members who work in or are retired from the early years, schools and school boards, post-secondary and the broader education sector.

We believe in the **power** of our **community** to **secure** a better **future**.

## For more information:

- Visit our website at [rtoero.ca](http://rtoero.ca)
- Sign up for free membership until retirement: [rtoero.ca/free-membership](http://rtoero.ca/free-membership)
- Call 1-800-361-9888
- Email [media@rtoero.ca](mailto:media@rtoero.ca)

## Engage with us on social media:

-  [facebook.com/rto.ero](https://facebook.com/rto.ero)
-  [@rto\\_ero](https://twitter.com/rto_ero)
-  [linkedin.com/company/rto-ero](https://linkedin.com/company/rto-ero)
-  [bit.ly/RTOEROYouTube](https://bit.ly/RTOEROYouTube)



# Our story



Regardless of our career or role, what unites us as members of the education sector has always been our belief in the future – and the desire to secure better futures for students, for each other, and for the communities we’ve served.

This belief doesn’t go away just because we retire. In fact, our drive to keep learning, keep connected, keep contributing and keep living our best lives gets even stronger as we move into our senior years.

RTOERO is a unique organization inspired by these values and designed to help education sector retirees be better prepared for their own futures and part of a community that is making a difference in the lives of all seniors.

We provide essential health, wellness and travel benefits so our members can explore their journeys with confidence. We connect our members to each other as volunteers, as leaders and in support of individuals in need. We fund the research and drive the advocacy to advance the interests of seniors and increase their contribution to society at every age.

Our members have spent their careers serving the future through learning, caring and support. With RTOERO they are now part of a supportive community that continues that work, together.





## **Strategic goal:**

# Be the trusted voice for the broader education community

We are the recognized voice and leading benefits provider for the education retiree community in Canada. We are game-changing advocates who have influential relationships with the media, stakeholders and government policy makers. Our voice is clear and impactful to effect social change. We sustain strong relationships and networks of influence across Canada. Our Foundation contributes to our impact and authority.

## **Focus areas**

- Advocacy
- Diversity, equity and inclusion
- Thought leadership
- Relationship building and partnerships

# Success indicators

- Canadians reached with RTOERO's political advocacy messages
- Number of meetings with government officials
- Number of staff and volunteers who have completed diversity, equity and inclusion self-assessment
- Number of training sessions in diversity, equity and inclusion attended by staff and volunteers
- Number of partnerships with like-minded non-profit organizations for mutual benefit
- Social media reach and engagement
- Number of presentations given by RTOERO staff and board
- Funds raised and granted by Foundation
- Impact and diversity of grants and scholarships
- Net Promoter Score

## Where we'll be in 2025:

**70% of stakeholders view RTOERO as a national authority on retirement and seniors issues.**



### **Strategic goal:**

## **Improve the lives of members and seniors**

We are focused on what matters most – our growing national membership and offering them more value than ever. The retirement journey is different for each of them, and we have products and services to offer every step of the way—from pre-retirement onward. We're defined by our "wow" service that exceeds all competitors.

### **Focus areas**

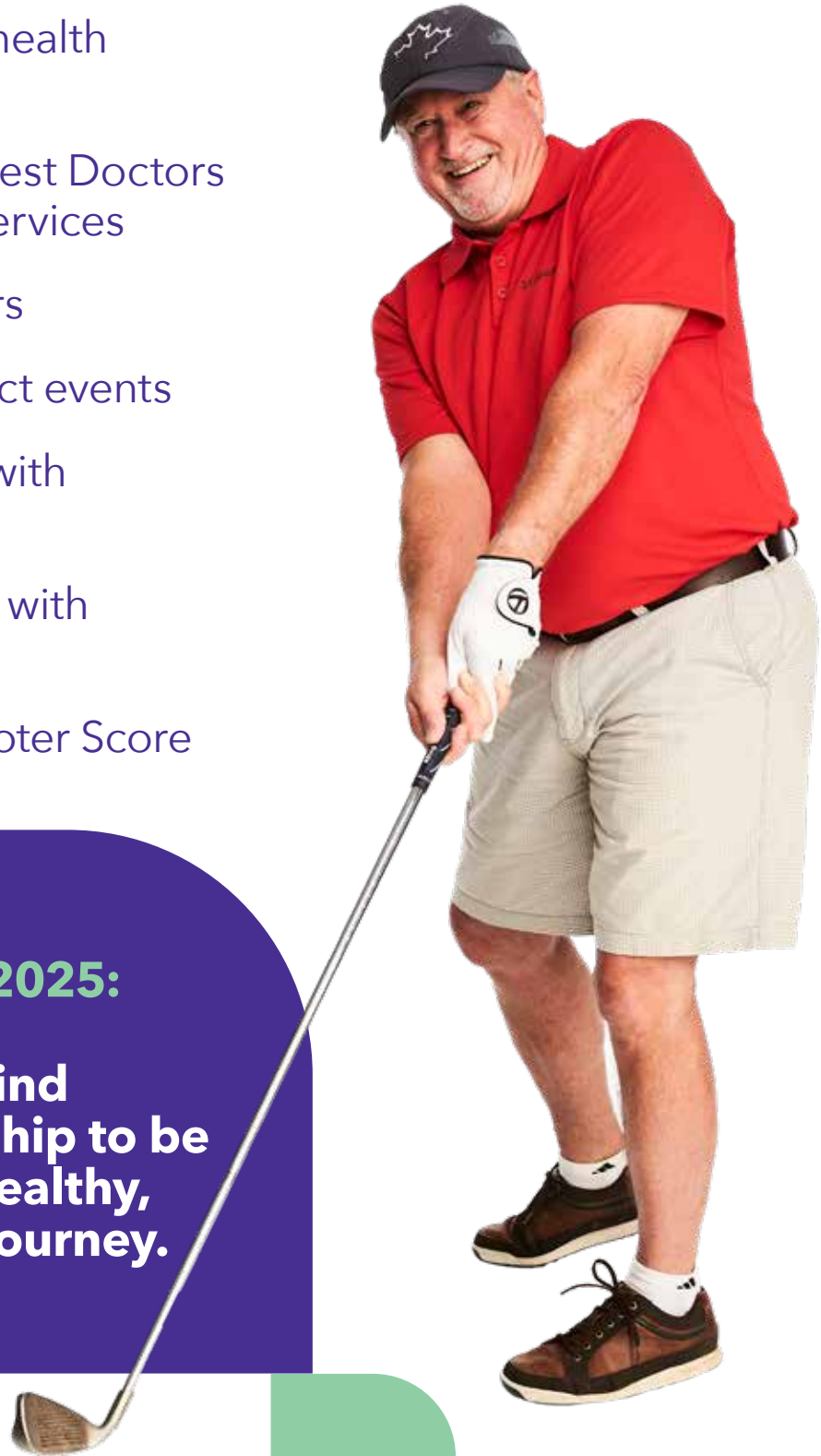
- Environmental sustainability
- Member engagement in service and growth
- Enhanced and increased member programs, services and health benefits
- Support for districts
- Volunteer engagement
- Good governance

# Success indicators

- Member satisfaction ratings with RTOERO and partner services
- Participation rate in health benefits plans
- Utilization rates for Best Doctors and MemberPerks services
- Number of volunteers
- Participation in district events
- Number of districts with Goodwill programs
- Member satisfaction with communications
- Members' Net Promoter Score

## Where we'll be in 2025:

**80% of members find RTOERO membership to be essential to their healthy, active retirement journey.**



**Strategic goal:**

**Broaden the membership base**

We have a growing membership. We reach out, connect and dialogue with future members to actively engage with them. Our brand is vibrant, our messaging is compelling, and we have a dynamic integrated marketing plan. Our investment has paid off with new members who are engaged and excited to be part of our organization.



## Focus areas

- Sustainable growth
- National marketing and outreach
- Market share
- Outreach to French-language education community
- Broader education community
- Actively employed
- Building the brand

## Success indicators

- Membership growth rate
- Number of new francophone members
- Retirement Planning Workshop attendance
- Social media reach and engagement
- Conversion rates
- Net Promoter Score

**Where we'll be in 2025:**

**120,000 members  
across Canada**

Be the trusted voice  
for the broader  
education community

Improve the lives of  
members and seniors

Broaden the  
membership base



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