

## PROVINCIAL EXECUTIVE GOALS AND PRIORITIES FOR 2014

GOAL 1: MAINTAIN QUALITY SERVICE TO MEMBERS	Assignment	Timeline
<b>OBJECTIVE 1: TO REVIEW SERVICES TO MEMBERS</b>		
a) Investigate the feasibility of expanding services to members	PE and Senior Staff	Ongoing
b) Support and review the success of the 2014 workshops for District Presidents, Communications, Member Services and HSIC representatives	PE and Senior Staff	Ongoing
c) Continue to monitor research of the demographic trends and needs associated with aging	PE and Senior Staff	Ongoing
d) Support initiatives/strategies related to: <ul style="list-style-type: none"> <li>• ensuring the RTO/ERO Group Benefits Program is competitive in the market</li> <li>• enhancing efforts in areas such as caregiving, long term care, and wellness</li> <li>• ensuring RTO/ERO's fiduciary responsibilities and governance policies continue to protect RTO/ERO from liability</li> </ul>	PE and Senior Staff	Ongoing
<b>OBJECTIVE 2: TO SUPPORT TECHNOLOGY INITIATIVES</b>		
a) Support the continuing implementation of new technologies for the Provincial Office and Districts	PE and Senior Staff	Ongoing
b) Select and implement a Customer Relationship Management (CRM) system	PE and Senior Staff	Ongoing
c) Continue to refine and test RTO/ERO's Business Continuity Plan, which allows the Provincial Office to respond to and recover from a disaster that may impact our technology and/or building and continues service to members in an appropriate manner	PE and Senior Staff	Ongoing
d) Provide appropriate professional development for the Provincial Executive	PE and Senior Staff	Ongoing
<b>OBJECTIVE 3: TO ENHANCE COMMUNICATION WITH MEMBERS</b>		
a) Continue to enhance Provincial support to meet the needs of Francophone members	PE and Senior Staff	Ongoing
b) Continue to enhance appropriate methodologies of communication of Provincial Executive with Districts/members at large	PE	Ongoing
c) Continue to encourage effective communication between Committees and District Liaisons	PE and Senior Staff	Ongoing
d) Coordinate the Annual District Presidents' Workshop, April 13/14, to be organized by a planning committee of the Provincial Executive, several District Presidents and Simon Leibovitz, Director of Administrative and Member Services	PE and Senior Staff	Nov-Apr

GOAL 2: RAISE THE PROFILE OF RTO/ERO	Assignment	Timeline
<b>OBJECTIVE 1: TO MARKET RTO/ERO</b>		
a) Review and revise the ongoing and "traditional" marketing and recruitment strategies to reflect the demographic trends, with the end result possibly being a provincial and District outreach strategy for teachers, school and school board administrators, college and university faculty, designated and non-designated private schools, and educational support staff	PE and Senior Staff	Ongoing

b) Encourage Districts to provide RPWs to educational organizations with emphasis on reaching out to non-traditional groups i.e. colleges, universities, designated and non-designated private schools, and educational support staff and strengthen the relationship with our traditional groups	PE and Senior Staff	Ongoing
c) Encourage Districts, in conjunction with the Member Services Committee, to focus on recruitment and involvement of Associate Members, in addition to Full Members, through the implementation of the Recruitment Toolkit	PE and Senior Staff	Ongoing
d) Support the development of a dynamic advertising strategy	PE and Senior Staff	Ongoing
e) Continue dialogue with Johnson Inc. on a joint marketing strategy for the RTO/ERO Group Benefits Program	PE and Senior Staff	Ongoing
<b>OBJECTIVE 2: TO UNDERTAKE POLITICAL ADVOCACY, AS WARRANTED</b>		
a) Assist the Political Advocacy Committee with the attainment of RTO/ERO priorities	PE and Senior Staff	Dec-Nov
b) Continue to dialogue with the Government and official political parties in the context of potential Provincial elections	PE and Senior Staff	Ongoing
c) Continue to consult with Government relations specialists regarding advocacy	PE and Senior Staff	Ongoing
d) Reinforce our non-partisan status	PE and Senior Staff	Ongoing
e) Continue to explore working on a project with the Ministry of Education and the aboriginal community	PE and Senior Staff	Ongoing
f) Raise awareness of Canadian pension issues	PE and Senior Staff	Ongoing
<b>OBJECTIVE 3: TO SUPPORT THE OBJECTS OF THE RTO/ERO FOUNDATION</b>		
a) Liaise with the Board of Directors of the RTO/ERO Foundation to actualize the Objects of the Foundation	PE and Senior Staff	Ongoing

<b>GOAL 3: MAINTAIN, STRENGTHEN &amp; EXPAND RELATIONSHIPS</b>	<b>Assignment</b>	<b>Timeline</b>
<b>OBJECTIVE 1: TO STRENGTHEN EXTERNAL RELATIONSHIPS</b>		
a) Liaise with groups such as <ul style="list-style-type: none"> <li>• ACER-CART</li> <li>• Colleges/Universities/Provincial Schools, District School Boards, and educational Support Staff in schools and school boards, and designated and non-designated private schools</li> <li>• OTF and Affiliates</li> <li>• Principals and Supervisory Officers</li> <li>• Trustee Associations</li> </ul> b) Continue to encourage Districts to include Principals, Supervisory Officers and Affiliates, Colleges/Universities/Provincial Schools, District School Boards, educational Support Staff in schools and school boards, designated and non-designated private schools in appropriate outreach activities	PE	Ongoing

<b>GOAL 4: ENSURE EFFECTIVE GOVERNANCE STRUCTURE</b>	<b>Assignment</b>	<b>Timeline</b>
<b>OBJECTIVE 1: TO ENSURE THE PRINCIPLES OF TRANSPARENCY, ACCOUNTABILITY AND DUE DILIGENCE ARE UPHELD IN ALL FACETS OF THE OPERATION OF RTO/ERO</b>		
a) Ensure compliance with new provincial legislation	PE	Ongoing
b) Act upon motions referred from Senate and Standing Committees	PE	Ongoing
c) Continue to conduct security audits of building and systems as needed	PE and Senior Staff	Ongoing
d) Establish an Ad Hoc Committee on Rights and Privileges of Membership	PE	Ongoing
e) Communicate with Chairs on governance matters	PE	Ongoing
<b>OBJECTIVE 2: TO ENCOURAGE LEADERSHIP AND ORGANIZATIONAL DEVELOPMENT</b>		
a) Monitor the activities of the Ad Hoc Committee on Succession of the Executive Director	PE	June
b) Provide professional development and training	PE and Senior Staff	Ongoing

<b>GOAL 5: ENSURE FINANCIAL ACCOUNTABILITY</b>	<b>Assignment</b>	<b>Timeline</b>
<b>OBJECTIVE 1: TO OVERSEE THE BUDGET PROCESS</b>		
a) Review implementation costs: Committees, projects, technology, special events	P.E. and Senior Staff	Ongoing
b) Review financial priorities and finalize budget for Senate	P.E. and Senior Staff	Aug.-Sept.
c) Investigate possible efficiencies and cost savings	P.E. and Senior Staff	Ongoing
<b>OBJECTIVE 2: TO OVERSEE FINANCES AND INVESTMENTS OF RTO/ERO AND 1316342 ONTARIO INC.</b>		
a) Review monthly statements of revenue and expenses for RTO/ERO and 1316342 Ontario Inc.	P.E.	Ongoing
b) Receive and review presentations from Investment Portfolio managers	P.E.	Quarterly
c) Continue to monitor the performance of the investment managers	P.E.	Ongoing
d) Review summary report of District Financial Statements	P.E.	April