

# Municipal Retirees Organization Ontario (MROO) Annual Report September 2020

The global Covid-19 pandemic has affected all organizations worldwide in one manner or another and MROO is no exception. The MROO board of directors and administration staff have strived to continue moving the strategic plan forward through these unusual times, however many things have been delayed or put on hold.

This annual report is one item that has been delayed as the June 2020 annual general meeting (AGM) had to be postponed due to government restrictions regarding public gatherings. The attached report covers a 15-month span due to this delay rather than the usual 12-month span. It is anticipated that the AGM cycle will return to normal in 2021 and will take place in June, which is in concert with constitutional requirements.

The MROO 2019-2021 Strategic Plan sets out a number of strategies and initiatives to further the organization's mandate to support its members and other OMERS retirees. Over the three years the strategic plan covers, the Board of Directors and Executive Director will work collaboratively to deliver on the initiatives and fulfil each strategy.

This annual report highlights progress and achievements made since June 2019 in pursuit of fulfilling the MROO 2019-2021 Strategic Plan objectives.

## **Strategy 1** **Continue to offer services and programs that are valued by members.**

**Initiative:** Provide a link for MROO members to legal services and estate planning.

**Report:** Two law firms, which specialize in the estate planning and offer services to MROO members agreed to continue to be listed on our new website. Additional firms will be explored in 2021

**Initiative:** Add discounts for hearing aids and batteries. **(Complete)**

**Report:** January 2020, MROO entered a 3-year affinity partnership agreement with Hearing Life Canada to provide discounted services on Hearing and batteries to MROO members.

**Initiative:** Conduct a member survey every three years to measure value and satisfaction of services/programs and identify new services/programs.

**(Complete)**

**Report:** A member survey was completed in February 2020. Because of Covid-19 the survey was only offered online. 2,383 members (20% of our online members) completed the survey. Results were shared with the board in an April 2020 information session and with members in the July 2020 newsletter. The survey results will help shape board planning over the next few years.

**Initiative:** Establish a link to retirement homes.

**Report:** This initiative was put on hold in 2020 given the Covid-19 pandemic. However, MROO is in the midst of creating an advocacy committee on Senior housing which will help provide direction to the board and the Executive Director on this initiative.

## Strategy 2

### Improve communication and engagement with members.

**Initiative:** Enhance MROO marketing.

**Report:** The launch of the new website in December 2019 was a positive step in assisting this initiative. The Executive Director will be working with our web host Esolutions over the next year to help increase our Search Engine Optimization (SEO).

Discussions with OMERS, OMHRA and OMAA took place in the last year and there are several opportunities the Executive Director will be pursuing in the coming months to augment this initiative.

**Initiative:** Employ use of videos. **(Substantially Complete)**

**Report:** Three videos have been added to the member section of the MROO website. These videos deal with Wills, Estates and Trustees, Power of Attorney and Reverse mortgages.

The Executive Director will add more videos to the website in 2020/21. Financial Planning and cyber security are two that are under consideration.

**Initiative:** Increase engagement with members.

**Report:** This initiative was directly affected by the Covid-19 pandemic as zone meetings, pre-retirement seminars and coffee meetings were all postponed or cancelled.

The board and the Executive Director will continue to find ways to enhance engagement in 2021 and beyond.

### **Strategy 3**

## **Continue to advocate for and support OMERS pensioners.**

**Initiative:** Build a historical timeline of advocacy successes and share on the website, in new member presentations, etc. demonstrating a track record for success.

**Report:** A timeline of successes, such as improvements to the pension investment portfolio and to spousal benefits, will be created in 2020 following the federal election. This timeline will be incorporated on the website and presentations. (ongoing)

**Initiative:** Continue to build and leverage affiliations with other organizations on advocacy efforts.

**Report:** Work continues with our two important partners, OMHRA and OMAA. The Executive Director will present a recommendation to the board in the fall to enter into a sponsorship agreement with OMAA.

Discussions continue with OMHRA regarding combined advocacy initiatives.

### **Strategy 4**

## **Grow the MROO membership by 30 per cent by the end of 2021.**

**Initiative:** Expand and standardize promotional materials in English and French and distribute when speaking to employers.

**Report:** This is an ongoing effort with the assistance of Zone Directors.

**Initiative:** Maintain engagement and visibility by annually sending thank you letters to employers and union locals that pay for MROO memberships, and personal contact with sponsored associations, etc.

**Report:** This is ongoing and will continue through the duration of the strategic plan period.

**Initiative:** Encourage reciprocal relationship with OMERS.

**Report:** MROO president and executive director continue to meet with OMERS to discuss ways to further the reciprocal relationship. MROO's new Executive Director has had virtual meetings with the Vice President, Employer & Stakeholder Relations and the Manager, Education and Training.

**Initiative:** Encourage more union locals and employers to purchase a MROO membership for retiring employees and members.

**Report: (2019)** To encourage new members, MROO has changed how it charges for pre-retirement sessions. Instead of asking organizations to pay a fee for the sessions, during which members are asked to consider purchasing a membership, organizations are now asked to pay for a membership for employees attending the session, in lieu of a fee. This is expected to lead to an increase in members over the coming years, especially with efforts to deliver more of these sessions each year.

In addition to the above, the Executive Director is working with his counterpart at OMAA to get this message out to their members via a website video and eblast.

**Initiative:** Strive to gather email addresses to facilitate online connection with members.

**Report: (2019)** MROO has implemented a new onboarding process for new members. As part of this each new member will be asked to provide a valid email address along with other contact details, such as mailing address. Existing members who have not provided an email address will be asked to do so as part of the roll out for the new website. These two efforts will result in creating a database of contacts which can be used to facilitate online communication and connections with members.

The new website rollout and requests in the newsletter has helped to increase our online connection to over 12,000 members which is roughly half of our membership. The Executive Director is in discussions with OMERS on some opportunities that might be beneficial to both MROO and OMERS through search engine optimization (SEO) and will continue to look at ways to encourage on line connectivity with our members.

**As a result of the efforts to grow memberships so far, MROO welcomed over 2336 since 2018**

## **Strategy 5**

### **Continue to evolve the MROO organization, processes and resources to optimally serve the current and future membership.**

**Initiative:** Improve intra-board communications. **(Complete)**

**Report:** Beginning in 2020 the board of directors have added 6 web-based information meetings to their meeting schedule to augment the 4 in person board meetings a year. These web-based information meetings have significantly enhanced intra-board communications.

Additionally, the board is using zoom web technology to hold sporadic board meetings as required.

**Initiative:** Implement MROO email addresses to replace use of personal email addresses **(Complete)**

**Report:** As part of the new website, MROO directors and staff will be assigned new email addresses which align with the position, instead of the individual. This will ensure seamless communication when new directors or staff are appointed and provide an archive of communication to aid in the transition of new board members.

**Initiative:** Schedule speakers at board meetings.

**Report:** Although Covid-19 pandemic has put this initiative on hold, the board did manage to have presentations from our new affinity partner Hearing Life, at a recent board meeting and our new Web host, Esolutions, also attended and presented at a board meeting.

It is hoped that 2021 will present opportunities to augment this initiative.

## Conclusion

Although 2019 and 2020 have created some challenging issues for Canadians, it has also become a fertile ground for creativity and ingenuity. MROO has grasped on to this part of the challenge and has made great strides in increasing intra board communication and has continued to communicate with and engage our members through newsletters, surveys and eblasts.

MROO was on target for a record year in delivering pre-retirement seminars with hopes of facilitating 35 in person programs however those plans came to a crashing halt in March 2020. MROO met the challenge of not being able to meet face to face with future retirees for pre-retirement seminars by creating a web-based version of our program delivered on an interactive platform via zoom. We have managed to deliver this program to 5 municipalities so far and will be adding more in the fall/winter of 2020 and spring of 2021.

The MROO board of directors was also able to get creative when they recognized an opportunity to take the funds that were slotted for the cancelled 2020 zones meetings and donated the money to charities across the province. MROO was able to donate a total \$63,000 to over 100 charitable organizations with an emphasis on food banks and women and homeless shelters.

All the above was accomplished in addition to the MROO executive team getting a new Treasurer, Gerry Davis, and a new President, Keith Robicheau. Additionally, Ken Noakes was added to the MROO group as the new Executive Director.



Interim President



Past President