

Municipal Retirees Organization Ontario Annual Report - June 2019

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 Directors will work collaboratively to deliver on the initiatives and fulfil each strategy.

Although 2018 was a transition year for MROO with the retirement of our first-ever Executive Director and our long time Bookkeeper, the Board of Directors of MROO were tasked with finding replacements while keeping the organization moving forward.

This annual report highlights progress and achievements made since the adoption of the MROO 2019-2021 Strategic Plan.

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, are currently featured on the organization's website. The Executive Director has commissioned a new website which will be able to offer a wider variety of information and services. As part of the process to launch the new site, the listed law firms will be reviewed and additional firms added.

Initiative: Add discounts for hearing aids and batteries.

Report: While MROO health insurance policy holders currently receive discounts on hearing aids and batteries, other members do not. The Executive Director has entered into discussion with a nationwide hearing appliance provider about extending discounts to all members. It is expected this item will be subject of a report to the June Board of Directors meeting.

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

Report: Preparations are underway to launch a member survey later in 2019. The results of the survey will be the subject of a future report to the Board of Directors.

Initiative: Establish a link to retirement homes.

Report: This initiative will be part of the Executive Director's 2020 workplan.

Strategy 2

Improve communication and engagement with members.

Initiative: Enhance MROO marketing.

Report: A number of items have been accomplished in the past year to support this initiative. The largest of these is commissioning of a new website. The new site, which will provide updated content in addition to updated technology, will be a significant tool in marketing MROO to recent retirees, as well as those who have retired previously but have resisted becoming members. It will allow for more information about the organization, its services and story-telling about the benefits of membership.

While the website, which will launch in June, is the largest undertaking in the area of enhanced marketing, other tactics include:

- Ongoing distribution of newsletters, both paper and online. The new website will allow for additional linkages from the newsletter to online content.
- Zone meetings continue to be an important tool to share the MROO story with members. Recognizing this, a Fall meeting was added for Zone 9 in 2018 in addition to the Fall Zone meetings in Zone 3 and 4.
- Email blasts are now sharing zone-specific email. These types of blasts were not possible previously due to technical constraints. The impact of these blasts will grow as efforts to secure an email address for each member continues.

Initiative: Employ use of videos.

Report: Once the new website is launched, videos will be used as a promotion tool, as well as for education purposes on topics of interest to members. These include wills and estate planning, power of attorney and financial planning. In the meantime, the organization will look for ways to integrate more videos as part of presentations and zone meetings. Within the last a new video was created for presentations to the OMMA and the Ontario Library Association (OLA)

Initiative: Increase engagement with members.

Report: The Executive Director recognizes the importance of personal interactions when connecting with members and has focused on increasing the number of pre-retirement sessions offered by the organization. In 2018, MROO hosted 31 of these sessions. Additionally, three new facilitators have been hired, providing increased capacity for additional sessions going forward.

MROO is also working on reaching out to French-speaking retirees by creating the organization's first French brochure. Additionally, the new website will offer some French content with efforts to increase this area of growth.

The organization will continue to provide branded items and gifts as part of meetings and presentations, with the Marketing Committee recently selecting three new items.

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.

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

Report: MROO is part of the Canadian Federation of Pensioners and has been working to advocate for pensioners and pensions. The previous Executive Director and the President has met with the NDP MPP Joel Harding, pension critic, to discuss pension security, specifically ensuring pensioners are considered first payers in the event of an employer bankruptcy.

The Executive Director has met with the Executive Committee of OMHRA and the Executive Director of OMMA to look at ways our organizations can assist each other and work collaboratively on Advocacy issues.

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: When launched in the summer 2019, the MROO website will offer information in both English and French. Additionally, the organization has produced its first French-only brochure which will be distributed during presentations to employers and prospective members.

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. These items include mailings to retirees including MROO information, and links on the MROO website to OMERS retiree information sessions. Three such meetings have taken place in the past year and additional meetings are anticipated in the coming months.

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

Report: 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.

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

Report: 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.

As a result of the efforts to grow memberships so far, MROO welcomed over 900 new members in 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.

Report: The Board of Directors has also put in place some changes to improve communications. These include a new report format to clarify issues and a new review process for policies which will require each policy to be reviewed every five years.

Initiative: Implement MROO email addresses to replace use of personal email addresses.

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: While board meetings are a time for bringing all directors together to make important decisions for the organization, they are also an opportunity to bring speakers to discuss areas of interest to MROO.

In June 2019, speakers from OMERS will attend the board meeting to discuss the Sponsor's Corp and Admin Corp with the Board. Also at the June 2019 board meeting discussions with the facilitators of the pre-retirement seminars about potential changes to the program and opportunities to expand it will be discussed.

Conclusion

Over the past year we have made very significant changes and advances. I would like to thank all of the directors, alternate directors and ambassadors collectively known as MROO reps. Without their dedication and support none of our strategies could have been met. As we go into the new year, we still have some significant challenges to meet. One is the large number of new OMER retirees who get by our gate. I know in most cases they are in a hurry just to be retired. We must find a way to capture their attention for just a few moments to objectively look at what MROO stands and does for current and future OMERS retirees. Attendance at the OMERS information sessions and Coffee Shops are one of a few ways we get the attention of new members.

With our growing numbers MROO is becoming more complex with many new challenges for our consulting staff and MROO reps. With more pre-retirement seminars, OMERS information sessions, reaching out to employers, local unions, and Coffee Shops all present challenges and in particular to our Office Administrator. If we share the challenge with each other in one's Zone; we can meet the challenge successfully. Directors to-day are the leaders within their Zone, they are not expected to carry the full weight. Working collectively, sharing information and good advice with each other will bring success to each Zone. Those in the north are especially challenged due to great distances. That is why recruiting Ambassadors is encouraged. As Directors we have to be innovative, able to recognize and encourage activities within one's zone that will give purposeful participation for our members. In some cases, this can be done with new technology. We will all have to keep up with advances and how to apply it. We must be able to communicate this to our respective MROO reps on how it all works.

In closing a special thank-you to our support staff Jennifer Cooke, Office Administrator; Phil Hollins our Pre-retirement facilitator; Sheila Blacklock our new Bookkeeper; and to our new Executive Director Dan Carnegie. I would be remised to for not recognizing the twenty-five years of service and dedication of our former bookkeeper Jacqueline Newton who kept impeccable records; and Bill Winegard, our former Executive Director, who on joining MROO was faced with the challenge to bring MROO into the twenty-first century. His leadership and advice have brought us to where MROO is to-day, with a strong foundation to go forward into the second decade of the twenty-first century. This concludes my Annual General Report. Thankyou.

A handwritten signature in blue ink that reads "William J. Harford". The signature is written in a cursive style with a prominent initial "W".

William J. Harford
President