

NCTR Strategic Plan – 2018

GOAL 1: Deliver value-add products/services for our constituents

Objective 1: Review all current products / services offered to NCTR's constituents

- Strategy 1:** Document what NCTR currently offers its constituents.
- Strategy 2:** Review what companion organizations offer.
- Strategy 3:** Conduct gap analysis between offerings by NCTR and companion organizations.

Objective 2: Understand member needs and develop responsive presentations for the annual conferences 3-months following the annual conferences

- Strategy 1:** Survey current members afterward, and use the +/-delta technique at the conference to identify topics of interest.
- Strategy 2:** Review NCTR conference agendas for the past 5 years.
- Strategy 3:** Review Companion organization conference agendas for the past 3 years.
- Strategy 4:** Synthesize data and develop responsive conference offerings.

Objective 3: Add specific training workshops and conference content to include the full spectrum of pension designs annually.

- Strategy 1:** Identify DB/DC, Cash Balance or Hybrid presentations for future workshops/webinars/conferences.
- Strategy 2:** Survey the need/desire for additional or different training on DB/DC, Cash Balance, or Hybrid following each annual conference.

Objective 4: Determine why non-renewing members left, and learn why non-participating organizations left or didn't join and what could be required for their return

- Strategy 1:** Survey non-renewing systems.
- Strategy 2:** Survey non-renewing corporate sponsors to determine why they left or have not joined (develop an understanding of what NCTR can offer them)

Objective 5: Increase the number of webinars year on year, beginning in 2018 by targeting key professionals and specific content, and consider which topics might fit the annual conference or other trainings.

- Strategy 1:** Conduct gap analysis to identify additional purposes and topics for webinars.

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Goal 2: Become the preferred public-sector trustee training program

Objective 1: Offer a “new trustee” training session at each annual conference no later than 2019

Strategy 1: Determine if the session could be added

Strategy 2: Enable the session to be delivered

Strategy 3: Market the session

Objective 2: Assess past Trustee workshop content, recommend updates to current content and finalize updated content with educational providers

Strategy 1: Review all Trustee Workshop agendas from the previous 5 years

Strategy 2: Seek feedback from attendees of the annual Trustee workshops

Objective 3: Develop new NCTR trustee web-based guides

Strategy 1: Offer trustee guides that deliver value

Objective 4: Expand trustee training session beyond one annual session by Summer 2020

Strategy 1: Determine demand for trustee training sessions

Strategy 2: Schedule the trustee events

Objective 5: Offer a trustee training material library on the NCTR website

Strategy 1: Make systems’ trustee training materials available to members

Strategy 2: Reference trustee-training materials of notable sources

GOAL 3: Be a leader in advocacy for retirement benefit adequacy

Objective 1: Provide information and contacts to assist individual member advocacy efforts as requested

Strategy 1: Prepare advocacy information

Strategy 2: Develop simplified “user-friendly” means of communicating information on key NCTR Federal issues to members

Objective 2: Broaden communication with other advocates of retirement benefit adequacy

Strategy 1: Enhance NCTR’s current relationship with national public pension organizations.

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GOAL 3: Be a leader in advocacy for retirement benefit adequacy (continued):

Objective 2: Broaden communication with other advocates of retirement benefit adequacy (cont.)

Strategy 2: Build upon NCTR's current relationships with national education/educator organizations to enhance joint education efforts and explore new ways of working together.

Strategy 3: Leverage our ongoing relationships with NCTR commercial associates' in order to utilize their private sector advantages to help support, where useful, public pension issues before the Federal government.

GOAL 4: Strengthen the NCTR Brand

Objective 1: Review and update our Mission, Vision and Core Values (MVV)

Strategy 1: New "MVV" is reflected/reinforced throughout NCTR's content

Objective 2: Align our media message with our Mission, Vision and Core Values

Strategy 1: Create the media image and message(s).

Objective 3: Update our media presence and annually thereafter

Strategy 1: Request that the Executive Board establish a Communications Committee to focus on multi-channel media opportunities

Strategy 2: Create a list of potential improvements and costs.

Strategy 3: Identify staff strengths in terms of media messaging.

Objective 4: Redesign NCTR website

Strategy 1: Survey a cross section of membership and staff to get ideas good & bad about our current site.

Strategy 2: Create a project plan.