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.
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.
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.