

AORS STRATEGIC PLAN, 2015 – 2019: **THE ROAD TO EXCELLENCE**

(As approved by the Board of Directors, February 22, 2015)

STRATEGIC OBJECTIVES

At the Strategic Planning Workshop, the AORS Strategic Planning Committee and representatives from several Local Associations agreed on the following eight areas of focus for the next AORS Strategic Plan, which were subsequently approved by the Board of Directors in June 2014 as the ***Strategic Objectives***:

1. Leverage ***Strategic Partnerships*** to achieve broader goals
2. Prepare AORS and our members for the upcoming ***Demographic Shift***
3. Strengthen our ***Communication & Advocacy*** Capabilities
4. Help our ***Local Associations*** increase and engage their membership
5. Build ***Corporate Capacity*** to achieve our goals
6. Improve our ***IT Proficiency and Strategy***
7. Continue to deliver ***Education Programs*** that meet our members' expectations
8. Expand on the AORS ***Certification Program***

Background

Following is some background information for each of the Strategic Objectives to better understand why each was identified as an area of focus:

1. Leverage ***Strategic Partnerships*** to achieve broader goals

AORS is a relatively small organization with limited resources, but committed to delivering the best possible service to its members, and expanding into new offerings where appropriate. There are several other organizations that serve the same constituency, but offer different services; others that offer similar services but to a different market; and in some cases there is overlap with AORS, where we both offer similar services to at least some of the same individuals. Some are non-profit organizations like AORS, while others are private sector for-profit organizations. The objective is to build partnerships with key organizations to raise awareness and extend the reach of AORS; and to expand or improve the services we offer our members, directly or indirectly, in the most cost-effective manner with minimal duplication.

2. Prepare AORS and our members for the upcoming ***Demographic Shift***

In a 2014 survey, our members told us that 30% plan on retiring over the next 5 years, and a further 30% in the following 5 years. This wave of baby boomer retirements presents challenges and opportunities to AORS, and to the municipalities and suppliers that our members represent. As municipalities and suppliers look to fill vacancies at all levels in their organizations, they will be competing with many others facing similar challenges, assuming the workforce shrinks as predicted. The millennials who will be filling many of these positions bring with them new skills, but also very

different attitudes about long term commitment to an employer and willingness to participate in activities like volunteering with an association. How do we help our members, and the Association, recruit and retain the best of the best?

3. Strengthen our **Communication & Advocacy** Capabilities

Effective communication with members and other stakeholders is critical for any organization to be successful. One particular area of communication for an association like AORS is lobbying on behalf of its members. While significant improvements have been made in these areas in recent years, we'll need to continue expanding our capabilities and communication channels, especially as technologies evolve, our members become more tech savvy, and municipalities are faced with increasing regulatory, fiscal and other demands.

4. Help our **Local Associations** increase and engage their membership

Many Local Associations are finding it increasingly difficult to attract new members, and to convince their members to actively participate. Even more so when members are asked to serve on their Local Association executive or participate at the Provincial level. This is expected to worsen as longterm members retire, and as municipalities search for ways to cut costs. What can AORS do to inject new life at all levels of the organization?

5. Build **Corporate Capacity** to achieve our goals

As organizations go, AORS is very lean, with just 2.5 FTE staff and several contractors who help AORS deliver key products and services. We also rely on a small group of dedicated members who volunteer their time. Not surprisingly, we are lacking in certain skillsets that are critical to delivering on our current and future objectives. There is also considerable risk if a key member of the team leaves, since there is a limited pool to draw upon for succession planning. And lastly, AORS has many outdated or deficient policies, procedures and systems, which creates risk and inefficiencies. We need to find innovative ways to close the gaps without adding to operational costs.

6. Improve our **IT Proficiency and Strategy**

AORS is struggling to keep up-to-date in its use of Information Technology, both for managing the association's operations, and to effectively interact with our members and other stakeholders. This will become more evident as technologies evolve and we welcome a younger generation into our membership.

7. Continue to deliver **Education Programs** that meet our members' expectations

AORS Training and Professional Development Programs have become one of the most important services we offer to help our members improve efficiency and effectiveness, comply with regulations and overall satisfy their due diligence obligations. They are also key contributors to the success of the CRS program, which is based on the principle of supervisory experience backed up with continuing education. The training space is highly competitive and increasingly crowded, so

AORS must constantly look for new opportunities, but focus on those that are most relevant and cost-effective for our members.

8. Expand on the AORS *Certification Program*

The Certified Road Supervisor (CRS) program is highly respected and increasingly accepted as an objective assessment of an individual's competency, as measured by their education and work experience. Historically the emphasis has been on roads related supervisory experience, even though many AORS members have responsibilities that go beyond roads, spanning the public works spectrum. However, there are other organizations that offer certification or accreditation programs specific to some of these other areas of specialization (e.g. water/wastewater, stormwater, waste management, facilities). How does AORS ensure the CRS program remains relevant? Should we expand the scope of our certification services to address the broader needs of our members; and if so, how do we avoid unnecessary duplication or competition?

STRATEGIES

In this section, several Strategies are listed under each of the Strategic Objectives. These were derived from discussions at the 2014 Strategic Planning Workshop, as well as feedback received in the Member Survey conducted early 2014, and discussions at the 2013 Local Association Workshop. The Strategic Planning Committee reviewed and ranked these Strategies. The rankings were used to establish approximate timelines for each of the Strategies. The years in brackets reflect when the Strategy is targeted for "completion", although many will be in progress before those dates, and will be ongoing beyond those dates.

1. Leverage *Strategic Partnerships* to achieve broader goals

Strategies

- a) Expand AORS' recognition and brand awareness by leveraging the communications channels of partner organizations. (2015 – 2016)
- b) Participate in joint initiatives, e.g. Public Works Week, to raise AORS' profile. (2015 – 2016)
- c) Conduct an analysis of other Ontario associations and like organizations to identify potential alliances that could lead to additional benefits for AORS members. (2017 – 2018)
- d) Seek mutual recognition agreements with other organizations that will allow AORS training and certification programs to be accepted towards other certifications, and vice versa. (2017 – 2018)
- e) Partner with other associations to deliver joint programs that will allow us to cost-effectively expand our service offerings. (2018 – 2019)
- f) Partner with third party service providers to offer enhanced member benefits (e.g. hotel discounts, group insurance rates). (2018 – 2019)
- g) Identify similar organizations in other provinces, and explore opportunities for cooperation that would benefit AORS members. (2018 – 2019)

2. Prepare AORS and our members for the upcoming **Demographic Shift**

Strategies

- a) Promote AORS training and professional development programs, including certification, as key elements of a workforce planning strategy for municipalities. (2015 – 2016)
- b) Raise awareness and improve the appeal of Public Works as a career option among college and high school students (e.g. assist Local Associations offering bursaries to students in related programs). (2015 – 2016)
- c) Make use of key functions (e.g. Trade Show, Truck Roadeo) as opportunities for outreach. (2017 – 2018)
- d) Expand the use of social media and other electronic tools for communication and service delivery. (2017 – 2018)
- e) Develop a mentoring program to facilitate the transfer of knowledge and provide support to junior staff. (2018 – 2019)
- f) Develop enhanced recruiting and job placement services for municipalities and members. (2018 – 2019)

3. Strengthen our **Communication & Advocacy** Capabilities

Strategies

- a) Specifically promote AORS membership, training and certification programs to municipal councillors and senior managers. (2015 – 2016)
- b) Retain and enhance AORS' existing communication platforms (Spotlight, Advance newsletter, website, email blasts), to reach a broader audience. (2015 – 2016)
- c) Make better use of existing and future networking events (e.g. Trade Show, Local Association meetings) to deliver key messages. (2017 – 2018)
- d) Develop and deliver messaging tailored to different target markets (e.g. members, municipalities, suppliers, students). (2017 – 2018)
- e) Utilize our website, social media, and other electronic tools to improve communications with and between our members. (2018 – 2019)
- f) Study the viability of developing a platform to share best practices and standard operating procedures. (2018 – 2019)
- g) Working with our strategic partners, leverage AORS' impartial position to lobby regulators on issues of common concern, well being aware of politically sensitive issues. (2018 – 2019)

4. Help our **Local Associations** increase and engage their membership

Strategies

- a) Conduct an LA Workshop to develop tools and best practices focused on member recruitment, retention, and engagement. (2015)
- b) Develop and deliver a multi-pronged membership development program that promotes the benefits of LA membership and participation, aimed at (2015 – 2016)
 - i. Councilors and senior municipal managers
 - ii. Potential members, in particular younger employees
 - iii. Supplier members

- c) Encourage and support LAs to host joint meetings with neighbouring LAs or similar organizations in their region, or pursue amalgamation where it makes sense. (2017 – 2018)
- d) Enhance and promote training, templates, and other tools to support members serving on LA executives. (2017 – 2018)
- e) Identify and promote potential speakers for LA meetings. (2018 – 2019)
- f) Assist LAs in conducting joint tendering, joint training, and other shared initiatives that generate mutual benefits. (2018 – 2019)
- g) Monitor the use of third party contracting by municipalities, and the potential to recruit these contractors as LA members. (2018 – 2019)

5. Build **Corporate Capacity** to achieve our goals

Strategies

- a) Maintain up-to-date succession plans for employees and key contractors. (2015 – 2016)
- b) Identify weak links in delivery chain (e.g. sole providers of key products or services), and develop contingency plans. (2015 – 2016)
- c) Support LAs in appointing AORS representatives and orientation for new Directors. (2017 – 2018)
- d) Develop a program to invite and engage Directors and members-at-large to serve on AORS committees. (2017 – 2018)
- e) Develop a plan to review and update the AORS constitution, policies, procedures and systems to improve efficiency, reduce risk, and ensure compliance with regulations (e.g. new Ontario Not-for-profit Corporations Act). (2018 – 2019)
- f) Develop a staff training program for Board approval, to improve employee effectiveness and engagement. (2018 – 2019)

6. Improve our **IT Proficiency and Strategy**

Strategies

- a) Conduct an inventory and assessment of all AORS IT systems and services. Develop a plan for upgrading or replacing as necessary, and a strategy for maintaining IT proficiency into the future. (2015 – 2016)
- b) Expand the use of social media, apps, and other electronic tools to promote the Association and extend the availability of our products and services. (2015 – 2016)
- c) Study the viability of developing a platform to share best practices and standard operating procedures. (2017 – 2018)
- d) Study the viability of developing a members-only forum to solicit info or share concerns on current issues. (2017 – 2018)
- e) Raise awareness of the online directory of Equipment, Products and Services, as an online variation / complement to the Spotlight Directory. (2018 – 2019)
- f) Explore an enhanced web-based job posting / recruiting tool. (2018 – 2019)

7. Continue to deliver **Education Programs** that meet our members' expectations

Strategies

- a) Regularly evaluate and adjust training programs to ensure they continue to be relevant and high quality. (2015 – 2016)
- b) Work with our training providers, Local Associations and members to control costs and continue to deliver programs that are cost effective and close to home. (2015 – 2016)
- c) Ensure the continuity of training programs through succession planning for key instructors. (2017 – 2018)
- d) Monitor training programs offered by other providers to ensure AORS training remains competitive. (2017 – 2018)
- e) Identify new opportunities to deliver training, e.g. trade shows. (2018 – 2019)
- f) Explore potential new training programs, and opportunities to deliver training to private sector companies delivering services to municipalities. (2018 – 2019)
- g) Consider alternate delivery models where appropriate (e.g. distance learning, webinars). (2018 – 2019)

8. Expand on the AORS **Certification Program**

Strategies

- a) Actively promote the CRS program to the large number of Local Association members who are not currently certified. (2015 – 2016)
- b) Promote the value of the CRS and complementary programs to young public works employees and municipalities as professional development, career planning, and workforce planning tools. (2015 – 2016)
- c) Evaluate the CRS educational requirements to ensure they are not creating unnecessary barriers to certification (e.g. excessive cost, redundant training). (2017 – 2018)
- d) Continue to review and approve CRS course equivalencies and new eligible qualifying courses, to ensure the CRS is available to as many public works professionals as possible, without compromising its integrity. (2017 – 2018)
- e) Seek agreements with other organizations for mutual recognition of each other's certifications. (2018 – 2019)
- f) Review the broader public works sector to identify gaps where no certification programs are currently available, and evaluate whether the CRS should be expanded or a complementary program developed (e.g. equipment operators). (2018 – 2019)