



CPBI STRATEGIC DIRECTIONS 2024-2026

VISION. MISSION. VALUES. STRATEGIC DIRECTIONS.

Vision

Canadian pension and benefits industry professionals turn to CPBI first for high-quality education and networking opportunities.

Mission

To lead the professional development of Canadian pension and benefits industry via networking and educational content and bring people together to build relationships and exchange ideas in a safe, respectful and inclusive environment.

Values

We respect Regions' unique needs, while delivering on CPBI's national, not-for-profit mandate through:

- **Collaboration**
 - CPBI values collaboration by:
 - Encouraging open communication.
 - Sharing knowledge, best practices and learnings.
- **Innovation**
 - CPBI values innovation by:
 - Discussing new ideas and trends in the industry and in the association world.
 - Seeking out timely educational topics.
 - Practicing a continuous improvement mindset.
- **Accountability**
 - CPBI values accountability through:
 - Being transparent about our goals, reporting on results and holding ourselves accountable, both internally and externally.
- **Diversity, Equity and Inclusion**
 - CPBI values DEI by:
 - Treating everyone with fairness, respect and dignity.
 - Providing access to programs, services and opportunities.
 - Embedding principles of DEI in our education, networking and practices.
- **Sustainability**
 - CPBI values sustainability by:
 - Balancing long-term considerations with short-term needs while working in a framework of environmental, social and governance practices.



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CPBI BRAND

- Promote CPBI's brand positioning: Canadian pension and benefits industry professionals turn to CPBI first for high-quality unbiased education and networking opportunities because of its inclusive volunteer-led grassroots approach, where they can learn something new and meet someone new.
- Grow market reach by increasing the awareness of the CPBI brand.
- Expand our partnership with industry providers and continue to be a brand they want to align with.

MEMBERSHIP

- Actively promote a compelling membership value proposition.
- Continue to grow and sustain a membership base that shares a strong sense of belonging.

PROGRAMMING AND NETWORKING

- Provide high-quality unbiased programming and networking opportunities to plan sponsors, advisors and industry providers.
- Focus on promotion and growth in registrations.

OPERATIONS

- Exercise fiscal prudence in a manner that supports organizational growth, sustainability and member value proposition.
- Continue to find efficiencies in our operations and enhance cyber-security protocols.
- Continuous improvement in enhancing the user experience.

GOVERNANCE

- Strong people strategy that supports clear roles and responsibilities, recognition and development.
- Robust review of all bylaws and policies.