



**TRILLIUM CHAPTER**

**Strategic Plan  
2016-2017-2018**

## **VISION & MISSION**

The Trillium Chapter of the Canadian Society of Association Executives is the largest Chapter within the national association. The vision and mission of CSAE applies to the Trillium Chapter.

### **Vision**

*By providing relevant services and products that continuously improve, are affordable and in the forefront of not-for-profit knowledge, CSAE is recognized as the leading organization and role model by members, stakeholders and Canadians in developing excellence in not-for-profit sector leadership.*

### **Mission**

*CSAE provides the environment, knowledge and resources its members need to develop excellence in not-for-profit leadership through education, networking, advocacy, information and research.*

### **Context**

For the past several years, the Trillium Chapter has been focused on four strategic priorities to deliver more value to members. The priorities were:

- Membership (understand, engage, etc.)
- Resources (people, products, and processes)
- Events (current and leading-edge)
- Education –
  - Segmented offerings
  - Themed approach
  - Younger audience (GenY or 'F10') engagement
  - Utilizing members' knowledge

## **Strategic Considerations**

In discussion, the Trillium Chapter identified important considerations for ongoing success:

- ⇒ Partnerships, alliances, and collaboration are opportunities to be considered seriously in meeting member needs. CSAE members in the Trillium Chapter are often members in other, related associations (e.g., ASAE, PCMA, MPI). For-profit organizations, such as consultants, also deliver professional development.
- ⇒ Key Chapter success factors include an engaged membership, relevant services, and maintaining a strategic culture.
- ⇒ Sustainability is an important consideration as the Chapter is reliant upon volunteers and the demands on their time (from many sources) are increasing. To maintain a competitive edge and achieve future growth, the Trillium Chapter needs to address, as an internal priority, properly resourcing and supporting volunteers and staff.

## **STRATEGIC PRIORITIES, 2016-2018**

### **Strategic Priority I**

#### **Future CSAE Direction**

Overall Goal:

To proactively and collaboratively position the Trillium Chapter as a leading contributor to CSAE direction, establishing a synergistic relationship to advance the member experience.

Objectives:

- 1.1 Be actively involved in the decision-making and implementation of the new business model.
- 1.2 Demonstrate the Trillium Chapter's value as a strategic partner, for example
  - Have a portfolio of strategic successes.
  - The Chapter's connection with members (some members perceive their relationship is more so at the chapter level)
- 1.3 Identify opportunities for collaboration that are mutually beneficial (e.g., use national technology infrastructure to create Special Interest Groups/SIGs)

Other Considerations:

- 45% of all CSAE members are within the Trillium Chapter.

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- There is a need for more, improved communication, although progress is evident in the National-Chapter relationship.
- There needs to be better alignment between CSAE National and Trillium Chapter programming where regional interests/the market overlap(s).
- The Chapter has considerable resources to deploy should it wish to do so.

### **Strategic Priority II**

#### **Knowledge Management [Education and Content]**

##### Overall Goal:

To deliver and leverage high quality, relevant, education/professional development opportunities through multiple channels and formats, and at reasonable cost.

##### Objectives:

- 2.1 Tie professional development to the 44 competencies upon which the CAE® program is built.
- 2.2 Understand member needs, and the skill gaps to be addressed.
- 2.3 Continuously research and understand various education delivery channels and formats; using various delivery platforms to engage and educate members and to add value.
- 2.4 Identify, and invite, content experts/thought leaders (individuals and organizations) for the purpose of providing relevant, innovative education.
- 2.5 Knowledge products created/amassed by the Trillium Chapter are properly categorized (or tagged), and promoted, to members and non-members.
- 2.6 Information sharing is enabled through mentoring and peer-to-peer contacts.

##### Other Considerations:

- Content must be relevant and topical, and be seen to also have value to the corporate interest (the member's employer, who often pays the cost).
- The Chapter should re-purpose content to create a more robust offering.
- Programming must be affordable.
- The Chapter has to be responsive to member-needs, e.g., segment offerings as member interests become more specific/defined.
- Accessibility is of increasing importance as there will be more pressure on the time commitment to attend in-person group gatherings, and venue costs rise. This means the Chapter needs to offer more on-line content that can be accessed by the member regardless of when and where they wish to access the content.
- Participating in a Trillium Chapter activity will be fun in the future, as now is the case.

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- The Chapter should explore partnerships and alliances in education delivery.

### **Strategic Priority III**

#### **Networking**

Overall Goal:

To enhance the ability of our members to connect with each other.

Objectives

- 3.1 One event for Association Executive networking only (one event p.a. minimum)
- 3.2 30 minutes for members to connect with each other at all Chapter events (30 minutes minimum)
- 3.3 Develop two SIGs (minimum) that are targeted to a mix of Executive and Business members, and achieve a 75% satisfaction rate with the SIGs
- 3.4 Develop a networking tool and networking tips for members
- 3.5 Evaluate the effectiveness of the Chapter's networking opportunities, and the networking tool/tips resource, through a member survey

Other Considerations:

- The Chapter has members across Ontario.

### **Strategic Priority IV**

#### **Resources**

Overall Goal:

To ensure sufficient resources are available and utilized to support future growth, and to foster volunteer effectiveness.

Objectives

- 4.1 Conduct a review to determine resource gaps in the Chapter; what's working and what is not.
- 4.2 Quantify the resources required to deliver on member expectations and chapter programming, and actively fulfill the requirement.
- 4.3 Engage project managers, as required, for Chapter initiatives/programming.
- 4.4 Ensure committee volunteers are supported and volunteers are developed (e.g., training).

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4.5 Research on-line tools to further Chapter growth.

Other Considerations:

- Create a risk management plan for the Chapter. Succession can be addressed within it.

### **Conclusion**

CSAE Trillium Chapter is committed to responding effectively and efficiently to its members' needs. Through the four strategic priorities: Future CSAE Direction, Knowledge Management (networking and content), Networking and Resources will ensure that members continue to receive high quality professional development and networking opportunities that will strengthen their respective organizations.

This strategic plan provides a foundation when creating the annual budget and operational plan. The Executive Director and Executive Committee will develop an operational business plan that outlines key strategies and measurement tools.

### **List of Workshop Participants**

The members of the Trillium Chapter planning team are

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