Summary Report to Members
MEMBER ENGAGEMENT AND COMMUNICATIONS

MEMBER ENGAGEMENT AND COMMUNICATIONS 2015
Ottawa-Gatineau Chapter of the CSAE

By providing relevant services and products that continuously improve, are affordable and in the forefront of not-for-profit knowledge, the Canadian Society of Association Executives (CSAE) is recognized as the leading national organization and role model by members, stakeholders and Canadians in developing excellence in not-for-profit sector leadership.
The Ottawa-Gatineau (O-G) Chapter of the CSAE exists to provide the environment, knowledge and resources its more than 700 members seek to develop excellence in not-for-profit leadership through education, networking, advocacy, information and research.

In an effort to seek continual improvement in creating member value and benefit, CSAE O-G undertook a **strategic engagement and communications research project in the spring of 2015** to support priority setting for these goals. Core to this requirement was a need to more deeply understand the local Chapter’s value proposition for all members, with a particular focus on senior executives. The work also addressed the need to review the Chapter’s communication content and channels, as indicators of member engagement in all groups.

The outputs of this project include recommendations for a **member engagement strategy and communications plan**, the primary goals of which are to uncover ways to increase value to members, encourage greater involvement from disengaged members, and attract potential members.

This strategic project was initiated by the CSAE-O-G Board of Directors and guided by a Steering Committee of CSAE O-G Board Members, Committee Chairs and staff. **Powerhouse Communications** was the firm selected to complete the project work.

Below is a description of the project process, research outcomes and recommendations.

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**Focused Mandate**

At the foundation of the project was a mandate to identify key success factors that drive greater member engagement and generate higher levels of participation:

- Identify areas of greatest satisfaction in Chapter events/learning opportunities;
• Identify opportunities to expand communication that in turns drives engagement.

**Best-practice Framework**

The consultants used a framework based on industry engagement best practices to guide its research. Engagement can best be described as a measure of emotional and intellectual commitment to an organization. It measures the extent to which members:

- **Stay**—intend to stay (renew)
- **Say**—consistently say positive things about what you do
- **Strive**—strive or act beyond what the average person might do to encourage others to get involved
The project began with an extensive review of existing knowledge on what members do or do not value, how members do or do not participate and what influences members to engage or not engage in CSAE O-G programming. This was gathered from a number of information sources including member satisfaction data, participation data and historical documents.

After examining what we knew, a series of core questions were designed to better understand members and seek the required information to develop a member engagement strategy and communication plan for CSAE O-G.

Armed with these core questions, member input was sought via 20 extensive one-on-one interviews and two strategic focus groups (over 40 participants) with executive and business members – both engaged and non-engaged and present and past members. In addition, national and local CSAE leaders were interviewed for their insight.

An external environmental scan was also completed to consider best practices in member engagement and to better understand competition for members’ professional time and attention.
Based on the above noted research, strategic alternatives were developed, analyzed and finalized into strategic recommendations that form the foundation of the member engagement strategy and communication plan that CSAE O-G leadership will now implement in the coming years.

Chapter Strengths

Through years of good management and fiscal proficiency, the Chapter has built a robust organization, and is recognized as a leading Chapter in the country. Project research identified chapter strengths.

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<th>WHAT DOES CHAPTER DO WELL?</th>
<th>STRENGTHS</th>
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<td>• Professional, well-managed</td>
<td>• Provides opportunities for networking</td>
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<td>• Welcome environment</td>
<td>• Strong membership loyalty</td>
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<td>• Wide selection of networking and education events</td>
<td>• Strong network support</td>
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<td>• Focus is on general ‘association-specific’ areas</td>
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Opportunities for Member Engagement

The aggregated results of stakeholder interviews and focus groups, combined with the consultant’s review of Chapter event attendance and other documents, demonstrates that engagement levels are flattening or in some cases dropping (with exception of Tête-à-Tête).

Members in all categories have increasingly limited time to engage in Chapter events/programs or engage through communications channels.

The information below summarizes the value members seek to receive in order to more actively participate in Chapter events/programs and engage through Chapter communication channels.

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<th>WHAT COULD THE CHAPTER CHANGE?</th>
<th>OPPORTUNITIES</th>
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<td>• Give visibility to Chapter members’ success and challenges</td>
<td>• Local focus on best practices</td>
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<td>• Leverage Chapter members for committee expertise</td>
<td>• Trend tracking at local level</td>
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<td>• Inform on trends localized to Ottawa members</td>
<td>• Depth on topics of general interest</td>
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<td>• Invite more members’ ideas</td>
<td>• Don’t really know me</td>
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<td>• Awards and recognition of members’ leadership excellence</td>
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<td>• Collaboration with other related associations on common events</td>
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<td>• Target member education by member tenure</td>
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<td>• Target communication by member tenure</td>
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Recommendations for a *Next-Level Success*

Strategic recommendations for a **member engagement strategy and communication plan** were presented to the CSAE O-G Board in June.

Three categories emerged through member consultations. The three categories, **Innovation** – **Community** – **Connectedness** served as pillars for the recommendations.

**Innovation** – tailor-made offerings, flexibility in networking/learning, delivery of content and targeted communications

**Community** – opportunities to connect members outside of traditional events and learning to encourage sharing of ideas at a deeper level

**Connectedness** – convey a stronger brand for CSAE O-G as a go-to-place for local resources (peer help and suppliers) at the local level and to encourage pride in membership

**Next Steps**

The CSAE O-G Board along with Committee Chairs will discuss the recommendations for feasibility and level of impact. From this discussion, the Chapter will develop its strategic plan, along with concrete operational plans, timelines and budgets for the next three-year period.

CSAE O-G members can look forward to some new and innovative communication and programming that will reflect the member values and needs identified through this project.

**REVIEW**

• Establish priorities for action based on strengths and improvement areas identified by research.

**IMPLEMENT**

• Implement high-impact, low cost changes that can *easily* be addressed.

**MEASURE**

• Member engagement becomes an operational priority tracking member feedback and engagement levels against strategy.
Thank You to Participants

CSAE O-G members were most gracious in providing input to this process. Their commentary was professionally expressed and feedback was respectful in its delivery. Knowing the untapped loyalty that this region’s members has will provide unending opportunities for the Chapter to explore in the coming years.

September 2015