

The following document provides a status update of the elements of the Sustainability and Growth Plan dated February 27, 2019, including a summary of achievements against the plan to date and a summary of the next steps for each strategic goal.

The document is organized by our three strategic priorities and provides comments for each stated goal:

- ✓ Strategic Priority 1: Be the Premier Education and Training Organization in Governance in the Region
- ✓ Strategic Priority 2: Be the Premier Service Organization for the Governance Community in the Region
- ✓ Strategic Priority 3: Improve the Effectiveness of the Organization

It is important for the reader to note that there are a number of services and support processes that need to be put into place before some of these strategic goals can be added to the implementation timeline. When the Treeline Associates took the reigns of the association on February 1, 2020, the first priority was to conduct an audit of the association and its services. In reviewing the operations, there were several shortfalls noted, including:

- The association is not running as a member-centric association.
- The pieces are not in place for effective recruitment and retention.
- Member and prospect communications are lacking.
- The www.charteredsustainabilityinstitute.com website requires a complete overhaul.
- CGI of Canada Social Media accounts have a limited following.
- Rebranding has been inconsistently done to date.

More information pertaining to these shortfalls can be found in SP 12.1 to 12.6.

Many of these shortfalls limit the ability of CGIC to be successful. **As such, it is our recommendation that a six-month preparatory period is needed before proceeding with many of the strategic priorities previously outlined.** The risk of not fixing these operational issues before relaunching the association is significant. CGIC needs to present itself as a well-run member-centric association in order to successfully grow and prosper.

Our observation is that very little had been done to move the majority of the strategic plan forward. While progress had been made on two goals - Provide the CSQS in an effective way to enhance Candidate success (Goal 1) and Review the ICSA Governance and management structure for effectiveness in supporting the key strategic priorities of the new CGIC (Goal 9) – there is a lot of work still to be done to improve the operational effectiveness of the organization. To that end, we recommend that the following preparatory activities happen in short order:

- Finish audit of operations and service offering in March 2020
- Member research to be conducted in April/May 2020
- Development of member personas in May/June 2020



Sustainability Plan Update with Implementation Schedule

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- Development of member engagement plan from June to August 2020
 - Overhauling the website and social media accounts with proper SEO and SEM) from May to August 2020
 - Developing targeted promotional assets in July/August 2020

As shown above, these preparatory activities will take place over a six-month period (February to July 2020) with the aim of relaunching the association in August 2020. Then the real work on the remainder of the Strategic Plan can begin in earnest.

The following pages provide commentary on each strategic initiative and a road map for the coming months. An update to this document will be prepared in September 2020, at which time we expect that a more detailed plan that addresses the remaining strategic priorities, along with the corresponding marketing activities, can be set in motion.

The Canada Division trusts that this document demonstrates our commitment to moving the elements of the plan forward now that we have our new management team in place.

Respectively yours,

Patricia Thacker

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Strategic Priority 1: Be the Premier Education and Training Organization in Governance in the Region

Goal 1: Provide the CSQS in an effective way to enhance Candidate success

Note that Strategic Priorities 1.1 to 1.5 MUST be completed before any major promotions commence.

SP 1.1	License the CSQS 2.0 material and examinations from UKRIAT.	September 2019	<Completed>
<p>The license agreement between the Canada Division and UKRIAT was signed on October 15, 2019.</p> <p>The license agreement is in effect for a three-year period – January 1, 2020, to December 31, 2022 – with an option to extend for an additional two years – to December 31, 2024.</p>			
Next Steps:	Q4 2022 - Agree to agreement extension prior to December 31, 2022.		
SP 1.2	Provide supplementary Canadian material for three modules where there are larger differences between Canada and the UK.	November 2020 exam session	<In progress>
<p>The Division is in the process of localizing UK papers for Governance, Law, and Compliance using the adaptation guidelines previously developed. The adaptation guidelines have been incorporated into the Letter of Engagements with the Chief Examiners for these modules.</p> <p>The Division is in the process of identifying subject matter experts to support updating the study materials for Governance, Law, and Compliance using the UK guides as a reference. Copyright and intellectual property rights will be followed.</p> <p>RFPs for each have been issued to ACIS and FCIS members with a closing date of March 23, 2020. The RFPs were also distributed via our weekly eNewsletter and are housed on the Canada Division website.</p> <p>The Division will be running unaltered versions of the UK papers for Finance, Risk Management, Development of Strategy and Boardroom Dynamics in 2020.</p>			
Next Steps:	<p>April 2020 - The review and selection of the successful bidder(s) for the three subject matter experts will be made by April 3, 2020.</p> <p>The project timelines are as follows:</p> <ul style="list-style-type: none"> - Submission of the proposed updated syllabus by April 17, 2020 - Submission of the first draft of the updated study guide by June 1, 2020 - Submission of the final draft of the updated study guide by July 1, 2020 <p>The study materials will be finalized by end of July 2020 for release and use for the November 2020 exam sessions.</p>		



Sustainability Plan Update with Implementation Schedule

SP 1.3	Provide Canadian examiners for the three examinations.	June & November 2020 exam sessions	<Ongoing>
<p>This is an ongoing requirement whereby the Director of Education recruits the required number of examiners for each exam session. June examiners are approved by the Education, Training and Candidate Success Committee in January/February, while November examiners are approved in August/September.</p>			
Next Steps:	April 2020 - Approve localized exams for June Session.		
SP 1.4	Provide distance education classes on a weekly basis for all seven courses to enhance Candidate competency, engagement, and examination success. Enhance the program on a continuous basis.	November 2020 exam session	<In progress>
<p>Webinars have been created for Boardroom Dynamics and Development of Strategy. The webinars have been reviewed by the Subject Advisory Committee & Subject Matter Review Group (SAC/SMRG). Webinars for Interpreting Financial & Accounting Information are also being developed.</p> <p>As opposed to a weekly offering, the plan is to offer live sessions and that will be recorded and available for on-demand viewing for those who were unable to attend the live session. The webinars for Boardroom Dynamics, Development of Strategy and Finance are being held March through May. The first Boardroom Dynamics webinar was held on March 12, the first Development of Strategy and Finance webinar will be held March 18. Webinars are scheduled to take place every couple of weeks with a final review session taking place approx. a week to so before the exam session.</p> <p>Assignments have been created for Risk Management. Candidates participating in the November 2019 session had the option to complete the assignment and submit for feedback. Only two candidates attempted the assignments in November 2019.</p>			
Next Steps:	<p>March to May 2020 - Webinars for Boardroom Dynamics, Development of Strategy, and Interpreting Financial & Accounting information to be launched.</p> <p>Assignments will again be used for the June 2020 exam session and candidates will be encouraged to complete them.</p> <p>November 2020 (and beyond) - The Division will provide educational support for Governance, Law, and Compliance exams once the materials have been localized (see SP 1.2 above).</p>		



Sustainability Plan Update with Implementation Schedule

SP 1.5	Ensure that the Quality Assurance requirements are in place based on the licensed curriculum and examinations from UKRIAT.	March 2020	<In progress>
Canada's QA application has been submitted to the Professional Standards Committee (PSC) and is on the agenda for finalization as part of their March 2020 meeting. The Division fully expects that the application will be accepted as presented now that the appointment of David Miriguay as Director of Education has been confirmed.			
Next Steps:	December 2020 - The QA report needs to be submitted annually.		



Goal 2: Pursue Relationships with Canadian Higher Education Institutions

SP 2.1	Provide resources to pursue and negotiate higher education institution relationships from 2020 onwards.		
<p>This topic will be part of the operational agenda for the International CEO meeting on April 1, 2020. During this meeting, Division leaders will discuss how these partnerships work within their Divisions. Understanding global best practices will help the Canada Division develop an informed strategy.</p> <p>Currently, four paths for pursuing higher education institutions are under investigation by the Division:</p> <ol style="list-style-type: none"> 1. Identify Higher Education Institutions that could offer the IQP. In this scenario, Universities would license the curriculum, provide accreditation, provide instructors, and offer the program as part of their course of study. 2. Recognize equivalent programs of study at existing Higher Education Institutions for entry into CGIC. In this scenario, certain programs at certain universities could be considered equivalent, with membership to CGIC granted upon completion of that program. 3. Recognize equivalent courses on offer at existing Higher Education Institutions that would provide prospects with certain exam exemptions. 4. Attract faculty and staff (as individuals interested in Higher Education) to take a more active role in CGIC through membership, mentorship or thought-leadership. Provide these individuals with direct benefit to joining CGIC for their own purposes and not under the banner of their schools. <p>Each will need to be vetted based on the learnings from the April meeting.</p>			
<p>Next Steps: This strategic priority will be properly examined after the discussion at the April International CEO meeting. It is likely that this item will need to be shelved until such time that CGIC has all the other goals in place. There will be very little appetite for Higher Education Institutions to look at the CGIC offering in its current state.</p>			
SP 2.2	Implement a recruitment campaign to attract educationists in the governance arena to become members of CGIC.		
<p>This strategic priority follows SP 2.1. Once a course of action has been determined, an appropriate plan will be developed. If options 1, 2, or 3 are of interest, relationships will need to be built and agreements put into place for each. For option 4, one possible outreach mechanism is the Higher Education One Thought Blog (reach of 9,000 subscribers including Provosts, Presidents, VPs, AVPs & Directors).</p>			
<p>Next Steps: This strategic priority will be added to the implementation timeline after the completion of SP 2.1.</p>			



Goal 3: Expand Directors’ Education in the Number of Sessions and Scope of Programming

<p>SP 3.1</p>	<p>Develop a promotional campaign for the existing program to increase the number of sessions and the average number of paying participants per session.</p>		
<p>The Director of Education for the Canada Division has been tasked to develop a Teaching, Learning and Assessment Plan following best practices in other Divisions, in order to provide enhanced competency and learner success with an eye on expanding the number of sessions and number of participants in the session. This plan will also outline appropriate promotions to prospects that may include:</p> <ul style="list-style-type: none"> - Chartered Professional Accountants of Canada (CPA) magazine - Canadian Bar Association Law Times (reach of 18,000 lawyers) - Canadian Legal Newswire (reach of 32,000 subscribers) <p>Additionally, promotions will be developed for current members to assist in recruiting new participants and/or new closed sessions via:</p> <ul style="list-style-type: none"> - Cross-pollination: e.g., promoting IQP program to Acc Dir and promoting Acc Dir program to IQP Graduates, ACIS and FCIS members - Attracting new audiences: e.g., promoting AQP and Acc Dir to colleagues, both within and outside of their current organization 			
<p>Next Steps:</p>	<p>In light of COVID-19, until such time that it is under control, we cannot really consider booking any Canadian sessions. The Director of Education will continue to work on the Dominica session (although that is now on hold) and possibly a Barbados session for the Fall.</p>		
<p>SP 3.2</p>	<p>Develop a sales strategy to provide directors’ education for full boards.</p>		
<p>The intent behind this strategic priority is to grow interest in an accreditation program that a full board can participate in as a group to improve the effectiveness of that board en masse.</p> <p>The deliverable will be the development and distribution of a corporate pitch book.</p>			
<p>Next Steps:</p>	<p>This strategic priority will be added to the implementation timeline after the required services and support processes have been put into place.</p>		



SP 3.3	Develop new streams of the directors' education program such as for the public sector, non-profits, and specific industries.		
<p>While this Action Item is important, the market is not yet saturated with the existing program. It is suggested that CGIC delays the analysis and discussion regarding the development of new streams until 2021.</p>			
Next Steps:	<p>This strategic priority will be added to the implementation timeline after the required services and support processes have been put into place.</p>		
SP 3.4	Develop a short presentation to be done at the end of each session regarding the CGIC and Chartered Membership.	Fall 2020 (exact date TBD)	
<p>This presentation will be developed and provided to instructors of the DEAP sessions being held within Canada starting in the Fall of 2020.</p> <p>This asset will also be used to promote awareness of CGIC to SUSPECTS (i.e., senior professionals trained in the law, finance, governance, and strategy not aware of CGIC and its educational programs) via the website, social media, events held by other professional bodies, and other appropriate venues. It will be a key tool for Awareness Building.</p> <p>Targeted Pitch Books will also be developed to assist with Awareness and Interest Building and will be customized based on the different target audiences.</p>			
Next Steps:	<p>Fall 2020 - This asset will be developed after the development of the member personas which are required to inform the messaging/content.</p> <p>Note that a member persona is a “semi-fictional representation of [an] ideal customer based on market research and real data about existing customers” and is a common marketing technique for defining the different groups with one’s target market.</p>		



Strategic Priority 2: Be the Premier Service Organization for the Governance Community in the Region

Goal 4: Increase quality and number of Continuing Professional Development (CPD) and Networking Activities

SP 4.1	Provide additional support for the Branches to increase the number of events in the regions and increase the quality of the events from 2020 onwards.	March to May 2020	<In Progress>
<p>The Executive Director to reach out to each Branch to discuss additional support requirements for each in March 2020 with this objective in mind. Based on this dialogue, a strategy to assist branches will be created in April 2020 and may include:</p> <ul style="list-style-type: none"> - Quarterly Branch leadership calls to discuss branch issues and support requirements - Standardization of, and improvements to, the individual Branch microsites - Providing event listing submission forms online - Shared membership flyers and other promotional assets - Develop a Branch marketing strategy with Branch Commitment - Develop Branch deliverables and action items - All hands on deck 			
Next Steps:	<p>March/April 2020 - ED to call each Branch President</p> <p>April/May 2020 - Development of Branch support strategy</p>		
SP 4.2	Establish and promote the “Grow your Governance Network” service.		
<p>This strategic priority is to create an eCommunity on the website where governance professionals would meet and work.</p>			
Next Steps:	<p>April 2020 - Interest in a Canada Division eCommunity will be assessed as part of the member research before investing time and \$ into developing the program.</p>		



Goal 5: Improve support for members regarding governance issues

SP 5.1	Establish a network of volunteers who are prepared to answer questions from members and then promote this service.		
<p>A well-structured and managed mentoring program is far more than a “feel-good” initiative. It offers significant returns to any association interested in engaging their member base and genuinely advancing the profession or industry they represent. There is plenty of anecdotal evidence that association members who participate in a mentoring program, whether as mentors or mentees, are more likely to retain their membership.</p> <p>Not only does a mentoring program enable members to mix with peers for a common purpose, but it also allows younger members, with the help of their mentor, to network within the association more easily. The ties developed through the program enhance all participants’ sense of belonging.</p> <p>A well-run mentoring program will also help to attract new members. Word of mouth is a powerful tool within any industry. Mentoring program participants will have wide individual networks with whom they discuss their experience. So long as the mentoring program is well structured, it will put an association “on the grapevine” in a very positive way.</p> <p>A proper mentorship program takes time to develop and resources to manage. There are software solutions that can assist CGIC to scale a mentorship program easily, reduce necessary admin time, provide extra value to your members, and quickly pull results to show your association’s leadership.</p>			
Next Steps:	April 2020 - Interest in a mentorship program will be assessed as part of the member research before investing time and \$ into developing the program.		



Goal 6: Establish an Organizational Membership category to support organizations and their Boards

SP 6.1	Develop a policy and procedure for this new Organizational Membership category of membership.		
<p>CGIC membership structure is very complex and is confusing to members. We have been surprised by the number of members who have contacted the National Office uncertain of what fees they should be paying. With over 80 different member category permutations, processing memberships is very time-consuming. Simplifying the membership structure will be key to operational efficiency.</p> <p>Different membership models will be examined to see if there is a better solution for CGIC, e.g., standardized branch fees, fewer membership tiers, organizational vs. individual members, adding categories for prospects, subscribers, etc.</p>			
Next Steps:	<p>April 2020 - The policy and procedure will be developed after the member research which is required to inform the content. Input will also be sought from the Membership Services and Growth committee.</p>		
SP 6.2	Develop and implement a promotional campaign to attract organizational members.		
<p>Once a new membership fee structure has been defined and approved by the board, a promotional campaign will be introduced that highlights the key benefits of the new structure and to encourage lapsed members to rejoin the association.</p>			
Next Steps:	<p>This strategic priority will be added to the implementation timeline after the logistics of the membership model and fee structure have been worked out and policies and procedures have been approved by the Board and Committee for Canada.</p>		



Goal 7: Expand Recruitment Services for Governance Professionals and Directors

SP 7.1	Remove the fee requirement for job placements for organizational members.		
<p>Management recommends that the job board be offered to all – members, prospects, suspects – as a way to encourage volume. We recommend that CGIC consider tier pricing for members and non-members as a way to create member-value.</p>			
<p>Next Steps: A change to the fees for the job board can be made at any time with Board approval.</p>			
SP 7.2	Expand the job board to allow for director searches.		
<p>At present, the CGIC job board is under-utilized. With only a handful of postings yearly, there isn't enough traffic to generate interest. But, the availability of jobs in Canada is one of the top five member questions asked during the past month suggesting there is a strong desire for such a service. Management will investigate why the job board is under-utilized and put a plan in place to improve the service.</p>			
<p>Next Steps: April 2020 - Interest in a job board will be assessed as part of the member research before investing time and \$ into developing the program.</p>			
SP 7.3	Expand the job board to allow for member (all categories) advertising and put the process in place to facilitate this new service.		
<p>It is worth investigating setting up a job board that integrates with job sites (such as Indeed.ca) and/or professional networking sites (such as LinkedIn.ca) as a way to increase usage and exposure. Management also recommends that the job board be offered to all – members, prospects, suspects – as a way to encourage volume. Suspects will learn of CGIC and its educational programs through interactions with the job board service. Prospects can evaluate the benefit of educational programs in securing employment. Members can use the job board to post open positions or when investigating new employment opportunities. Listings can be tiered by membership level, as can pricing.</p>			
<p>Next Steps: Should sufficient interest exist, a business case and implementation plan (including promotions) will be developed.</p>			



Goal 8: Leverage Governance Thought Leadership in Canada

SP 8.1	Develop a strategy to implement the Thought Leadership goal in 2020.		
<p>When you establish your association as a driver of industry innovation, research, and discussion, you will uncover infinite opportunities for growth and development. There are a number of ways for CGIC to structure and implement a thought leadership campaign. For example, identifying best practices among its members can prove extremely useful. By taking such an approach the association becomes recognized as a core source for cutting-edge understandings that members can use to become more successful.</p> <p>There are quite a number of other ways for an association to be recognized as a thought leader, which is a function of the nature of the membership, the resources that can be accessed, and the ingenuity of the association. Before any approach to becoming a thought leader is taken, it's important that the association think through how to achieve the objectives noted above.</p> <p>CGIC needs to set up an infrastructure to support thought-leadership (blogs, eCommunities, website, social media) and build up audiences beyond its eNewsletter (especially in the social space).</p> <p>But, preliminary steps can be taken including:</p> <ul style="list-style-type: none"> - Adding the Corporate Governance Weekly eNewsletter to the website and promoting it via social media. - Sharing thought-leadership pieces produced by CGI and other divisions. - Leveraging the International eCommunity platform. - Work to expand the audience base. - Building relationships with thought-leaders in the industry. 			
Next Steps:	<p>This strategic priority will be added to the implementation timeline after the required services and support processes have been put into place.</p> <p>CGIC needs to identify the volunteer or (additional) staff person to manage this process.</p>		



Strategic Priority 2: Improve the Effectiveness of the Organization

Goal 9: Review the ICSA Governance and management structure for effectiveness in supporting the key strategic priorities of the new CGIC

SP 9.1	Build the new board of CGIC based along competency lines and availability/commitment (capability and capacity).	June 2019	<Completed>
The Divisional Committees were restructured in 2019 for effectiveness in supporting the key strategic priorities of the new CGIC. <i>(refer to Strategic Priority (SP) 9.2 through 9.5 for more detail.)</i>			
Next Steps:	<p>March 2020 – The Governance and Admissions Committee is currently seeking nominations for open positions. A slate will be confirmed once the nomination period ends on March 16, 2020.</p> <p>April 2020 – In November 2019 the CFC/Board approved amendments to the governing documents of the Canadian Division. The amendments have been agreed to by the Constitutional Agreements Committee of the International Council and will be on the agenda of Council for approval at its April 2/3 2020 meeting. The bylaws of CGIC will be presented to the members of the Canadian Division for approval during the May 28, 2020, AGM.</p> <p>May 2020 - Elections to fill open positions on the CFC/Board will be held at the CGIC AGM on May 28, 2020, with the first meeting of the 2020-21 CFC/Board taking place the following day.</p>		
SP 9.2	Combine the Admissions, Nominations and Governance Committee into a Governance and Admissions Committee.	September 2019	<Completed>
This combined committee is now in operation and held three meetings between July 2019 and March 2020. Terms of References (TOR) have been developed and were approved for dissemination to the five-person committee on March 4, 2020. This committee is currently chaired by Ingrid Stefancic, with Patricia Thacker providing staff support.			
Next Steps:	April/May 2020 - Committee to identify strategic goals, under its Terms of Reference, to pursue in support of the implementation of the Growth and Sustainability Plan in the coming months.		



Sustainability Plan Update with Implementation Schedule

<p>SP 9.3</p>	<p>Add a Membership Services and Growth Committee and integrate the CPD Committee into this committee, with the responsibility for member services, CPD, marketing, promotions, and communications.</p>	<p>September 2019</p>	<p><Completed></p>
<p>This combined committee has been formed but has yet to. Terms of References (TOR) have been developed and were approved for dissemination to the committee on March 4, 2020. This seven-person committee is currently chaired by Jean Jeannot, with Patricia Thacker providing staff support.</p>			
<p>Next Steps:</p>	<p>April/May 2020 - Committee to identify strategic goals, under its Terms of Reference, to pursue in support of the implementation of the Growth and Sustainability Plan in the coming months.</p>		
<p>SP 9.4</p>	<p>4. Retain the Education Committee but expand its scope to be the Education, Training and Candidate Success Committee. Combine the Subject Matter Review Group and the Assessment Review Panel into the Subject Advisory Committee more fitting with the new Institute Quality Assurance requirements.</p>	<p>September 2019</p>	<p><Completed></p>
<p>This committee is now in operation and held 2 meetings between July 2019 and March 2020. Terms of References (TOR) have been developed and were approved for dissemination to the committee on March 4, 2020. This seven-person committee is chaired by Michael Ashford, with David Miriguay providing staff support.</p>			
<p>Next Steps:</p>	<p>April/May 2020 - Committee to identify additional strategic goals, under its Terms of Reference, to pursue in support of the implementation of the Growth and Sustainability Plan in the coming months.</p>		
<p>SP 9.5</p>	<p>Evolve the Executive Committee to be the Executive and Financial Committee which will receive financial reports monthly.</p>	<p>September 2019</p>	<p><Completed></p>
<p>This combined committee is now in operation and held 5 meetings between July 2019 and March 2020. Terms of References (TOR) have been developed and were approved for dissemination to the committee on March 4, 2020. This five-person committee is chaired by CGIC President Wisdom Ncube, with Patricia Thacker providing staff support.</p>			
<p>Next Steps:</p>	<p>April/May 2020 - Committee to identify additional strategic goals, under its Terms of Reference, to pursue in support of the implementation of the Growth and Sustainability Plan in the coming months.</p>		



SP 9.6	Once the plan is approved, empower the executive and management of the organization to go ahead and implement the plan with quarterly Spotlight reports to the Board and the committees (Executive and Financial committee receives the financial reports monthly). Only material deviations from the plan or the serious challenges in the achievement of objectives, or a major change in circumstances will require the executive to consult with the Board outside of the quarterly reports.	September 2019	<Ongoing>
<p>The Executive and Financial Committee is now operational and reviews financial reports monthly and reports to the CFC/Board on a quarterly basis. The Committee holds teleconference calls as needed and has held 5 teleconference calls since its formation in June 2019. Committee updates are now a standing agenda item for combined meetings of the Board and Committee for Canada. The Committee reports progress against goals identified in the Growth and Sustainability Plan to the CFC/Board for discussion and serious challenges are identified at each CFC/Board meeting.</p>			
Next Steps:	May 2020 – The next round of committee updates are scheduled for the in-person Board meeting in May 2020.		



Goal 10: Engage more members to support their own and the CGIC’s objectives

SP 10.1	Develop and implement a member engagement strategy.		
<p>The lifeblood of any association is its membership. Therefore the primary economic imperative for any association is to attract and retain members. Yet, there is no member engagement strategy in place. The association does not offer any tangible member benefits or any value beyond its two educational programs.</p> <p>A proper member engagement strategy needs to be Informed by member research. Some initial ideas to be tested as part of the member research:</p> <ul style="list-style-type: none"> - What are the member’s current pain points? - Why do members belong? - What is important to your membership and how do they perceive CGIC on these items of importance? - What recruitment campaigns would drive participation? - What can CGIC do to increase member value? - How can CGIC help support members in their careers? - Etc. <p>During the relaunch, there will be an element added requesting that current members refer colleagues and acquaintance to CGIC as potential members.</p>			
Next Steps:	<p>April/May/June 2020 - Process to be informed by consumer research and website visitation data collected in April 2020.</p> <p>CGIC needs to identify volunteers and additional staff resources to get a member engagement strategy pulled together in a timely manner.</p>		



Goal 11: Develop closer relationships with other professional organizations

<p>SP 11.1</p>	<p>Develop and implement a plan to expand relationships with other appropriate professional bodies in Canada, the US and internationally from 2020 onwards.</p>		
<p>While SP 3.1 touched upon some promotions that would reach other professional audiences, this Strategic Priority is more about relationship building with different professional groups such as the Chartered Professional Accountants of Canada and the Canadian Bar Association.</p> <p>The Executive Director to reach out to the President of relevant professional bodies to discuss what partnership or sponsorship opportunities exist. Based on this dialogue, craft a Memorandum of Understanding (MOU) that will define the relationship moving forward.</p>			
<p>Next Steps: This strategic priority will be added to the implementation timeline after the required services and support processes have been put into place.</p>			
<p>SP 11.2</p>	<p>Expand and strengthen the relationship with GPC and exhibit the strengthening of ICSA in Canada as it transitions to the new CGIC.</p>	<p>August 2020</p>	
<p>The Executive Director to reach out to GPC president to discuss what partnership or sponsorship opportunities exist. Based on this dialogue, craft a Memorandum of Understanding (MOU) between the two organizations that will define the relationship moving forward.</p> <p>One suggestion was to recognize the GPC-ED as an acceptable entrance to the IQP for those without an appropriate degree.</p>			
<p>Next Steps: April 2020 - Connect with GPC president Lynn Beauregard.</p> <p>August 2020 – Promote the IQP at the GPC annual conference on August 23-26, 2020 in Kelowna, BC. Consider sponsorship and exhibition opportunities.</p>			



Goal 12: Substantially enhance the level and effectiveness of Marketing and Communications activities in CGIC

SP 12.1	Upgrade the website with the new services and image.	March 2020	<In progress>
<p>While initial steps have been made to remove outdated information and fix all broken links on the website, improvements to content, navigation, mobile responsiveness, and SEO and SEM are sorely needed. Members and prospects reach out daily indicating that they can't find the information contained on the website or just don't understand what they are reading. Having access to easy to understand (and easy to find) information is a critical first step to promotion. Initiatives to drive new traffic to the website is not advisable in its current format.</p> <p>Some initial observations:</p> <ul style="list-style-type: none"> - No search feature - No site map - The home page is unappealing and uninformative - Content is hidden in the complex page structure - Look and feel could be vastly improved - No electronic forms - No content submission - Little thought leadership - Under-utilized job board - Member site lacking - No member directory <p>Management recommends moving the main CGIC site to a new website platform that is more robust and offers built-in SEO and SEM. The Configio system should be maintained for the virtual boardroom, learning management system, and member site (including the shopping cart) as these all link back to the membership system.</p>			
Next Steps:	<p>April 2020 - It takes 6 months to properly overhaul a website, so an RFP should be issued early to mid- April.</p> <p>CGIC needs to identify volunteers and additional staff resources to overhaul the website in a timely manner.</p>		
SP 12.2	Implement the rebranding activities required in all media with the change to the new CGIC.	February to August 2020	<Ongoing>
<p>While the new CGIC logo has been added to the website, there is still outdated terminology contained throughout. Forms were being sent out with old logos and information.</p>			
Next Steps:	<p>Ongoing - Treeline is committed to not send out any outdated forms or information. Forms are being updated as required and the creation of new materials will occur once asset requirements have been fully defined.</p>		



SP 12.3	Implement an SEO strategy.		
<p>This strategic goal is to build a search engine optimization (SEO) and search engine marketing (SEM) strategy for CGIC around the keywords and products most searched by our core consumers to make the CGIC website more visible on organic search lists and maximize traffic to the CGIC website. Informed by consumer research and website visitation data, strategies may include:</p> <ul style="list-style-type: none"> - Paid search - Pay-per-click advertising (Google Ads) - Business listings (Google My Business, LinkedIn) - Keyword placement throughout the site - Forging links with other websites that support and complement the CGIC site (such as CGI & its Divisions, GPC) - Social bookmarking <p>Before effective SEM and SEO strategies can be put in place, the CGIC website and social media channels need to be overhauled. Updated content, blogs, eCommunities, site maps, search functions, links, etc. all need to be designed to support SEO and SEM strategies. While the current Configio platform offers built-in SEO, it may not be robust enough to meet the needs of the association and another website platform may need to be used.</p>			
Next Steps:	<p>April/May 2020 - Process to be informed by consumer research and website visitation data collected in April 2020.</p> <p>Reach out to Internation to find out how they can assist (e.g., if the eCommunity platform can inform the SEO strategy and/or be leveraged to maximize traffic to the CGIC website.</p>		
SP 12.4	Implement a Social Media strategy.		
<p>Poring resources into a social media strategy with so few followers is not a good use of resources. Audiences need to be built and regular content produced to reach members and prospects through the social web.</p> <p>Collect social media handles as part of the member research. Invite members & prospects to engage via social media, e.g.,</p> <ul style="list-style-type: none"> - When a member joins or a new prospect reaches out, reach out on LinkedIn with a personal invitation to connect. - Follow those who follow you (in most cases) - Follow thought-leaders - Tag relevant professional associations in posts 			
Next Steps:	<p>April/May 2020 - Process to be informed by consumer research and website visitation data collected in April 2020.</p>		



SP 12.5	Provide resources and systems for rapid and effective direct recruitment of members and organizations.	August 2020	
<p>CGIC is currently not set up as a member-centric association. Some examples:</p> <ul style="list-style-type: none">- There are no processes in place to capture contact info from interested parties.- Members are being asked to follow a cumbersome registration process sometimes leading to frustration and abandonment.- The fee structure is complex and confusing.- All forms are being handled via word documents/pdfs.- There is no prospect list in place.			
Next Steps:	<p>August 2020 - There are several operational improvements that should be incorporated into a new website platform – lead generation, improved registration, online forms, clarity of content, etc. – that will help with recruitment and retention.</p> <p>Once the support processes are in place, a referral program will be introduced. Other retention ideas will be considered such as adding resources for one-on-one follow-ups with prospects.</p> <p>CGIC needs to identify volunteers and additional staff resources to get this done in a timely manner.</p>		
SP 12.6	Substantially enhance communications to members and other stakeholders.	August 2020	
<p>Regular communications beyond the eNewsletter are lacking. There is no thought-leadership present on the current website (except for the link to CGI International).</p> <p>A targeted communication strategy needs to be developed with individualized messaging for each target group.</p>			
Next Steps:	<p>April/May 2020 - Process to be informed by consumer research in April 2020.</p> <p>August 2020 - Release a quarterly President’s message when the association is relaunched.</p>		



Goal 13: Establish the Affiliate and Subscriber Membership Category in CGIC and expand membership in these categories

SP 13.1	Establish the Affiliate and Subscriber Membership categories in the appropriate documentation of CGIC.		
As previously stated, different membership models will be examined to see if there is a better solution for CGIC, including whether it makes sense to adjust the Affiliate category to align with International.			
Next Steps:	April/May 2020 - The policy and procedure will be developed after the member research which is required to inform the content. Input will also be sought from the Membership Services and Growth committee.		
SP 13.2	Promote and apply the two new membership categories where appropriate.		
Once a new membership structure has been defined and approved by the board, a promotional campaign will be introduced that highlights the key benefits of the new categories to appropriate audiences.			
Next Steps:	This strategic priority will be added to the implementation timeline after the logistics of the new category have been worked out and the policy and procedure have been approved by the Board and Committee for Canada.		