

A group of seven diverse children of various ethnicities and ages are smiling and posing on a green lawn. They are arranged in a cluster, with some sitting on the grass and others standing behind them. The background is a soft-focus outdoor setting with trees and sunlight.

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**TRANSFORMED APPROACHES
FOR MEMBERSHIP AND
DIGITAL FUNDRAISING**

High-level framework

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This high-level strategy framework is part of the second phase of work commissioned by Canadian Parents for French (CPF) National¹ to optimize opportunities for collaboration within its pan-Canadian Network. Phase II of this important work is focused on implementation and builds on pathways identified in an April 2022 report and the commitment of Network partners at a Leadership meeting in August 2022 to improve strategic collaboration.

One area identified for better collaboration was the development of a Network Affiliation Agreement. This has culminated in an Agreement signed by most Branches before Canada Day. It will clarify roles and responsibilities, create formal mechanisms for mutual accountability and establishes formal alternative dispute resolution mechanisms. The Agreement will improve the effectiveness of decision-making and create opportunities to collaboratively grow revenues and impact.

A second area of improvement identified for Phase II includes the development of a high-level framework for Digital Membership and Fundraising (the Framework).

It is against this backdrop of productive discussions about the Network Affiliation Agreement that this Framework is mapped out. The intent is to offer a high-level sketch – not a detailed implementation plan – for discussion with CPF Network leaders. The detailed implementation of the Framework as adapted with input from Network leaders will be the responsibility of CPF National in collaboration with CPF Branches.

A review of key documents, reports and plans provided the baseline for this work. Key documents reviewed included:

- Membership Model Review: Final Report by Nayar Consulting (Dec 2013)
- CPF: Membership Marketing Plan (undated, likely circa 2017)
- CPF: Network Strategic Plan (2020-2025)
- CPF-National: Membership Feedback Survey Analysis & Results (Feb 2022)

To deepen my understanding of current realities, I hosted two small and loosely structured discussions with key staff² involved in membership marketing and fulfilment as well as in digital marketing and fundraising.

The next step in this process is to present this high-level Framework to spark a discussion with CPF-N leaders to establish priorities for implementation by 2026.

¹ In this paper, references to Canadian Parent for French, National means the national backbone organization headquartered in Ottawa and incorporated under the Canadian Not-for-Profit Corporations Act. 'Branch' denotes the provincial members that are typically incorporated by provincial statute. 'Chapter' denotes unincorporated local structures accountable to the branches. 'CPF' denotes the sum of the backbone organization, its branches, and chapters.

² A first session with a focus on membership was held on May 5th with Debbie Murphy and Cathy Stone. A second session on fundraising and digital marketing was held on May 25th with Marin Hawley, Jason Howe and Marcos Salaiza.

OBSERVATIONS

STRATEGIC PLAN AND STRATEGY IMPLEMENTATION

The strategic plan identifies Building Member, Volunteer and Donor Engagement as a key strategic priority with two pillars (B1) Understanding Members, Volunteers and Donors and (B2) Creating Informed Allies to our Cause.

At B1, the action plan calls for: consulting to better understand and respond to member, volunteer and donor needs, interests and expectations; and Implementing improved member recruitment/retention strategies as well as incentives for volunteers and donors.

At B2, the action plan calls for: Increasing understanding of the value of FSL learning and Canada's official languages; trends, issues and possible solutions; and Creating and supporting a strong pool of informed official language champions and deepen their allegiance to our cause.

The strategic plan sets the right path forward. What is needed is the resolve to have everyone in the boat paddle in that same direction.

In my April 2022 Discussion paper, I commented on aspects of CPF's strategy and culture offering that 'there is a greater level of consensus on high level strategy direction, but this consensus is not reflected in the way strategy is implemented on the ground. High level strategy appears to break down when difficult decisions are required to allocate/share resources to drive forward the implementation of strategy which is often piecemeal and reflects a patchwork of priorities.'

This remains true and is evidenced in the failure to give significant traction to the implementation of the strategy to grow and diversify revenues beyond important government funding. This is a very critical comment which does not disparage individual staff or efforts by volunteers. It underscores that by relying on a piecemeal and patchwork efforts, the potential for revenue growth is not fully realized.

The lack of ability to implement strategy in a coordinated way is also reflected in what appears to be little or no action to implement previous recommendations on a membership strategy such as those contained in documents cited above from a decade ago.

My hope is that renewed efforts to collaborate evidenced in the discussions of a proposed Network Affiliation Agreement will allow CPF as a Network to optimize resources and personnel in pursuit of member engagement, revenue growth and diversification. The recommendations offered below are intended to spark debate. They invite bold and difficult decisions to apply resources strategically in efforts to diversity and grow revenues.

MEMBERSHIP AND MEMBER ENGAGEMENT

Useful context on the question of membership and member engagement is available in CPF reports from 2022 which effectively summarize the need and the opportunity to reframe the membership structure and program. The excerpts below set the stage for further discussion below:

Conversations reflected widespread dissatisfaction with the current membership model. These conversations also revealed little consensus about the justification for the current model. All acknowledge legacy elements of the membership model including the role of members in the governance of CPF; all agree that this legal legacy element would not be easy to change. Yet, many are unclear that current levels of efforts should continue to be expended to maintain membership levels at current levels.

Many are not clear that the current membership model is the best tool to mobilize citizens in CPF's advocacy efforts at the local, provincial, or national levels. Many offer the view that social media platforms offer more reach, agility, and power in mobilizing citizens around policy change.

In 2020-21, A decision to waive the membership fee demonstrated the interest in membership when the payment barrier was removed, and then reinstated.



Few imagine the membership model as a source of significant growing revenues. Many are concerned about the efforts required to sell membership which confer few benefits (except for the requirement to be a member to participate in summer camps). Yet, many recognize that the modest revenues currently generated through membership sales are an important and often the only source of revenues for local chapters.

FUNDING DIVERSIFICATION – BUILDING A CULTURE OF PHILANTHROPY

There is little evidence of a strategy to grow revenues outside of opportunities available to increase revenues from governments. CPF and its Branches (except one) are registered charities which confers the significant benefit of being able to issue tax receipts for donations. CPF is not harnessing this important privilege to maximum value.

The National Office is systematic in pursuing opportunities to grow funding from Canadian Heritage while many branches multiply efforts to grow project funding from provincial governments.

Many people identify the need to develop, resource, and implement a strategy to grow fundraising, and sponsorship revenues. The branches have few resources alone to make significant inroads in this area; they recognize that to realize significant potential in this area requires a coordinated

pan-Canadian approach and a policy framework. Most look to the National Office to exercise leadership to frame a strategy and related policies for such a coordinated approach. The crux of the challenge in addressing this opportunity is that the investments required to build the strategy and capabilities in sponsorship and fundraising will not pay back quickly.

Significant reliance on funding from the Department of Canadian Heritage

My mandate is to explore the potential for generating more revenue for CPF beyond the critical funding through grants and contributions from the Federal and Provincial governments. It is important to note that, on a combined basis (i.e., income from all sources for the CPF-N as a whole), CPF relies significantly on a single funder – the Department of Canadian Heritage of the Federal Government. A strategy to grow revenue from sources other than the Federal Government is important as it reduces the risk of a major shock to CPF were funding from Canadian Heritage to be significantly reduced. Today, the stability and importance of the funding from Canadian Heritage provides the foundation upon which such a strategy can be implemented.

It is important to underscore that CPF knows Canadian Heritage to be supportive of efforts to grow and diversify its revenue base.

Earned and philanthropic income: definitions and context

Having acknowledged the critical importance of funding from governments and, in particular, of the Federal Government, my exploration shifts to other potential sources of revenues. In this context, my focus is on two sources which are common with most charities. Earned income is revenue generated from commercial transactions which provide tangible private benefit to the purchaser. The purchase of tickets to a performance from a charitable performing arts organization (e.g., the Charlottetown Festival, l'Opéra de Montréal, the National Arts Centre, the Vancouver Symphony Orchestra) and tuition fees paid to colleges and universities are excellent examples of earned income. Earned income also includes sales of products such as t-shirts, water bottles, and other sundry items.

By contrast fundraising or philanthropic income is revenue generated through fundraising events and donations received without consideration unless these are incidental (donors cannot receive tangible private benefit except if these are intangible such as a one's name listed in the back pages of a theatre program) and for which an official receipt for tax purposes is issued.

Sponsorship revenues from corporations are another interesting source of revenue for CPF. They typically are classified as earned income because sponsorships confer tangible commercial benefits to the sponsors. Corporations typically treat sponsorships as promotional expenses and these typically have their source in a corporation's marketing budget and not its donation budget. The development of a strategy to grow sponsorship revenue is beyond the scope of the present report.

The analysis here focuses on individuals, not on corporations or charitable foundations. Yet, it is important to underscore my view that potential is available to grow revenues from sponsorships and charitable foundations building on examples of current success.

ASSUMPTIONS ON GIVING AND CONTEXT

Four observations are key before turning to a discussion of key recommendations. These are well-founded assumptions I offer to set the stage for recommendations which follow:

Belief in a cause and engagement fuel giving.

Research on giving establishes clearly that people give primarily because they believe in a cause, and they are engaged in its work.

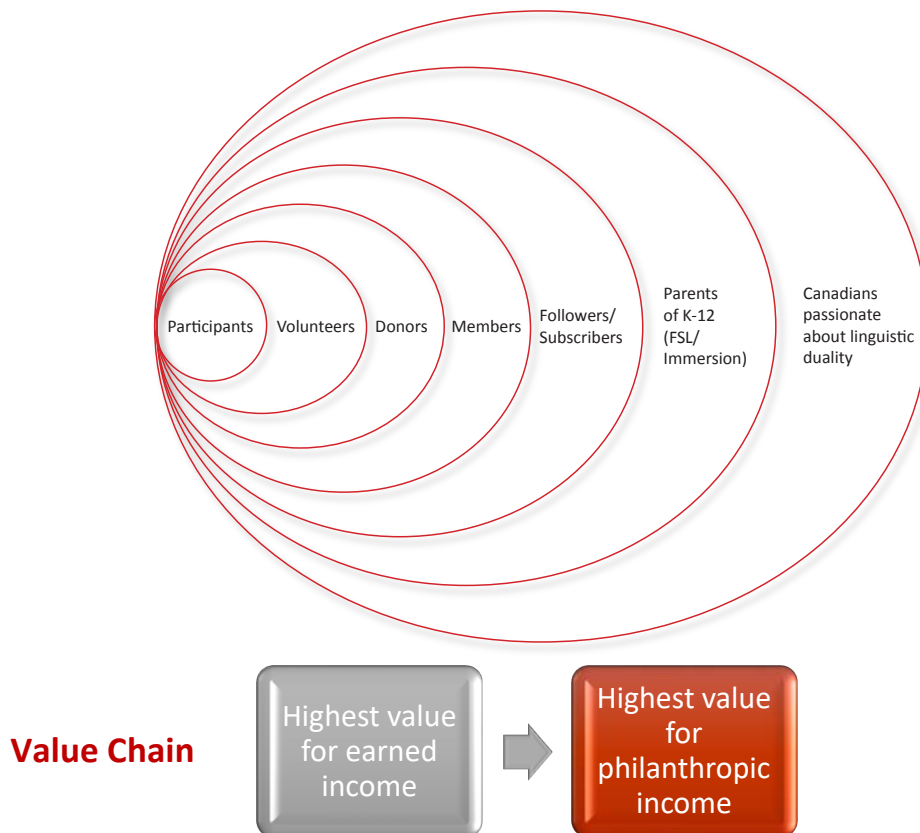
Engagement can be nurtured in many ways. People give to the Canadian Cancer Society because a loved one has been affected by cancer. People give to their local hospital because they are grateful for service received as a patient. People give to their alma mater because they met their loved one while at university. These are examples of engagement. People give to Ducks Unlimited because they are passionate about the conservation of wetlands and our natural environment. These examples underscore how engagement can take many forms.

At CPF, engagement takes at least two forms. The first and most important is through direct participation of children and their parents in programs or use of didactic resources for children who are enrolled in FSL education. A second avenue for engagement is offered by those who believe in Canada's linguistic duality and value the cognitive and social aspects of learning a second language. CPF program alumni offer a tremendous source of people who share in the value of linguistic duality.

The most direct engagement is the most powerful. It creates the strongest bonds and offers the best changes of creating a lasting feeling of belonging.

From a value chain perspective, one can conceive of pathways for engagement as a set of concentric circles (see model below). The highest value for earned income is the bullseye and it offers concrete opportunities for engagement through programs. Those who volunteer or are members of CPF offer a reservoir of potential for philanthropic participation. The outer bands invite targeted efforts to engage people more closely and in larger numbers. As engagement deepens, they move towards the bullseye where the potential to develop streams of revenues becomes.

This model also illustrates the important relationship between marketing efforts to grow the number of people in the outer bands, coupled with the fundraising efforts to deepen philanthropic affinity, and those of programming staff who generate engagement through active participation in learning.



A growth posture requires investments and patience.

Business leaders understand that growing a business requires investment. They also understand that any investment carries its share of risk. They also understand that some investments will not generate profits right away. If you are in the mining business, you may have to deploy capital for decades before harvesting gold (literally). It is not easy for charities and not-for-profits to access capital. This often results in a posture that undermines growth strategies either for lack of resources or for lack of patience.

Significant growth in revenues will require a readiness to make investments and require a readiness to be patient. This may mean that the payoff will come in a fiscal year after the year in which the investment was made (requiring CPF to access reserves)³.

A strategic growth posture implies a deliberate choice to focus resources.

Because the resources (human and financial) available to invest in a growth strategy are (and will be) limited, efforts must be targeted very strategically on the opportunities and methods that offer the highest potential return.

I have noted earlier that the best opportunity to grow revenues is available through modest fees associated to program participation. To focus resources in this area, one cannot be distracted.

CPF should exit the business of retail sales (it may choose to outsource it a partner is interested and available although this is highly unlikely given the relatively small marketplace). There is no evidence that sales of T-shirts and water bottles generate significant net income or that there is

³ Accessing unrestricted reserved for planned multi-year investments will result in a 'planned deficit' in the presentation of financial statements. CPF should ensure that its policy prohibiting deficits does not limit its ability to deploy unrestricted reserves (if there are available) which could be invested wisely to build the capacity to grow in the future.

significant potential available in the growth of this line of business. Yet, anecdotal evidence is clear that fulfilling those sales is a significant distraction for staff. There are also reports of write-downs of spoiled inventory or of surplus inventory.

To boost activity where potential lies, digital tools allow micro-targeting⁴ to reach exactly those who offer the highest potential. Examples of micro-targeting include digital ads to IP addresses in Canada that have searched the key words ‘French immersion.’ They could include search optimization initiatives to ensure that everyone who uses the key words ‘French immersion’ in a search engine will quickly see sponsored ads from Canadian Parents for French promoting its programs and educational resources for parents.

Email capture efforts should be implemented pro-actively. A typical email capture effort would see a pop-up screen appear on one’s device when attempting to download a resource to support a child in French immersion from the CPF site. While the resource may be available without charge, the pop-up screen will incent (but not require) of the parent to sign-up for free membership and thereby have the privilege of receiving newsletters/bulletins and early registration of their children in relevant programs.

Each new email captured is a new prospect for engagement in the work of CPF. Upon capture, a welcome email should be sent marking the start of a new relationship.

These examples illustrate avenues available to broaden the reach of CPF by implementing pro-active efforts on a broad scale in ways that are automated and digital (micro-targeting also offers the potential to give regional colour to such initiatives).

Staff leadership for the implementation of a growth strategy is too diffuse.

Given the relatively modest scale of CPF as a Network, specialized expertise to implement such efforts cannot be replicated in each Branch and at the National level. Doing so, would be inefficient and expensive. As a Network, CPF must focus efforts and ensure these are coordinated.

My assessment is that there are pockets of relevant expertise, but they lack coordination and leadership. Some larger branches have expertise in these areas but, for the most part, smaller branches rely on generalists for these processes and activities. National and Branch efforts are not well coordinated; no one ensures that all team players are rowing in the same direction in the pursuit of clear objectives.

There is no director-level role in the backbone organization for marketing and development. When asked, staff point to individual managers or coordinators who perform important tasks, but the tasks related to membership, fundraising, and marketing do not fit into an integrated strategy. They also explain that the Network CEO leans in to provide overall direction and guidance as required. While you would expect her to be engaged in fundraising and marketing activities, it is not reasonable for them to provide leadership on a consistent basis to this important pillar of the organization’s activities.

⁴ Micro-targeting refers to popular online marketing strategies which involve collecting people’s data (subject to applicable privacy legislation) and using it to segment/divide people into groups. Charities, companies and political parties are able to target different messages and content to different groups through micro-targeting. If you have experienced searching online for winter boots, only to receive numerous ads in the following 24 hours about winter boots, you have experience micro-targeting.

Infrastructure to support marketing efforts is inadequate.

Some elements of the infrastructure for these efforts are in place. Others are sorely lacking. The infrastructure is not conceived of as an ecosystem that permits constituents to journey through various stages of connection as is depicted in the use of concentric circles in the model above.

CPF has an integrated website with modern content management software. The website requires improvement for email capture and to improve payment processing tools.

Information about constituents is maintained in multiple databases (e.g., volunteers and members) or in excel spreadsheets. There is not an integrated constituent database where a single view of a constituent's interactions with CPF can be captured. The database is not used in a systematic way to prospect for new members, new participants, and new donors.

PATHWAYS FORWARD

Transform the membership proposition.

Membership has two meanings in the context of CPF. I propose to disentangle them for greater clarity.

- a. Membership has the meaning ascribed to it at law of persons with voting rights in a not-for-profit corporation (as per bylaws).
- b. Membership also has the broader meaning of a belonging formally to a group through which exclusive privileges (access to resources, learning opportunities or products) may be available or conferred.

At CPF, membership is administrated by CPF-National on its behalf and on behalf of the branches with the effect that members are concurrently members in CPF-National and in the Branch which serves the province where they are resident. This means that members have legal rights in each of the corporation of which they are members. The Directors owe their duty of loyalty to the corporation on of which they are a director, and they are accountable to the members of the corporation.

The Canada Not-for-Profit Corporations Act by virtue of which CPF-N is incorporated allows a not-for-profit corporation to create different classes of membership. CPF-N currently has four (4) classes of members in the Corporation, namely, Individual, Family, International and Associate Member Organizations (AMO). Individual and Family are voting memberships. International is a non-voting membership, available to individuals who reside outside of Canada. Associate Organization is a non-voting membership, available to organizations.

In my view, this complex membership structure does not provide value and is not necessary for CPF. Worst, this complex structure confounds efforts to strengthen the ties of belonging of individuals who are the core group (or class) of members of the corporation.

Recommendation 1 **Simplify the membership structure of CPF-N and of its branches** adopting a single class of individuals members. This proposed change is subject to a special resolution at meetings of

the members. Note that this would best be accomplished when important revisions are proposed to the bylaws of the corporations.

Within that single class of individuals members, permit memberships to be held by individuals or by families. Transform the International and Associate Members Organizations Classes of Membership into Associates and Associates (International) without legal rights in the corporations.

The policies and the fees for the single class of individual members would be determined by CPF-N Board of Directors on behalf of the Network as per the proposed Network Affiliation Agreement.

Simplifying the legal structure of CPF membership will provide opportunity to focus greater effort on two fronts:

1. Increasing the number of individuals and families who are members and cementing their sense of belonging (or engagement) with CPF.
2. Reducing the administrative burden related to the administration of the complex membership structure and the collection/transfer of relatively small sums. While there is not detailed analysis of the net contribution of the membership program, some staff offered to me privately that if one factored the value of all staff effort in administering the membership database and associated financial transactions, the membership program would not generate a net benefit to CPF (meaning the membership program is subsidized by other sources of revenues). Releasing those resources would permit a greater focus on activities that relate to philanthropic engagement and pro-active fundraising solicitation.

Focus income generation on high-perceived value

We noted above that the attraction to CPF lies in its educational resources and programming for children who are enrolled in French second language education. Membership does not have high perceived value and efforts to monetize its value have not been successful. In plain language, membership in CPF is not and will never be like membership in Aeroplan or in a yacht club. Consistent with a focus on income generation in areas of higher perceived value, CPF should exist business lines which are likely implemented at a loss, and which generate little value.

Finally, to generate value, CPF must resolutely embrace the shift to the digital age and implement a period of transition at which time it will stop delivering membership in analog formats. This will create opportunities to rationalize process and re-direct resources where they matter most.

It is useful to recall a previous discussion of the impact of the digital technology on CPF.

We live in an age of revolution powered by the exponential rise in the computational power of microchips and the near ubiquity of internet technology. The shrinking unit costs of computing power and data transmission are fueling a revolution in how we consume information and entertain ourselves, work, and socialize. The digital transformation in our lives has been accelerated not only by shifting cost structures and the advent of new technologies but also by the global pandemic that restricted our ability to gather in large groups for two years.

[CPF must] seize opportunities offered by these technologies to reduce costs and improve their competitive advantage. CPF's fragmented program structure slowed or inhibited the

implementation of improved customer service through modern technologies (e.g., digital preference centers, chatbots, automatic call distribution technology, constituent relationship management systems, systematic evaluation, and user feedback loops, expanded service coverage in languages other than English and French, etc.).

Technology creates new dynamics for networks as backbone organizations can have direct-to-consumer communications that are not mediated by their affiliates.

Let us illustrate the pooling of IT capabilities in a shared services framework with a network that places responsibility for IT on a network-wide basis in the backbone organization or in one of its largest affiliates which has a depth of IT expertise. Imagine an IT team designed on a pan-Canadian basis with members of the team housed in a few locations across the country (but not necessarily in all affiliate offices) resulting in deeper specialization among some members of the team. By pooling resources, this might permit the hiring of an individual to lead the IT team with more specialized skills. The individual leading the IT team has accountability to the affiliates and the backbone organization for service level agreements (SLAs) established via a shared services agreement. The decision-making model ensures that those who benefit from the shared services infrastructure have the right to be informed and to provide input, but they no longer have decision rights in IT decisions.

Technological change (e.g., the ease with which geo-location tools are available in web design, and advances in web content management tools for improved user experience) have caused networks including Canadian Parents for French to improve their web presence and the users' experience by creating a single web portal.

Recommendation 2 Set the price of digital membership at \$0. Focus efforts to generate earned income where there is high perceived value.

- While the membership fee is \$0, this does not mean that the annual renewal cycle is eliminated. Because of the legal basis for membership, there will continue to be an annual communication inviting people to confirm renewal of their membership.
- Ensure that signing-up or renewing a membership is as intuitive and smooth as buying a movie from Apple TV. Renewal or signing-up for membership should involve a few keystrokes only on a mobile device or computer.

Replace current sources of membership income by **broadening the practice of modest fees to participate in in-person and hybrid programs, to access resources or products.**

This recommendation with the important proviso that in each of those program streams, a small number of spots should be reserved for children whose families are unable to pay. No means testing should be implemented or required to admit children to the spots reserved for children whose families are unable to pay. Administering means testing is expensive and invasive. Good judgement should be exercised by program staff in making these determinations.

In communicating the value of membership, focus on two related attributes that confirm its value.

- **Members receive information about programs and members have the first opportunity to register in programs** (meaning that programs with limited number of places such as camps) will have a registration period for members before registration is open for the general public.

- **Members receive information and an early-bird registration opportunity to register for programs; they do not receive discounts on program participation fees!**

Recommendation 3 Charge a fee for non-digital membership for those members who are unable or prefer to receive membership communications in non-digital formats.

- The price of non-digital membership should cover all direct costs of continuing to print membership materials and newsletters in print formats and postage for distribution of materials.
- When launching the revised membership structure, ensure that a clear sunset date is set for non-digital membership with the effect that by December 31, 2025, non-digital membership will be sunset, and membership will be available in digital format exclusively (the sunset of analog approaches to membership is an example of the kind of difficult decision that requires bold leadership and reflects the capacity of an organization to be strategic; it is akin to Volvo declaring that after 2025 it will manufacture electric vehicles).
- Implement a channel-switching strategy to motivate constituents who receive analog communications to register for e-communications. Highlight important savings and environmental benefits of this strategy reflecting the opportunity to redeploy those resources in more programming for children and youth.

In unique instances where specific educational resources (e.g., colouring book) requires a print version, shift to print-on-demand strategies (i.e., offer a PDF file which constituents can use to print the education resource at home or at their local office supplies store).

Fees for a basic membership are not acceptable as a donation as a basic membership typically confer a tangible private benefit (e.g., as is the case with membership in museums which confer free admission privileges to the member)⁵.

Recommendation 4 Ensure all membership communications includes a soft ask for a donation to CPF highlighting its broad purpose of promotion of Canada’s linguistic duality. Ensure all donated income from the membership communications flow directly to the Branch in which the member is resident.

Recommendation 5 Focus on Communications to Members: Implement a digital-first strategy. Consistent with the digital age, **transform communications to members so that they include more images and video** (images and video have the benefit of being more powerful and engaging than text). Ensure communications to members are more frequent and bite sized. For example, transition the newsletter so that it is replaced with more frequent e-news flashes and updates that keep members current and excited about belonging to CPF.

Implement geolocation technology on the CPF main website. Internet geolocation is software capable of deducing the geographic position of a device connected to the internet allowing the website’s landing page to be personalized to the visitor’s province or territory of residence ideally with important information contained in the sliders about programs in that region. This kind of personalize will generate better engagement from the first click on each visit to the website.

The internet, powerful search engines and other tools of the digital age have created an explosion in the power of individual consumers. Just like online shoppers can compare prices, check in-store inventories, and make purchases at the click of a mobile device, the tools of the digital age have increased choices for donors and consumers of educational programs. To be competitive in this environment requires an ability to respect constituent choices. **All digital marketing activities should respect the privacy of individuals.**

⁵ In some cases, a portion of the membership contribution may be receipted as a donation if the value of the membership exceeds the value of the benefits conferred onto the member.

Unsubscribing from CPF e-communications should be easy and intuitive. Ideally, a preference center can be implemented allowing constituents more than a binary subscribe-unsubscribe choice. Inviting constituents to control the frequency and type of communications they receive (and respecting those choices) will deepen engagement.

Recommendation 6 **Exit CPF's direct involvement in all retail business lines** where CPF sells sundry items such as water bottles and t-shirt. If possible, contract an outsourced 'white label' solution to design, produce and fulfil the sales of a select number of items. If there is no vendor interest in such a contract, it confirms that there is no economic feasibility to the sale of branded CPF items.

Redeploy resources in support of development and marketing efforts.

Broaden the pool of CPF members.

In the approach described above, members are not directly a source of earned income. Yet, they remain a base of loyal and committed constituents. When their belonging and engagement is deepened through effective communications, they represent a source of earned income through participation in programs and of philanthropic income through receipted donations.

Members offer significant legitimacy in other ways. To Canadian Heritage, they represent an important justification for the expenditure of public funds. They are also available to be mobilized, including through electronic-advocacy platforms, when faced with opportunities to improve or defend access to FSL in public education systems and school boards.

Currently, there are limited efforts to prospect for new members. Chapter and Branch volunteers and staff promote membership through word-of-mouth. Word-of-mouth is the most effective marketing method available, and it is inexpensive. The pitfall of word-of-mouth efforts is that these have very narrow reach, being limited to available personal networks.

Other efforts are deployed to renew lapsed members through email and print communications, but these do not broaden the pool of constituents. Information about membership on the CPF website is a very passive marketing strategy as it relies on constituents having awareness of CPF and going in search of the membership information.

Recommendation 7 **Broaden the pool of members significantly through effective use of digital technologies:** systematic email capture efforts and the capture of internet protocol (IP) addresses AND the systematic use of direct digital marketing efforts and increased targeted advertising using search engine optimization and search marketing. Ensure regular testing of those efforts to allow for optimal resource use or to focus or suspend those expenditures.

In communicating the value of membership, focus on two related attributes that confirm its value:

- Members receive information about programs and members have the first opportunity to register in programs (meaning that programs with a limited number of places such as camps) will have a registration period for members before registration is open for the general public.
- Members receive information and an early-bird registration opportunity to register for programs; they do **not** receive discounts on program participation fees as the program participation fees are modest and represent the source of income replacement now that membership itself is proposed to be free.

Maintain a price for non-digital membership for those members who are unable or prefer to receive membership communications in non-digital formats.

- The price of non-digital membership should cover all direct costs of continuing to print membership materials and newsletters in print formats.
- When launching the revised membership structure, ensure that a clear sunset date is set for the non-digital membership program with the effect that by December 31, 2025, non-digital membership will be sunset, and membership will be available in digital format exclusively. This will focus limited staff resources where the highest potential lies.

Ensure all membership communications includes a soft ask for a donation to CPF highlighting its broad purpose of promotion of Canada's linguistic duality.

- Ensure all donated income (less any direct costs of fundraising such as credit card fees, and other related expenses) from the membership communications flow directly to the Branch in which the member is resident.

While the membership fee is \$0, this does not mean that the annual renewal cycle is eliminated.

- Because of the legal basis for membership, there will continue to be an annual communication inviting people to confirm renewal of their membership.
- Ensure that signing-up or renewing a membership is as intuitive and smooth as buying a movie from Apple TV. Renewal or signing-up for membership should involve a few keystrokes only on a mobile device or computer.

Note that a decision could be made by the National Board of the CPF to offer memberships for a three-year period only. This would provide significant benefit of reducing the amount of work involved in the renewal cycle and would increase the effective retention rate.

Invest in capabilities to diversify and generate revenues.

A few larger branches have been successful in developing a suite of fundraising programs. CPF-N implements relatively modest direct marketing campaigns (e.g., Giving Tuesday). These appear to be one-off efforts which are implemented without a series of communications to engage and 'prime the pump' before a pro-active solicitation is implemented.

CPF-N also invites volunteers and staff to donate part or all of their travel reimbursements. Giving from volunteers and staff is acknowledged to be the most important source of donations. The success of this campaign confirms that those who are deeply engaged are the most likely to give.

There is no journey mapping of a typical constituent. Let's imagine a parent who makes a first visit to the website where her email is captured. She receives a warm welcome email which highlights the benefit of early registration for members and offers a save-the-date for the PEI summer camp. Mom becomes a member and is quick to register her daughter at summer camp. The September e-newsletter contains dynamic video images from camp and testimonials from children. The Giving Tuesday solicitation 'hits the nerve' by replaying a powerful testimonial from a child at camp. The request for a donation will make it possible for more people to attend camp next summer. This is an example of a fundraising solicitation that harnesses the constituent engagement in a cause. This example also highlights a pro-active strategy to broaden the base as this parent is only recently on CPF's database.

- Recommendation 8** **Map journeys for typical constituents** and develop a plan for serial e-communications which culminate in high engagement before a specific fundraising ask is made. Ensure all communications, include a soft ask.
- Recommendation 9** **Significantly increase advertising expenditures** to boost efforts to broaden the base of constituents through SEO and SMO, or to boost social media posts.
- Recommendation 10** **Develop a policy ensuring that donor-directed funds** (less direct costs of fundraising) are used as directed. Where a donor does not direct their funds, ensure that the funds (net of direct fundraising costs) are directed to the branch in which the constituent resides.
- Recommendation 11** **Create a director-level position for marketing and development** to consolidate the leadership, human and other resources, and processes involved in marketing, website and digital media management, membership administration and fulfilment, database management, and fundraising. Ideally, this position would be one which straddles leadership in the backbone organization and in a branch reflecting shared interests and interdependence.
- Recommendation 12** **Turbocharge investment in CPF's digital ecosystem**⁶. At its core should be a single electronic constituent relationship management (eCRM) system where authorized personnel can have a view of a constituent with all of their relationship to CPF (e.g., former board member, parent of child in CPF programing from 2004-2010, board members of CPF-PEI, then board members of CPF-N, etc.). Currently, CPF has multiple eCRMs and many smaller databases which are housed in Excel on local devices. These various databases are not linked with the effect that a single view of a constituent's relationships is not available.

⁶ A digital ecosystem is the suite of software and IT infrastructure including owned social media channels, content management software, websites, online payment processing portals or tools, and databases which are intelligently inter-connected. Together, they power the implementation of a digital development and marketing strategy.



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