

# CSAEBC 2018 Strategic Plan

February 2018



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## I. INTRODUCTION

The CSAEBC leadership team met in January 2018 to develop a strategic plan to guide the work of the leadership team and its committees over the coming twelve months. The one-day workshop was facilitated by CSAEBC Past President, Carol-Anne Moutinho.

CSAE was represented nationally at the meeting by Barbette Igonia, CSAE national director and Treasurer. The group spent some time discussing national priorities to ensure CSAEBC's plan aligned and supported the association's work at a local level. The January timing of the planning session was specifically planned to align CSAEBC's planning and budgeting activities with CSAE national and will continue as part of the yearly planning cycle.

Although the CSAE 2018 national membership survey was not completed in time for this meeting, the CSAEBC plan was also informed by a verbal summary of 25 member interviews conducted in January by CSAE research partner, The Portage Group.

The following individuals attended the meeting:

- Rhian Williams, CSAEBC Chair, Events and Content co-chair
- Parveen Parhar, Membership and Network Development co-chair
- Rick Nickelchok, Membership and Network Development co-chair
- Carla Giles, Membership and Network Development Committee Member
- Urvi Ramsoondar, Events and Content Committee Member
- Carol-Anne Moutinho, Membership and Network Development Committee Member
- Zena Peden, CSAEBC Manager, Events and Sponsorship
- Barbette Igonia (observing), CSAE National Board Treasurer

Regrets:

- Giovanna Boniface, CSAEBC Vice Chair, Events and Content co-chair
- Tim Read, Membership and Network Development Committee Member

<b>CSAEBBC Strategic Plan 2018</b>		
<p>The primary role of CSABC is to provide quality local education, professional development, content, and networking opportunities for members and stakeholders across British Columbia.</p> <p>CSAEBBC’s secondary roles are to provide local support, input and insight to CSAE national in areas that include: National events and education in BC; member growth, engagement and retention; and, marketing and content development.</p> <p>CSAEBBC will strive to enhance the member experience locally by working to achieve the following objectives and preliminary strategies.</p>		
<b>Committee</b>	<b>Key Objective</b>	<b>Preliminary Strategies</b>
<b>Events and Content</b>	<p>To engage all members by providing strong ROI via:</p> <ol style="list-style-type: none"> <li>1. Events (high profile)</li> <li>2. Executive focused events (wine, round tables, lunch n’ learn)</li> <li>3. MLA event, golf tournament, round tables in Fraser Valley, Southern Interior, Vancouver Island</li> <li>4. Events, webinars, executive topics, more regional seminars.</li> </ol>	<ul style="list-style-type: none"> <li>• Fun event 2018: Create new ideas for holiday event for 2018. 2019 holiday event to possibly change to evening event with theme. Make it ‘the’ event to attend</li> <li>• ‘Businesses’ bring executives to events</li> <li>• Explore MLA event that engages multiple regions – consider streaming/webinar</li> </ul>
<b>Membership and Network Development</b>	<p>To foster a recognition of CSAEBBC and renew relationships with:</p> <ol style="list-style-type: none"> <li>1. Council – aligning/integrating our approach to work together. Thinking about succession planning</li> <li>2. Members – engaging existing members (e.g. letter/email outreach), past executives (e.g. executive cocktails)</li> <li>3. Sponsors: fostering existing relationships, identifying and capitalizing on potential sponsors.</li> </ol>	<ul style="list-style-type: none"> <li>• Member package template:             <ol style="list-style-type: none"> <li>1. Annual recognition letter – existing members</li> <li>2. Welcome letter and follow up call (new members)</li> <li>3. Year-end survey (to communicate and engage) all members</li> </ol> </li> <li>• Phone tree</li> <li>• Local networking – provide the tools and know-how to organize like-minded educational sessions</li> </ul>

## II. CSAEBEC COMMITTEE STRUCTURE

Following discussion of the role of CSAEBEC and how it can better align its work with CSAE’s national focus and priorities, CSAEBEC leadership decided to consolidate its three committees into two. Because CSAEBEC content is largely driven by events, it was felt that combining these two committees would facilitate and strengthen CSAEBEC’s communications efforts. Further to this, the network development committee mandate was expanded to include an enhanced and more tactical approach to member outreach and engagement.

CSAEBEC’s committees are summarized, below:

Committee	Focus and Responsibility	Members
<b>Events and Content</b>	<ul style="list-style-type: none"> <li>• Content and quality of events</li> <li>• Events planning</li> <li>• Marketing and communication (enews, social media, curated content)</li> </ul>	Giovanna Boniface, Co-Chair Rhian Williams, Co-Chair Zena Peden Urvi Ramsoondar Steven Ing
<b>Membership and Network Development</b>	<ul style="list-style-type: none"> <li>• New member outreach</li> <li>• Existing member outreach and engagement</li> <li>• Grow and engage new members and stakeholders</li> <li>• Re-engage former members</li> </ul>	Rick Nickelchok, Co-Chair Parveen Parhar, Co-Chair Tim Read Carla Giles Carol-Anne Moutinho

### **III. NEXT STEPS**

Following approval of CSAEBBC's strategic plan, the heavy lifting will begin by the committees who will continue to develop and implement the objectives and strategies established in January. A sample committee work-plan template has been included as an appendix to this document.

#### IV. COMMITTEE SAMPLE WORK-PLAN TEMPLATE

Committee Work Plan TEMPLATE					
Objective					
Strategies	Actions	Accountability	Timeline	Progress	Next Check In
Objective					
Strategies	Actions	Accountability	Timeline	Progress	Next Check In

### V. APPENDIX I: WORKSHOP OUTPUT









