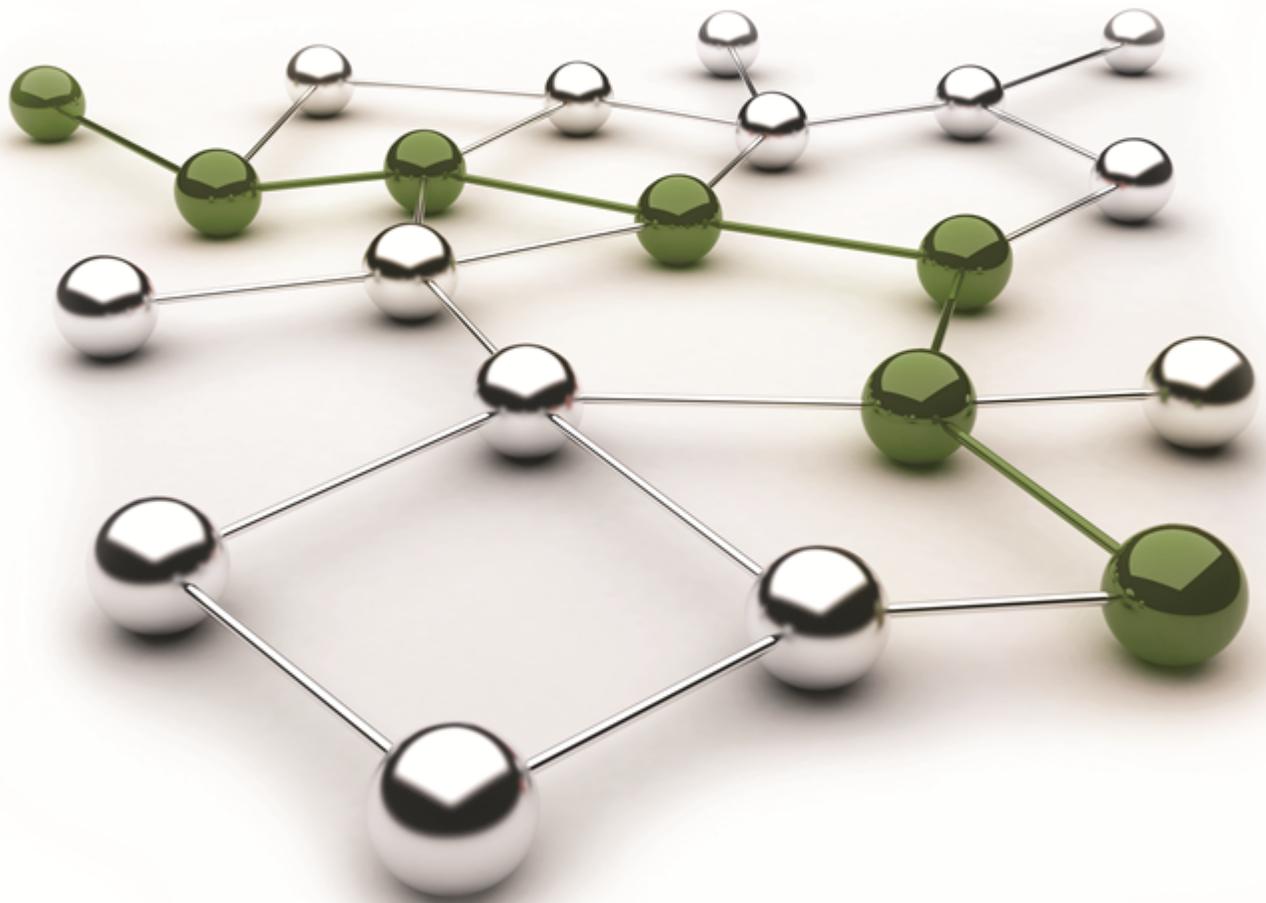


City of Edmonton Management Association (CEMA)

## Communication Strategy 2014 - 2016

November 30, 2013



the **DAGNY**  
partnership

STRATEGIC COMMUNICATION SOLUTIONS

## TABLE OF CONTENTS

STRATEGY DEVELOPMENT PROCESS	PAGE 2
SITUATIONAL ANALYSIS	PAGE 2
COMMUNICATION GOAL & OBJECTIVES	PAGE 5
TARGET AUDIENCE	PAGE 5
KEY MESSAGES	PAGE 6
TACTICAL OVERVIEW	PAGE 7
TACTICAL PLAN, BUDGET & TIMELINE	PAGE 9

# CEMA Communication Strategy 2014 - 2016

## STRATEGY REVIEW PROCESS

In May of 2012 the volunteers with City of Edmonton Management Association (CEMA) commenced the process of developing a communication plan to guide the messages, priorities and activities that would be undertaken by CEMA in 2013.

The Communication Plan 2013 was finalized and circulated for several rounds of review in late 2012 and early 2013. In late spring 2013, Communications Committee members approached Dagny Alston of The DAGNY Partnership and asked the firm to review the plan and provide a second opinion and any recommendations that might improve its approach and optimize the deployment of financial and human resources.

The DAGNY Partnership's preliminary review indicated that the Plan covers most of the bases reasonably well; however, it would benefit from some work to better align, organize and prioritize messaging and action plans.

The DAGNY Partnership was contracted to build off the work done to date and refine, edit, prioritize and expand the current Communication Plan as needed. The desired outcome is a focused program of activities clustered to serve priority audiences and outcomes.

In addition to reviewing the existing draft Communication Plan 2013, The DAGNY Partnership solicited input from the Communications Committee members around any issues, priorities and scope of resources available. The DAGNY Partnership also reviewed current information and material on CEMA's website, its brochure and member satisfaction survey.

Following this review the revised Communication Strategy 2014 – 2016 was drafted for review and consideration by CEMA.

## SITUATIONAL ANALYSIS

CEMA is a voluntary membership association that supports and represents City of Edmonton management and out-of-scope personnel regarding various employment matters. The Association currently represents approximately 1,000 members, over 90% of the total pool of management and out-of-scope employees and, as such, can provide a legitimate voice for this group of civic employees with the senior civic administrative and political leadership.

Management and out-of-scope employees are as diverse as the range of civic departments that they work in or the professional or educational backgrounds that they bring to their positions. This provides both a challenge and an opportunity as CEMA strives to focus its services and advocacy to address the collective needs.

Understanding why staff chooses to join is currently more anecdotal than documented; however, members' patterns of participation would lean toward seeing this organization as an opportunity to network and meet other civic managers across the corporation, gain insight into civic initiatives and connect with civic leadership outside the formal workplace setting. It is also suggested that the modest payroll deduction fee contributes to the ease of membership recruitment.

## CEMA Communication Strategy 2014 - 2016

### SITUATIONAL ANALYSIS

(cont'd)

Observations made by the Communications Committee members highlight the important recruitment role or influence that Human Resources plays in sharing information and the potential membership of new recruits. Word of mouth peer discussion and promotion from existing members is also seen as a strong influencer.

As with many organizations, active participation varies depending on the type of activity and or the topic of the issues being explored. CEMA's recent Member Satisfaction Survey (January 2013) provides insight into members' interests and priorities.

With nearly 50% of membership sharing their views, it is notable there is clear interest in the organization and what it offers. Results include:

- Luncheons very popular activity
  - 81% of members attended at least one luncheon with many attending all four per year, of which received a 78% satisfaction rating
  - Speaker ideas highlight CEMA being seen as a conduit for facilitating presentations from civic leaders, or on major civic projects or initiatives and key employment issues
  - Some social or networking events are valued by a more focused group of members (e.g. Christmas lunch and golf tournament)
- Other events combine learning and social or fun opportunities and have been supported by fewer members (40-55% of respondents) but still notable
  - City of Edmonton facility tours and golf tournament
- Advocacy and policy activities less well known but generally satisfied with effort by those aware of them
  - Vacation Carryover Task Force – 50% unaware, 39% satisfied
  - Benefits Study and Recommendations – 86% aware, 75% satisfied
  - Services including legal assistance, retirement recognition, Edmonton Civic Employees Charitable Assistance Fund and bereavement condolences – 70% aware
  - LTD Annual Rate Review – 52% aware, 48% satisfied
- Website is found to be useful by 89% of respondents

In probing why people don't participate, responses were related primarily to work pressures and conflicts with work schedule.

In reviewing the survey's unaided comments and suggestions, members recognize and appreciate the work CEMA does and see CEMA as more than a social club. They view CEMA as an avenue for influencing key issues impacting their employment condition and benefits. Several suggestions encouraged an increase in timely, relevant communication with members which would highlight work or initiatives that CEMA is involved with – beyond soliciting members to attend luncheons and special events.

## CEMA Communication Strategy 2014 - 2016

### SITUATIONAL ANALYSIS

(cont'd)

Balancing out the desire to increase communication to the membership and key civic influencers is the reality of very limited resources – both human and financial. While CEMA can tap into the civic network and has a couple of fundamental tools such as the website in place, it still takes staff or volunteer time or contract resources to optimize the use of these tools.

Communication is a tool to support the business objectives of a membership organization and, as such, should reflect the priority, tone and culture of that organization. A key question for CEMA to consider is what is the priority driving its image. Is CEMA an issue/policy discussion, review and advocacy organization or is it a marketer for membership events and services? While not completely exclusive of each other, based on priority, the tone and choice of tactics may be different.

Secondly, it always takes more time and effort to launch an initiative than to maintain an initiative. While it is unwise to become complacent with successful programs, keeping them going does not take the effort of establishing them and getting them going in the first place.

For example CEMA's membership recruitment would fall in the category of a sustaining initiative. Whether it is the nominal payroll cost, HR's timing of sharing the application form or peer influence with new recruits, the current 90% recruitment range is notable. It is questionable that return on the effort needed to secure another 5 – 8% would be worth it while providing focused support material to the recruitment and peer network to assist them in promoting the association may suffice.

When resources are very constrained it becomes even more important to prioritize where you invest scarce communication resources. Each tool or activity should deliver the message multiple times or to multiple audiences.

Currently CEMA communicates to and with members through its luncheon and other events, e-mail, website and a promotional/recruitment brochure. In addition, special outreach, member discussion groups and surveys are undertaken to probe attitudes and solicit opinions or positions regarding targeted employment and association-related issues.

Some of these communication approaches are used to inform while others are designed to engage members in a two-way discussion. For an organization such as CEMA, both types of communication are important – especially in strengthening its reputation as the voice of management.

Tapping into the membership as active volunteers to manage and deliver aspects of the communication program offers opportunities and challenges. There is obviously a pool of currently untapped members to recruit from, but the challenge is finding the right skill fit for the right role with the time to deliver a program. Some organizations find that the time it takes to manage this is more than it would take to hire someone to do it.

Having a promotional tool kit which offers off-the-shelf tools or basics that can be easily modified by either staff or volunteers enhances the consistency and professionalism of the message delivery and is a key priority for a basic communication program.

# CEMA Communication Strategy 2014 - 2016

## COMMUNICATION GOAL

To position CEMA as **the voice** for management and out-of-scope employees of the City of Edmonton on employment-related matters

## COMMUNICATION OBJECTIVES

1. To **retain a membership** of 90% plus
2. To **increase participation by 15% in the development of CEMA** positions on key civic issues impacting management and out-of-scope employees
3. To **achieve 80% awareness of CEMA's positions** on key employment-related issues impacting management and out-of-scope employees
4. To **strengthen CEMA's reputation** with senior leadership and City Council as a one-stop shop for input from civic managers on targeted employment-related issues
5. To **strengthen members' awareness** and understanding of CEMA services, major civic directions/directives and initiatives
6. To **provide a forum** for cross-departmental interaction between management and out-of-scope employees

## TARGET AUDIENCES

### PRIMARY TARGET AUDIENCES

- CEMA current members
  - Active members – event attendees, committee members, department representatives, policy participants
  - Passive members
- New management and out-of-scope employees
- Senior civic leadership – Administration and Council

### SECONDARY TARGET AUDIENCES

- Recruitment support – City Human Resources staff
- Public sector influencers
  - Policy and pension-related civic and provincial staff

## CEMA Communication Strategy 2014 - 2016

### KEY MESSAGES

Key messages are the foundation of communication and association marketing. They are not slogans but simple statements that reflect the essence of what needs to be communicated. Collectively the key messages need to paint the full picture of the product, organization or position in the minds of the target audience. They are critical in creating or fostering the desired image, reputation or desired action.

While other information may be included in the communication tools, the essence of the key messages should be integrated in a frequent and consistent manner across all the products.

Key messages help to link, leverage and re-enforce the most important information to the target audience. Frequency and repetition of the underlying message help the association to cut through the information clutter created by today's avalanche of information.

This is particularly important given the limited resources available for CEMA to build and strength its image in the minds of both its members and key influencers.

1. CEMA's breadth of membership, over 90% of management and out-of-scope employees, offers the collective voice for management and out-of-scope employees on employment-related and civic management matters.
2. CEMA is a vibrant, responsive organization that actively engages with, listens to and advocates for the priorities and positions of its members on civic management matters.
3. CEMA strives to create solutions to management issues facing its membership.
4. CEMA provides civic leadership a one-stop shop for insight and meaningful input on key management issues.
5. CEMA offers its members a cross departmental network to share insights, knowledge and understanding while fostering fellowship between civic managers.
6. CEMA supports its membership through targeted member-specific services from legal assistance to bereavement condolences, and from retiree gifts to access to the Edmonton Civic Employees Charitable Assistance Fund (ECECAF).

## CEMA Communication Strategy 2014 - 2016

### TACTICAL OVERVIEW

The tactical strategy has been organized to recognize the need to support existing activities, enhance the professionalism of the communication material and strategically expand the frequency of communication to members within very constrained resources.

Each of the tactics is grouped together in a communication stream designed to frame the message, recruit and retain members, foster member participation and advocate CEMA members' positions. The overall thrust is summarized below.

#### **Strategy Stream 1- Communication tool box**

This stream focuses on updating and expanding basic communication to more effectively communicate key messages in an updated and professional manner. The tools are designed to be off-the-shelf products and templates that can be customized as needed by staff and volunteers. They support delivery of the messages for the other communication streams.

##### **Desired Outcomes:**

- Communication tools that present a positive professional image of CEMA to their members and target audiences
- Enhanced consistency of message
- Tools to support streamlined and cost-effective delivery of information to CEMA's target audiences by staff and volunteers

#### **Strategy Stream 2 – Member recruitment, retention and awareness building**

With the significant percentage of available employees already members, the thrust of this stream is to update the basic recruitment tools and support active peer-to-peer recruitment.

Membership retention occurs when people are aware of and understand the value of the activities or benefits offered by an organization. This stream focuses on those activities that will enhance awareness of CEMA's initiatives and member services.

##### **Desired Outcomes:**

- Retain a membership level of over 90% of management and out-of-scope employees
- Over 80% of the membership understand and support the value-added benefit of CEMA membership
- Increase awareness of CEMA's activities, initiatives, positions and services to 80% of CEMA members
- Over 70% of the membership indicate satisfaction and support for CEMA's advocacy positions

# CEMA Communication Strategy 2014 - 2016

## TACTICAL OVERVIEW (cont'd)

### Strategy Stream 3 – Member participation building

CEMA's success in bringing forward a legitimate collective voice is more than pure membership numbers; it is driven by its ability to attract participation from a significant percentage of its membership through various events and activities.

This stream focuses on activities that convert awareness into active participation in CEMA events, forums, discussion groups, policy reviews or feedback sessions.

#### Desired Outcomes:

- Retain 80% membership participation in at least one CEMA event per year
- Increase membership participation by 50% over the next three years in CEMA special events (other than luncheons)
- Increase participation to 50% of members providing input into CEMA discussion, policy or evaluation forums
- Increase CEMA committee participation by 20%

### Strategy Stream 4 – Advocacy program

This stream focuses efforts toward moving CEMA's position forward with key decision-makers.

#### Desired Outcomes:

- CEMA continues to proactively engage senior leadership in key issues annually
- CEMA's positions on key policy discussions are integrated into final recommendations and/or directions
- CEMA is perceived as the 'go-to' organization for issues with management and out-of-scope staff by senior leadership and or City Council

### Budget Summary

Communication Streams Summary	Strategic Marketing Plan Order of Magnitude Budget by Year		
	2014	2015	2016
<i>Strategy Stream 1 - Communication tool box</i>	\$6,250	\$4,500	\$1,500
<i>Strategy Stream 2 - Member recruitment, retention &amp; awareness building</i>	\$1,750	\$8,100	\$7,750
<i>Strategy Stream 3 - Member participation building</i>	\$500	\$2,000	\$500
<i>Strategy Stream 4 - Advocacy program</i>	\$0	\$0	\$0
<b>Sub Total - Communication Program</b>	<b>\$8,500</b>	<b>\$14,600</b>	<b>\$9,750</b>
<b>Inflation contingency</b>		<b>\$400</b>	<b>\$400</b>
<b>Total Communication Program</b>	<b>\$8,500</b>	<b>\$15,000</b>	<b>\$10,150</b>

# CEMA Communication Strategy 2014 - 2016

## TACTICAL PLAN, BUDGET & TIMELINE

Primary Objective Served & Priority (A, B, C)	CEMA Staff or Volunteer	Contract Services	Activity	Strategic Marketing Plan Order of Magnitude Budget by Year			Timeline												Program Details & Assumptions								
				2014	2015	2016	2014				2015				2016												
							Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4									
			<b>Strategy Stream 1 - Communication tool box</b>	<b>\$6,250</b>	<b>\$4,500</b>	<b>\$1,500</b>																					
Objective 3			1.0 CEMA Corporate information tools	\$6,250	\$4,500	\$1,500	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	
A		Graphic design	1.1 Revised Visual Identity/wordmark	\$750			X																				Re-design word mark professionally.
A	Staff/volunteers write material	Graphic design, structure & web conversion	1.2 Updated website - visual design, organization and survey	\$5,000	\$500	\$1,000	X	X	X			X	X								X	X					Year 1 - review and update structure, information, organization and graphic design; Year 2 - integrate in a regular survey feature (see 3.2.3). Budget in Yr. 2 & 3 includes minor web updates.
A		Graphic design	1.3 E-newsletter template for quarterly members' newsletter		\$750							X															Design template to be used by staff or volunteers for e-newsletter in 2.2.1.
B	Staff/volunteers write material	Graphic design, print & display system	1.4 Pullup display - 3.5 foot wide free standing format		\$1,000							X	X														Free standing unit for use at events and civic employment forums and displays. Cartridges can be interchangeable with additional panels if needed.
A	Staff/volunteers write material	Design of 3 banner variations & 1 ad template	1.5 Electronic ad template (City Link) and specialized CEMA alert e-banners to promote events and announcements in e-mail		\$750							X															Design template for integrating into City Link and a feature HTML masthead for e-mail marketing to differentiate different announcements.
B	Staff/volunteers write material		1.6 Social media program including a Facebook page and a "Twitter" team	\$500	\$500	\$500		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	Year 1 - set up and promote a Facebook and LinkedIn site for members' posting. Link to the website. Establish a Social Media Swat Team that posts information and encourages discussion. Establish a "Twitter Team" that tweets to promote upcoming events or during CEMA events. Year 2 & 3 - implement as resources dictate.
C	Staff/volunteers write material	Graphic design	1.7 PowerPoint slide template		\$1,000							X															Design a PowerPoint slide template set of 8 - 10 formats with new visual identity and graphics.



# CEMA Communication Strategy 2014 - 2016

## TACTICAL PLAN, BUDGET & TIMELINE (cont.)

Primary Objective Served & Priority (A, B, C)	CEMA Staff or Volunteer	Contract Services	Activity	Strategic Marketing Plan Order of Magnitude Budget by Year			Timeline												Program Details & Assumptions								
				2014	2015	2016	2014				2015				2016												
							Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4									
			<b>Strategy Stream 3 - Member participation building</b>	\$500	\$2,000	\$500																					
Objective 3,5 & 6			3.1 Member events - networking and information sharing	\$0	\$0	\$0	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	Continue existing luncheon program with a focus on speakers that link into major civic initiatives, senior leadership and management related topics. These events are valued and offer a good forum to promote other CEMA initiatives and to encourage dialogue with members. Consideration could be given to offer a breakfast option and/or continue "behind the scenes" site visits to provide an alternative time and unique experience. Each session should be structured to provide a brief update on CEMA activities and cross promote upcoming events and initiatives.
A	Staff/volunteers to organize		3.1.1 State of the City - City Manager's Address				X				X					X										Integrated into the luncheon program continue to host an annual "State of the City" address by the City Manager providing insight into the strategic direction for the upcoming year. Open this event to non-members on a fee basis. Fee should reflect more than cost recovery as an incentive to join CEMA.	
A	Staff/volunteers to write & distribute		3.1.1 Event marketing				X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	Promote through member e-mail alerts with a special event banner (Item 1.5) linked to the website, posting on website calendar, Facebook, LinkedIn and Twitter. Included in the calendar and cross promoted through newsletter and earlier events. Where possible, market current and upcoming events each time.
C	CEMA Social Media and Twitter Team		3.1.2 Social media marketing (Facebook, LinkedIn & Twitter)				X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	Establish a CEMA LinkedIn Group, Twitter hashtag and Facebook page and use to promote events and member discussion on issues.
A	Staff, Board, Committee and Departmental Reps		3.1.3 "Bring a guest" promotion				X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	Implement a program where Board, Committee and Departmental reps are offered a guest card to invite a non-member to attend one of the luncheon events or the Christmas social event. Budget for discounted or comp tickets factored into the overall event budget.



# CEMA Communication Strategy 2014 - 2016

## TACTICAL PLAN, BUDGET & TIMELINE (cont.)

Primary Objective Served & Priority (A, B, C)	CEMA Staff or Volunteer	Contract Services	Activity	Strategic Marketing Plan Order of Magnitude Budget by Year			Timeline												Program Details & Assumptions		
				2014	2015	2016	2014				2015				2016						
							Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4			
			<i>Strategy Stream 4 - Advocacy program</i>	\$0	\$0	\$0															
Objective 4 - Priority A	Staff/Board members		4.1 Annual presentation to senior leadership	\$0	\$0	\$0		X		X			X		X			X	X	Pursue an annual presentation and round table discussion with senior civic leadership representatives to share the issues, views and ideas from the membership and gather input from senior leadership as to areas or issues where CEMA can assist the City and its members.	
Objective 1 & 4 - Priority A	Staff/volunteers		4.2 Issue specific advocacy	\$0	\$0	\$0	X	X	X	X	X	X	X	X	X	X	X	X	X	X	As issues warrant, develop and present members' views, suggestions and options to key stakeholders and civic leaders. Post presentations on the website and share results through the communication avenues listed in Item 2.2.
<b>Sub Total Communication Program</b>				<b>\$8,500</b>	<b>\$14,600</b>	<b>\$9,750</b>															
<b>Inflation contingency</b>					<b>\$400</b>	<b>\$400</b>															
<b>Total Communication Program</b>				<b>\$8,500</b>	<b>\$15,000</b>	<b>\$10,150</b>															