

ENDEAVOUR CONSULTING



[FINAL PRESENTATION]

Canadian Group Psychotherapy Association

April 29th, 2011

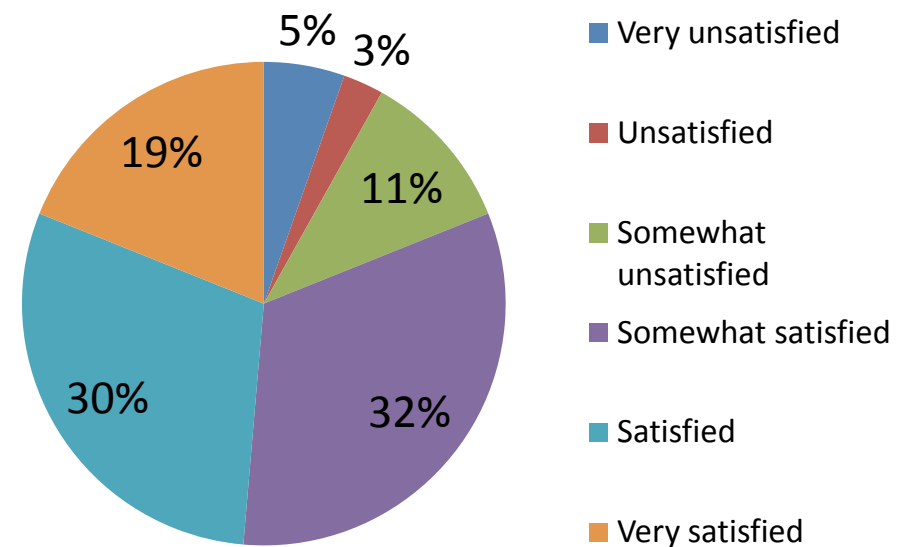


- Welcome and Introduction of Teams
- Review of Statement of Work Deliverables
- Key Insights
- Revised Mission, Vision and Goals
- Strategic Framework, Recommendations and Timelines
- Immediate Next Steps
- Discussion

1. **Recommendations on potential revisions & refinement to the CGPA's mission & vision**
2. A comprehensive review of the current mission & objectives of the CGPA and how they relate to their membership base and the community they serve
 - **Current overview of the community's perception of CGPA's mission & objectives**
 - **Recommendations on key services/programs that can be offered to best meet members needs**
 - Financial assessment of service/program recommendations and review of other revenue/funding opportunities
3. An implementation strategy for recruiting, retaining and engaging membership/volunteers
 - **Recommendations on refinements to current membership structure and process**
 - Recruitment process (start to finish)
 - Communication and marketing initiatives
 - Financial assessments of recommended methods and overview of time & effort investments necessary

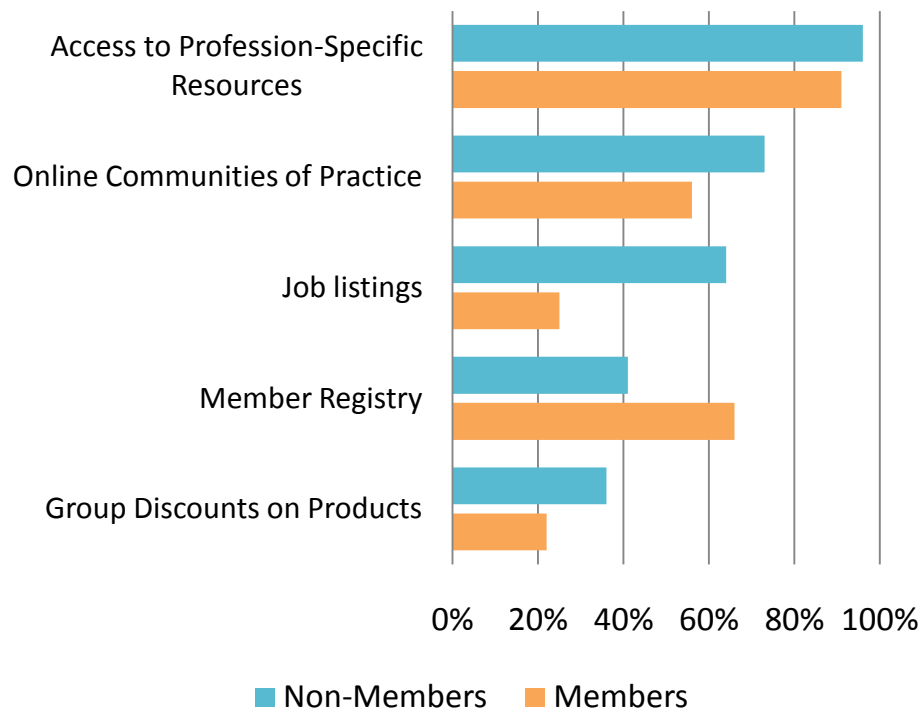
- Only Canadian organization with a mandate specific to group therapy and processes
- Long standing membership base
- Conference and networking opportunities are extremely well received and valuable to members
- Word of mouth is a powerful tool for recruitment

How satisfied are you with the value that the CPGA membership provides you with?



Survey: 81% of current membership is satisfied with the value of their CGPA membership.

**What exclusive benefits would you like to receive as a CGPA member?
Select all that apply.**



- It's complicated to become a member and benefits of membership are not well defined
- Not well known outside of the membership
- A large number of members do not pay member fees
- Lacking relevance to new professionals
- Students represent a vibrant and untapped resource
- Members want more training and education opportunities

Members want more exclusive benefits, training and education opportunities.

VISION, MISSION AND GOALS

Vision: We work to create public awareness about the merits of group therapy and processes in Canada, and become the primary resource for expertise, education and networking in the field.

Mission: To provide Canada-wide accessible expertise, education and networking resources to students and professionals interested in group therapy and processes.

Goals: Create an open environment and act as a central communication source providing:

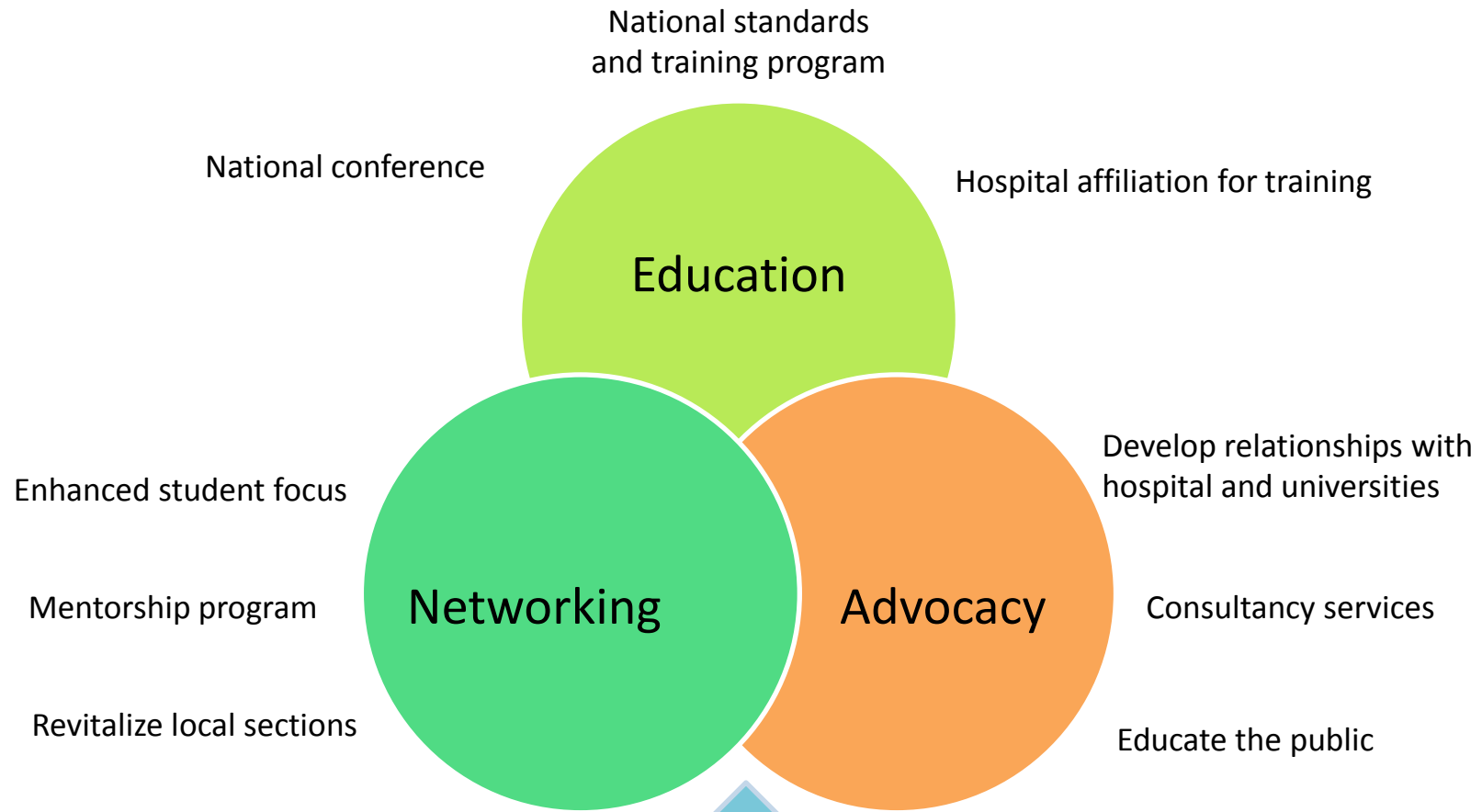
1. Educational training programs and networking conferences pertaining to group therapy and processes.

2. Networking, mentorship and communication forums for open discussions on group therapy and processes.

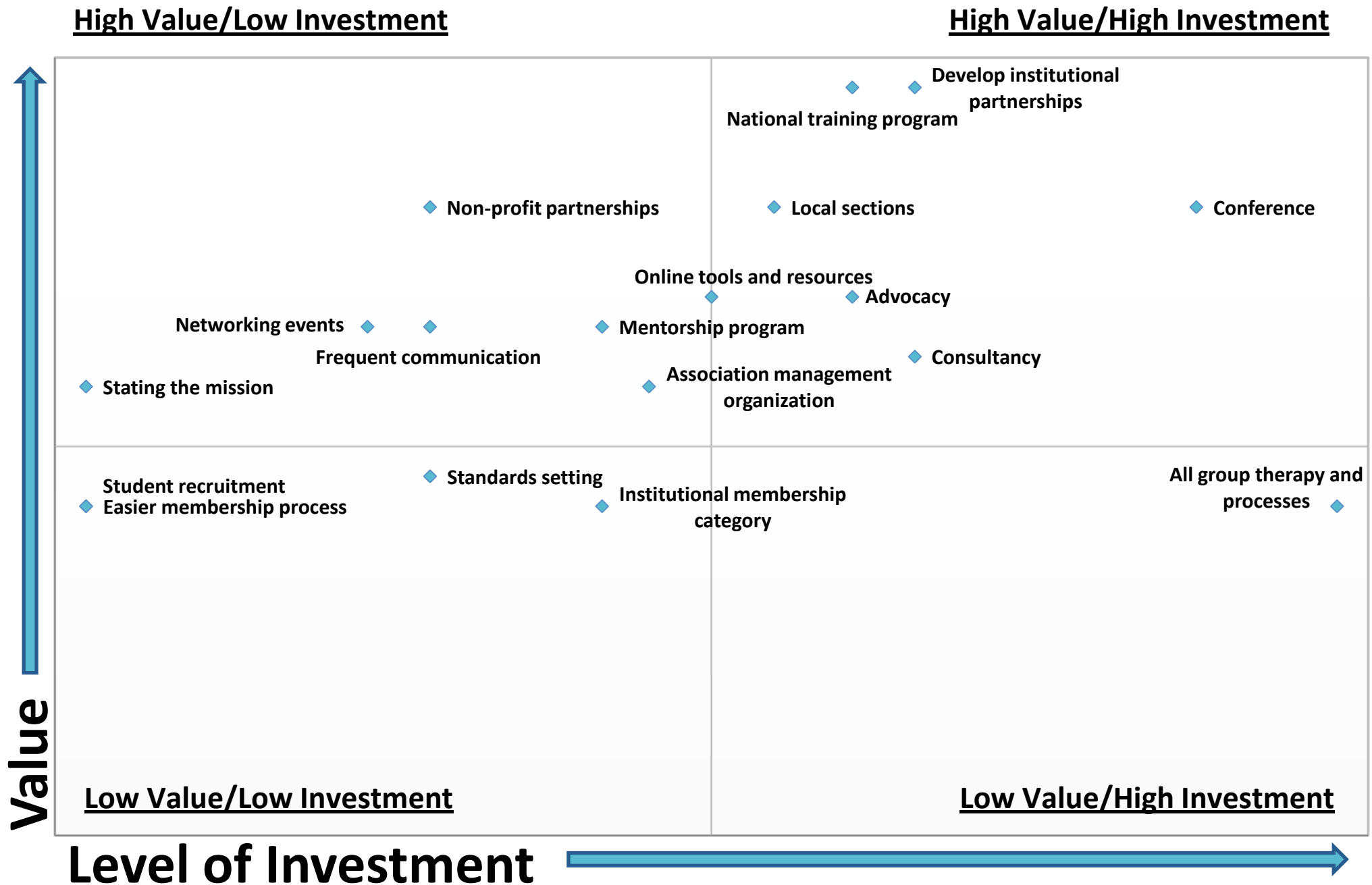
3. An online hub for resources and discussions on current practices in group therapy and processes.

4. A bridge to universities, residencies, health centres and hospitals to educate about the value of group therapy and processes.

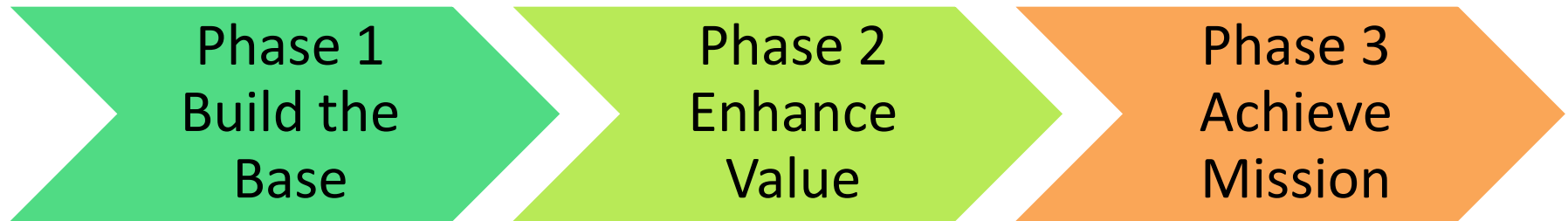
STRATEGIC FRAMEWORK



STRATEGIC OPTIONS



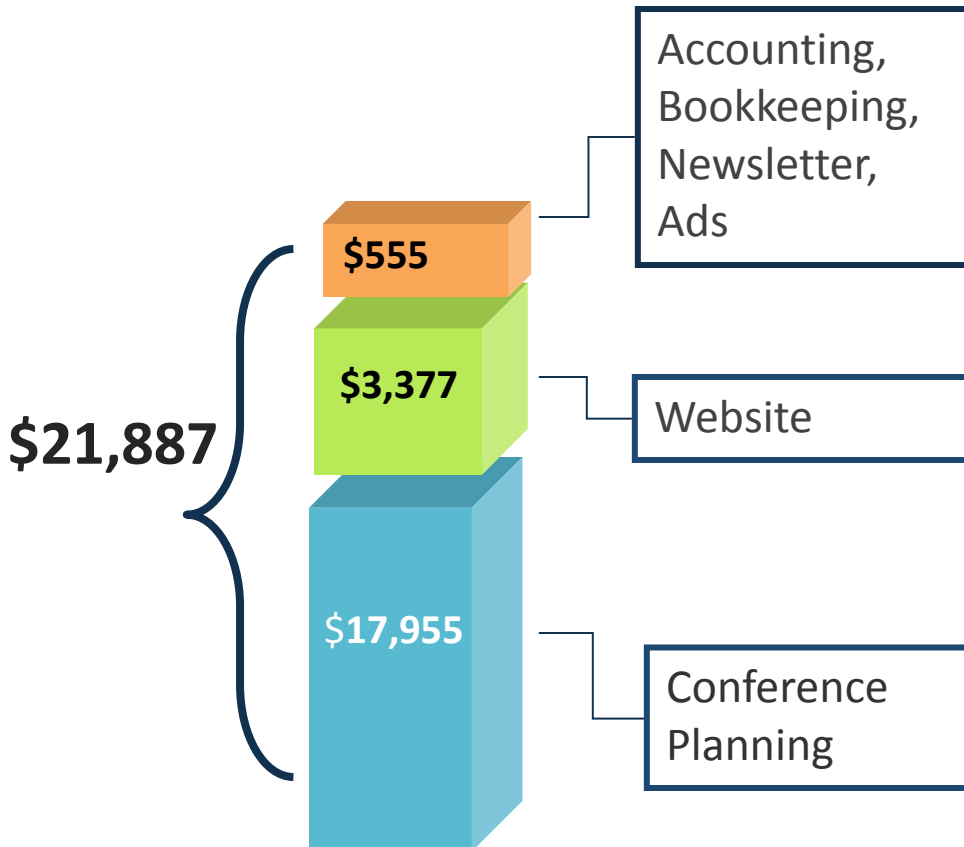
IMPLEMENTATION PHASES



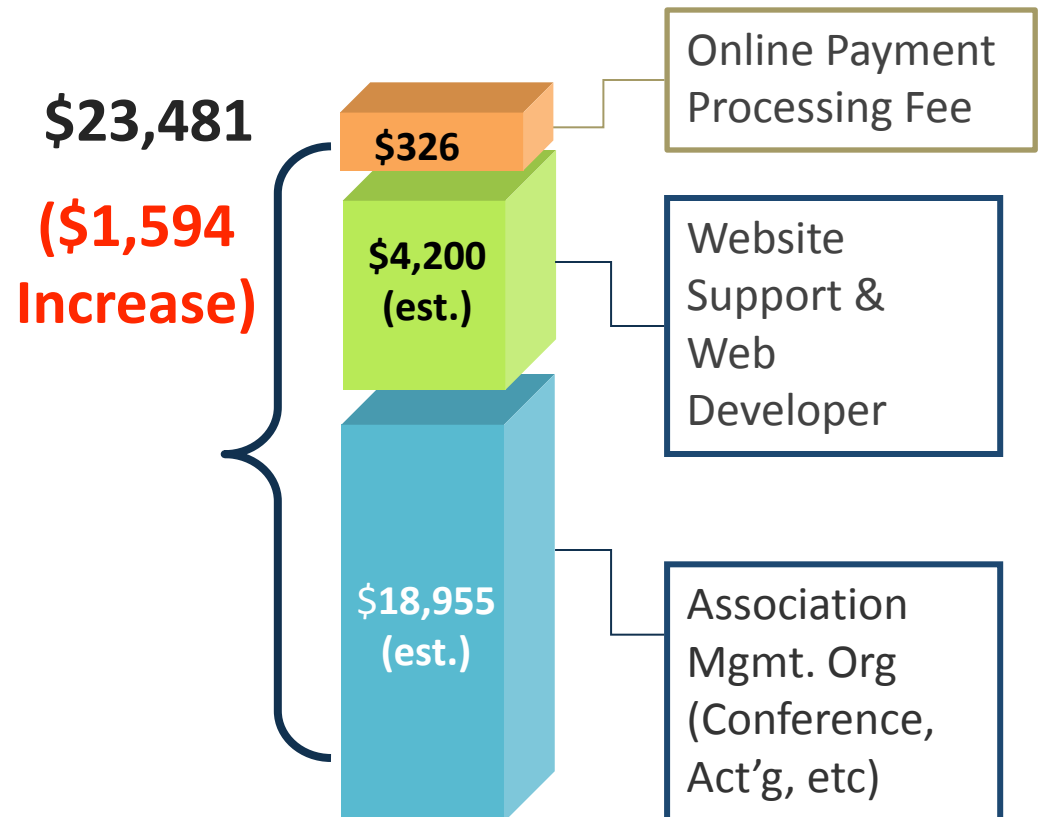
<p>Adding Value for Members</p>	<ul style="list-style-type: none"> •Focus on student recruitment •Mentorship program 	<ul style="list-style-type: none"> •Launch national training program •Standards setting •Institutional membership category 	<ul style="list-style-type: none"> •Advocacy •Expand to all group therapy and processes •Hospital affiliation for training •Local Sections •Consultancy services
<p>Enablers</p>	<ul style="list-style-type: none"> •Association management organization •Online tools and resources •Refine member structure •Redesign payment process 	<ul style="list-style-type: none"> •Partnerships 	

FINANCIAL IMPLICATIONS PHASE 1

Select Current Expenses (2010)



Select Proposed Expenses



INCREASE REVENUES

Membership Growth		Proposed Year 1 Increases		
Number of Members <i>Increase in Membership Base</i>	2010 244	256 5%	256 5%	256 5%
Number of Paying Members <i>Increase in Paying Members</i>	138	152 10%	166 20.0%	179 30.0%
Increase in Membership Fees Collected over 2010		\$1,359	\$2,718	\$4,076
<i>Percentage of Members who Pay</i>	57%	59%	65%	70%

*This will more than offset the expected increases due to IT (website) and AMO (back-office) expenses

Increase in members paying fees will increase revenues to offset increased expenses.

BUILD THE BASE

PHASE 1: RECOMMENDATIONS

STUDENT RECRUITMENT

Bring fresh ideas and additional volunteer hours to assist an already stretched executive committee. CGPA currently has only 1 student member.

Rationale

- **This will assist the CGPA in retention and growth of its membership base**
- CGPA is experiencing volunteer burnout
- Students have expressed interest in being mentored
- Few other psychotherapy organizations are targeting students
- Will allow CGPA to teach the value of group therapy and processes early in the career.

Benefits

- **For CGPA:**
- **Volunteer hours**
- **Fresh ideas**
- Technical know-how
- Students will be associated with group for years to come (plenty of membership dues)
- **For Students:**
- **Mentorship program**
- **Resume building - Differentiation Tool**
- Networking with and learning from seasoned professionals
- Belonging to a recognized body

Implementation

- Leverage network of professionals to get the word out to students through hospitals & universities
- Advertise the value of mentorship and the opportunities to network with people who may hire them in the future
- Involve students in decision-making (e.g. student member on the board)
- Leverage Facebook, LinkedIn and Twitter

MENTORSHIP PROGRAM

Both students and seasoned professionals expressed interest in a mentorship program.
Builds on CGPA's strengths in networking

Rationale

- **A method of providing training and networking early on before the training program is established**
- Supports focus on student recruitment
- Provides an avenue for promoting group processes
- Provides a recruiting vehicle into training programs once established

Benefits

- **Mentees:**
- **Career advice and networking opportunities**
- Develop network of supporters
- Build/gain knowledge
- Foster learning

- **Mentors:**
- **Share knowledge and skills**
- **Develop future therapists**
- Provide career advice and networking opportunities
- Provide an avenue for mentees to find resources they need

Implementation

- Develop structure and objectives for the program.
- Recruit a coordinator for the program
- Approach potential mentors

- Advertise program on website and through university relationships

- Match mentor and mentees

- Evaluate the program

Allows for focus on program development, less time spent on administrative work

Rationale

- **Use the services of 3 external service providers to manage web, book keeping and conference functions**
- CGPA has no full-time staff
- Some of the service providers do not provide great value
- AMC provide: governance, business management, event management, administration and support services.

Benefits

- **Gain efficiencies between service providers**
- **Support future growth in membership base and services.**
- Provide timely attention to members and potential new members.
- Improved member communication.
- Free up volunteer time to focus on program development.

Implementation

- Define the required support
- Develop a Request For Proposal
- Identify 3-5 AMCs to negotiate with
- Determine financial feasibility
- Transition workload

Members want exclusive online tools and resources related to group processes – training materials, news, latest research, interactive media, database of members/ professionals

Rationale

- **Members spread throughout Canada and many do not have the necessary funds to attend the conference**
- New professionals have requested online tools
- Existing website has capacity to support different technologies
- Would be beneficial to new student members
- In line with mission to become “the source” for expertise on group therapy and processes and creating public awareness

Benefits

- **Members will be more engaged and it is possible to reach members/potential members in remote areas**
- Provide networking and a feeling of community throughout the year
- Provide more flexible learning opportunities
- Clearly defined value for members

Implementation

- Define what type of content to share, frequency of updates, etc
- Identify who is responsible for finding and selecting appropriate content
- Update existing documents to make more current/recent
- Enhance the current website to include features such as online forum, membership directory, research materials and announcement lists
- The website forum and membership directory will require a tech savvy volunteer to create OR use AMC
- Use social media tools to promote the organization, upcoming events and new website content

Membership dues will be easier to collect, freeing up valuable volunteer hours and generating additional revenue

Rationale

- **Members have said they have been turned off by the lengthy and demanding process, and it deters non-members**
- **Only ½ of CGPA's "members" pay fees**
- Cheaper membership for students will not break the bank to sign up
- Many other organizations and companies have online payment – it is efficient and relatively cheap and entices people to sign up
- Can then leverage other services to extract additional funds
- Having the system in place will allow for a smooth transition to all group therapy and processes

Benefits

- **Will make it much easier to collect money and for interested persons**
- **No policing necessary and will free up time for volunteers to complete other tasks**

Implementation

- 3 "Titles"
- Associate Member
- Member
- Student Member
- Consider "general" membership category
- Online payment process - via credit card or Pay Pal - Automatically renews membership unless otherwise specified
- Tech savvy volunteer must be recruited to redesign website so it is in line with the new structure OR use AMC
- Simplify documentation required (ability to do it all online, limited references)

TIMELINES AND MILESTONES

Activity	Month																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Explore feasibility of an Association Management Company	█	█	█	█	█	█	█	█	█	█								
-Define the required support	█	█																
-Identify 3-5 AMCs		█	█															
-Begin initial discussions with AMCs		█	█	█														
-Determine financial feasibility (Go/No-go?)				█	█	█	█	█	█	█								
-Develop a Request for Proposals					█	█	█	█	█	█								
-Negotiate contract							█	█	█	█								
-Transition workload									█	█								
Develop a strategy for online tools and resources	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
-Define what type of content to share, frequency of updates, etc.	█	█																
-Identify who is responsible for finding and selecting appropriate content			█	█														
-Update existing documents to make more current/recent				█	█	█	█	█	█	█								
-Enhance current website to include online forum, membership directories									█	█								
-Implement webcasting technology on website											█	█						
-Create Twitter, LinkedIn and Facebook accounts												█	█					
-Use social media tools to promote the organization, upcoming events and new website content													█	█	█	█	█	█
Redesign Membership Process	█	█	█	█	█	█	█	█	█	█								
-Decide on membership categories	█	█																
-Decide on required documentation	█	█																
-Automate registration process			█	█	█													
-Update website to reflect new process									█	█								
-Add ability to pay fees with credit card									█	█								
Target Student Recruitment	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
-Determine existing relationships with hospital and university training programs			█	█	█													
-Determine student role in decision making (board member?)				█	█	█	█	█	█	█								
-Develop advertisements highlighting unique benefits to students								█	█	█								
-Advertise CGPA memberships to students									█	█	█	█	█	█	█	█	█	█
Mentorship Program	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
-Develop structure and objectives for the program	█	█	█															
-Determine if company will sponsor program			█	█	█	█	█	█	█	█								
-Recruit a coordinator for the program (volunteer)				█	█	█	█	█	█	█								
-Approach potential mentors					█	█	█	█	█	█								
-Train mentors						█	█	█	█	█								
-Advertise program on website, through university relationships and social media									█	█	█	█						
-Match mentor and mentees												█	█					
-Evaluate the program																		█

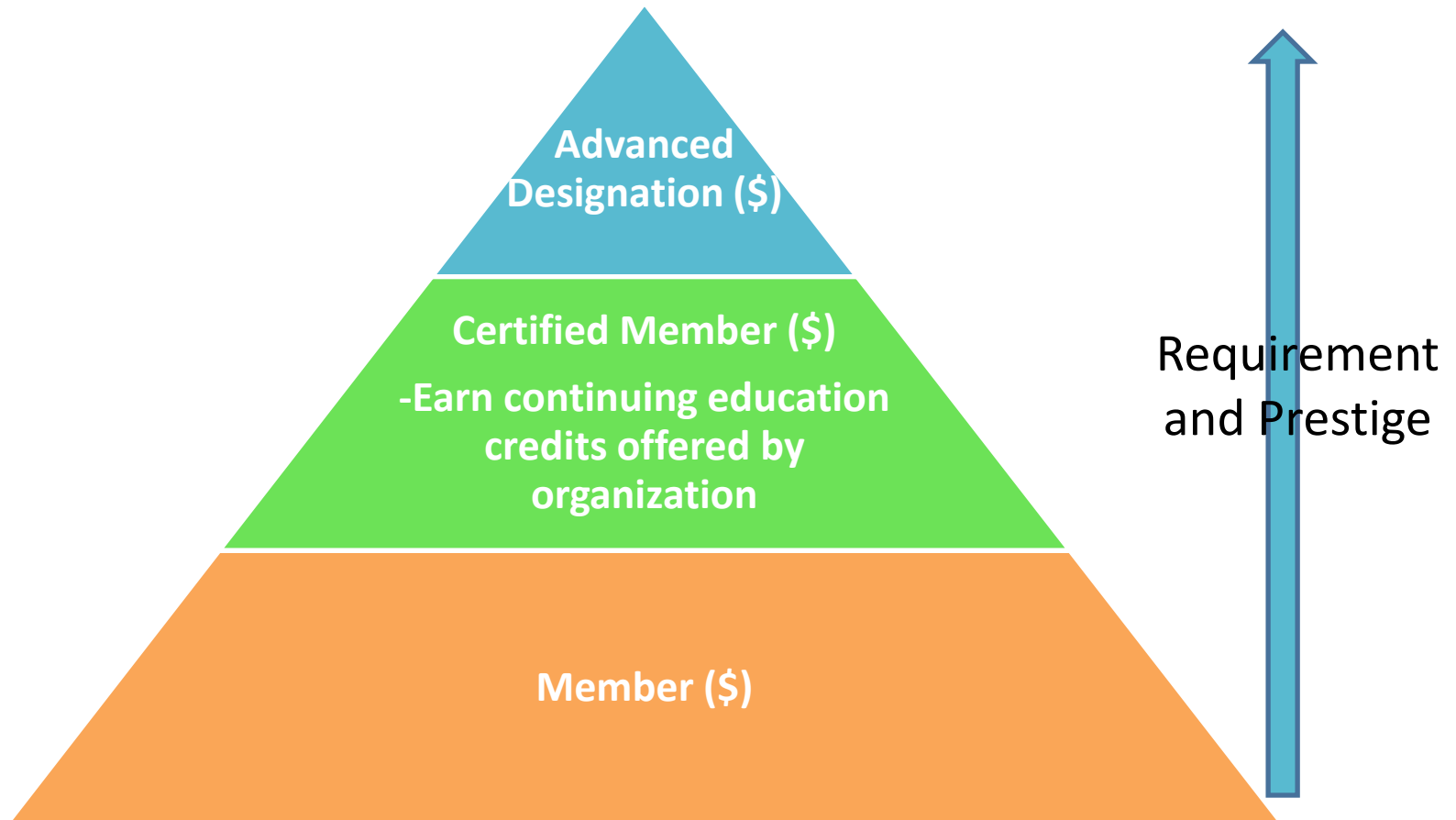
ENHANCE VALUE AND ACHIEVE MISSION

PHASE 2 and 3: RECOMMENDATIONS

PHASE 2: ENHANCE VALUE

Recommendation	Rationale	Benefit
Launch National Training Program	<ul style="list-style-type: none"> •Program is congruent with CGPA's mission and vision •From survey results, respondents indicated a strong support for national training program 	<ul style="list-style-type: none"> •Support training and education initiatives •Provide networking opportunities
Standards Setting	<ul style="list-style-type: none"> •It is congruent with CGPA's mission and vision •Standards are already in place, and only need to be updated 	<ul style="list-style-type: none"> •Setting standards are beneficial for quality in training, practice and research •Supports implementation of training program
Institutional Membership Category	<ul style="list-style-type: none"> •Encourage membership among those who think it might be too expensive 	<ul style="list-style-type: none"> •Allows access to a number of members through recruitment of one organization
Partnerships	<ul style="list-style-type: none"> •Support CGPA's mission, vision and goals while reducing costs and enhancing value of members •Gain economies of scale 	<ul style="list-style-type: none"> •Enable CGPA to invest in new programs & services •Members would benefit from additional shared resources from partners

FUTURE CONSIDERATIONS



Once a national training program is in place, consider creating a membership and program structure that incents members to continue purchasing products and services (e.g. training) from the organization.

PHASE 3: ACHIEVE MISSION

Recommendation	Rationale	Benefit
Advocacy	<ul style="list-style-type: none"> •From survey results, the respondents indicated a strong interest in advocacy •Group therapy and processes are under-utilized •Funders favour one-on-one over group therapy •Stigma associated with group 	<ul style="list-style-type: none"> •The CGPA can generate awareness and change public perception about group processes •Social benefits in reduced healthcare costs and improved patient outcomes •Members will benefit via favourable image
Expand to all group therapy and processes	<ul style="list-style-type: none"> •Increase in membership base •vast potential for funding opportunities •Expanding focus to include all group therapy and processes would broaden CGPA's identity to incorporate other areas besides group psychotherapy •IAGP and other organizations are following the same type approach 	<ul style="list-style-type: none"> •CGPA would have additional resources to increase it's training options as well as other member services •Diversity of thoughts/ approaches to improve patient outcomes

PHASE 3: ACHIEVE MISSION

Recommendation	Rationale	Benefit
Hospital affiliation for training	<ul style="list-style-type: none">•Support CGPA’s mandate to foster and provide training	<ul style="list-style-type: none">•Developing relationships with hospitals and universities would enable CGPA to encourage the use of group processes•Recruiting ground for new members
Local sections	<ul style="list-style-type: none">•From survey results and feedback from interviews conducted with members, there is a strong interest in local sections	<ul style="list-style-type: none">•Local sections are beneficial to members as they would offer services such as local training programs, discussion groups, journal review groups, etc
Consultancy	<ul style="list-style-type: none">•Already being done in small areas for no revenue•Potential niche that CGPA could fill	<ul style="list-style-type: none">•Revenue generating•Help to advance group therapy and processes

IMMEDIATE NEXT STEPS

- Implement with rigor!
- Carefully plan and coordinate a launch
- Explain to membership at a high-level the path you want to take.
- Think about change management
- Motivate volunteers to participate in new initiatives
- Communicate refined mission, vision and goals before you are ready to take the first step
- Create timelines and stick with them
- Make a splash with your membership when you launch!

Focus your initial energy on building a solid base so you can further develop strong programs and services to meet the emerging needs of those practicing group processes.

THANK YOU!

