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TRANSFORMED APPROACHES FOR CHAPTERS AND TEAMS

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) National[1] 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 all but one Branch in 2022. It clarifies roles and responsibilities, creates 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.

With the implementation of the Agreement, attention turned to specific areas of collaboration within the Network. The first chapter in this work culminated in the presentation of a high-level framework for Digital Membership and Fundraising[2] which sparked discussion. Key recommendations from this earlier report including a recommendation to shift to a model of free membership are now being implemented.

A second area of improvement identified for Phase II includes the strengthening of the Chapter and Teams framework through which CPF mobilizes local volunteers. This exploration is motivated by a desire to increase CPF's impact in the lives of young people and grow revenues (the Framework).

It is against this backdrop of the ongoing implementation of the Network Affiliation Agreement and the implementation of changes to CPF's membership and digital strategies that this Framework will be 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 this Framework as adapted with input from Network leaders will be the responsibility of CPF National in collaboration with CPF Branches and Chapter and Team leaders.

The paper opens with a discussion of the external factors that shape the environment in which CPF operates. A picture of the demographic, economic, social, and technological changes as well as those that affect not-for-profit organizations as a sector are discussed to glean the implications for change at CPF. The second part of the paper inventories pathways for action for CPF to embrace change which would equip it to attract and retain more volunteers in local communities and thereby increase its impact in the lives of young people.

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[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. 'Team' denotes small groups of volunteers also accountable to Branches created in areas where Chapters are not present that have joined forces to implement one or more local activity in a specific time window. 'CPF' denotes the sum of the backbone organization, its Branches, Chapters, and Teams.

2 Savoie, Yves. *Transformed Approaches for Membership and Digital Fundraising: High-Level Framework.* May 2023.

Beyond my own experience and the research required in preparation for this paper, I also hosted a small focus group of CPF Chapter volunteers and staff[3] to test anchor my own research in perspectives of CPF volunteers and staff.

EXTERNAL ENVIRONMENT

DEMOGRAPHIC AND ECONOMIC

Since the 1970s, the size and structure of Canadian families has continued to change. Families are smaller and more families with children have a lone parent. Families face significant challenges in accessing affordable housing and childcare. Some face the added challenge of caring for aging parents. A growing number of families with children now face the challenge of homelessness.

The pandemic created important stressors for families. These were amplified by the inflationary pressures that accompanied the lifting of public health restrictions. These economic pressures add to the significant gap in household income and wealth that has grown relentlessly since the 1970s and has left many households, even those of the middle classes, feeling pinched.

Canada's population is ageing with the youngest baby boomers now approaching retirement age. Yet, among OECD countries, Canada continues to experience a relatively high level of population growth fueled by high levels of immigration.

These economic and demographic changes are having profound impacts on the extent and ways in which Canadians volunteer and donate. We will discuss these implications later.

CANADA'S LINGUISTIC DUALITY

Canada's linguistic portrait is changing. The number of Canadians who predominantly speak a language other than English or French hit a record high in 2021, according to Statistics Canada. While English and French remain dominant, the number of people who speak a non-dominant language at home grew to 4.6 million, or roughly 13 per cent of the population[4]. This shift in the predominant language spoken at home reflects Canada's sustained high levels of immigration.

While the number of Canadians who speak an Indigenous language remains relatively small[5], a growing awareness of the fragility of Canada's more than seventy Indigenous languages has been fueled in large part by truth and reconciliation efforts. This new level of awareness is leading to efforts in parts of the country to improve opportunity to learn Indigenous languages both as a first or second language.

While access to French as a second language (FSL) education has improved, challenges of access to continue to be widespread especially for access to French immersion programs. These are

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[3] The focus group was held on October 16th and was attended by Trish Rognavldson (AB & NWT), Denise Massie (Ontario), Dan Bergerman (BCY), Megan Chartrand (QC/NU/National), and me.

[4] Statistics Canada, The Daily, '*While English and French are still the main languages spoken in Canada, the country's linguistic diversity continues to grow*' accessed at https://www150.statcan.gc.ca/n1/daily-quotidien/220817/dq220817a-eng.htm on December 12, 2023.

[5] Ibid., In 2021, 189,000 people reported having at least one Indigenous mother tongue and 183,000 reported speaking an Indigenous language at home at least on a regular basis. Cree languages and Inuktitut are the main Indigenous languages spoken in Canada.

combined with challenges of retention and those related to achieving a level of proficiency in French.

These and other changes may have diminished the urgency and the associated level of public awareness associated to questions of access to FSL except in situations where existing access to FSL programs including French immersion programs is explicitly threatened.

Again, these linguistic changes are having profound impacts on the ways Canadians volunteer or donate specifically to organizations which promote access to FSL programs. We will discuss these implications later.

SOCIETY

More than twenty years ago, American sociologist Robert Putnam authored the seminal book 'Bowling Alone[6].' In it, he highlighted the crisis in trust, relationships, agency and belonging among communities in the US. Like other sociologists, Putnam argued that the networks of relationships among people who live and work in a particular society and enable its effective functioning are a source of value, hence the use of the word 'capital.' He argued that stores of social capital were depleting showing up in high levels of crime and anti-social behaviour and poor mental and physical health. Depleting stores of social capital was evidenced in the ways in which Americans were 'bowling alone' abandoning the volunteer and associative roles which they had played in earlier generations. He presented rich data revealing these trends in decreasing membership in service clubs (e.g., Lions, Rotary, Kinsman), decreased weekly attendance at places of worship, lower membership and participation in political parties and labor unions, etc.

Many of these same forces are at work right around the world, including in Canada. The depletion in stores of social capital shows up in various indices of trust. The Edelman Trust Barometer Global Report[7] charts declining trust in institutional leaders and shows how income-based inequality created trust realities. The Muttart Foundation's own research on trust in charities and charitable leaders has showed how trust in charity leaders has declined although trust in charities remains higher than trust in governments or businesses[8].

Declining levels of trust have caused families and institutions including charities to become more risk averse and to implement new processes to mitigate risk. Background screening of volunteers and adult supervision of children during outdoor play are but two examples of ways in which society has adapted to declining levels of trust.

These societal shifts are evidenced in the changing ways Canadians engage as volunteers. Data reveal that the number of volunteers is growing faster than the population (this may reflect the rise of 'mandatory' volunteering programs in many high schools) but the total number of volunteer hours has plateaued. Sports and recreation are the areas which continue to engage the largest number of <mark>volunteers</mark>. More volunteers are volunteering for shorter periods of time and most of the volunteer hours are contributed by a smaller number of older volunteers[9]. The reality of the few 'super' volunteers who contribute a large number of volunteer hours was described by a CPF

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6 Putnam, Robert D, (2000) Bowling Alone: The Collapse and Revival of American community. Simon and Schuster.
7 Edelman, *Trust Barometer – Global Report* (2023) accessed at https://www.edelman.com/sites/g/files/aatuss191/files/2023-03/2023%20Edelman%20Trust%20Barometer%20Global%20Report%20FINAL.pdf on December 12, 2025.
8 The Muttary Foundation, *Talking About Charities – Executive Summary* (2013) accessed at https://muttart.org/wp-content/uploads/2014/12/2.-Executive-Summary-2013.pdf on December 12, 2023.
9 Vézina, Mireille and Crompton, Susan. *Volunteering in Canada,* Statistics Canada, Canadian Social Trends (2012), p. 3.

volunteer at the focus group held on Oct 12th as STP. When I probed for the meaning of STP, he exclaimed 'the Same Ten People who do everything.'

Family structure and the stage of the lifecycle influences those likeliest to volunteer. Those who are currently married and have children over six are likeliest to volunteer. Other factors that influence volunteering are social connectivity, length of time living in a community, and regular attendance at place of worship. In general, younger Canadians are more likely to volunteer than older Canadians although older Canadians contribute on average more hours. Adults aged 25 to 34 were the only age group to record an increase in volunteerism between 2007 and 2010. Those with higher education volunteer more[10].

These data offer hope for Canadian Parents for French. Rates of volunteering by parents with school-age children are high and growing. Yet, the data also invite adaptation to the reality that volunteers engage in more episodic fashion for shorter periods of time .

TECHNOLOGY

Our world is now characterized by the ubiquity of broadband (internet) and computing devices with sharp increases in the use of mobile devices and quantum leaps in their processing power.

Digital transformation has created new ways of being and feeling connected, often without regard to geographical boundaries. Because the marginal cost of communication over long distances is eliminated with the advent of broadband (think WhatsApp and Zoom), the meaning of 'community' has changed to encompass new types of virtual communities as well as those which are defined by belonging to a geographical neighbourhood or region.

'Internet-facilitated person-to-person interaction is the most significant trend that has come out of the technology-propelled innovation of the last decade. It serves to, among other things, enable the long tail of niche content, buyers and sellers, givers and receivers. This is a new environment where "peer-to-peer" (P2P) is a dominant mode of acting in and understanding the world, especially for younger generations[11].' The rise of peer-to-peer interactions is observed in social media but can also been see in new peer-to-peer approaches to fundraising and yielded important peer-to-peer fundraising platforms and events (e.g., charity walks, bike and other fundraising events).

Lacking capital to invest in new technologies, many charities have been slow to harness the power of new technologies. Networked and federated organizations which fail to pool resources to scale investments in new technologies are even slower in adapting new technologies. Their approaches reflect traditional ways of engaging (e.g., the charity decides how to direct the way in which donated resource are used and volunteers have little or no ability to direct the manner in which they volunteer) with the result being gradual attrition in the number of those who engage with them as volunteers and donors.

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[10] Ibid., p. 6

[11] Glogovac, Marina. '*New Technologies and Fundraising*,' CanadaHelps.org (2019) accessed at https://go.pardot.com/l/905392/2021-04-22/p6kl6/905392/1619125805uZparJ74/GEN___Brand___New_Technology_and_Fundraising__Guide_.pdf on December 12, 2023.

'We now live firmly in a consumer-centric, user-experience driven, platform-agnostic universe – the bar has been set high by Millennials and Gen Z. They want to create, communicate, and connect on their own terms[12].'

As crowdfunding platforms provide limitless opportunity to direct the way in which donated resources are used, donors experience a new level of control in the way they choose to engage. This is supercharging the growth of crowdfunding platforms including fundraising directly to benefit individuals (e.g., gofundme.com/f/vdn56-french-immersion-trip) or businesses.

In fact, crowdfunding platforms are allowing donors to do good in the life of individuals directly without the involvement of a charity. This process of disintermediation is easy to recognize as it operates in many aspects of our lives as digital technologies replace many intermediaries of decades past (e.g., travel agents, telephone operators, receptionists, real estate agents, bank tellers, taxi dispatchers).

While it may be more difficult to discern, disintermediation is also at work in the ways Canadians volunteer as a growing number of people are choosing to assist neighbours or friends directly without the involvement of a charity. Charities which are embracing this change are inviting volunteers and donors to engage in ways that shift control to the constituent while allowing them to see the impact of their engagement.

The rise of do-it-yourself platforms which combine aspects of volunteering, fundraising, and peer-to-peer fundraising is an example of how charities are tackling these profound societal changes. Do-it-yourself platforms allow constituents to create their own event or fundraising activity with access to the digital platforms of the charity (for processing donations). Do-it-yourself activities rely on volunteers accessing their social networks through social media and other tools. They shift control away from the charity to the donor and participant allowing them to elect how their support will generate impact.

The advent of do-it-yourself fundraising platforms has its parallel in the realm of advocacy where digital advocacy platforms have proliferated. Platforms such as Bonterra[13] which acquired two leading platforms Salsa (for online petitions) and Mobilize (for e-advocacy) reflect the growing presence of digital advocacy to power political change by amplifying the voice of small groups of individuals.

These digital fundraising, peer-to-peer fundraising and advocacy tools have the effect of shifting the role of the charity away from controller and organizer, to one of promoter and enabler.

THE NOT-FOR-PROFIT SECTOR

Growth in the number of charities has leveled off but their total number is at its highest ever.

In surveys of the state of the not-for-profit sector conducted after the pandemic, many report a state of being overwhelmed with staff and volunteers feeling stretched. On the one hand, not-for-profits are facing critical labor shortages and pressures for increased wages on account of

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[12] Ibid., p.7.

[13] The author does not have a commercial relationship with Bonterra nor does he benefit in any way from citing it here as example of leading digital advocacy technologies.

persistently high inflation. These challenges are coupled with sharp increases in demand for social services reflecting deepening crises in housing, mental health, and food insecurity[14].

Networked (or federated) organizations (those which involve many separate not-for-profit corporations sharing in the same name) are under stress and adapting to changing ways of being pan-Canadian while also being connected to local communities. Many of those organizations are integrating capabilities and pooling resources to leverage the tools of the new digital age (e.g., Canadian Cancer Society, Heart and Stroke Foundation of Canada, Canadian Red Cross). Others are fracturing under mounting pressures of regionalism (e.g., Canadian Lung Association, Chartered Professional Accountants, Diabetes Canada). Many pan-Canadian organizations with local chapters have seen significant consolidation of their chapter or local affiliates (e.g., United Way Centraide Canada, YMCA) while others have seen both significant consolidation and decline in their membership (e.g., United Church of Canada, Canadian Legion, Girl Guides of Canada and Scouts Canada).

IMPLICATIONS FOR CHANGE

The challenge of recruiting volunteers against this backdrop of change and growing anxiety is proving to be a real one for not-for-profits. Efforts to recruit volunteers now need to be strategic, pro-active and focused. The management of volunteers has been professionalized requiring investments of resources to promote volunteer engagement, to attract and screen new volunteers, and to train, direct and reward those that are engaged. Gone are the days when attracting volunteers required few efforts.

The challenge of attracting and retaining volunteers also introduces important questions about the platforms or structures through which their involvement is managed and sustained.

New approaches to fundraising (e.g., peer-to-peer fundraising both through event and do-it-yourself fundraising, CrowdFunding, social media fundraising) are taking hold at a time when others are sunsetting (e.g., traditional paper-based direct marketing, door-to-door canvassing, volunteer-led flower sales or Christmas kettle fundraising). Charity portals including Canada's leading portal CharityHelps.org have seen tremendous growth while other philanthropic intermediaries with a focus on workplace fundraising (e.g., United Way Centraide) have experienced significant decline.

Charities that stand still in this environment are either intentionally or not accepting that they will lose ground. The choice to do nothing – or the inability to muster the consensus required to act – is an important choice, one which introduces important consequences.

My hope in identifying pathways for action is to stimulate discussion and debate that will yield choices and action.

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14 Vantage Point and the Vancouver Foundation, '*2023 State of BC's Non-Profit Sector: Safety Net*', p. 20.

CURRENT STATE OF VOLUNTEER MANAGEMENT AT CPF

My comments here will amount to a few broad strokes that ignore the particularities in some Branches of regions of the country. Yet, it is important to offer some reflections on the current state of volunteer engagement at CPF.

Support for Chapter and Teams volunteers is largely delivered through Branches (with the exception of Quebec and Nunavut where there are no Branches or Teams and supports are offered by a National staff person). The National Office coordinates the volunteer screening policy and programs which is consistently implemented across the country. There is acknowledgement that the depth of support available across the Branches varies significantly with the largest Branches (BCY, AB & NWT, and ON) able to deliver more sustained and specialized supports. All acknowledge that the BC & Yukon Branch has achieved a level of success and scale with its Chapter network which is unrivalled. Yet, the context described above is relevant to both large and small Branches.

There has been steady growth in the number of Teams. Some of that growth is explained by Chapter volunteers who transition to Teams while other Team volunteers are net new. There is no evidence of new Chapters being formed and significant evidence of growing challenges of attracting and retaining the volunteers for the key Chapter board roles.

There is no evidence of coordinated pan-Canadian efforts to promote or advertise opportunities for volunteering. Many of the efforts to recruit volunteers are implemented through word-of-mouth and through the connections available in school and PTA communities. While word-of-mouth tactics are very powerful marketing tactics, they are very narrow and limited in their reach. There is also acknowledgement that Chapters and Teams have a more vital presence in communities where French immersion programs are available. Parents of children in French immersion may be motivated to create for their children extra curricular activities which enhance a child's learning of the French language. Some note that threats to the funding or existence of French immersion programs are often the catalyst for mobilization of CPF volunteers.

Chapters face challenges in recruiting new volunteers. This challenge owes in part to the fact that each chapter has requirements for a governance structure with demanding volunteer roles (e.g., chair, treasurer, et al) and administrative and governance practices (e.g., holding regular board and annual meetings, maintaining a record of those meetings, managing a bank account, et al). These roles and practices are internally facing (not oriented to impact on young people) and are not episodic. They require of volunteers to make long-term commitments which is counter-trend as discussed above.

Yet – and this is the key point in this discussion – long-serving volunteers in those roles are deeply committed and engaged. They cherish their autonomy and control over the resources available to deliver local programming. They are also nervous about changes being implemented to the membership fee structure for fear of experiencing diminished local resources.

Current CPF Chapter structures are ill-adapted to the social, technological and demographic changes of today. In my view, the resources required to support these legacy structures are preventing CPF from embracing the future.

PATHWAYS FORWARD

CPF's 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.

Make Teams and do-it-yourself engagement a priority.
Reflecting the broad changes discussed above, CPF must adapt its approach to attracting and retaining volunteers for the future. Levels of participation as volunteers have flattened with few older volunteers now accounting for the bulk of volunteer hours. Younger adults including those with school-age children have high rates of participation as volunteers although they contribute smaller total volunteer hours. Their participation as volunteers is likely motivated, at least in part, by a desire to give their children and other opportunities for learning and play outside the school system. Their participation as volunteers is also changing, becoming more episodic and more focused on direct impact on those served (as opposed to involvement in the administration, governance or financial administration of a Chapter).

While this may appear to be counter-intuitive, organizations must commit human and financial resources to attract volunteers. Because CPF has limited resources, it must orient the resources expended on attracting, screening, managing, and rewarding volunteers in ways which will deliver maximum impact.

Recommendation 1 | **Make Teams the only platform for group-based volunteering.**

CPF created the Teams platform to engage small groups of volunteers to organize a specific learning or advocacy activity in an episodic way. This platform is designed in ways which reflect the changing context for volunteering in Canada. The Teams platform currently co-exists with the more traditional CPF Chapters.

CPF should plan and implement a three- to five-year transition during which current Chapters[15] would be invited to become one or more Teams. After this period of transition, the Teams platform would be the only platform available for group-based volunteer efforts within CPF.

Such a decision would not be an easy one as Chapter volunteers are justifiably proud of their accomplishments and invested in their roles. The implementation plan should provide for ways in which CPF will honour the contribution of Chapter volunteers who choose not to be involved in one or more Teams.

From a strategy point of view, this is a generic decision which breaks from the past to focus resources on embracing the future. La Presse is a good example of a news organization which abandoned the printed edition of the highest circulation French-language newspaper in Canada to focus exclusively on its award-winning digital news platform. The decision of the then owners of La Presse, the billionaire Desmarais family, was not motivated by a lack of resources but by a resolute focus to be a dominant player in the digital news future. Grand & Toy offers another such example. In the face of significant increases in online shopping, the office supplies retailer chose to shutter its retails stores to focus on its online shopping platform.

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[15] One exception to this recommendation pertains to an Alberta Chapter which was granted permission to incorporate separately to satisfy the regulations of Alberta Gaming, Liquor and Cannabis (AGLC). This grandfathering should apply if this chapter maintains a significant income flow from gaming.

Recommendation 2	**Make it easy to apply (and to create) a Team.**

Current rules exclude the possibility of Teams being established within the boundaries of an existing Chapter. At least one CPF Branch limits the ability to create a Team within its territory. All Branches should permit the establishment of Teams. This change should be implemented without delay.

The rules governing the establishment of Teams should allow more than one Team to co-exist or overlap a given geography (i.e., no Team should be granted exclusivity over a territory). Discretion should be applied by CPF staff to not establish two Teams for similar events planned in the same community on approximately the same dates.

The application form to become a Team should be an online one (not just available online) with automated workflows. Applying to become a CPF Team should not require a motivated volunteer to launch an email to a CPF staff person although the opportunity to connect with a staff person should be advertised. CPF should signal to volunteers a service commitment ensuring that completed online Team application will be approved or rejected in no more than five working days. The important caveat to this service level promise is that volunteer screening may require more time. This should be made explicit, and no exception should be made to volunteer screening requirements.

The current rules require of Team applicants that they be members of CPF. This requirement should be adapted in favor of an invitation to become a member or to donate in support of the proposed event (where a fundraising project is proposed).

Recommendation 3	**Expand the objectives for which Teams are created.**

Currently, Teams can be created for a single purpose which is local programming. The current template agreement identifies programming as the only permitted objective. It does allow fees to be collected in an ancillary way to such programming.

Teams should be reinvited to permit a broader range of objectives. Some Teams might pursue a single objective while others could choose to pursue more than one objective through a single activity (i.e., an event might have both programming and fundraising components).

The list of objectives permitted should including programming, local advocacy, fundraising and revenue generation.

The agreement should allow Teams to be created for the explicit and primary objective of mounting a fundraising event. While the Teams agreement implicitly invites volunteers to consider revenue generation by charging admission fees to programs and events, this should be made more explicit in the objectives section of the Teams agreement. The intent here is not to impose on Teams the requirement to fundraise or to generate revenues but to make it permissible.

Where a Team chooses to implement a registration fee to their event, the Teams agreement should require volunteers to waive such fee for students who, for any reason, would be prevented from participating in the event for financial reasons. The Teams agreement should prohibit the implementation of invasive income testing relying instead on trust-based self-declarations by families.

Where volunteers elect to fundraise or collect registration fees for an event, fees should be collected via a secure digital portal implemented by CPF-National.

Teams should not be authorized to issue official tax receipts for donations. Steps should be implemented to ensure that tax receipts can be issued by CPF National and/or Branches for the amounts allowable subject to the rules and guidance of the Canada Revenue Agency.

Recommendation 4	**Amend the Teams template agreement to improve clarity.**

The Teams agreement should be reviewed to ensure the use of plain language and to improve clarity before the Agreement becomes a digital form.

The Teams agreement should improve clarity on various fronts:

- a simple reference to adherence to all CPF policies is insufficient as many applicants may not have awareness of those policies. The Agreement should include details of the rationale for volunteer screening and include a thumbnail sketch of other critical policies with hyperlinks to the relevant policies.
- the Agreement should explicitly permit the use of the CPF logo except that any planned promotion of the activity using the CPF name should be pre-approved.
- the Agreement should explicitly prohibit the purchase of advertising.
- the Agreement should prohibit the opening or creation of any social media, email, or web accounts in the name of CPF. The use of volunteer's personal social media and email accounts should be explicitly permitted and encouraged.
- the Agreement should prohibit the opening/creation of any account of any type with any financial services institution in the name of CPF. The Agreement should be explicit that where a micro-grant has been approved, legitimate expenses are to be incurred by one of the volunteers and will be reimbursed by CPF in a timely way.
- the Agreement should explicitly prohibit the involvement at events of volunteers which have not been screened or whose screening results prevent them from being involved in programming for children.
- the Agreement should explicitly prohibit the organization of certain types of events including those which involve gambling or risk being perceived as degrading to any person by reason of their gender, race, age, religion, language, etc.
- The Agreement should prohibit any activity which involves the promotion or will be conducted in a manner that involves endorsement of a product, firm or organization other than CPF and its sponsors and donors.
- The Agreement should reserve to CPF the right to decline association with any event when CPF believes that such association may have a negative effect on its reputation.

Recommendation 5	**Create do-it-yourself (DIY) platforms to mobilize support.**

The Teams platform is for volunteering in groups with a minimum of two individuals required. CPF should implement a platform for do-it-yourself fundraising by individuals and families.

Do-it-yourself fundraising platforms enable peer-to-peer (P2P) fundraising[16] in connection with an event that the participant proposes and organizes. P2P fundraising can take place in the context of naturally occurring events (e.g., a birthday party or wedding anniversary) or can involve the creation of a net new event (e.g., a bicycle journey across the country).

Leading examples of DIY platforms (see the Cancer Society's DIY fundraising page) motivate individuals to be creative in developing events that reflect their personality while also offering tips and tools for events which are commonly used in P2P fundraising.

Child service organizations are also leveraging these new approaches to volunteer engagement and fundraising. A brilliant example is available from BGC Edmonton. Many Parent Teacher Associations have turned to GoFundMe to power their fundraising approaches. At the time of the writing of this report, no part of Canadian Parents for French has a presence on the largest crowdfunding platform in North America (GoFundMe).

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[16] Peer-to-peer fundraising is a strategy in which supporters ask their peers – families and friends – often through email or social media to donate to a cause that they have chosen to support.

Imperfect Equity.

Geographic coverage of CPF's current Chapter and Teams network does not cover Canada's vast geography consistently or comprehensively. In fact, many not-for-profit organizations which were founded at the instigation of volunteers or depend on continuing engagement of volunteers do not deliver comprehensive geographic coverage. For example, YMCAs and Untied Ways have not been present, until now, in northern and remote communities.

By contrast, government services are designed with a promise to be accessible to all citizens independent of where they live. With few exceptions, policing, electric utilities, public schools and child protection services are available independent of where Canadians live.

CPF may aspire to have a volunteer Chapter and Teams present in every part of the country, but this is neither feasible nor realistic with current resources.

Virtual programming, delivered synchronously or asynchronously, is the only viable option for CPF to achieve consistent and comprehensive coverage in communities that do not enjoy the benefit of local programming. To achieve the scale required to deliver a range of virtual programs require such efforts to be implemented with the leadership of the backbone organization or a select few branches upon which a pan-Canadian mandate has been conferred.

Recommendation 7	**Deploy funding from governments to improve equity.**
	Reflecting the equity principle which is the foundation of the administration of public services, ensure funding from the Government of Canada is deployed equitably across the country (and similarly for funding from provincial governments which should be deployed equitably across those provinces). Apply some of the resources from the core grant from the Department of Canadian Heritage to create and maintain a suite of digital offerings which ensures one level of equitable access including in remote and northern communities which are more difficult to serve.
Recommendation 8	**Accept lack of comprehensiveness in geographic coverage of Chapters and Teams.**
	Accept that Chapter and Team volunteers will exercise control (within the limits of the CPF framework and policies) to define the geography for their activity with the concomitant result that not all geographies will be served at all times in the same way. Volunteers will exercise discretion as to the programs they choose to offer, and these may not be available every year or in every community.
	Yet, CPF should encourage Chapter and Teams volunteers to extend invitations to participate in their events, programs or activities well beyond the immediate community or neighbourhood where such volunteer effort originates. For example, if a Teams event has its origin in an affluent suburb of a large metropolitan city, CPF should encourage those volunteers to extend invitations to less affluent neighbouring communities where children may not enjoy the same access to French language programming.

Deploy pay-it-forward functionality in platform to collect event registration fees.

We noted above that CPF should implement a digital platform to collect event registration fees on behalf of Chapters and Teams.

This platform should introduce a 'pay-it-forward' option for every event registration fee that invites participants to donate a 'pay-it-forward' amount for children who would not be in a position to participate. This 'pay-it-forward' option should not be a negative option but should be clearly identified as a way for CPF to broaden access to its valuable programs in remote and Indigenous communities.

Cede control to constituents.

We know that donors will contribute larger amounts if they have some discretion to direct the way in which the funds are to be used. This evidence explains why large comprehensive universities decentralize their fundraising to the many schools and faculties to which their alumni feel indebted. Large academic health sciences centers also structure their grateful patient fundraising programs in ways that allow patients to support research or equipment priorities in areas that match their own need for healthcare. This ensures that a patient who survived breast cancer will typically be invited to contribute to women's health initiatives or to breast cancer research.

We also know that larger donors often tie their major gifts to a specific project, facility or program. For many years, ceding this level of control to smaller donors was not practical for reasons which were purely administrative in that the cost of processing many small donations with restrictions proved to be prohibitive. Digital tools for fundraising which have automated gift processing and receipted have eliminated this barrier. Smaller donors are now able to direct gifts in myriad ways.

Chapters were designed to exercise some control over the use of local funds. This has been expanded to Teams.

Now, the same invitation to cede control should be expanded to constituents (i.e., individual donors and participants in do-it-yourself fundraising). This should be implemented within a menu that makes it practical to administer those directions.

Recommendation 10   **Cede control to constituents.**

Within a realistic menu of options, offer donor discretion over where and for what purpose a donation is entrusted to CPF while recognizing that many but not all donors have a preference to support programming in their local community.

In terms of 'where', the menu should default all DIY, Teams and Chapter efforts to the community in which the Teams or Chapter is based or where the DIY event originated. In a larger province, the default will typically be to a region or municipality. In a smaller province, the default may be to a community (e.g., Charlottetown) or to the entire province.

In terms of 'purpose', the menu should default all DIY, Teams and Chapter efforts to local programming in the local community where the volunteer activity originates. If a Chapter or Teams offers a range of programs, the menu might invite donors to earmark their contribute in ways that reflect their preference within the range of that chapter offerings.

The menu structure should not offer an 'Other' option with limitless possibilities as some contributions could be earmarked in ways which are not feasible or practical to implement.

Except for direct event expenses (which are limited by the grants to Teams or by an eventual agreement with DIY participants), overhead expenses for digital and staff support should not be attributed to these local efforts and should be borne from the grant received for core operations from the Department of Canadian Heritage.

Focus efforts to invest in engagement of local volunteers.

In my May 2023 report titled *Transformed Approaches For Membership And Digital Fundraising*, I argued that for CPF to succeed in growing membership and digital fundraising revenues, it needed to invest in capabilities to diversify and generate revenues.

This work is evidenced in efforts CPF is deploying at all levels to nurture and inspire a culture of giving and volunteering.

Growing volunteer engagement at CPF also requires an investment posture. For this reason, recommendations 11 and 12 below mirror recommendations in the May 2023 report. The following recommendations and those contained in the May 2023 report should be considered as part of an integrated package.

It bears repeating that, while this may appear counter-intuitive, growing volunteer engagement will not happen without a readiness to invest more financial and human resources in those efforts.

In fact, the recommendation to prioritize Teams and to gradually transition away from Chapters is born out of a desire to focus limited resources in ways that reflect the greatest potential for growth.

Recommendation 11	**Significantly increase advertising expenditures.**
	Boost advertising expenditures to broaden the base of volunteers and participants. This advertising should be focused on search engine optimization (SEO) and social media optimization (SMO), or in efforts to boost social media posts.
Recommendation 12	**Turbocharge investment in CPF's digital ecosystem[17].**
	At the core of this digital ecosystem should be a <u>single</u> 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, Chapter or Teams volunteer, DIY participant or donor, 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.

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17 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.

Recommendation 13	**Deploy a digital DIY fundraising platform which should interface with (or be part) of the CPF eCRM.**
	CPF should deploy an online digital platform that enables DIY fundraising. This platform should either be part of the eCRM or interface with it. Many cloud-based software-as-service solutions are available in the marketplace. While the following does not amount to a systematic review of those solutions, CrowdChange and Funraisin are examples of platforms deployed by networked organizations in Canada[18].
	Beyond DIY fundraising, some of these platforms offer comprehensive fundraising tools as well as tools for event ticketing, social fundraising and online shops.

NEXT STEPS

Networks are changing at a frenetic pace. This high-level framework is intended as a backgrounder for discussion about leading practice. The hope is that it will serve to inspire changes in practice in a stepwise and considered way.

The intention is to simulate reflection about the changes that may be appropriate at this juncture. A robust implementation plan for transformation of the chapter and teams framework will require engagement of those who could be affected by the ultimate outcome of such change process.

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[18] The author does not have a commercial relationship with these companies nor does he benefit in any way from citing them here as example of leading DIY fundraising technologies.