


Mezzanine helped the Canadian Cardiovascular Society develop its strategic plan and conduct a members needs assessment. The plan has helped the CCS focus on its strategic needs and better align with its members.



Understanding Member Needs – How the Canadian Cardiovascular Society Increased Membership and Engagement

"The Member Needs Assessment catalyzed the organization around a set of tangible priorities and enabled us to move forward in a consistent and focused direction,"
Aime Ferguson, CEO, Canadian Cardiovascular Society

The Canadian Cardiovascular Society (CCS) faced a challenge. How could it meet the expanding needs of its membership with limited resources? The CCS wanted a complete and independent assessment of member needs.

Engaging Mezzanine helped CCS identify member profiles and perceptions, and provided invaluable data and insight to guide the organization's decisions.

The result? Within three years, the CCS increased membership by 40% and attendance at its Annual Congress by 20%.

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"The key to success for a comprehensive member needs assessment is that it engages members and non-members in ways they want to be engaged, at times they want to be engaged," says Lisa Shephard, president of Mezzanine. "A single-prong approach, say an online survey, has been tried by dozens of organizations, with little success. It may be efficient, but it is almost never effective at engagement."

Mezzanine's approach was to make the member needs assessment a landmark initiative. The highest levels of management and governance of the CCS prioritized the initiative through various communications, and the research was conducted among numerous audiences and through multiple channels. Qualitative insights were gathered through in-person and telephone interviews with members while at their places of work. These insights were then validated through quantitative data via telephone, online and mail surveys.

"In order to achieve high participation rates and deep insights from members, it is vital to demonstrate the importance of the assessment to the organization's leadership. If members think, 'It's just another survey, the initiative will fail,'" says Shephard. "Our process is very intensive – it involves high quality interaction by qualified professionals to reach and engage busy members. It isn't easy, but it is the only way to obtain the deep and robust information that leadership needs to make informed decisions."

The CCS Process

The CCS Member Needs Assessment kicked off in May and was completed by September. The preparation phase required three weeks, the interviewing and surveying process required eight weeks, and analysis and recommendations another five weeks. Within four months of launching the initiative, the CCS had robust data and insight on the needs, priorities and perceptions of its members.

The research phase was the most intense, including in-person interviews, telephone interviews, mail and online surveys. "We had a participation rate of over 40% – it was an unparalleled success. This was a reflection of both the kind of members in the CCS – they are committed to helping their Society – and also the engaging and comprehensive nature of the member needs assessment process," said Shephard.

Funding the Member Needs Assessment

Like any non-profit organization, the CCS has limited resources. Before committing to the Member Needs Assessment, the CCS presented its business case for the initiative to several industry partners, with a request for unrestricted support from them to fund it. The business case was comprehensive, outlining the process for the assessment, its expected benefits and a risk analysis. Within three weeks, five partners had committed to the full cost of the initiative and the CCS was able to proceed.



The Canadian Cardiovascular Society (CCS)
The Canadian Cardiovascular Society is the national voice for cardiovascular physicians and scientists in Canada. It represents over 1000 physicians and researchers and has a mission to promote cardiovascular health and care through knowledge translation, professional development and health policy advocacy.

The Situation: A diversifying market with evolving needs

Canada's cardiovascular community has become diverse as a result of increasing medical specialization and evolving healthcare practice patterns. With over \$10 billion spent annually on Canadians' cardiovascular health, this area represents a large and growing focus in the Canadian healthcare system. The CCS sits at the centre of this community, as the national accrediting body for cardiovascular education among cardiologists and the primary advocate for cardiovascular healthcare providers.

The CCS underwent a number of changes in response to its shifting market, including new leadership, a growing staff and budget, and broadening activities. In 2004, the CCS recognized that with the right changes in the cardiovascular community and the Society itself, it could better understand the needs and expectations of members had declined.

The CCS reached to widely and deeply assess its community, both members and potential members. It reached more than a survey or poll – it wanted qualitative insight and quantitative data that would shed light on the different types of members, their different needs, perceptions and expectations of the CCS.

For that level of detail, the CCS wanted to work with an independent organization with strong research expertise that would also offer practical and actionable business recommendations.

Introducing Mezzanine

The CCS identified a number of organizations who offered the expertise, professionalism and credibility to undertake the member needs assessment. After interviewing and reviewing proposals from a number of firms, the CCS selected Mezzanine. Mezzanine had understood the scope of the CCS mandate, demonstrated a level of professionalism that was vital for dealing with the organization's membership, and had developed a clear plan that combined a qualitative approach with quantitative analysis.

The Member Needs Assessment Process

The Member Needs Assessment started with benchmarking of the current membership of the CCS. This served as the baseline for membership size and mix, and highlighted weaknesses – for example, in particular geographies or types of member. Mezzanine also conducted interviews with the organization's leadership, management and staff to understand their perceptions of the membership and their needs. Findings from these interviews were used to develop questionnaires for conducting interviews and surveys with members and prospective members.

The Results

The final analysis and recommendations from the Member Needs Assessment were presented to the CCS Council at their annual meeting. The presentation included quantitative data on the nature, needs and profiles of members, their perceptions of the CCS and the value it provided, and the pain points experienced in their professional lives that the CCS could address.

Mezzanine identified 6 priorities for the CCS based on the member needs assessment. Recommendations included programs and services to address emerging member needs, functional areas where the CCS could deliver more value, and target audiences that were underserved by the Society.

One of the significant benefits of the member needs assessment was the hours provided to Council. CCS chief executive officer, Aime Ferguson, stated:

"The Member Needs Assessment catalyzed the organization around a set of tangible priorities and enabled us to move in a consistent and focused direction."

Immediate Impact, Increased Membership and Focus

The results of the member needs assessment were threefold:

- Increased membership: The member needs assessment and recommendations arising from it helped the CCS increase total membership by 40%, grow retention of Trainees (the likelihood of the Society's future) by 25%, and increase attendance at the Annual Congress by 20%.
- Program Development: The needs assessment helped the CCS enhance programming and member involvement as well as launch the CCS brand online.
- Decision Making: The data and insight provided by the member needs assessment enabled Council to focus its decision making, make investments for specific initiatives that were valued by members and effectively say 'no' to initiatives that were not a priority for members.

Key Stats

- 40% increase in membership
- 250% increase in retention of Trainees
- 8 weeks of research
- 4 months from engagement to completion and 6 months until implementation

Results

- Overall increase in membership and engagement
- Increased focus in decision making
- Enhanced brand credibility
- Greater communication of the CCS message
- Increased staff and number of CCS programs ...

Challenge

Canadian Cardiovascular Society recognized that with the rapid changes in the cardiovascular community and the Society itself, its understanding of the needs and expectations of members had declined. The CCS resolved to widely and deeply assess its community, both members and potential members. It wanted qualitative insight and quantitative data that would shed light on the different types of members, their different needs, perceptions and expectations of the CCS.

Solution

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