

Integrated 2020-2023 Strategic Plan, Digital Strategy and Digital Needs Assessment

The Writers' Union of Canada

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1. Introduction

1.1 Background

As **The Writers' Union of Canada's (TWUC) 2015-2018 Strategic Plan, *Writers' Matter***, comes to an end, TWUC sought to:

1. Refresh its strategic plan,
2. Review its mission and vision,
3. Conduct an organizational digital needs assessment and
4. Develop a digital strategy for the organization.

TWUC engaged Nordicity, a global research, strategy and analytics firm with roots in the Canadian creative industries and the arts – in partnership with digital expert and advisor Avery Swartz, to facilitate the strategic planning session and develop the **TWUC's** digital strategy. For the Digital Strategy to be successful and actionable, it must **align with and support TWUC's overall strategic priorities**.¹

Nordicity worked closely with TWUC throughout the strategic planning process. Over the course of this engagement, Nordicity conducted a(n):

- Analysis of the TWUC Member Survey: January-February
- Strategic Planning Session with National Council: February
- COVID-19 Implications Session with TWUC: April
- Digital Needs Assessment Interviews with TWUC Staff (and follow-ups): April-June
- Mission and Vision Review Session with National Council: February and May

This document synthesizes the research undertaken and presents a strategy and implementation roadmap for TWUC.

1.2 Strategic Challenges

The following issues were highlighted through research and consultations as priorities facing writers in Canada, challenges such as:

- Economic conditions
- **Conveying TWUC's value to members**
- Managing member expectations
- Building community with younger and more diverse writers
- Positioning TWUC online

These challenges, described in more detail below, often pre-existed the global COVID-19 pandemic, but were amplified, and occasionally made more urgent to address, as a result.

Challenging economic conditions: A lack of sustainable income has been long-standing challenge **for TWUC's members**, as it is for writers around the world. However, members experienced even

¹ **A plan that outlines your digital goals and how you will achieve them, not a marketing, web or social media strategy (Canada Council for the Arts).*

further income declines during the period of the last strategic plan, in large part due to the loss of educational copying revenues. According to the income report released by TWUC in October 2018, Canadian writers earned an average of just \$9,380 from writing in 2017. The COVID-19 shutdown in March 2020 then had (and continues to have) an immediate and devastating impact on revenue for writers in Canada including:

- Sharp loss of income: Readings, appearances and launches were cancelled, bookstores/libraries closed or operated online only at (initially) reduced capacity, further shifts towards lower margin e-book sales;
- Sudden, enormous dependence on social media/online promotion – skills which were already in-demand by members but became even more urgent to acquire amid COVID-19.

Challenge conveying TWUC’s value to members: Despite an over 80% membership retention rate and other positive feedback, the member survey pointed to declining member satisfaction with TWUC overall between 2016-2019. The root causes for this evaluation may lie largely with frustrations over declining incomes and the tough immediate economic climate for members over that period. For example, the past Strategic Plan bound TWUC to deliver results in areas such as advocacy and livelihood, over which TWUC can have no direct control of outcomes. There was also a sense that the low satisfaction related in part to the difficulty TWUC faces in conveying its value and efforts to its members. While the role of TWUC as an organization - and its value to the broader sector - is clear, the value of the membership itself is not necessarily easy to articulate. Ideally both TWUC and its members should have a clear sense of how a TWUC membership is differentiated from other **memberships and/or contributions to other organizations (e.g., provincial associations, other writers’ causes)**. As the COVID-19 pandemic effects continue to be felt through 2020 and 2021, and members’ earnings are further endangered, TWUC will need to articulate its value clearly and boldly to maintain its membership.

Challenges managing member expectations: Related to or adjacent to the challenge of communicating **TWUC’s value proposition**, is the pressure on TWUC to stretch to **be “all things” to its members** (as evidenced by the member survey results). This strategic plan aims to support TWUC to concentrate its efforts on fewer, higher impact activities. The digital strategy will help TWUC as it continues to leverage digital tools, capacity and services for maximum member reach and impact. TWUC has already embraced a rapid implementation of digital improvements, data analysis, and service delivery in response to the pandemic.

Challenge building community to include younger and more diverse writers: Given that most writers publish their first book in their 40s, the TWUC membership has naturally tended to skew older. While new member sign-ups roughly offset member departures, there is little to no growth overall (less than 2%) **in TWUC’s total membership**. Attracting a wider range and more diverse set of writers to the organization is a vital objective for **TWUC’s sustainability and relevance**. TWUC is working to appeal to younger and emerging writers in many ways. Perhaps most importantly by, in 2020, TWUC changed its membership criteria to be more inclusive of writers in earlier career stages, while continuing to serve its engaged existing members. The importance of increasing the diversity of the membership has been and remains a core priority for the organization. Current members also deemed accessibility, equity, diversity, and inclusion as their priorities for the organization. Operationally, TWUC continues to follow-through with its Equity Implementation Plan. TWUC also recognizes the need for continuous learning about Canadian writers beyond current members, to better understand how TWUC’s community includes or excludes them.

Challenges positioning TWUC online: There are three main dimensions to **TWUC’s digital positioning**. These are:

- Engagement: How TWUC engages its members online, shares news updates and builds a sense of community with members. From the survey, we know that digital technology

continues to underpin many of the struggles and opportunities facing **TWUC's members** and writers in general. Digital connection and outreach are **also vital to TWUC's member engagement and ability to reach to and beyond the National Council's main regional hubs. TWUC's increased online engagement activity in response to the pandemic, has been** welcomed by members and illustrates the opportunities that TWUC needs to further exploit.

- **Programming and Resources and Professional Development:** The digital content or digital skills curriculum TWUC prioritizes within the resources/materials, information and training it provides online. In the digital age, TWUC existing and future members often have access to networking, training and other professional development supports online for free. In this context, it has been occasionally challenging for TWUC to differentiate itself and what it offers in the online engagement and support landscape for writers. In the past, TWUC has provided unique digital resources to its members. As an organization, **however, it didn't** necessarily capture back enough of the value that these resources provided (e.g., being recognized as part of the membership value proposition). This imbalance may be improving with the additional webinars TWUC has delivered since the pandemic but is nonetheless important to monitor.
- **Emerging Platforms and Innovations:** The degree to which TWUC can and should at least *introduce* writers to emerging digital trends and experimental platforms related to the craft, distribution, promotion and monetization of their writing. Looking ahead, members may need greater exposure to new digital revenue streams such as self-publishing, crowdfunding and subscription models – which have all been used by writers to distribute and sell their books. While these newer platforms may not immediately **result in improving writers'** incomes they ought to be monitored in some respect. TWUC could absorb some of the effort of researching what is working and not working for other writers in the Canadian landscape and communicate these findings to members.

The nature of the recovery is as yet uncertain for the culture and creative sectors. A return to the past **"normal"** is unlikely. The reality will be far more online dependent than pre-COVID-19. What is clear, however, is that amid great uncertainty, TWUC took swift quick action to support its members through the immediate Phase 1 shutdown. TWUC partnered with other stakeholders to launch the Emergency Relief Fund and pivoted to online member support through webinars and is preparing for virtual reading programs. TWUC will continue to monitor sector changes, and to support members through the recovery phases as retail, education, tourism and other sectors open up.

1.3 TWUC Vision and Mission

After ongoing consultations with the TWUC leadership team and the National Council, and in light of the newly expanded membership criteria, **TWUC's Vision and Mission** have been updated as follows:

Vision: A thriving, diverse Canadian culture that values and supports writers.

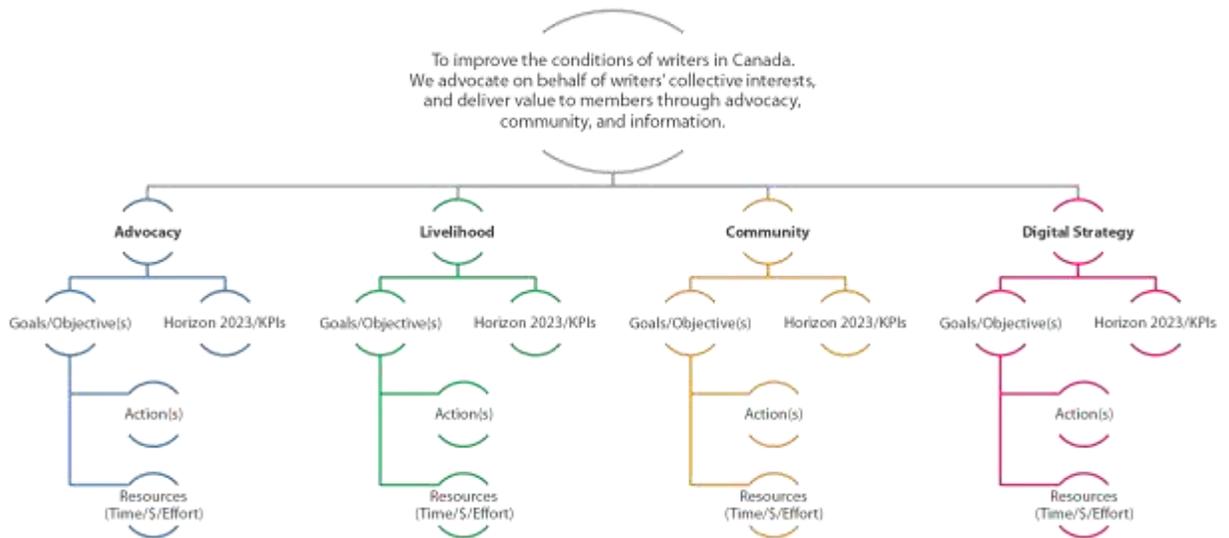
Mission: **To improve the conditions of writers in Canada. We advocate on behalf of writers' collective interests, and deliver value to members through advocacy, community, and information.**

2. Strategic Plan and Digital Strategy

2.1 Structure

TWUC and the NC agreed on four inter-related strategic priority areas. These are: Advocacy, Livelihood, Community and Digital Strategy. For each strategic priority area, we present:

- The rationale: the aspects, within this area, that need to be addressed as a priority (and why)
- A look at the Horizon 2023: what will be true by the end of the term of this strategy? How will TWUC know it has been successful? and
- The main goals within this priority area and the actions for achieving each goal



The Digital Strategy is not only the fourth priority area, but also comprises the Appendices which include:

- Appendix A. Digital Needs Assessment
- Appendix B. Choosing between WordPress and Drupal
- Appendix C. Website Analytics
- Appendix D. Data Audit

2.1.1 A note on Key Performance Indicators (KPIs)

A series of KPIs have been introduced in this Strategic Plan. Ideally, however, TWUC would review these KPIs, identify new ones and discard those that do not feel relevant or do not seem feasible to collect, measure or interpret. TWUC would then prioritize this shorter, more meaningful set of KPIs. Typically, such a KPI exercise follows the acceptance of a new Strategic Plan and would have the buy-in of staff and the National Council. We have provided some notes for consideration below.

Why does TWUC need to measure its efforts and impact?

- To understand its impact and share that story with its members and other writers
- To satisfy government and/or funders and secure more funding
- To continuously improve as an organization
- To help colleagues understand the impact of their day to day work
- To help prioritise its resources, roadmap and workload
- To achieve Horizon 2023

TWUC is not looking solely for KPIs that demonstrate what the organization has achieved. It also wants to capture the impact of what it has *tried*. For the coming Strategic Plan era, the most important global KPI to monitor will be satisfaction. We assume this metric will next be measured in two to three years, if not longer, **with the question, “has TWUC delivered on its advocacy mission and provided value to members through programs and services?”** Before then, there are other indicators that help TWUC demonstrate that it is working hard and that stakeholders and members are taking stock of these efforts.

As TWUC reviews the KPIs introduced in this plan, it may wish to identify two main KPIs per goal or **strategic priority. One primary, or “north star” metric. The other being a “health” metric. The North Star Metric indicates whether TWUC is getting closer to the goal it wishes to achieve. For TWUC “satisfaction” could be the KPI (or, more specifically, a quantifiable measurement of satisfaction). The Health Metric is the KPI that shows support and overall health along the way to the goal. So, for example, the newsletter open rate. Subscribers opening the email newsletter shows that they are interested in hearing what TWUC has to say. This action could be tied to members’ overall satisfaction and engagement with TWUC. In this example, open rate is a better indication of satisfaction than the number of subscribers, because people can be subscribed to the email but not opening it and not engaging with it.**

Sample of KPIs introduced throughout this Strategic Plan

- Advocacy and livelihood efforts (not only results) demonstrating what is possible with organizational leadership (over what an individual might achieve alone) e.g., TWUC appearances at forums and panels, track hours of formal meetings and preparation, touch points, official submissions/responses developed, press releases issued, member participation in letter writing campaigns
- Uptake and impact of emergency funding
- Member **satisfaction regarding TWUC’s effort to deliver on its mandate**
- **Increased interest in TWUC’s work from the broader writers’ community** alongside member and non-member perception of the Union, its role and achievements e.g., through non-member webinar attendance, e-newsletter sign-ups (if open to non-members), social media interactions from non-members

- Engagement with TWUC programs and services – including regional and virtual - Number of how-to downloads, Member referrals, newsletter opens. Member participation at TWUC webinars and workshops, successful matchmaking opportunities with agents, publishers, editors and other gatekeepers.
- Number of sustained and new partnerships (public, with other organizations and unions, private partnerships) and joint initiatives
- Opportunities provided for members to engage with, get more comfortable with digital marketing tools, registration/attendance at those sessions
- Increase use of, or sense of comfort and familiarity with, digital marketing tools for self-promotion reported among TWUC members.
- Signs of progress towards a more diverse membership with a greater age spectrum (survey to members)

2.2 Overview

Advocacy

- 1.1 Represent the rights of Canadian writers by advocating for the introduction or amendment of relevant laws related to the work of writers.
- 1.2 Bring the voice of Canadian writers before decision-makers and stakeholders of the publishing industry and education sector.
- 1.3 Explore new advocacy avenues and stakeholder alliances to gain fair recognition and compensation for creators.
- 1.4 Leverage advocacy efforts and successes to connect with and recruit non-members

Livelihood

- 2.1 Identify and explore new, public and private, direct and indirect revenue streams for writers and help members exploit these opportunities
- 2.2 Expand TWUC role for training and guidance with digital marketing and promotion
- 2.3 Support members in a world disrupted by the COVID-19 pandemic through efficient connections with relevant financial programs

Community

- 3.1 Provide current members with deeper and more frequent community engagement and self-promotion opportunities (including virtual and regional).
- 3.2 Engage and support writers from historically marginalized communities to address inequities in the writing industry.
- 3.3 Continue to increase and diversify membership

Digital Strategy

- 4.1 Modernize and invest in TWUC website
- 4.2 Migrate to the cloud and develop new digital workflows
- 4.3 Leverage data in organizational planning and to ensure successful program/service delivery

Priority #1 - Advocacy



Rationale

More than any other aspect of its work, advocacy is what sets TWUC apart in the Canadian writing ecosystem.

- Professional writers need a body to lead the battle over ongoing and critical concerns: favourable copyright legislation, increased public funding, protection of the PLR system, fair tax legislation, Canadian books in schools.
- Growing pressure on Canadian writers (including income challenges and marketing pressures exacerbated by the current COVID-19 crisis) reinforce the need for a national organization advocating for advancing collective interests.

Horizon 2023

- TWUC efforts to make changes are recognized as well as the results achieved.
- TWUC is accepted by members and other stakeholders as the national organization of professional writers.
- Canadian professional writers (members and non-members alike) **perceive TWUC's expertise** on a few core policy themes.
- TWUC has helped grow and/or maintain cross-sector alliances to further bring the voices of Canadian creators at strategic policy discussions

Performance

- Advocacy and livelihood efforts (not only results) e.g., appearances at forums and panels, hours of meetings and preparation, submissions/responses developed, press releases issued
- Uptake and impact of emergency funding
- Satisfaction **regarding TWUC's effort** to deliver on its mandate
- Increased interest in **TWUC's work from** the broader writers' **community**.
- Members and non-members' perception of the Union, its role and achievements.
- Uptake in Mailchimp subscriptions, open rates, increase of followers and interactions on social media

Priority #1 - Advocacy



Goal 1.1

Represent the rights of Canadian writers by advocating for the introduction or amendment of relevant laws related to the work of writers

- Continue to build and maintain coalitions of support for changes to relevant regulatory structure
- Continue to leverage copyright expertise in interventions with legislators, civil servants, partners and other stakeholders
- Continue to advocate for increased public funding
- Continue to take action to protect the compensation of Canadian authors through the Public Lending Right (PLR) Program
- Continue to advocate for fair tax legislation
- Continue to work with partners in possible ongoing litigations e.g., York University

Priority #1 - Advocacy



Goal 1.2

Bring the voice of Canadian writers before decision-makers and stakeholders of the publishing industry and education sector

- Explore new alliances **through a “shift the needle” initiative related to Canadian books and education.** Sample ideas include:
 - *Partner with ACP, libraries and Writers’ Trust to advance resource packages and study guides for schools.*
 - *Initiate a National strategy for Canadian content in libraries, schools, colleges and universities; or develop a best practices document for library and school purchases of Canadian books.*
 - *Partner with publishers and educators to amplify Canadian writers amid COVID-19, pursue more favourable terms for writers through the recovery.*
- Amplify and promote existing provincial virtual school reading programs and support extension of new programs to enable wider reach/accessibility.

 2.3

 2.1  4.2

Priority #1 - Advocacy



Goal 1.3

Explore new advocacy avenues and stakeholder alliances to gain fair recognition and compensation for creators

- Track and report on Income Loss due to COVID-19 and uptake of emergency funding
- Continue to support the **new “creator movement” in Canada**, advocating for a living wage for Canadian content creators (music composers and songwriters, playwrights, screen-writers, poets etc.) and modeled on a variant of universal basic income (UBI) principles as is happening with #artists4basicincome
- Investigate, monitor and share insights on new and arts adjacent funding sources/project initiatives such as social impact funding, innovation funding and skills development funds with partners and stakeholders in the writing eco-system to advance priority initiatives

 2.3

 2.1

Priority #1 - Advocacy



Goal 1.4

Leverage advocacy efforts and successes to connect with and recruit non-members

- **In recognizing that TWUC's** advocacy work benefits non-members as much as it does members, develop a communications strategy to share efforts, progress and achievements to date with non-member writers
 - *Collect non-member emails through the website and **initiate twice yearly "community newsletter" for those subscribers who are not official members, to reinforce TWUC's value for all writers***
 - *Share results of Emergency Fund initiative and other programs and services broadly across social and website*

 4.1

Priority #2 - Livelihood



Rationale

- While, the advocacy pillar refers to actions taken by TWUC to work towards a more favourable policy framework for Canadian writers, the Livelihood pillar focus on opportunities that TWUC can promote to help writers diversify, strengthen and eventually improve their writing income.
- This area was identified as a primary concern by members, with many indicating there is room for TWUC to improve.
- Moreover, the economic situation has worsened for writers over the past several years, and the decline in income will be critical amid the pandemic.
- Finally, self-promotion is increasingly critical to sales, as publishers have less in the way of marketing and promotion resources. Lack of digital savvy in marketing and promotion for many members has been expressed as a weakness and training need.

Horizon 2023

- Members share a better sense of the **sector's systemic issues**, TWUC's role within this landscape and the tools available to address these challenges.
- The Union has explored possible new revenue opportunities for writers and, when relevant, promoted and helped members pursue these opportunities.
- Members report greater confidence in using digital tools for self-promotion.
- Members enjoy more and new opportunities for exposure and remuneration through collaborations/programs in Canadian schools, higher education, libraries and other hosts.
- TWUC has enhanced/utilized cross-sector alliances to strengthen the voices of Canadian creators at strategic policy discussions, contributing to greater and/or more sustainable earnings/income for writers – whether through public programs or a more successful publishing sector in Canada.

Performance

- Number of new partnerships (public, with other organizations and unions, private partnerships) and joint initiatives
- Opportunities provided for members to engage with, get more comfortable with digital marketing tools, registration/attendance at those sessions.
- Increased use of, or sense of comfort and familiarity with, digital marketing tools for self-promotion among TWUC members.
- Exposure to new digital revenue avenues (not necessarily adoption).
- Attendance at webinars and workshops, successful matchmaking opportunities
- Expanded How-to publications and uptake in downloads

Priority #2 - Livelihood



Goal 2.1

Identify and explore new, public and private, direct and indirect revenue streams for writers and help members exploit these opportunities

- Encourage and support development of virtual school reading programs, test feasibility for a permanent virtual national reading program, amplify and promote existing provincial programs.
- Work with sector partners to try to develop a best practices document for library and school purchases of Canadian books.
- **Build on success of professional development webinars to expand TWUC's virtual offerings to include virtual match-making sessions with agents, publishers, editors and other gatekeepers, promote digital book fairs and support invited members.**
- Explore the practicability of partnerships with online literary publications and other digital distribution platforms (professional and user-generated – e.g., Wattpad, Kobo, CBC Books, 49th Shelf) to support discoverability of TWUC members and their works.
- Explore and assess relevance/interest in learning about indirect revenue platforms such as creating e-newsletters/short posts on:
 - [Medium](#): an online publishing platform where amateurs and professional writers and journalists can share their stories. Writers can receive compensation through the Medium Partner Program.
 - [Substack](#): an online service to develop, publish and manage subscription-based email newsletter.
 - [Patreon](#): a crowdfunding platform focused on developing sustainable revenue for creators including a dedicated stream for writers and journalists.

 1.2  4.2

 4.2

 1.2

While these platforms are mainly leveraged by journalists, contemporary non-fiction writers and social commentators with an online following, there may be benefits for some TWUC members in at least learning about what they are and how they work.

Priority #2 - Livelihood



Goal 2.2

Expand TWUC role for training and guidance with digital marketing and promotion

- Assess TWUC's professional development offering as far as its role in the support eco-system. Develop and communicate TWUC strategy for professional development programs and services to members and non-members
 - Map professional development programs and services available to writers and position TWUC in that eco-system (i.e., by reviewing TWUC's existing activities, information and/or support resources)
 - Identify where TWUC is best able to present (i.e., lead), to partner or to promote another association's service (e.g., 49th Shelf, I Read Canadian, Writers' Trust, WorkInCulture, BookNet, ACP)
 - Update resources/professional development calendar/priorities accordingly
 - Share/communicate strategy with partners, members and non-members
- Support digital self-promotion skills through professional development workshops and webinars
 - E.g., How to amplify offline promotional opportunities online, how to support writers working in isolation
 - E.g., Best practices for core social streams (Twitter, Facebook, Instagram, LinkedIn), introductions to emerging and under-utilized platforms (e.g., Reddit, TikTok, Pinterest) and publishing platforms (e.g., Medium, Substack, and Patreon).
- Refresh Writer's How-To series with digital best practices lens e.g., guides on digital distribution platforms, online reader engagement and online discoverability
 - Hold live "How-to" and FAQ webinars to raise awareness of new editions
 - Share case studies/examples/interviews with members who are successfully leveraging digital tools, "your peers are succeeding, and we can break down the steps so that you feel comfortable trying too"

 4.2

Priority #2 - Livelihood



Goal 2.3

Support members in a world disrupted by the COVID-19 pandemic through efficient connections with relevant financial programs

- Track and report on the impact of COVID-19 on both the Union and its members (e.g., income loss, evolution of membership numbers).
 - Identify supporters/funders to expand membership subsidies and sponsorships
- Track and report on results of emergency and relief measures (e.g., Canada Council, Canada Book Fund, Export Canada, tax breaks), share results to support further recovery planning
- **Revisit National Council's member retention task force findings, in light of COVID-19**, for strategies to continue to support members who may be struggling to pay membership fees
- Share info about resources, available funds and information to help members overcome the COVID-19 crisis and its ripple effects

 3.4

Priority #3 - Community



Rationale

- Members want more of a sense of community: overall and within their regions.
- TWUC members, broader community and staff note the need to develop stronger relationships with BIPOC and equity-seeking communities to better understand and respond to their unique needs. Indeed, **TWUC's membership profile has not changed much over the past decade**, despite efforts to include more diversity within the membership.
- Member survey suggests that the Union should continue with its efforts to meet accessibility standards and striving to represent the perspectives of persons with disabilities. While many actions have already been taken in this direction, the Union can further develop in this area and better understand needs through relationships and community-building.
- Under COVID-19 and the following recession, togetherness will be crucial to build a strong community that looks after the most vulnerable individuals and celebrates both collective and individual successes. TWUC can be this converging force for writers, but this will require TWUC to boldly demonstrate the value of a membership and highlight its response to the pandemic to protect against possible member attrition.

Horizon 2023

- A refined knowledge of our membership, their needs, expectations and engagement with the Union.
- Current members retained despite economic challenges wrought by COVID-19 (i.e., maintain low churn rate)
- New members recruited include younger and more diverse background.
- Membership value proposition clearly understood for members, non-members, new members, and regional members.
- Higher satisfaction levels amongst members overall, and in the regions.
- Increased engagement/use of TWUC services and programs.

Performance

- Value of a TWUC membership:
 - Engagement with TWUC programs and services, Number of how-to downloads, Member referrals etc.
- Regional connectivity:
 - Regional participation in virtual events, resources downloads, meeting attendance
- Member satisfaction, retention (e.g., low churn)
- Signs of progress towards a more diverse membership with a wider spectrum of age (survey to members)

Priority #3 - Community



Goal 3.1

Provide current members with deeper and more frequent community engagement and self-promotion opportunities (including virtual and regional)

- Assess and more clearly articulate the value proposition of a paid TWUC membership in all communications and online e.g., About, Why Join? Social channels etc.
 - Track and monitor engagement with TWUC programs, regional participation, referrals, shares etc. to understand what is valuable (i.e., what information/programs/services will writers pay for, give an email for, promote on your behalf)
- Build on Nordicity's **member survey** analysis to better understand member personas, needs, and churn. Develop strategies to respond accordingly (e.g., regional outreach, professional development programming)
- Leverage digital tools to expand reach into regions and develop stronger regional connectivity (e.g., through webinars/professional development, virtual meetings)
- **Promote TWUC's programs and services more boldly online and through Write magazine. Find avenues to showcase TWUC's programs/services (e.g., annual online presentation)**
 - Leverage success of membership referral program e.g., develop a communication strategy and kit to encourage members to recommend the Union to other writers.
- Identify success criteria with regards to community and brand building efforts – e.g., balancing goals of supporting/rewarding TWUC members vs. engaging and promoting TWUC to a broader writing community
 - Carry that criteria and strategy through with regards to pricing strategies for webinars, How-to guides etc. Test different approaches as needed and re-assess.
- **Develop and implement TWUC's inaugural digital marketing and social media strategy plan**

 4.1

 4.3

 4.2

 4.1

 4.2

Priority #3 - Community



Goal 3.2

Engage and support writers from historically marginalized communities to address inequities in the writing industry

- Continue to build on progress with TWUC's Equity Implementation Plan recommendations. Consider initiating a knowledge gathering exercise to learn about the needs, barriers and expectations of non-member writers from BIPOC and equity-seeking groups:
 - *The rationale being that it is very challenging for TWUC to appeal or respond to the priorities of BIPOC writers or writers with disabilities, without first better understanding their needs. Surveys have not been successful in the past, but it may be that a virtual roundtable or 1:1 interviews (ideally with remuneration) with a range of writers and/or community leaders could be more effective.*
- Develop joint programs and services with Canadian organizations that research and engage on issues of racial equity, accessibility, youth and newcomer integration (e.g. workshops, competitions, bursaries)
- Continue to amplify under-represented voices within the Union e.g., diverse contributors and diversity-focussed section in Write magazine, amplifying diverse voices on social media, increasing discoverability of diverse members through website
- **Continue to promote TWUC's Health Benefits program and its use, to a wider age spectrum and diverse members**
- Participate in **"creator movement"** to advocate for a living wage for Canadian content creators (Musicians, Playwrights, Screenwriters, Poets etc.).

 1.3

Priority #3 - Community



Goal 3.3

Continue to increase and diversify membership

- Set internal membership growth targets for three-year period, bearing in mind COVID-19 reality
- Build community and identify partners to initiate research program to learn about the needs, barriers and expectations of non-member writers from equity-seeking groups, and where TWUC is in a position to deliver value, and convert into a targeted outreach program
 - Build on success of BIPOC and accessible events in Ontario to expand across Canada, including regions and the North (in partnership with other leading organizations)
 - Expand awareness of Health Benefits program – or more clearly signpost to available options
- Explore feasibility (legal and financial) of expanding TWUC membership to include a student membership, a donor or community option and an increased number of sponsored or subsidized memberships.
- Share the expanded TWUC member criteria widely amongst partners such as 49th Shelf, Page Two, Kobo, Wattpad, CBC Books, Indigo and others to support recruitment

Priority #4 – Digital Strategy



Rationale

Horizon 2023

- The pandemic crisis proved that it is essential for TWUC to implement and improve digital services and tools
- Internal consultation has revealed avenues for integration, efficiency, agility and responsiveness to be explored
- Member survey results suggested potential for improvement in TWUC responsiveness and ease of access – both of which may be able to be supported online

- Expertise with digital tools and services strengthened internally and reflected externally through more responsive and efficient service delivery.
- Strong business intelligence foundation for strategic and executive decisions
- Reduced daily and tactical admin overhead, allowing staff to focus on long-term process improvement
- Simple, efficient, sustainable and flexible operations that reflect needs of the members and staff
- Increased satisfaction levels among members



The two guiding principles of TWUC's 2020-2023 Digital Strategy

- Provide ongoing admin excellence to support members more effectively
- Become a digitally integrated organization: implement, update and review

Priority #4 – Digital Strategy



Goal 4.1

Modernize and invest in TWUC website

Articulate TWUC's value proposition and gather insights about non-members

 3.1

- The member survey tells us that the core value (why people join or renew) lies in the “pride” of being a member of a national writers’ organization, TWUC’s leadership on advocacy, solidarity with other writers, the occasional access to advice and the subscription to Write.
- While this provides a high-level view of the value of membership, implementing gates around select information on the website could help articulate on a more granular level what member and non-member visitors value, i.e. what content is appealing to the community.
- These gates can be used to nudge website visitors to give some information about **themselves in order to access “free” resources on the website** – e.g., in order to download a preview of Write, please provide an email address/subscribe to our newsletter, etc.
- **Run the “gates” for 6 -12 months** and collect data from users willing to provide information.
- Use the data collected about users to gather a database of **“warm” leads**.
- TWUC could then nurture long-term relationships with these leads – email with membership offers, news etc.

Reduce administrative burden

- Work with the developers to expand the web-form outputs/exports to deliver user-friendly and formatted application forms so staff can easily review submitted information.
- Identify common questions received from members and put content on the website that address those queries – how-to guides, FAQs, templates, etc., and redirect members to the website when they call or email
- **Expand the website’s e-commerce capabilities:**
 - Work with the web developer to create one store and a unified payment process for subscriptions, memberships and all other items/events/webinars that can be purchased on the website
 - The e-commerce module (e.g. Drupal Commerce) should be integrated with the existing website and be compatible with future website upgrades



Modernize and invest in TWUC website

Develop and migrate to a new website

- Work on a plan with the developer to move to **either WordPress or Drupal's latest release** (please see Appendix 4.3 on choosing between the two)
 - The move to the new website should include the implementation of a new membership platform, and data migration from SUMAC to the new platform
- Address smaller changes such as web form exports and accessibility as part of the plan
- **The new website should be designed and developed with an “accessibility first” mindset, so it can support TWUC’s community goal of being more welcoming to writers with disabilities.**

Implement new membership management platform

- The new membership management platform will eventually replace SUMAC which was **primarily developed as a fundraising software. TWUC’s activities stretch beyond** simply fundraising; the organization manages members, subscribers, and other types of users, which the current system does not support in a seamless manner.
- The membership management platform would also function as a customer relationship management or CRM system that can help manage memberships in addition to other contacts. Using such a platform will allow TWUC to eliminate the overhead of using multiple systems to manage different information.
- Transitioning to a CRM will be time and effort-intensive, but once set up, it should act as the brain of the organization, and allow for a single view of important organizational data and contacts.
- Essentially, this system will be vital in TWUC’s continued efforts to be more data-driven, allowing TWUC to:
 - significantly reduce administrative burden e.g. there will be no need to duplicate information on the website and SUMAC
 - easily gain insights about member and non-member behaviour e.g. how many members are accessing certain resources, how many members signed up for a webinar or info session and then signed up for the second one in a series, etc.
- The new platform should have the following features:
 - Complete integration with the new website
 - Tier management i.e. allow TWUC to manage multiple tiers – union member, free/community member (and associate/student members should the membership structure change). A free/community member would be a non-member website user who interacts with the website either by buying materials/downloads or attending a paid webinar.
 - Controlled access i.e. access to areas of the website should be limited by the membership tier.

Priority #4 – Digital Strategy



- CiviCRM is the recommended choice for Drupal websites, whereas WordPress has many options – a developer should be able to advise on an appropriate solution for TWUC. Please see Appendix B for more details.

Priority #4 – Digital Strategy



Goal 4.2

Migrate to the cloud and develop new digital workflows

Maximize digital assets

- Create a place to store collections of digital assets (amount and complexity of which may increase as digital assets grow i.e., webinar recordings etc.). Encourage staff to perform routine cleaning and archiving to maximize the current file-sharing system.
- Develop collections of digital assets and reuse assets as much as possible for social media and email communications, advocacy materials and member-specific activities (onboarding materials, FAQs, portal and website help, etc.)

Develop cloud-based workflows



- Migrate to Office 365 to improve security and reliability of office operations
- Use the services of a vendor or IT partner to complete transition
- Develop behaviour around syncing and sharing documents
- Transition to working on the cloud primarily and use desktop (or local storage) as back-up

Plan and template

- **Develop and implement TWUC's inaugural digital marketing and social media strategy plan that reflects TWUC's different** audience segments e.g. email marketing could be used in different ways, with different messaging, to their different groups (current members, prospective members, regional members, etc.)
 - The strategy should include a digital content strategy for Write Magazine
- Plans should be living documents that are consulted and updated often – trial use of Office 365 tools such as Planner and OneNote to keep plans visible, shared and accessible



Migrate to the cloud and develop new digital workflows

Develop digital capabilities

- Continue use of Hootsuite (the latest version) to draft posts, schedule them for delivery, and respond to comments and questions on multiple social media platforms.
- Use MailChimp to access detailed reports² about subscriber behaviour to better understand the value that members, potential members, and non-members place on the content that TWUC creates.
- Build on success of webinars and virtual school readings to sustainably expand online professional development offering
- Explore digital production training and equipment costs/benefits, e.g., to create audio resources, further professionalize webinars (if needed) etc.

Streamline board governance and communications

- To best facilitate National Council meetings materials, set up OneDrive folders, and provide access to board members
- Post sensitive or confidential information and documents only in the shared OneDrive folders
- Limit use of email to update board members about new information in the folders
- After using this workflow for a few months, evaluate if a more specific board management tool is necessary
- Find tools that have most of the features you need at an acceptable cost. Here are some examples:
 - [Minute](#)
 - [Agreedo](#)
 - [4Minitz](#)
 - [MyCommittee](#)
- Implement short trials (e.g. 3 months) and involve board members in the process

² Upgrade to a higher subscription if current plan does not provide access to reports.

Priority #4 – Digital Strategy



Goal 4.3

Leverage data in organizational planning and to ensure successful program/service delivery

Conduct a data audit

- Evaluate if there is data in the organization that is under-utilized, and what data needs to be collected to deliver on strategic initiatives. Conduct a data audit:
 - Identify what data currently exists in the organization – make a list of systems and data collected through each system (see Appendix 4.4 Data Audit)
 - Indicate whether that data is currently being analyzed to understand member and community needs; and
 - Identify what data needs to be collected (i.e. to track KPIs) - compare list of systems and data with data needed to measure progress on strategic goals - e.g. demographic information from new membership applications
- Consider eliminating the process of entering data into SUMAC that is not reported on, or monitored on a regular basis

Systematically collect data

 3.1

- Develop workflows to collect and organize data in a way that is actionable and reportable
- Collect member feedback about programs and general satisfaction on a periodic basis.
- Collect data about every type of audience – members, website visitors, subscribers, one-off buyers of items on the website, and social media
 - For website data – please see Appendix 4.3 Website Analytics.
 - Use spreadsheets to collect and analyze data about purchases of items on the site – track number of purchases, total purchases by single user (track through email address) to see if they should be pursued as potential members, categorize purchases as one-time or frequent (or similar)
 - Collecting data about purchases will also allow TWUC to understand trends e.g. X% of users who purchase item A also purchased item B. This insight can inform pricing strategies like bundling (e.g. “add this to your cart for 50% off”)
 - Track newsletter subscribers and cross-tag with buyers to understand if the audiences are the same people, or if one group can be encouraged to engage in other ways
 - Run in-built SUMAC reports or set up reports on the new membership management platform to track retention, dues payments and non-payments, and other membership metrics.

Priority #4 – Digital Strategy



Leverage data in organizational planning and to ensure successful program/service delivery

Analyze, report and act

- Develop workflows in each function/department – especially in member services and marketing – to analyze data on a consistent basis (i.e. after every program, monthly, quarterly, etc.)
- The analysis should be driven by the strategic goals in this document.
- Use insights to inform decisions and communicate insights to members and the board
- Strategic Plan goals reliant on stronger business intelligence:
 - Capturing evidence of advocacy/livelihood efforts and impact e.g., track and report on Income Loss due to COVID-19 and uptake of emergency funding programs
 - Member satisfaction: Member retention/lower churn
 - Articulate the value of a TWUC membership e.g., monitor engagement with TWUC programs, services, webinars, How-to downloads, referrals, shares etc.
 - Greater regional connectivity e.g., track regional participation in virtual events, downloads, meetings

 2.3

 3.1

Priority #4 – Digital Strategy



Leverage data in organizational planning and to ensure successful program/service delivery

Conduct a program/service review

- Estimate the level of effort (hours and hard costs) required to deliver each program/resource/service e.g. Readings Program, professional development webinars, **Writers’** Guide to Canadian Publishers, publications, etc.
- Develop indicators to define success for each program; indicators could be quantitative and qualitative - revenue, increased membership, benefits to the community at large, advocacy, etc. as long as efficient for TWUC to gather, interpret and act on the results (see KPIs note in Section 1).
- Compare the level of effort, with the indicators to evaluate (i) the continued need for delivering that program/service; and (ii) the success of the program/service. The table below provides a sample, fairly detailed, approach to tracking program-level KPIs.

Program	Effort	Indicators		Expected Outcomes	Results	Assessment
Professional development webinars	20 person-days/year (8% of 1 person's annual effort)	Revenue	\$900	Sustainable source of revenue	×	Test a 10% higher price point; Track webinars as source of new member application; Increase engagement with warm leads
		Non-member audience	100	New member registrations	Unknown	
		Increase in social media engagement (likes, messages, comments, etc.)	5%	Increased community engagement	✓	
		Increase in membership applications (from webinar attendance)	5%			

- This exercise should be conducted at least on an annual basis.

3. Implementation plan

3.1 Timelines and milestones

The attached Gantt chart (and provided as a separate file) places each goal and action on implementation calendar. In this way TWUC can see at a glance, which activities are concurrent and which ones may have dependencies on other tasks. Actions are highlighted according to the strategic pillar they support, so that TWUC can also see the ways in which independent actions support multiple strategic goals. Timelines will need to be revised in consultation with external partners such as website developers and adjusted depending on factors such as COVID-19.

	Priorities				180-Day Priorities 2020												Year I: 2021												Year II: 2022				Year III: 2023			
	Adv	Liv	Com	Op	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4					
Represent the rights of Canadian writers by advocating for the introduction or amendment of relevant laws related to the work of writers																																				
Continue to build and maintain coalitions of support for changes to relevant regulatory structure																																				
Continue to leverage copyright expertise in interventions with legislators, civil servants, partners and other stakeholders																																				
Continue to advocate for increased public funding																																				
Continue to take action to protect the compensation of Canadian authors through the Public Lending Right (PLR) Program																																				
Continue to advocate for fair tax legislation																																				
Continue to work with partners in possible ongoing litigations																																				
Bring the voice of Canadian writers before decision-makers and stakeholders of the publishing industry and education sector																																				
Explore new alliances through a "shift the needle" initiative related to Canadian books and education																																				
Amplify and promote existing provincial virtual school reading programs and support extension of new programs to enable wider reach/accessibility																																				
Explore new advocacy avenues and stakeholder alliances to gain fair recognition and compensation for creators																																				
Track and report on Income Loss due to COVID-19 and uptake of emergency funding																																				
Continue to support the new "creator movement" in Canada, advocating for a living wage for Canadian content creators																																				
Investigate, monitor and share insights on new and arts adjacent funding sources/project initiatives																																				
Leverage advocacy efforts and successes to connect with and recruit non-members																																				
Develop a communications strategy to share efforts, progress and achievements to date with non-member writers																																				

	Priorities				180-Day Priorities 2020												Year I: 2021												Year II: 2022				Year III: 2023			
	Adv	Liv	Com	Op	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4					
Identify and explore new, public and private, direct and indirect revenue streams for writers and help members exploit these opportunities																																				
Encourage and support virtual school reading programs, test feasibility for a permanent virtual national reading program, amplify and promote existing programs																																				
Work with sector partners to try to develop a best practices document for library and school purchases of Canadian books.																																				
Build on success of professional development webinars to expand TWUC's virtual offerings to include virtual match-making sessions																																				
Explore the practicality of partnerships with online literary publications and other digital distribution platforms																																				
Explore and assess relevance/interest in learning about indirect revenue platforms (such as creating e-newsletters/short posts on Medium, Substack, Patreon)																																				
Expand TWUC role for training and guidance with digital marketing and promotion																																				
Clarify TWUC's offering as far as its professional development role																																				
Support self-promotion through professional development workshops/webinars																																				
Refresh/Update Writer's How-To series with digital lens																																				
Support members in a world disrupted by the COVID-19 pandemic through efficient connections with relevant financial programs																																				
Track and report on the impact of COVID-19 on both the Union and its members																																				
Track and report on results of emergency and relief measures, share results to support further recovery planning																																				
Revisit member retention task force findings for support strategies amid COVID-19																																				
Share info about resources, available funds and information to help members overcome the COVID-19 crisis and its ripple effects																																				

	Priorities				180-Day Priorities 2020												Year I: 2021												Year II: 2022				Year III: 2023			
	Adv	Liv	Com	Op	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4					
Provide current members with deeper and more frequent community engagement and self-promotion opportunities (including virtual and regional)																																				
Assess/articulate the value proposition of paid TWUC membership in all comms																																				
Build on Nordicity analysis to better understand and respond to members' personas, needs, churn																																				
Leverage digital tools to expand reach into regions and develop stronger regional connectivity																																				
Promote TWUC's programs/services more boldly: online, in Write and elsewhere																																				
Identify success criteria with regards to community and brand building efforts																																				
Develop and implement TWUC's inaugural digital marketing and social media strategy plan																																				
Engage and support writers from historically marginalized communities to address inequities in the writing industry																																				
Continue to build on progress with TWUC's Equity Implementation Plan recommendations. Consider initiating a knowledge gathering exercise.																																				
Develop joint programs and services with Canadian organizations that research and engage on issues of racial equity, accessibility, youth and newcomer integration																																				
Continue to amplify under-represented voices within the Union																																				
Review/promote TWUC's Health Benefits program to younger, diverse members																																				
Participate in "creator movement" to advocate for a living wage for Canadian content creators																																				
Continue to increase and diversify membership																																				
Set internal membership growth targets for three-year period																																				
Build community to initiate research program to learn about the needs, barriers and expectations of writers from equity-seeking groups.																																				
Explore feasibility (legal and financial) of expanding TWUC membership to new types of memberships																																				
Share the expanded TWUC member criteria widely amongst partners																																				

3.2 Costs and resources

- Some of the actions under Digital Operations need additional investment, over and above TWUC's operating budget.
- The table below contains estimates for the actions based on Nordicity's understanding of the effort needed. However, the estimates must only be used as a guide and should not be used in place of quotes from TWUC's web developer. The details of implementation i.e. look and feel, the modules chosen, timelines etc. may all impact the final quote.
- It is assumed that the migration to Office/Microsoft 365 will take place in the near future and the project has already been approved. It is therefore not included in the additional costs.
- All other actions will need resources in terms of effort and time but may not need additional funding.

Goal/Action	Additional Cost	Ongoing Cost
4.1	Expand, modernize and invest in TWUC website	
Develop and migrate to a new website	Get developer quotes for developing and migrating to a new website that includes a membership management module, ecommerce functionality, and gates to collect information about visitors, and importing old data from SUMAC. Nordicity Estimate: \$30,000 - \$50,000. (Requirements such as look and feel, size of data imports, timelines etc. may all impact the final quote)	Fixing Issues/Maintenance
Articulate TWUC's value proposition and gather insights about non-members	Get developer quotes for implementing gate. Nordicity Estimate: \$500 - \$800	Fixing Issues/Maintenance
4.2	Migrate to the cloud and develop new digital workflows	
Digital marketing tools		Hootsuite Professional Plan: USD\$30/month – offers a non-profit plan – inquire with company
Streamline board governance and communications		If board management tool is chosen, the tools suggested are either free, or range from \$3/user/month to \$29/user/month in fees.

3.3 Change Management Considerations

Increasingly, organizations around the world are recognizing that behaviour changes are a crucial ingredient to the successful adoption of new digital technologies and processes:

- Universally speaking, changes in digital infrastructure need to be accompanied by changes in user behaviour to maintain efficiency and increase staff cohesion
- For any software implementation (cloud platform, membership management, etc.) it is important to assign duties, dedicate time and resources, set milestones and treat it as another project or service to ensure it is prioritized by everyone
- For example, for a cloud-based collaboration platform to work, all employees need to work on the cloud. The solution will not provide all benefits if platform only partially adopted
- With increased virtual operations online security becomes even more important – e.g. website maintenance – staff need to be diligent about back-ups, software updates, and applying security patches for Drupal; use a paid subscription to Zoom to have encrypted video calls; and use OneDrive to share sensitive information, etc.

Appendix A. Digital Needs Assessment

Current scenario:

- COVID-19 has accelerated TWUC's shift to digital processes – not only for member-facing tasks but also internally with staff working remotely. Staff have started using new chat platforms, are conducting all meetings on Zoom, and adjusting to working remotely.
- TWUC has greenlit Microsoft 365 implementation, which will allow staff to collaborate on documents, and have reliable and secure access to files at all times.
- There is a fair amount of physical paper and non-digital communications with members – which has reduced due to COVID-19 – but normally expected by members.
 - Members are sent paper notices and physical welcome packages.
 - An estimated 40% of dues are paid online i.e. 60% are “offline” (phone/cheque).
 - Donation requests are sent using regular mail.
 - Membership applications are often printed out and reviewed.
 - About 40 members of TWUC do not have email addresses and receive only paper/offline communications.
 - Admin staff received many phone calls from members (e.g. for contract advice, questions about Readings programme, etc.), and from non-members (e.g. help on getting published, how to become a member, how to apply, for application status if they haven't heard back, etc.).
- In almost every scenario the current systems work “well enough” but certain operational challenges may be beginning to hinder TWUC's ability to enjoy stronger business intelligence and analytics about its members. Additionally, a “digital” mindset is needed across the organization; currently, “digital” activities are ad-hoc, and specific to certain functions.

Digital Challenges/Issues:

- Need for integration: The payment workflow for purchases on the website varies by payment method in terms of receipt generation, data entry into the backend, and communication with the buyer/customer/member. Membership dues paid by credit cards are integrated with the database in terms of updating membership information and generating receipts, but for subscriptions or other services (e.g. admin fee for Readings programme), PayPal is used which is not integrated and receipts are manually generated. Additionally, a large portion of members pay dues on phone, creating an offline payment channel. Given that the admin overhead is high due to the disparate processes, TWUC could benefit from an integrated approach to ecommerce and payments.
- Website issues: The current website was built on the Drupal 7 platform that will not be supported beyond November 2022. There are also functional limitations in that it is not mobile-friendly and does not provide formatted exports. Web forms that are currently used for membership, AGM registration, manuscript eval service, etc. do not export data in a ready to use manner, requiring staff to make changes manually and/or work with printed copies of data. With the definite date of obsolescence, and the discussed limitations, TWUC will plan for a new website implementation imminently.
- Limited data strategy: TWUC maintains information about its members and programs by manually entering information into their donor management database, SUMAC. A record is created for every person that has an interaction with TWUC's programs e.g. a writing

competition participant, subscribers, donors, members, potential members, etc. While TWUC staff enter data diligently into the system, the data itself is not structured in a manner conducive to reporting. There is also a limited amount of planned reporting run from this database. Evidently, the organization has plenty of data about members and the larger community, but no coherent data strategy to realize the potential of that data.

- Digital transformation to support strategy: This strategy recommends several actions to strengthen community efforts and in their current state, the website and the database do not have the functionality required to fully execute on those initiatives.

Digital Goals/Opportunities

- Digital producers: Given the current environment where everything is moving online, TWUC wants to be able to provide more digital support, training, and learning experiences to its members. While it may always be more cost efficient and reasonable to outsource digital production to experts, the team is open to augmenting its current skills and comfort levels. Specifically, they would like to develop some digital producing skills to produce videos for webinars, or training, and marketing collateral for their community and advocacy efforts. One advantage would be the ability to react faster to immediate needs for content.
- Marketing strategy: Marketing activities currently include email communications (newsletters and member-related), the TWUC website and social media channels. Member invitations/outreach to new potential members is the main recipient **of TWUC's marketing** energy. TWUC staff use social media to find potential members – alongside primary sources such as Quill & Quire, **publishers' catalogues, etc.** Overall, however, there is not a concrete plan or target for ongoing marketing and communications to nurture those warm leads. Staff execute upon short-term initiatives but recognize the need for a broader marketing strategy that can help focus their efforts and keep them on track. Additionally, they track marketing metrics (website analytics, social media engagement) on an ad-hoc basis, not periodically, which does not allow them to monitor metrics over time, understand trends, and act on insights.
- Need for new digital processes: Staff expressed the need for streamlined and secure communications with board members. They would like to have one system/process to bring together governance communications – emails, minutes, agendas, meeting invites and follow-ups. With no in-person meetings now, staff are unsure of how best to share confidential information. A new system will address these concerns.

Issue prioritization:

Task	Pain/Friction/ Urgency	Frequency/ Volume	Priority to simplify/find solution
New website	High	High	1
Processing payments (invoicing, receipts, membership dues)	High	High	2
New member/subscriber onboarding (set up on SUMAC, website account, add to Mailchimp, welcome emails)	High	Moderate	3
Analyzing and monitoring data about member/subscriber interactions/engagement	High	Moderate	4
Supporting professional development (producing/sharing PDF, webinars)	High	Moderate	5
Communicating with National Council	Moderate	Moderate	6

Appendix B. Choosing between WordPress and Drupal

In general, WordPress websites are more common than Drupal websites³ and hence:

- finding a developer or designer for WordPress is easier, or switching to another developer or designer is easier because there are more designers, developers, and website professionals that "speak WordPress";
- there are more user forums and online help is likely to be easier to find than for Drupal i.e. for staff to add content on their own, etc.; and
- if there are specific needs/requirements in the future, WordPress is more likely than Drupal to have a solution/plugin for it (because of the large user and developer base)

A new member management portal (or CRM) that can accommodate various types of users and membership levels may get complex over time. Both platforms have options for member management modules that allow for member logins and restricting access to areas of the website. Adding e-commerce and member management to either WordPress or Drupal would create an equal amount of complexity, and each system can handle that complexity equally well. In terms of functionality, complexity, and future-forward compatibility, both WordPress and Drupal are very much comparable.

Although the platforms are comparable, TWUC is familiar with Drupal. **Staff's** understanding of and comfort with Drupal and its tolerance for Drupal-specific idiosyncrasies should also be considered in the decision.

Going ahead with the new website on Drupal takes away flexibility in how easily TWUC can shift to another developer in the future due to the nature of Drupal website development which tends to be highly configured and customized. This is only a disadvantage if TWUC is dissatisfied with the current **developer. If the reality of being "locked-in" to this developer is undesirable, maybe WordPress is the more suitable platform.**

Here are some questions that staff can ask the developer to help in choosing one platform over another:

1. Would you recommend one over the other given the requirements of ecommerce and membership management? Why?
2. Which platform would be easiest to maintain and keep up-to-date with patches and versions over time?
3. What are some of the issues you have faced with implementing CiviCRM and Drupal 8? Can these issues be avoided by using a WordPress solution?
4. Will adding a type of user or membership level to CiviCRM require significant development effort?
5. Is the cost of developing a new website with ecommerce and membership management modules different for Drupal and WordPress?

³ Wordpress used by 37.8% of all websites, while Drupal is used by 1.6%.

Appendix C. Website Analytics

The goal for website analytics is mainly to figure out what audiences (members and non-members) value from TWUC. There are several metrics that can be tracked to evaluate which parts of the website appeal to certain types of visitors. Metrics to track include:

- repeat site visits;
- time on site; and
- number of pages viewed.

All of these metrics indicate that someone finds value in what they are seeing. These metrics should be tracked over time, for all the pages, particularly the open non-member parts of the website.

Tracking these metrics will help TWUC articulate what people value, so that they can do more of “it”. Creating more content, services, and products that members value is likely to drive up the word-of-mouth and referral memberships, which fuels membership growth. Similarly for non-members, knowing what they value can help TWUC price its publications and other services better, and also help them prioritize efforts spend on creating these products and services.

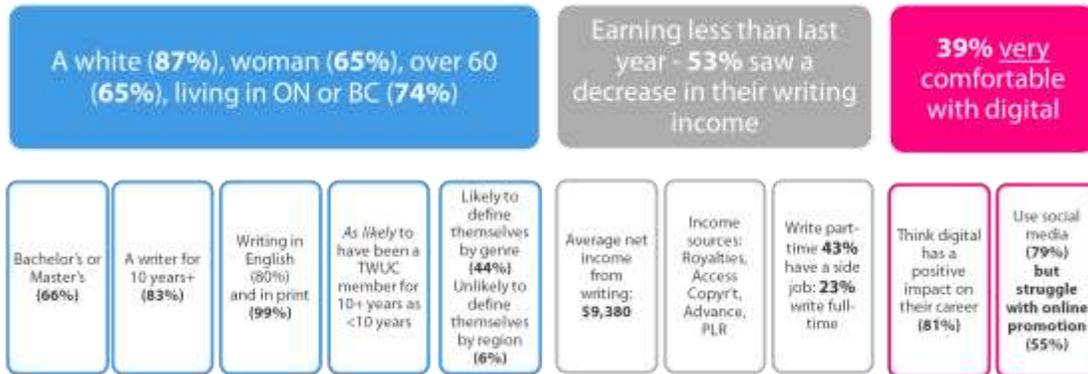
Appendix D. Data Audit

Make a list of all systems, platforms and databases used to collect data about members and non-members – website visits, purchases, webinar attendance, SUMAC, Payloadz, etc. Also list data collected through each system and indicate whether this data is being tracked or analyzed on a regular basis. See sample table below:

System	Data points/ Audience	Currently analyzed?	Metrics/Data relevant to community initiatives
Payloadz	Sales; Non-member names and email addresses	Yes	Revenue; Community engagement
Website ecommerce	Sales; Non-member names and email addresses	Yes	Revenue; Community engagement
SUMAC	Membership related; Readings Programme	Partial	Retention; Participation in member-only programs
Surveys	Member satisfaction	Yes	Satisfaction trends

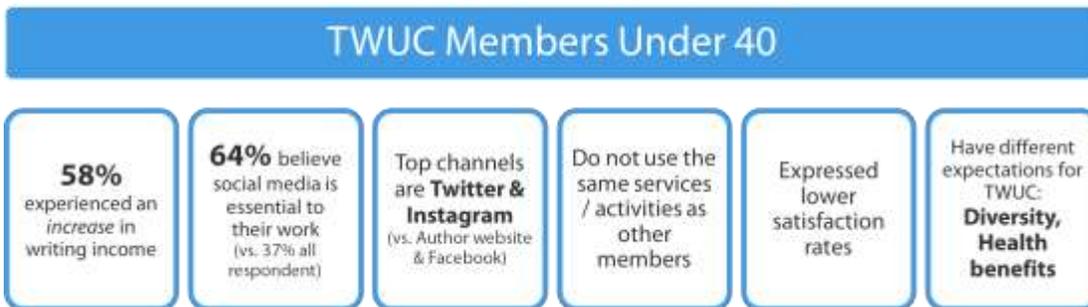
Appendix E. Membership Analysis

The following presents an overview of the typical profile of a TWUC member. The 2020 profile has seen little change from the 2014 member survey results.

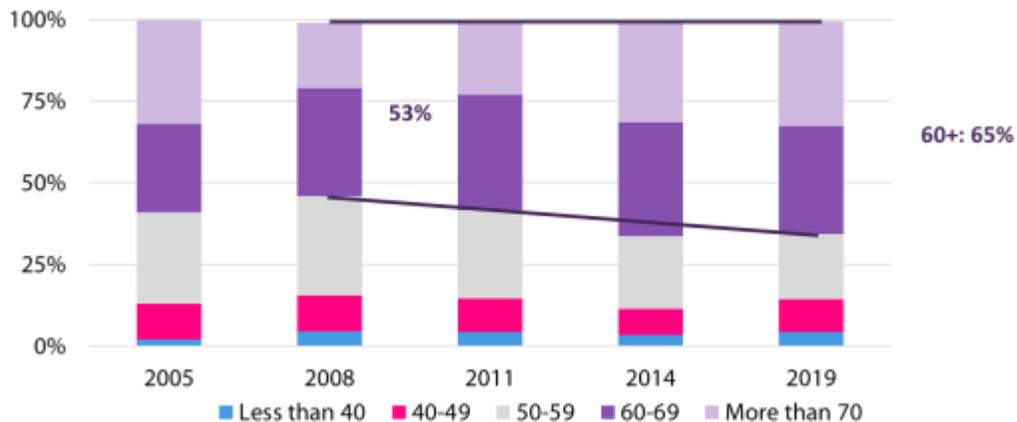


Members under the age of 40 only account for 4.4% of the total membership, so the results below are based on a small sample.

Nevertheless, members under 40 seem to have different expectations and needs, and are more familiar with digital technologies.

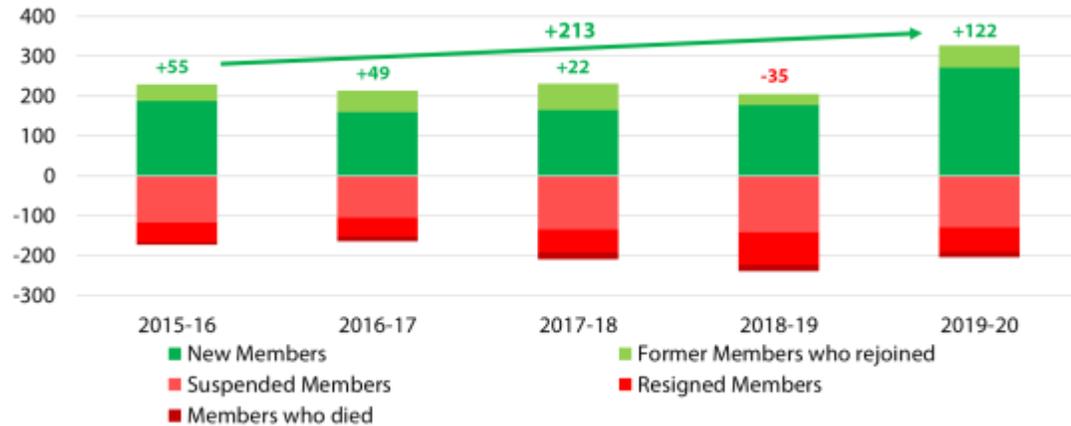


Over the past decade, the 60+ age group has become increasingly important, accounting for 65% of the membership in 2019. Two elements are likely to explain this trend: not only existing members got older, but new members were also already in this age bracket. In the end, if the total membership grew, so did the 60+ group.



This chart shows the “source” for new TWUC members and members who left the union. Every year, about 90% of members renew their membership.

Based on the data, the **current environment and the Union’s objectives**, the Union could add 150 members over the 2020-2023 period.



Example of organizations that implemented tiered membership and/or discounts for some profiles:

- [AAOF, association des auteurs et auteurs de l’Ontario français](#)
- [UNEO, union des écrivaines et écrivains Québécois](#)
- [SoA, The Society of Authors](#)
- [WGGB, Writers’ Guild of Great Britain](#)
- [SWA, Screenwriters Association](#)
- [Irish Writers Union](#)