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CONSUMER MOVEMENT PROGRAM STRATEGY

AND PLANNING FRAMEWORK

April, 1984



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## 1.0 PURPOSE OF THIS DOCUMENT

The purpose of this document is to provide an understanding of the Consumer Movement Program. This program is one of four major thrusts of the Consumer Services Sub-Activity within the Consumer Affairs Program of the Department. This document is therefore structured to accomplish the following:

- ° To explain why our interest in the consumer movement in Canada
- ° To outline the advantages and benefits that are sought for the Canadian consumer through this interest in the Consumer Movement
- ° To highlight what could contribute to the building of an effective consumer movement in Canada
- ° To describe the instruments that are currently available to the Consumer Services Sub-Activity for contributing to the building of an effective consumer movement in Canada
- ° To describe what are the roles of headquarters and the field in the use of these instruments
- ° To indicate how these instruments will be used in the immediate future.

## 2.0 THE MISSION

The mission of the Consumer Movement Program is a composite of the reasons why we are interested in the consumer movement and the advantages/benefits which we seek for the consumer. It is therefore best described by discussing the following:

- ° The Consumer Movement in the context of the Consumer Services mandate
- ° The advantages and benefits which are sought for the consumer
- ° The objectives of the Consumer Movement Program.

### 2.1 The Consumer Movement in the Context of the Consumer Services Mandate

The Consumer Services mandate was derived from the reality that the availability of federal resources was declining when increasing social sophistication and awareness were creating the need for greater consumer assistance. The mandate was therefore an attempt to increase the

effectiveness of our limited resources by essentially withdrawing from direct program delivery and attempting to catalyse the considerable resources of the private sector, the not-for-profit sector and the voluntary resources of the individual and community groups. It was, in effect, an approach to encourage the delivery of consumer services by business, community and consumers themselves.

The mandate has been designed to influence the following three types of resources:

- ° Consumer Services in business where it is being recognized increasingly by business that consumer services are in effect good business. Here the total spectrum of consumers is expected to benefit from better complaint resolution, feedback mechanisms to business, and product information through to increased quality of goods and services.
- ° Consumer services available primarily through existing voluntary activities aimed at the vulnerable consumer. This specialized consumer assistance for the elderly, native, handicapped, and the like is expected to be increased through better focussing of existing resources upon their identified needed consumer services.
- ° Consumer services available through the processes of the social movement. It is more and more apparent that the demonstrated effectiveness of individuals to organize and focus around a social issue could be utilized for the benefit of the consumer. All consumers are expected to benefit from the catalysing of the considerable resources and expertise available to organized social movements focussed upon an issue.

The remaining and fourth thrust of the Consumer Services Sub-Activity is to maintain a watching brief on all government programs (existing, new and emerging) to make certain that the consumer perspective is appropriately present and represented.

The Consumer Movement program is therefore a catalytic approach to encourage the organization of the consumer for appropriate, responsible collective action in the marketplace. Individual consumers have remained the silent majority in the marketplace, traditionally dominated by business. Consumer collectively have shown little capacity for effective joint action, compared to business industry and labour. The marketplace can therefore be said to be currently unbalanced against the consumer.

## 2.2 The Advantages and Benefits Which Are Sought for the Consumer

Through the Consumer Movement Program, Consumer Services seeks to obtain the following advantages and benefits for the consumer:

- ° The rapid and effective resolution of local and national consumer issues not currently within the purview of existing legislation

- Increased value for money in consumer expenditures through influencing the quality of goods and services in the marketplace
- Increase consumer satisfaction through the ability to influence the tailoring of goods and services more appropriate to consumer needs and desires.

These advantages and benefits are expected to be available to the broad spectrum of consumers.

### 2.3 The Objectives of the Consumer Movement Program

The following hierarchy of objectives is relevant to the Consumer Movement Program:

**To strengthen the consumer's role in the marketplace by assisting (catalysing, encouraging) in organizing for appropriate collective action.**

- supporting the development of consumerism by encouraging consumers to take collective action on issues of interest to them
- supporting consumer efforts to establish self-reliant and responsive organizations at local, regional and national levels of interest and activity
- supporting organizations in efforts to be informed, efficiently managed and make useful contributions to the consumer movement
- supporting those initiatives of voluntary organizations which will improve the competence, credibility, accountability and confidence of the consumer movement.

### 3.0 THE STRATEGY

The strategy for achieving the objectives of the Consumer Movement Program is based upon a recognition of the delicateness needed for government involvement in this area and the difficulty of ensuring a positive reaction to attempts to create a viable self-sufficient consumer movement. Therefore the strategy is based upon attempting to provide the background conditions that are currently recognized as being necessary (but probably not sufficient) for a viable consumer movement through the use of limited expenditure and advisory instruments. These necessary conditions and currently available instruments are described in detail below.



### 3.1 Conditions Needed for a Viable Consumer Movement

There are four necessary conditions that have to be in existence for a viable consumer movement to flourish:

- ° There should exist a strong, national organizational infrastructure that is linked into a broad network of voluntary organizations which do not necessarily have to be dedicated entirely to consumer issues but could be organizations such as women's institutes, church groups, etc., which support the interests of their members as consumers.
- ° There should exist a mechanism for consumer issue identification and testing of consumer support for action on specific issues.
- ° There should exist a body of professional advocacy competence within, or easily accessed by, the consumer movement.
- ° There should exist a process for continuously using and expanding the network of consumer movement linkages through conferences, meetings, seminars and appropriate published material.

### 3.2 Characteristics Needed for Viable Consumer Organizations

The characteristics of motivation, capacity and opportunity require attention in order to develop stronger consumer organizations in the Canadian marketplace. Motivation may be described as the inclination or desire by an organization to take some particular course of action. Capacity refers to its ability to take that action and opportunity is the occasion to undertake that action. It makes no sense to emphasize any one of these three components if the other two are not somehow addressed. Why, for example, develop an organization's capacity to take some particular action for which it has neither sufficient motivation nor opportunity? Similarly, a highly motivated organization which lacks skills or expertise risks failure, regardless of the opportunities for action. All three components are essential in order to bring about change, each having the potential to affect the other two in some positive fashion.

There may be times when the enthusiasm and commitment of an organization will compensate for some deficiency in skill or knowledge. There may be other times when the adage "where there's a will, there's a way" applies. However, having the willingness and chance to succeed are not enough. The organization must also have the capacity to achieve. This is where the Consumer Movement Program can direct resources most effectively.

### 3.3 Instruments Available

There are two instruments by which Consumer Services helps consumer organizations or organizations working on behalf of their members as



consumers. These involve **financial (funding)** and **non-financial (technical)** assistance. Financial assistance (funding), however, has limitations. On the one hand, the fund is limited and stringently administered. On the other hand, it can perpetuate a relationship of dependence. While the funding instrument has become a featured attraction of the department for a limited number of organizations, the greater potential for self-sustained growth, in terms of support to many many organizations, lies with the provision of non-financial (technical) support. It is more innovative, as it can have many different expressions and can occur at almost any point in time.

3.3.1 Financial (Funding): The department has been helping to fund various consumer groups and voluntary organizations across the country since 1970. As the consumer movement evolved and as the needs of Canadians became more diversified, the funding program was modified. From the outset, funding was offered to organizations whose activities promoted the general interests of Canadian consumers. Today the objective of funding is to help consumers collectively strengthen their position in the marketplace. This represents a strategic shift away from providing funds for the delivery of such direct services as complaint handling or budget counselling, to providing funds in such a way that the consumer movement becomes a stronger force in the marketplace. **Funding groups to provide specific services generally results in consumers using the service but never becoming part of the movement.** There are four distinct types of funds with nearly \$2 million in grants and contributions to be awarded annually, at national and community levels.

Type I: Core Operating Support. These are grants which ensure the existence of a national organizational infrastructure which is linked with a broad network of voluntary organizations acting in the interests of their members as consumers. For this purpose, a national organization is considered to be one which has a headquarters office and/or membership which affect Canadian consumers across the country, or can present evidence that such scope of operation is being developed. Voluntary organizations supported by this type of funding must be able to respond to consumer issues which affect Canadians in some national context.

Type II: Advocacy Support. These are grants offered to national organizations in order to ensure that professional advocacy exists at the national level, and is accessible to the consumer movement across the country. Organizations which receive advocacy grants should demonstrate their commitment to building professional advocacy competence amongst voluntary organizations in the consumer movement. In so doing, they will help to develop useful advocacy skills and knowledge so that these organizations can represent consumer interests before regulatory boards, marketing boards and similar judiciary bodies at the national level.

Type III: Project Support. Contributions for this type of funding are intended to help consumer organizations in responding to particular issues according to priorities established in consultation with the organizations. These projects will have a finite lifespan. They will also relate to the ways and means by which organizations will attempt to resolve these issues. The types of projects for these contributions deal with further defining consumer issues, building issue awareness, and taking responsible action to resolve them across the country.

Type IV: Movement Development Support. Grants are awarded for funding in an effort to help consumers and their organizations develop skills and build working relationships within the consumer movement. They are also used to provide support for studying the validity of emerging issues and problems and testing the extent of consumer concern about them. Such support would be available to groups of consumers seeking to organize or improve their organization or groups of organizations, through such activities as training sessions, meetings, research, special surveys, and the like.

3.3.2 Technical Support (Non-financial): Technical support to voluntary consumer organizations can be defined in many different ways. For the most part, it refers to any kind of non-financial assistance which helps to address the deficiencies or needs which the organization identifies for itself. Some of this support may be designed for use at regular intervals while other kinds of support may occur on an ad hoc basis (e.g. advice, referrals, skills development workshops). Initiatives for technical assistance are determined by Consumer Services officers in close collaboration with representatives from such voluntary organizations.

The voluntary sector's requirement for useful information is a case in point! Voluntary organizations have consistently described a need to be kept aware of the changing environment and trends which impact on their activities or membership. Bulletins or newsletters serve such purposes. A national quarterly newsletter is to be instituted by headquarters as one way of informing voluntary organizations of emerging consumer issues, and of building a stronger network of support for the consumer movement. Similar mechanisms are evolving at regional levels, and for similar reasons.

In addition, advice and expertise may be exchanged through other means such as monographs, discussions or seminars. Often an organization or group of organizations will ask for special assistance in dealing with a particular operational problem. This might range from training on how to run a meeting, to fundraising, and assistance on how to build membership.

In these examples, a cautionary note deserves mention. Since the aim is to promote self-reliance amongst voluntary sector organizations, it is even better to refer one organization with a problem or need, to another

organization which may have already resolved that problem or which has the capability to resolve it. Our real value is as a point of reference and not one of dependence. The idea of working with organizations in a support capacity, and not one of authority or leadership, should not be lost in defining our role. As difficult as it may seem, a bigger long-term payoff results when we play a role which is subordinate to that of the organizations in the voluntary sector. We need not be the "experts to everyone for everything", but we should be able to help organizations find or develop the expertise they require simply through the provision of technical support or skills transfer.

#### 4.0 THE PLANNING FRAMEWORK

There are **three** phases in the implementation of the Consumer Movement Program:

- Phase I: Studying the Environment
- Phase II: Planning for Action
- Phase III: Taking Cooperative Action

These phases constitute a **sequence** of activities rather than a prescribed schedule. The successful implementation of the program depends on the ability of headquarters and field staff to work cooperatively in their respective roles. The responsibility of each is described in the following sections, and explained in graphical form in Appendix B.

#### 4.1 Phase I Studying the Environment

The first phase is an ongoing activity by which we become more aware of the voluntary consumer organizations or organizations working on behalf of their members as consumers and the latent or emerging consumer issues which attract or require their attention. This activity is documented through organization profiles and issue profiles.

4.1.1 Organization Profiles: The organization profile is a reference tool for all Sub-Activity programs to document, as a point of reference, information related to major marketplace organizations.

The **Consumer Movement** section of the profile focuses specifically on the structural aspects of voluntary organizations - i.e. their funding base, leadership structure, expertise and non-profit status. It also enables some documentation of areas where specific developmental assistance is required in order to help the organization perform more effectively with other marketplace participants. It is attached to this document as Appendix C.

4.1.2 Issue Profiles: The success of the Consumer Movement Program depends to a large extent on an understanding of emerging or persistent consumer issues. Consequently, the issue identification process is critical.

While the systems for identifying issues may vary within each region and headquarters, the process for documenting and reporting on the issues will be standardized.

The various approaches to issue identification and the procedural details will be outlined in a separate document.

#### 4.2 Phase II Planning for Action

This phase attempts to process the data gathered in Phase I as a basis for clarifying and prioritizing the kinds of tasks or initiatives Consumer Services may wish to undertake. It is essentially an analytical and planning role. It presents an objective way of determining how Consumer Services will allocate its resources over a specified period of time. Two particular types of documents support this aspect of our work.

4.2.1 Consumer Services Quarterly Reports on Organization Needs and Consumer Issues: A quarterly report containing brief analyses of organization needs and consumer issues will be prepared at headquarters and regional levels. The reports are to be based upon a review of information documented on the Issue Profile and Organization Profile report forms. Reporting requires some commentary on status and significance for the region and headquarters. These reports represent a simple factual statement about a particular issue or organization need. Regional input is important in this regard. The quarterly report form on organization needs is attached to this document as Appendix D. The quarterly report form on consumer issues is included in the separate document on the issue identification process.

These reports are prepared on a quarterly basis and rolled into one national quarterly report by headquarters' staff. The national report will attempt to identify trends or patterns in organization needs across the country, as a basis for providing relevant technical support. It will also highlight emerging or existing consumer issues in a national context and will be useful in determining program and funding priorities.

4.2.2 National Consumer Newsletter: Headquarters will produce a quarterly newsletter aimed at voluntary organizations, noting in particular, the current issues which might be addressed by voluntary sector organizations. While the newsletter will encourage improved working relationships in the marketplace, its principal purpose will be to generate amongst voluntary organizations, awareness and motivation

to respond to consumer issues in some self-reliant fashion. As well, it will be a natural vehicle for sharing information about opportunities for action and for encouraging organizations to build linkages and networks for cooperation.

4.3 Phase III Taking Cooperative Action: Based on the information from organization profiles and the issue identification process, priorities and resources available, Consumer Services will be able to respond to organization needs and consumer issues in two ways, through financial and non-financial assistance.

4.3.1 Financial (Funding) Support: Voluntary organizations may receive financial assistance from four different types of funding, each having a different purpose and set of terms and conditions. For the most part, **Contributions for Projects** and **Grants for Movement Development** will attract the greatest interest.

Under these two specific funds, financial assistance will be directed to eligible organizations willing to undertake projects which respond to prioritized consumer issues. Consumer Services has a critical role to play in this regard. Not only should we encourage funding applications on specific consumer issues from voluntary organizations, but will adjudicate those submissions at regional and headquarters level, prioritize them and relate them to an overall plan for strengthening the consumer movement.

4.3.2 Non-Financial (Technical) Support: There are few limitations to the kinds of non-financial (technical) support available to voluntary organizations.

Consumer Services is a facilitator for change, and is not expected to be a "know all and do all" for voluntary organizations.

Our role is to assist organizations in planning and taking action in response to their identified needs. Consumer Services is a source of information and advice for analyzing and responding to organization needs, in one case recommending a workshop, in another a special referral, and in still another, perhaps helping in skills training. Consumer Services is a listener, analyst, educator and promoter, and as such, encourages organizations to become self-reliant and more directly responsible for changes on behalf of consumers. Headquarters and each region will be responsible for coordinating, in conjunction with voluntary consumer organizations, a technical support activity. This could take the form of a workshop, a publication, audio-visual tool or other. The important points to note are a) the technical support activity responds to an identified need and b) the planning, implementation and evaluation of the activity is conducted in conjunction with the target organization.

The goal is to strengthen an organization or group of organizations. As they are strengthened, the consumer movement becomes more viable.

4.3.3 Canadian Consumer Week: The Sub-Activity has already identified a need to highlight positive initiatives undertaken in the marketplace among business, voluntary, government and special interest organizations. In this regard a National Canadian Consumer Week is being proposed as an event which will increase the public awareness of marketplace issues and appreciation for cooperative ventures on behalf of consumers. The proposed Canadian Consumer Week is a great opportunity to promote cooperation among organizations in the business, government and voluntary sectors, and as such, deserves special consideration for program planning and implementation.

## 5.0 MEASURING PROGRESS

In order to be recognized as a viable government activity the Consumer Movement Program must be accountable for its use of resources. Two kinds of assessments can be undertaken to ensure that program resources are used effectively for the purposes for which they were intended. Such assessments are useful as planning as well as control instruments for financial and non-financial activities.

### 5.1 Assessing a Voluntary Organization

Four measurable factors contribute to an organization's capacity to bring about change in the marketplace. They are **Competence, Credibility, Accountability** and **Confidence**. The following considerations for each factor provide a comprehensive assessment of any particular organization. They facilitate a structured analysis of the organizations which make up the consumer movement, and they help to identify areas where financial and non-financial resources can be allocated most effectively.

5.1.1 Competence: Competence refers to the administration and expertise identified with any particular organization. It is based on the performance of the organization in the marketplace. An assessment of competence results from an analysis of the following:

- ° the extent to which the organization has clearly-defined and measurable objectives
- ° the extent to which the organization has the necessary skills, expertise, structure and managerial abilities to achieve measurable results in an effective and efficient manner
- ° the extent to which the organization is able to acquire and maximize the use of limited resources.

5.1.2 Credibility: Credibility refers to the reputation of the organization, and it is often based on its experience and the perceptions of other organizations in the marketplace. An assessment of credibility results from an analysis of the following:

- ° the extent to which the membership of the organization is representative of, and supported by, the constituency it serves
- ° the extent to which the organization can mobilize support from other groups in order to address issues of mutual concern
- ° the extent to which the organization is perceived by its peer groups to be constructive and responsible.

5.1.3 Accountability: Accountability refers to the relationship and response of the organization to its members, its particular constituency and the general public. An assessment of accountability results from an analysis of the following:

- ° the extent to which the goals, priorities and activities of the organization reflect those of its constituency
- ° the extent to which the membership of the organization participates in the planning, policy and decision-making processes
- ° the extent to which the organization keeps its members, peer groups, and the general public informed of its activities

5.1.4 Confidence: Confidence refers to the ability of the organization to represent itself among peers and those organizations with which it aspires to be equal. Confidence spawns an attitude of self-reliance, responsibility and assertiveness. An assessment of confidence results from an analysis of the following:

- ° the extent to which the organization is informed, thorough, articulate and able to effectively advocate its position in the public arena
- ° the extent to which the organization demonstrates a sense of self-determination and an ability to achieve self-sufficiency
- ° the extent to which the organization manifests initiative and responsibility in dealing with other organizations in the marketplace.

## 5.2 Assessing Projects

Although technical assistance and some financial support is aimed at developing organizations and their networks within the Consumer Movement, most resources in the Consumer Movement Program are directed to specific



activities related to consumer issues. For the most part, these activities are projects which further identify consumer issues, generate awareness about them, test their significance in terms of consumer concern, and help to resolve related problems. The following eleven factors seem to be useful in assessing such projects and will constitute an important part of the adjudication process:

- ° the extent to which the project contributes to the development of a viable and effective consumer movement in Canada, including a more capable, active and assertive force in the marketplace
- ° the extent to which the project specifically addresses identified issues
- ° the extent to which the conduct of the project will encourage consumer participation and expand movement linkages
- ° the extent to which the project relates to specific consumer problems at the local, regional or national levels and with relevance across Canada
- ° the extent to which the project contributes to a greater sense of self-reliance and improved reputation for voluntary organizations
- ° the extent to which the project is supportive of, and consistent with, the overall goals and intentions of the sponsoring organization
- ° the extent to which the project has a finite lifespan
- ° the extent to which the requested funding is reasonable in view of the proposed scope and level of effort associated with the project
- ° the extent to which the project is suitably planned in terms of defined outputs, milestones and resource requirements
- ° the extent to which integrated systems are in place which will allow the project to be effectively monitored and controlled
- ° the extent to which there exists a commitment to conduct an evaluation of the results of the project once it is completed.

#### 6.0 DEVELOPING THE PARTNERSHIP

The success of the Consumer Movement Program is dependent on several factors. Not only must the program be flexible enough to accommodate regional concerns, but it must also rely to a great extent on the interest and commitment of voluntary organizations.

Organizations respond to issues differently, depending on the economic and political climate in which they work. Will Canadians support

consumer organizations or do their priorities and interests lie elsewhere? Perhaps a consumer problem is only one part of a larger or more complex matter. For example, to help people deal with the reality of automated banking (fear of fraud or depersonalized convenience service) may in fact mean coming to grips with their general concern about computer technology or the invasion of privacy.

A major determinant of the direction and pace with which the consumer movement develops relates to the perspective and priority any organization chooses to give to any particular consumer issue. Financial support, or any other kind of governmental support, can only go so far in determining the attention an issue will receive. Voluntary organizations have a mind of their own and no matter the state of their relationship with governments, they will invariably do what they want to do when they wish to do it.

Much of the relationship between governments and voluntary organizations is based on custom or some established process of interaction. To change such practice is not easy, since many organizations have come to expect a particular kind of behaviour from other organizations, including the government.

Understanding and support for cooperative action requires a certain degree of planning, consultation and education among all marketplace players. As this is achieved, a stronger and more self-reliant consumer movement will develop over time in Canada.

## GLOSSARY OF WORKING DEFINITIONS

The following current definitions are proposed in the interest of consistency in the administration of the Consumer Movement Program. They are unique to our purposes and not necessarily applicable outside the purview of the program.

- i **Consumer** is one who purchases a good or service in the marketplace, for private use.

Purchase is understood to include any arrangement involving an economic transaction (e.g., lease, rental, purchase, indirect transaction through payment of taxes).

A good or service is understood to include anything to which an economic value can be affixed (e.g., food, housing, health care, transportation).

The marketplace is understood to refer to any setting where goods or services are offered for purchase (e.g., not including informal sales of used goods from neighbor to neighbor).

For private use is understood to include any use that is not primarily for commercial purposes (e.g., not including the wholesale purchase of products for retail sales).

- ii **Consumer Interest** is the expectation that the marketplace does and will function according to reasonable standards regarding availability, or cost, or quality of goods or services for private use (including factors which affect pre-purchase decision-making or post-purchase satisfaction).

Availability is understood to include access by consumers to goods or services, and a reasonable choice of goods or services.

Cost is understood to include price and financial terms (e.g., interest, deferred payments, finance costs) related to purchase.

Quality is understood to include representation of the good or service in the marketplace and performance standards, (e.g., safety warranties, misleading advertising).

- iii **Consumer Concern, Problem or Issue** is a situation which can arise whenever the marketplace fails, or may in future fail, to function according to reasonable consumer standards regarding availability, or cost, or quality of goods or services for private use.

Concern relates to a matter which an individual considers to be of relatively low priority and removed from the exigencies of daily living.

Problem is directly related to and contended by an individual as an immediate difficulty, source of distress or question for preferential attention.

Issue is a conflict or potential conflict which results when individuals are or may be unable to resolve common problems or concerns. In magnitude it is larger than a problem and has impact on many individuals.

iv Consumerism is the organized efforts of consumers seeking to influence the activities of the marketplace in their interests as a group, and the belief that such organized efforts are necessary if consumer interests are to be respected in the marketplace.

v Consumer Movement is the collection of consumer groups, consumer organizations and voluntary organizations seeking to influence the activities of the marketplace in the consumer interest.

Consumer Group is a number of individuals who come together in some common cause related to the consumer interest. The group is relatively unstructured, legally unaccountable, and exists only to deal with a specific subject over a short period of time.

Consumer Organization is a voluntary organization which represents its members as consumers or in which major aspects of its programs or services are related to the consumer interest.

Voluntary Organization is a group of people, legally incorporated and freely organized around some common cause which is not profit motivated. For the most part, members donate time and talent to the objectives of the group and they determine the direction priorities and operation of the organization.

vi National Organization is considered to be one which has a headquarters office with activities and/or membership, which affect Canadian consumers across the country or can present evidence that such scope of operation is being developed.

vii Regional Organization is considered to be one which is geographically defined by the federal government - i.e., Atlantic, Ontario, Québec, Prairies and Pacific.

viii Project is a one time non-recurring undertaking, which has specific and clearly defined objectives and results and a definable beginning and end.

ix Grant is an unconditional payment to an organization for which the government will not receive any goods or services. It is normally requisitioned in a "lump sum" upon receipt of the approval of the Minister, and no formal accounting is required to satisfy eligibility criteria. However, groups may be requested to provide final reports on activities or on the use of the funds.

x Contribution is a conditional payment for which the government will not receive any goods or services. It is subject to an audit, and strict accounting is required. It is intended to contribute to the program of an organization by funding a specified project. A contribution will not be used for core operational (sustaining) funding.

Appendix B

CONSUMER MOVEMENT  
PLANNING FRAMEWORK

<u>Phases</u>	<u>Resources</u>	<u>Responsibility</u>
<p>I Studying the Environment</p> <ul style="list-style-type: none"> <li>◦ Identify organizations and their developmental needs</li> <li>◦ Identify consumer issues</li> </ul>	<ul style="list-style-type: none"> <li>◦ Organization Profiles</li> <li>◦ Issue Profiles (and a variety of other approaches)</li> </ul>	<p>Regions &amp; Hdqtrs</p> <p>Regions &amp; Hdqtrs</p>
<p>II Planning for Action</p> <ul style="list-style-type: none"> <li>◦ Document and analyze information for allocating program priorities and resources</li> <li>◦ Distribute information to increase awareness of organization needs/consumer issues</li> <li>◦ Identify existing technical support resources</li> </ul>	<ul style="list-style-type: none"> <li>◦ Quarterly Reports (Organization Needs and Consumer Issues)</li> <li>◦ National Quarterly Summary: Organization Needs/Consumer Issues</li> <li>◦ Consumer Movement Newsletter</li> <li>◦ National Inventory of Technical Support Resources</li> </ul>	<p>Regions &amp; Hdqtrs</p> <p>Headquarters</p> <p>Regions &amp; Hdqtrs</p> <p>Headquarters</p>
<p>III Taking Cooperative Action</p> <ul style="list-style-type: none"> <li>◦ Plan, implement and evaluate cooperative courses of action in conjunction with target groups</li> </ul>	<ul style="list-style-type: none"> <li>◦ Market Funding Program</li> <li>◦ Financial Support</li> <li>◦ Technical Support</li> <li>◦ Canadian Consumer Week</li> </ul>	<p>Regions &amp; Hdqtrs</p> <p>Regions &amp; Hdqtrs</p> <p>Regions &amp; Hdqtrs</p> <p>Regions &amp; Hdqtrs</p> <p>Regions &amp; Hdqtrs</p>

ORGANIZATION PROFILE

Date \_\_\_\_\_

Completed by: \_\_\_\_\_

° NAME OF ORGANIZATION \_\_\_\_\_

Address \_\_\_\_\_ Telephone No. \_\_\_\_\_

\_\_\_\_\_ Postal Code \_\_\_\_\_

CONTACT PERSON \_\_\_\_\_

Title \_\_\_\_\_

° SOURCES OF INFORMATION ABOUT ORGANIZATION: Details (how, when, where)

\_\_\_\_\_  
\_\_\_\_\_

° TYPE OF ORGANIZATION

Voluntary \_\_\_ Business \_\_\_ Government \_\_\_ Other \_\_\_

° JURISDICTION

Municipal \_\_\_ Regional \_\_\_ Provincial \_\_\_ National \_\_\_

Specify \_\_\_\_\_

° AIMS AND OBJECTIVES OF ORGANIZATION:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TARGET AUDIENCE: \_\_\_\_\_

\_\_\_\_\_

ACHIEVEMENTS:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

CONSUMER-RELATED RESOURCES:	In C.S. Files	
	Yes	No
° Publications _____		
(i.e. Books, _____		
pamphlets, _____		
newsletters, _____		
reports) _____		
_____		
° Other (Specify) _____		
_____		
_____		

° CURRENT ACTIVITIES, PRODUCTS, SERVICES AND/OR PRIORITIES:

\_\_\_\_\_

\_\_\_\_\_

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° ADDITIONAL COMMENTS/OBSERVATIONS:

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\_\_\_\_\_

\_\_\_\_\_

° ADDITIONAL CONTACT PERSONS

NAME	POSITION	TELEPHONE
1. _____	_____	_____
2. _____	_____	_____



CONSUMER MOVEMENT SECTION

DESCRIPTION OF THE ORGANIZATION

i) Brief History of Organization (i.e. length of time established, when incorporated)

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ii) Membership (Numbers of Active/Paying/Subscribing Members)

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iii) Organizational Structure (i.e. Numbers of Volunteers and Paid Staff, Decision-Making Structure/Board of Directors)

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iv) Source(s) of Funding (Including Approximate Percentages/CCAC Funding)

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CONSUMER MOVEMENT SECTION (Cont'd)

PRACTICAL NEEDS OF THE ORGANIZATION

A. Organization's perceptions of their **THREE** most important developmental needs (in order of priority):

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

B. Details of the above:

- 1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

C. Other identified organization needs:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

QUARTERLY REPORT  
ORGANIZATION NEEDS  
(Consumer Movement)

Date: \_\_\_\_\_  
Region: \_\_\_\_\_  
Submitted \_\_\_\_\_  
by: \_\_\_\_\_  
Title: \_\_\_\_\_

IDENTIFIED NEEDS	IDENTIFIED BY WHICH ORGANIZATION(S) ?	RECOMMENDATIONS FOR FOLLOW-UP (Priorities and Rationale)

Project Number: CM-NAT-1 (84/85)

Project Title: Marketing Amended Funding Program Delivery

Work Element: Consumer Movement

Region: National

Project Manager:

Issue: Need to ensure that organizations working in the consumer interest are aware of the new program delivery strategy

Objectives: To promote understanding and support of the revised funding delivery strategy by consumer interest organizations.

Results/Success Measures: Constructive feedback and acceptance of the new delivery strategy by target groups.

<u>Milestones</u>	<u>Completion Date</u>
1. Regional review of "The National Marketing Strategy and Operational Guide".	April 30, '84
2. Regional briefing sessions with Headquarters representative re: "Marketing Strategy and Operational Guide".	May 14, '84
3. Official launching of new funding delivery strategy.	May 28, '84
4. Information sessions with voluntary organizations (including the distribution of explanatory pamphlet.)	September 14, '84
5. Evaluation of marketing plan and direct feedback from groups.	October 31, '84

(CM-NAT-1 cont'd)

Resources Required:

<u>Location &amp; Project Designation</u>	<u>Person Days</u>
CM-NAT-1-HQ-1	35
CM-NAT-1-ATL-1	30
CM-NAT-1-QUE-1.1	43
CM-NAT-1-ONT-1	38
CM-NAT-1-PRA-1	31
CM-NAT-1-PAC-1	<u>41</u>
TOTAL	218

Project Number: CM-NAT-2 : 84/85

Project Title: Financial Support to Consumer Movement Organizations

Work Element: Consumer Movement

Region: National

Project Manager:

Issue: Need to ensure that financial support to voluntary organizations working in the interest of consumers, promotes the realization of the funding strategy's four sub-objectives

Objectives: To allocate financial resources to voluntary organizations in a manner which helps consumers collectively strengthen their position in the marketplace.

Results/Success Measures: The development of a voluntary organization network which resolves consumer issues and demonstrates the existence of a viable consumer movement

Milestones

Completion Date

- |  |               |
|--|---------------|
| 1. National and Regional issues identified, and/or transitional criteria developed for issue oriented projects | July 31, '84  |
| 2. Applications for funding solicited by National, Regional and District levels                                | Sept. 30, '84 |
| 3. National, Regional and District funding requests evaluated and recommendations prepared                     | Nov. 15, '84  |
| 4. National and Regional Funding requests received at Headquarters and forwarded to regional offices           | Nov. 22, '84  |

(CM-NAT-2 cont'd)

<u>Milestones</u>	<u>Completion Date</u>
5. Applications studied by Review Committee	Dec. 15 '84
6. Recommendations prepared and forwarded for Minister's approval	Jan. 15, '85
7. Minister's approved results communicated to groups, and payment procedure commenced.	March 31, '85

Resources Required:

<u>Location &amp; Project Designation</u>	<u>Person Days</u>
CM-NAT-2-HQ-2	97
CM-NAT-2-ATL-2	53
CM-NAT-2-QUE-1.2	95
CM-NAT-2-ONT-2	72
CM-NAT-2-PRA-2	48
CM-NAT-2-PAC-2	<u>33</u>
TOTAL	398



Project Number: CM-NAT-3 (84/85)

Project Title: Organization Profiles

Work Element: Consumer Movement

Region: National

Project Manager:

Issue: Need to document, as a point of reference, key organizations working in the consumer interest, their developmental needs and current activities, in order to assist in strengthening the consumer movement in Canada.

Objectives: To establish regional and Headquarters inventories of organization profiles to facilitate effective program planning and implementation.

Results/Success Measures: The development of regional and Headquarters inventories related to target organizations.

MilestonesCompletion Date

- |   |           |
|---|-----------|
| 1. Prepare an inventory of prospective organizations  | Quarterly |
| 2. Review current bank of Organization Profiles   | Quarterly |
| 3. Prepare Organization Profile on consumer interest organizations through some systematic interview method | Quarterly |

Resources Required:Location & Project DesignationPerson Days

CM-NAT-3-HQ-3	25
CM-NAT-3-ATL-3	30
CM-NAT-3-QUE-1.3	29
CM-NAT-3-ONT-3	41
CM-NAT-3-PRA-3	27
CM-NAT-3-PAC-3	46

TOTAL	198
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Project Number: CM-NAT-4 (84/85)

Project Title: Quarterly Report of Organization Needs and Consumer Issues

Work Element: Consumer Movement

Region: National

Project Manager:

Issue: Need to understand organization needs and emerging consumer issues on a national scale

Objectives: To produce, on a quarterly basis, a national analysis of emerging consumer issues and organization needs.

Results/Success Measures: A quarterly summary and analysis of organization needs and consumer issues.

MilestonesCompletion Date

- |  |           |
|--|-----------|
| 1. Review Organization Profiles and other relevant sources of information re: organization needs and consumer issues | Quarterly |
| 2. Prepare Quarterly Report of:<br>a) Organization Needs<br>b) Current Consumer Issues                               | Quarterly |
| 3. Submit quarterly report to Headquarters for input to national Report of organization needs and consumer issues.   | Quarterly |
| 4. Headquarters produces a national report of organization needs and consumer issues for internal use.               | Quarterly |

(CM-NAT-4 cont'd)

Resources Required:

<u>Location &amp; Project Designation</u>	<u>Person Days</u>
CM-NAT-4-HQ-4	32
CM-NAT-4-ATL-4	61
CM-NAT-4-QUE-1.4	30
CM-NAT-4-ONT-4	36
CM-NAT-4-PRA-4	7
CM-NAT-4-PAC-4	<u>31</u>
TOTAL	197

Project Number: CM-NAT-5 (84/85)

Project Title: Non-Financial (Technical) Support to Organizations

Work Element: Consumer Movement

Region: National

Project Manager:

Issue: Need to respond to the developmental needs identified by organizations working in the consumer interest in order to improve their effectiveness in the marketplace.

Objectives: To plan, coordinate and implement, in conjunction with target organizations, a technical support project/activity in response to identified organization needs.

Results/Success Measures: An effective response to a specific need identified by organizations working in the consumer interest.

MilestonesCompletion Date

- |   |              |
|---|--------------|
| 1. Clarify the specific need to be addressed and those organizations affected by it.  | Nov. 25, '84 |
| 2. <u>Assist</u> target organizations using the national inventory of support resources in the development of a plan of action to meet the identified need. | Jan. 25, '85 |
| 3. Implement the project, preferably with credit and responsibility shared by the organizations.  | Mar. 15, '85 |
| 4. Evaluate the project and report to Headquarters  | Mar. 29, '85 |

(CM-NAT-5 cont'd)

Resources Required:

<u>Location &amp; Project Designation</u>	<u>Person Days</u>
CM-NAT-5-HQ-5	29
CM-NAT-5-ATL-5	31
CM-NAT-5-QUE-1.5	143
CM-NAT-5-ONT-5	74
CM-NAT-5-PRA-5	20
CM-NAT-5-PAC-5	<u>20</u>
TOTAL	317

Project Number: \*CM-NAT-6 (84/85)

Project Title: Coordination of Canadian Consumer Week

Work Element: Consumer Movement

Region: National

Project Manager:

Issue: Need to highlight cooperative initiatives among the key players in the marketplace. (i.e. business, voluntary sector, public sector, special interest organizations.)

Objectives: To coordinate an event for demonstrating a marketplace in which the interests of consumers are balanced appropriately with those of the private, public and voluntary sectors.

Results/Success Measures: Establishment of National and Regional Steering Committees, representing target organizations.

Participation of key marketplace sectors.

Increased public awareness of government, business and voluntary sector programs and services oriented to the consumer.

Milestones: See attached

Resources Required:Location & Project DesignationPerson Days

CM-NAT-6-HQ-6	75
CM-NAT-6-ATL-6	31
CM-NAT-6-QUE-1.6	75
CM-NAT-6-ONT-6	23
CM-NAT-6-PRA-6	38
CM-NAT-6-PAC-6	42
TOTAL	284

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\* This project is subject to Ministerial approval. Therefore the schedule is tentative.

CANADIAN CONSUMER WEEK

## PROJECT IMPLEMENTATION

PROJECT MILESTONES*	RESPONSIBILITY		COMPLETION DATE (WEEK)
	H	R	
1. Regional Project Leader Identified		X	To be determined
2. Sub-Activity Projects Identified	X	X	To be determined
3. National & Regional Steering Committees established	X	X	To be determined
4. Steering Committee meetings conducted	X	X	To be determined
5. Preliminary letter of invitation to all project contacts	X		To be determined
6. Follow-up and ongoing liaison with target group contacts	X	X	To be determined
7. External (non-departmental) projects identified	X	X	To be determined
8. Communications Materials Drafted and Approved	X		To be determined
9. Communications Materials Produced	X		To be determined
10. Information package distributed to all project contacts	X		To be determined
11. Follow-up & ongoing liaison with contacts	X	X	To be determined
12. Support to external project activities	X	X	To be determined
13. Evaluation	X	X	To be determined
14. Decision to continue	X		To be determined



Project Number: \*CM-NAT-7 : 84/85

Project Title: Sub-Activity Project to Support Canadian Consumer Week

Work Element: Consumer Movement

Region:

Project Manager:

Issue: Need to demonstrate the Sub-Activity's commitment and support for Canadian Consumer Week

Objectives: To support Canadian Consumer Week with a project which highlights the particular activities and successes of the Sub-Activity over the previous year.

Results/Success Measures: Increased public awareness of the sub-activity's support for co-operative action in the marketplace.

MilestonesCompletion Date

- |   |                  |
|---|------------------|
| 1. Sub-Activity project identified  | To be determined |
| 2. Sub-Activity project developed in detail and specific tasks, responsibilities and schedule defined | To be determined |
| 3. Necessary arrangements for materials, resource persons and facilities completed                    | To be determined |
| 4. Implement Sub-Activity Project   | To be determined |
| 5. Evaluate and Report  | To be determined |

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\* This project is subject to Ministerial approval. Therefore the schedule is tentative.

(CM-NAT-7 cont'd)

Resources Required:

<u>Location &amp; Project Designation</u>	<u>Person Days</u>
CM-NAT-7-HQ-7	22
CM-NAT-7-ATL-7	39
CM-NAT-7-QUE-1.7	10
CM-NAT-7-ONT-7	26
CM-NAT-7-PRA-7	20
CM-NAT-7-PAC-7	<u>36</u>
TOTAL	153

