



Association of
Canadian Archivists
Association canadienne
des archivistes

Moving Forward Together

ACA Strategic Plan, 2018-2021



Presented June 7, 2018
Rebecka Sheffield

Introduction

- The Association of Canadian Archivists (ACA) is a professional association that has served Canada's archives and recordkeeping professionals for over 40 years.
- The ACA is recognized around the world for its three 'Crown Jewels':
 - *Archivaria*
 - Annual Conference
 - Pride in membership
- *Moving Forward Together* identifies key priorities for the ACA and strategic objectives over the next 3 years.

Strategic Planning Task Force (SPTF)

- The SPTF formed in Summer 2017 and includes representation from across all of the ACA's standing committees. Individual and institutional members are also represented.
- The SPTF includes a Council of Canadian Archives (CCA) liaison.
- Supported by the ACA President, Board and Executive Director.
- Engaged The Portage Group (TPG) to assist with planning facilitation, stakeholder research and communications.



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THE
PORTAGE
GROUP

SPTF Timeline

2017:

- June: ACA President called for a new strategic plan for the association
- August: Strategic Planning Task Force formed
- September: RFP for strategic planning consultation, awarded to The Portage Group (TPG)
- October: 2-day strategic planning retreat, Ottawa
- November: In-depth one-on-one interviews with 10 ACA members
- December: Survey of members (194 responses: 170 individuals and 24 institutional)

2018:

- February: 2-day strategic planning retreat, Vancouver
- May: 2 virtual focus groups with ACA members
- June: Draft strategic priorities and key objectives circulated to members (ACA Bulletin)
- June: Strategic plan presented for feedback at Members Input Session and documentation will be posted for further review. Feedback will be tracked and addressed as necessary
- July: Members will vote on strategic plan through online voting

ACA Benefits

The ACA is...

- ✓ A key resource for information about and for the archives and records profession
- ✓ A recognized leader in national and international advocacy efforts
- ✓ A place for new, mid-career and senior professionals to connect, interact and learn from one another
- ✓ A vocal advocate for relevant and cutting edge post-secondary archival education
- ✓ An enabler for interactions between the archives and recordkeeping professions and related industries
- ✓ A creator of learning opportunities through *Archivaria*, the Annual Conference and continuing professional education

Stakeholder Research



Strategic Considerations

1. Professional Landscape is Changing

The archives and records profession and sector landscape are changing in response to:

1. rapid technological shifts
2. funding constraints in the national and international archival systems
3. a broadening understanding of the role of records and archives in society
4. a desire and need to diversify the records and archives profession

Strategic Considerations

2. The ACA is not Member-Driven

The foundation of ACA appears to be largely in place. Members indicated that they feel proud to belong to the association and want the ACA to be successful.

Members do not see themselves well represented by leadership and want a more transparent governance structure that facilitates and encourages member participation.

The ACA is not member-driven and stakeholders want to see the association become more responsive to member needs and more nimble in response to the changing professional landscape.

Strategic Considerations

3. Effective Communication is a Gap

Members want to better understand what the ACA does, how it conducts its work and how it interacts with other organizations within and outside of the Canadian archival system.

Members want more information about what is happening within and outside of the Canadian archival system and how this will impact their professional careers.

Members want the ACA to leverage digital and collaborative technologies to better engage with all stakeholders.

Focusing on the Priorities

- 1. Education and Professional Development.** The ACA needs to 'up its game' and provide quality opportunities that meet the needs of our changing records and archives profession.
- 2. Advocacy.** The ACA needs to be more responsive to issues that impact recordkeeping and archival functions and to communicate its continuing efforts more clearly to stakeholders.
- 3. Diversifying the Professions.** The ACA needs to work collaboratively with other records and archives associations and allied professions to encourage diverse conversations, foster participation of a variety of perspectives, and expand its reach

Establishing Priorities



Strategic Priority Areas, 2018-2021

Strategic Priority Areas

1. Education and Professional Development
2. Advocacy
3. Membership Development

Enabling Strategic Priorities

1. Organizational Performance
2. Communications

Education & Professional Development

1. Renew Guidelines for Graduate Education.
2. Undertake feasibility study of accreditation programs for education programs and professional services.
3. Develop more robust suite of professional development opportunities, including:
 - 1) Concurrent PD stream at future ACA conferences
 - 2) Leadership training workshops.
 - 3) Regional offerings in collaboration with local associations.
 - 4) Online and/or digitally mediated workshops and roundtable discussions.

Advocacy

1. Establish mechanism for raising advocacy issues and communicating status of current efforts.
2. Affirm or establish agreements with other organizations to coordinate and add strength to advocacy work (e.g., Steering Committee on Canada's Archives).
3. Develop and recommend advocacy initiatives to address issues impacting the organization and the profession.
 1. Develop robust internal Response Process.
 2. Develop procedures to seek consultation from membership.

Membership Development

1. Develop strategic communications that leverage digital and collaborative technologies.
2. Implement a more responsive and efficient membership management tool.
 1. Facilitate easier membership sign-up and renewal.
 2. Facilitate electronic voting.
3. Develop a diversity framework that prioritises efforts to grow and support membership from diverse backgrounds.
4. Develop communications materials to encourage greater participation in ACA from new professionals, allied professionals, and underrepresented communities.

Enabling Priorities – Open Doors

Organizational Performance

Adopt electronic voting for members (Summer 2018)

Implement a new membership management system (Fall 2018)

Refresh governance manual and revise by-laws (Spring 2019)

Communications

Refresh website and redevelop members-only content (Fall 2018)

Refreshed Bulletin for member communication (Spring 2019)

ACA Website
Now



ACA Website Soon (but not soon enough)

1. A destination for information by, for and about Canada's records and archives profession.
2. Integrated with membership management tool.
3. Dynamic, responsive and visually appealing.
4. Accessible and useful for a variety of stakeholders.

Measuring Success



Measuring Success

1. Increase member satisfaction benchmark from 58% to 65% by 2021.
2. Increase member awareness by 10% by 2021.
3. Increase member satisfaction with communications from 56% to 70% by 2021.
4. Grow membership by 2% annually.
5. Increase total association revenues by 10% over 3 years.

Next Steps





Validate and Endorse the Strategic Plan

This is about you.

The strategic plan responds to member needs and expectations for the ACA.

Please review the full plan at: www.archivists.ca



Moving
Forward
Together



Strategic
Planning Task
Force, 2017-2018

Rebecka Sheffield, Chair

Greg Bak, Education

Jennifer Douglas, *Archivaria*

Wendy Duff, Education

Shamin Malmas, Membership

John Roberts, Institutional Member

Corinne Rogers, Governance

Leah Sander, Outreach

Jim Suderman, Ethics

Andrea Tarnawsky, Advocacy

Chris Trainor, Finance

Thank You!

ACA Staff

Jo McCutcheon, Executive Directors

Maureen Tracey, Client Services Coordinator

ACA Board of Directors

Luciana Duranti, President (2017-2018)

Jordan Bass, Vice President (2016-2017)

Chris Trainor, Treasurer (2017-2018)

Patti Harper, Secretary (2016-2017)

Jane Morrison, Secretary (2018-2019)

Krisztina Laszlo, Director (2016-2017)

Suher Zaher-Mazawi, Director (2017-2018)

Jennifer Mohan, Director-at-Large (2018-2019)

ACA Volunteers

John Lund, Membership

Shyla Seller, *Archivaria*

Elizabeth Shaffer, Education

The Portage Group

Carol-Anne Moutinho

Geoffrey Thacker

Lara Wilson, CCA Liaison

