



May 31, 2018.

Re: Strategic Plan Epanel Report Findings

Attn: J.M. McCutcheon, Executive Director
Association of Canadian Archivists
223 Colonnade Rd. S, Suite 111, Ottawa, ON K2E 7K3

Introduction

Over the course of the last 8 months, the leadership of the Association of Canadian Archivists (ACA) has been working to develop a 3-year strategic plan that is driven by the needs and priorities of its members.

With the support of external association consultants from The Portage Group (TPG), members have been highly engaged in providing feedback to inform the planning process through mechanisms that have included in-depth telephone interviews in late fall of 2017 and a survey that went out to all ACA members in December and January.

This feedback was used to drive the planning process at a strategic planning workshop with the ACA leadership February 12 and 13th in Vancouver. The result of this workshop is a forward-thinking and member-driven strategy to guide the work of the association over the course of the next three years – and beyond.

Two virtual epanel discussions were held from May 23rd to May 25th with individual and institution members of ACA. The purpose of the epanel discussions was to gather additional feedback on the draft plan prior to submission for approval by the broader membership at our Annual General Meeting in June. This process is to ensure our proposed focus is truly aligned to the needs and priorities of our members and the profession they serve.

The following document summarizes the key findings from these important discussions.

Methodology

Virtual epanel discussions were designed for individual and institutional members of ACA. Participants were recruited from a candidate list provided to TPG by ACA. These included members that were not previously consulted during the qualitative interview phase conducted in the fall of 2018.

The sample sought to include diverse views from members across the country, representing different areas of the archives profession and included individuals with varying degrees of engagement and length of membership with the organization. Accordingly, the epanel sample was not random. The feedback and results should therefore be interpreted as qualitative in nature and not statistically representative of the broader ACA membership.

Participants for the two epanel groups included the following:

- Twelve individual members; and,
- Nine institution members.

Summary of Key Findings

Overall, both groups were supportive of the priorities, objectives and strategies established by ACA in its three-year strategic plan and agreed that the plan aligns well with their needs as well as the needs of their fellow individual and institution members.

The common themes in terms of feedback on the plan were similar across the two groups. Specifically, some of the more common comments related to the following:

Importance of Diversity: Epanelists from both groups suggested ACA should consider moving the development of a diversity framework (currently strategy 3.5 to be implemented in year 3) “up the priority list.” Some epanel comments on this subject are summarized, below.

- “This is so important, must it wait till year 3? I'm worried it will be an afterthought.”
- “I believe the 'diversity framework' is especially important and would hope this not only implies an effort to include a diversity of non-archival professions, but also diversity of peoples within the archival profession itself - specifically those from underrepresented and marginalized groups.”

Accreditation: There were comments in both the individual and institute epanels to suggest a few members (both individual and institution) question whether accreditation is a good idea. The view held by those who oppose accreditation is summarized in the comment below:

- “Accreditation of education programs is not necessary. In my experience, some of the best archivists with whom I have worked have not come from traditional archival education programs. There are also a number of archivists who do not work in archival institutions so being from an "accredited" program may not be of much benefit.”

Innovation and Reach: Though a strong majority in both epanels responded favourably to the strategic plan, there were a small number of comments in both groups to suggest a wish the strategic plan was more “ambitious.” As one member explains:

- “As a member of the ACA, I am disappointed that this summary doesn't present more inspiring.”

Technology and Professional Development: There was support in both panels for strategies that involve collaborating with other organizations to deliver quality professional development. A few individual members also commented on the importance of better leveraging technology in ACA’s professional development initiatives. As one interviewee explains:

- “While I like the idea of regional workshops, I imagine that the costs of coordinating such events will be passed on to members. I’d rather see materials developed and made available for people to consume as they are able – online modules, webinar recordings, self-directed exercises that can be done whenever, etc. - so that so much effort is not put into a one-off event that can't be reused or accessed by others.”

Operational Performance: A small number of individual members expressed concern over the cost of new technologies to build member communication capabilities and engagement. A couple of comments were made to suggest that more consultation in this area may be needed before a significant investment is made.

Further to the above, a couple of institutional members expressed concern about the ability of ACA to implement the strategic plan and question whether the plan is too “ambitious for a volunteer organization.”

Ongoing Stakeholder Engagement, Consultation and Transparency: A couple of the institutional epanelists expressed a desire for ACA to continue to engage them as ACA’s strategic plan moves into the implementation and resource-planning phases – and beyond. There was also a desire expressed for ongoing communication to members regarding the planning process and ACA’s progress toward its stated objectives.

Strategic Alignment to Institution Member Needs

In addition to getting feedback on the strategic plan, institutional members were engaged in this initiative to gather further feedback about the level of synergy between what ACA offers and their organizational needs.

Importantly, very few institutional members made comments to specifically suggest there is misalignment between the focus of ACA's strategic plan and their needs. The few comments that were made in this area related to a diminished sense of value for money, as well as a belief (expressed by just one member) that they get little from ACA as an institutional member that they cannot get as an individual member. Some relevant comments are summarized, below:

- "I feel as though these priorities certainly match my needs as an individual member but less so as an institutional member. I struggle to see the benefit of institutional membership while also being an individual member as there are few benefits to institutional membership outside of individual membership."
- "ACA should stop charging exorbitant fees for institutions with high staff levels."

Their suggestions to ACA for improving the alignment of what it offers to support institutional member needs included the following:

- Allowing professional development opportunities for para-professionals that make up much of institutional members' staff.
- Dedicated representation of institutions at the board level and in the governance structure of ACA (such as a standing committee).
- "Tangible" benefits to institutions such as: Free hard copy issues of *Archivaria*; reduced rates on conference and workshop fees for institutions bringing more than one staff member.

Additional themes that arose specific to the institution member epanel are summarized below:

Supporting Less-Resourced Members: The institution member discussion revealed a desire by some to see greater focus by ACA on smaller, less-resourced members and in making ACA more financially accessible. Some specific institutional member comments are summarized below:

- "Start reaching out to people working in smaller places"
- "Recognize more the value of all who work in the archival field, not just those who are employed by larger institutions that can afford to send staff to the conference and that support staff to assume roles on the ACA board or committees."
- "ACA should start offering subsidies/bursaries to archivists who cannot afford to attend the annual conference."

Desire to see ACA 'Ramp Up' Advocacy: Although there were comments related to the importance of advocacy in both the individual and institutional member epanels, the institutions in particular

emphasized the desire to see ACA up its game in advocacy. Some specific suggestions include the following:

- “Start pushing the advocacy file - promoting the vital role of archives.”
- “Provide tools for members to do advocacy within their own institutions (justifying their existence).”
- “Start aggressively advocating for the profession. Please ramp up advocacy. The profession needs a public voice. We haven't had one for a number of years.”
- “Start advocating more for the profession actively instead of reacting to issues that arise in the press/media.”

Diversity of the Conference: A few comments were made to suggest a need for greater diversity at the annual conference. These include the following:

- “Stop making the conference so one-dimensional.”
- “Balance the annual conference programs a bit more - currently a very heavy focus on high level/academic subject matter.”

Access to Content: A couple of institutional members made comments related to their ability to access ACA content. As one panelist suggests, “Stop the embargo on content. So much of ACA content is behind the member's only pay wall.”

Conclusions and Next Steps

Overall, the individual and institutional members consulted were supportive of the draft ACA strategic plan. Several from both groups expressed appreciation at the opportunity to be involved in this important process.

In terms of implications of the feedback to the draft strategic plan, there are two considerations for ACA as it finalizes the strategy in preparation for the upcoming AGM:

1. Diversity is important to many of those consulted. ACA may wish to revisit the timing of strategy 3.5 (Develop a diversity framework) and move this “up the list” in terms of a priority.
2. Pursuing accreditation may create some pushback among some members. The strategic objective (1.3 – Explore accreditation of education programs – whitepaper) may need to be reworded slightly to ensure members are clear that pursuing accreditation is in the exploratory phase and is not going to be implemented without further research and consultation.

The panels provided a great deal of additional feedback provided as future strategies and considerations in support of ACA's various initiatives going forward. Some of these include:

- Leveraging technology to deliver education and PD is an important consideration in building out ACA's strategies in this important priority area.
- Communication and transparency is key and will require continued focus on keeping members informed about how the plan evolves, as well communication about how ACA intends to resource, implement and report back to members as the plan is carried out.

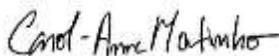
Finally, there were several suggestions related to improving the value proposition specific to institution members. These include:

- Increasing focus on advocacy and communicating effectively to institution members about progress in this important area;
- Building in 'tangible' benefits (such as staff discounts to attend conference and workshops) to increase ROI for institutions;
- Enhancing ACA's focus on less-resourced institutions;
- Broadening education and training to include para-professional who make up many of the staff working within institutional member organizations; and,
- Providing (and communicating) ways for institution members to engage in the governance and decision-making processes of ACA.

Finally, it will be important for ACA to include in its communication how these epanels were used to drive any modifications or changes to the strategic plan draft in preparation for the AGM.

I hope you agree this feedback has been helpful in validating the strategic direction set through the hard work of the ACA leadership in February and provides some clear feedback regarding areas that you may consider modifying prior to submission of the plan at your AGM. Please don't hesitate to reach out should you have further questions or wish to discuss the findings from this consultation initiative.

With Kind Regards,



Carol-Anne Moutinho, MBA | Senior Consultant

The Portage Group

110-174 Wilson Street, Suite 347

Victoria, BC V9A 7N7 Canada

Phone: (250) 479-7449 | Toll Free: (888) 479-7449 | Fax: (250) 380-2232

Web: www.portagegroup.com