Editors Canada Conference: Strategic Plan Presentation

Patricia Huntsman Culture + Communication

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Land Acknowledgement

We are grateful to gather on the unceded traditional territories of the xʷməθkʷəy̓əm (Musqueam), Sḵwx̱wú7mesh (Squamish), and səlilwətaɬ (Tsleil-Waututh) Nations.

Thi Skwithe

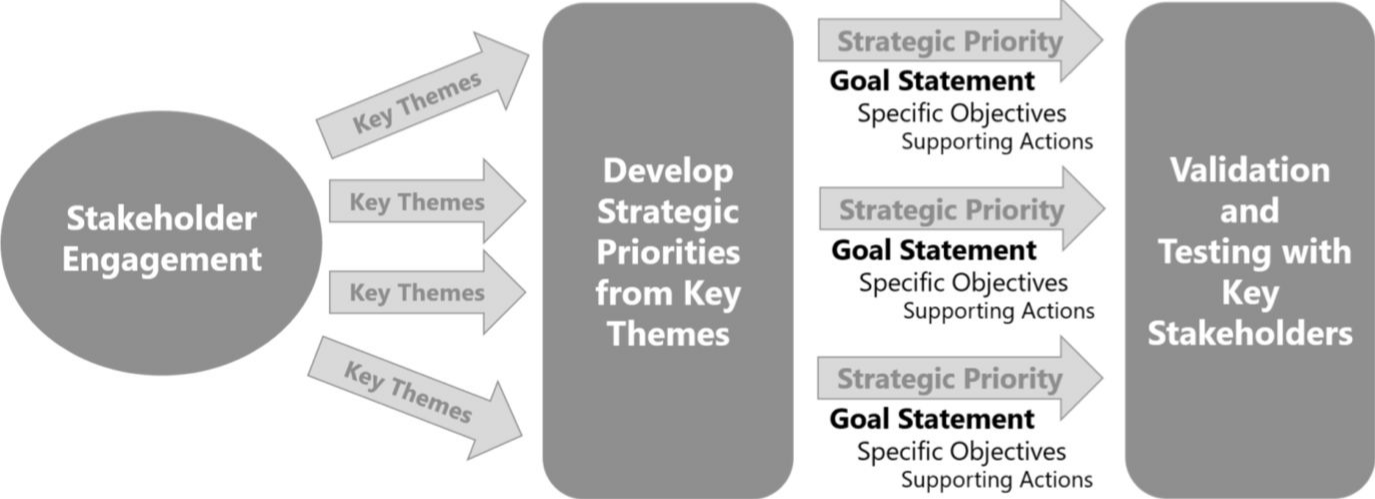("Big Island" in Hul' qumi' num) *"Good heart, good mind."*

We have centered our practice in the United Nations Declaration of the Rights of Indigenous Peoples since 2009.

We acknowledge that Editors Canada has a national mandate and serves various First Nations, Inuit, and Métis nations across Turtle Island.

What We'll Cover Today…

- Overview of the process

- What we heard through engagement

- Draft vision and mission

- Draft strategic directions

- Gather your input

Our Process

What is your major strategic orientation for the next 3-5 years?

Our Process

PHASE 1:
Start-up and Project Initiation

PHASE 2: Key Themes and Strategic Directions

We're here!

PHASE 3: Draft Plan Development and Finalization

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What we heard through engagement so far

What We Heard - Staff

- Interest for Editors Canada to be innovators and thought leaders in the field

- Nuanced relationship with volunteers
  - Over reliance on volunteers, volunteers as decision-makers, timelines and workflow difficulties due to precarity of volunteerism, volunteer burnout leads to staff burnout

- There is a disconnect between the current strategic plan + day-to-day operations – new plan must be operationalized / can't sit on shelf

- Great policy and procedures framework → but may be too complicated

- Recent wins:
  - Equity, diversity, inclusion commitments and activities
  - Bookkeeping updates and streamlining
  - Website update

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What We Heard - NEC

- Support from staff is helpful, collaborative, and friendly

- Governance structure is strong - but limited volunteer capacity to deliver

- Organization feels silo'd, fragmented

- There's a lot of volunteer burnout – including leadership levels

- Lack of continuity in institutional knowledge

- Need to reach new audiences through new mediums - social media (e.g. Tiktok), improve internal online platforms (e.g. email + slack + discord)

- Need to focus on communicating the value of editing/editors to the general public and allied professions/sectors

- Sees Editors Canada as leaders in the industry, ahead of a changing landscape

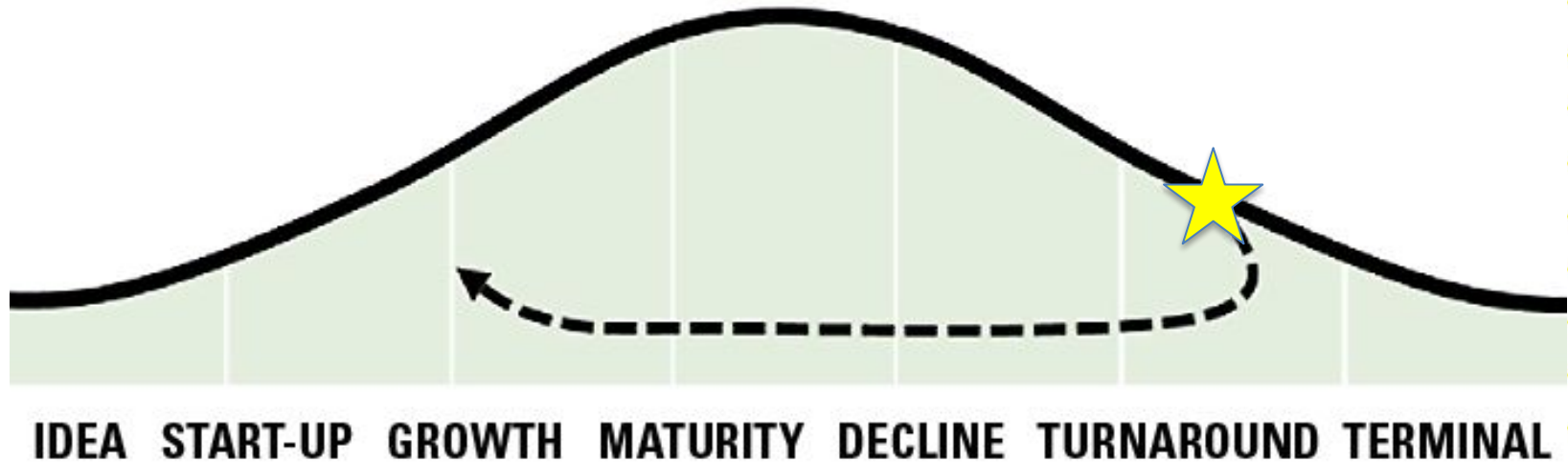- Need to build a better sense of community across the organization

What We Heard - Branches and Twigs

- Branches and Twigs experiences differ from place-to-place
- Volunteers sometimes feel lost or confused on how to do things (e.g. run events, organize meetings, admin, etc.)
- Over reliance on volunteers leading to burnout; some volunteer work feels like unpaid labour
- Committees are silo'd from each other; more remote members feel isolated
- Need to define and distinguish the value and difference of service/program offerings between national and local levels
- Interest:
  - More resources + capacity for EDI initiatives
  - More interest in resources/professional development for fiction editors
  - Supports for editors in new or niche industries

What We Heard - Francophone Membership

- Language trends– tensions between colloquial language use and "purist" french
- Communication is poor with francophone membership–expectations francophone members are bilingual
- Losing francophone volunteers and members to Quebecoise specific organization
- Francophone volunteers are expected to be both editors and translators
- No francophone representation at the national level
- Not all materials available in French
- Hard work is being done at the local levels, but they are struggling for resources and direction
- Editors Canada community outreach and visibility is poor in Quebec

Organizational Life Cycle Assessment

IDEA   START-UP   GROWTH   MATURITY   DECLINE   TURNAROUND   TERMINAL

Overall Life Cycle Assessment Analysis

	Start Up Energy and passion are highest but systems generally lag far behind	Growth Program opportunity and audience demand exceed systems and operating capabilities	Mature Org has reputation for a steady production cycle, a relevant program, and a solid operation.	Decline Making status quo decisions based on internal factors.	Turnaround Taking decisive action to regain relevance and viability.
Programs	Simple, experimental; doing whatever might prove that artistic or cultural program can and should exist	Finding what is distinctive, developing a niche with a specific audience	Balance of favourite programs with audience resonance as well as of artistic/cultural renewal with playing it safe	Rigid, status quo; losing audiences to more relevant offerings	Being evaluated and modified in light of market viability; stakeholder input being sought.
Management	Leader is a 'spark plug' and the most experienced staff person; staff or contractors wear multiple hats	Staff battle against lack of time and constant sense of urgency; first intro of staff specialists that require competitive compensation	Second or third generation leadership, mgm't perceived as leader among field peers, leader inspires confidence among all stakeholders	Committed to status quo, organizational slippage is ignored, mgm't is trapped by commitment to programs	New leader is strong-willed w clear sense of direction; decisive and able to mobilize resources
Governance	Directors have personal connection to mission or founder, tend to defer board decisions to founder, do not view themselves in a governance role	Recruits from outside friends circle bring higher org performance expectations; board structure starting to appear	Board sets direction, leaves mgm't to leader; is organized for maximum effectiveness; keeps mandate focused and vital	Board only takes action when money starts to run out; not focused on community response to org	A core is ready to do what it takes to restore org integrity; non-committed members are gone
Resources	Low-budget, boot-strap operation, budget is the sole financial document, operating on a cash rather than accrual basis	Income sources diversifying; more sophisticated financial management systems are needed	Multiple sources of income; reasonably accurate financial forecasting and deficits generally avoided	Averse to cutting expenses; income forecasts based on the past, if asset-rich looking to prior earnings to cover current costs	Financial crisis may have been the trigger point therefore often short of cash; willingness to cut expenses to reflect reality
Systems	Finance and admin functions and systems are generally weak or are outsourced	Systems of all types must now be improved to meet demands of prog expansion, more fundraising, marketing	Regular communication systems exist w/in the org and with publics, admin systems support timely decision making	Antiquated and physical space may be deteriorating; systems haven't kept up with the times	Existing may be too complicated and expensive for turnaround stage

Key characteristics at this stage

- Information is in disparate places; organizational infrastructure, systems and resources, and knowledge not mobilized and managed

- Financial picture may be good but may also lack a long-term sustainable trajectory and clarity

- Perspectives and opinions of the future of the organization may be divergent

- Evaluation and reflection is needed on services and programs after a period of expansion and growth

- Shifting from grassroots to non-profit administration org structure characterized by turnaround and renewal.

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Overall Engagement Key Takeaways

- Life cycle assessment:
  - Growth/Decline/Turnaround characteristics
- Period of change and renewal
- Open but cautious to change

- Knowledge mobilization gap
- Need to revamp structure to meet capacity of volunteerism today
- Need to cater to multiple audiences
  - Early, mid, established careers
  - Different technological competencies
  - Supporting francophone editors
- Culture shift
  - Organizational culture
  - Generational considerations
  - Addressing divergent values

Draft Vision & Mission

Current foundational statements

Core purpose

The Editors' Association of Canada is a membership organization whose core purpose is to support and advance the interests of editors and excellence in editing.

Mission

Powered by our community of volunteers, our mission is to develop and promote professional editorial standards, increase awareness of the value of editing, and provide products and services to editors throughout their careers.

What we heard:
- Current statements feel timid and neutral. The statements are not compelling.
- There is an opportunity to take a more "forward-thinking", "innovation" role in profession.
- They need a community component
- The statements do not comment on current trends.

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Updated foundational statements

Vision (Future Statement)

Canadian editors are equipped with the skills and knowledge to innovate in a changing profession and advocate for their professional value.

Mission (How we achieve this future?)

Editors Canada champions the interests of Canadian editors and supports excellence in editing by providing professional development and community-building opportunities.

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Draft Strategic Directions

Overall Draft Strategic Directions

SD1   **Begin to build out pathways towards organizational renewal and sustainability**

SD2   **Create a more welcoming and exciting community for all members**

SD3   **Encourage change and thought leadership in a shifting professional landscape**

SD4   **Attract and grow memberships**

SD 5   **Advance advocacy of the profession**

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Strategic Direction 1: Begin to build out pathways towards organizational renewal and sustainability.

What is our goal(s)?

- *The organization is empowered by a complementary blend of staff and volunteers where everyone feels supported and collaborative.*

What are our objectives and how will we achieve them (actions)?

- *Objective 1: Clarify the delegations to the executive director and staff including decision-making processes and operational direction.*
- *Objective 2: Invest in staff and volunteer capacity building and mitigate burnout.*
- *Objective 3: Cultivate long-term financial sustainability for the organization.*

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<mark>Strategic Direction 2:</mark> Create a more welcoming and exciting community for all members

What is our goal(s)?

- *Members understand what Editors Canada is and how to access services, programs and supports.*
- *Members feel a sense of community and belonging and are excited to participate in activities and volunteer.*

What are our objectives and how will we achieve them (actions)?

- *Objective 1: Embody and take concrete actions to support Truth & Reconciliation within the organization and its interactions to the profession.*
- *Objective 2: Continue to support equity, diversity, inclusion, and accessibility initiatives in organizational processes, programs, and services.*
- *Objective 3: Foster an environment that welcomes, celebrates, and embraces all members.*
- *Objective 4: Support bilingualism within the organization and the profession at-large.*

Strategic Direction 3: Encourage change and thought leadership in a shifting professional landscape

What is our goal(s)?

- *Editors Canada is known as a leader in the editing profession by fostering dialogue, cultivating ideas, and embracing innovation around the challenges and opportunities of the industry.*

What are our objectives and how will we achieve them (actions)?

- *Objective 1: Continue to provide exemplar professional development, programs and services that explores the complex issues facing editors today, specifically in the Canadian landscape.*
- *Objective 2: Continue to strengthen partnerships and collaborations with other editing-related organizations and allied professionals.*

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Strategic Direction 4: Attract and grow memberships

What is our goal(s)?

- *Editors Canada is the go-to professional organization for all editors in Canada.*

What are our objectives and how will we achieve them (actions)?

- *Objective 1: Prioritize membership recruitment and retention.*
- *Objective 2: Expand programs and services for new and emerging editors.*

Strategic Direction 5: Advance advocacy of the profession

What is our goal(s)?

- *Editors Canada advocates for the rights and well-being of editors in Canada.*

What are our objectives and how will we achieve them (actions)?

- *Objective 1: Identify a membership-informed advocacy platform for the organization.*
- *Objective 2: Identify generative ways to advocate for editors in Canada.*

NEXT STEPS

Refine Strategic Directions and Objectives— Provide your input!

Draft the Plan, Review and Refine

Finalize