



EDITORS
RÉVISEURS
CANADA

Strategic Plan 2017–2021

Editors' Association of Canada/
Association canadienne des réviseurs

National
executive
council



EDITORS
RÉVISEURS
CANADA

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Executive summary

Every organization needs to plan in order to set and attain its goals. The Editors' Association of Canada (Editors Canada) develops a strategic plan every five years. To start developing the 2017–2021 plan, a strategic planning group met for a full-day professionally facilitated strategic planning session on November 30, 2015. The group was composed of the national executive council, the executive director and other members.

The 2017–2021 strategic plan for Editors Canada contains five priorities to help the association grow and thrive over the next several years:

- Editors Canada will be recognized as *the* voice of Canadian editors.
(*Represent Canada's Editors*)
- Editors Canada will reflect Canada as it is today: linguistically, culturally and geographically.
(*Bilingual and Diverse*)
- Editors Canada will embrace new ideas. (*Innovative and Agile*)
- Editors Canada will have effective and cohesive marketing and communication, externally and internally (between the national executive council and members, and among members).
(*Communications and Marketing*)
- Editors Canada will have more members, and they will be engaged.
(*Membership: Increased and Engaged*)

This document unpacks these five priorities, explores the actions that support them and identifies the outcomes members can expect to result from them.

If membership increases, leading to increased income, the association could do strategic planning again in three years instead of the five-year cycle we are using now.

Introduction

The purpose of the 2017–2021 strategic plan is to make sure that Editors Canada focuses its member energy and resources on agreed-upon goals that will strengthen the association.

The strategic plan for 2012/13–2016/17 focused on volunteering, and the plan before that focused on financial stability. Editors Canada achieved many of our goals from the last plan, despite being hampered by several factors, including limited volunteer resources and changing technology. It's time to update our plans, in part to catch up with and use technology—mainly, social media—so that we can better serve and engage with our members.

The strategic priorities tell us where to focus.

The outcomes tell us what we expect to see happen.

The actions tell us how to get there.

Volunteering, which is central to our member-run association, is part of this new plan; it is found in one of the five strategic priorities. The association will continue the work that was started under the previous plan (including expanding volunteer recognition, providing more volunteer training and creating a volunteer directory). The 2017–2021 plan also includes some new actions on volunteering that should increase the number of members who want to become engaged.

But we clearly need to focus on increasing our membership numbers in the next few years in order to have enough resources (money and people) to sustain and renew our association.

The strategic plan tells us what we want Editors Canada to look like by 2021: an organization that is nationally recognized, diverse and innovative, with excellent communications and actively engaged members.

Background

Our bylaw and policies, along with our procedures and guidelines, describe how we've set up Editors Canada to consistently perform various governance tasks: to organize our association, make decisions, elect people, spend money and support members. These governance documents are based on our core purpose and our mission.

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.

The purpose, mission and governance documents express our values as an organization. This strategic plan is built on that firm foundation.

What are the developing themes?



Methodology

To develop this strategic plan, the national executive council used a typical strategic planning methodology, including working with a trained facilitator (David Kardish, The Centre for Excellence in Communications).

Strategic plans do not always discuss how the strategic priorities were derived. The national executive council has decided to include such information in this plan so that members can walk through the thinking and the discussions as they read the document. Including the process here also expresses a commitment to transparency and serves as a record for future years.

- You can find background information in Appendix 1: Expectations, strengths and strategy drivers.
- You can find details about the methodology and participants in Appendix 2: Methodology and participants.
- You can find the interview summaries in Appendix 3: Summary of the interviews.

Strategic priorities

Our strategic priorities should be determined by the issues we are facing. These are the areas where we should put our attention, our money and our human resources.

Participants spoke individually about what they'd like the organization to become and then together grouped and prioritized everyone's ideas. They arrived at the following priorities.

Represent Canada's Editors

Editors Canada will be recognized as *the voice of Canadian editors.*

Bilingual and Diverse

Editors Canada will reflect Canada as it is today: linguistically, culturally and geographically.

Innovative and Agile

Editors Canada will embrace new ideas.

Communications and Marketing

Editors Canada will have effective and cohesive marketing and communication, externally and internally (between the national executive council and members, and among members).

Membership: Increased and Engaged

Editors Canada will have more members, and they will be engaged.

To turn these priorities into reality, participants set outcomes (goals and objectives), along with the actions required to achieve each strategic priority. These are identified below.

Represent Canada's Editors

Editors Canada should be the place employers and clients go when they need to hire an editor. We need to be careful not to sound stuffy, condescending or boring (do not reinforce editor stereotypes).

Other organizations claim to be the voice of editors. How can we work with them?

Outcome	Actions
Define what editing means and what it brings to the client.	Set up booths at events.
	Educate human resource departments about Editors Canada.
	Do presentations.
	Use training to promote the association.
	Make some promotional videos.
Become the hub: the source of editors and the definitive representative of Canada's editors.	Build awareness.
	Create incentives to promote the association.
	Find synergy with other organizations.
	Have a higher education hub.
	Create a student centre (building for the future).
Become the authority on editing: certification, standards, training.	Set up booths at events.
	Encourage members to provide content.
	Have lunch-and-learn speakers.
	Do more public relations; show the connection between the association and products.
	Do presentations.
	Send out media releases.
	Do radio interviews.
	Make some promotional videos.

recognized as voice of Canadian editors

Bilingual and Diverse

We are in a good situation right now with two francophone staff and a wildly successful French editing test. Can we take advantage of the situation, such as by setting up a satellite office in Montréal?

What about subgroups, such as editors who work in other languages in Canada? Can we support them rather than provide services? Some branches are liaising with other organizations. Can we work with the Office of the Commissioner of Official Languages and others?

Outcome	Actions
Bilingual <ul style="list-style-type: none"> • Offer all services in both languages. • Have a better balance of services for francophone members. • Work on a gradual shift in culture to be a truly bilingual association. 	Take an inventory of services in both languages and use survey results to identify needs of both language groups.
	Expand student outreach (francophone).
	Research organizations for francophone editors in Canada.
Diverse <ul style="list-style-type: none"> • Broaden reach geographically, with more local groups and more online benefits for remote groups. • Broaden appeal to all types of editors. • Offer services to English and French editors outside of Canada. 	Set up online training.
	Provide better resources and support for local groups.
	Expand student outreach.
	Help editors interpret our standards for different areas of editing.
	Have our standards and certification recognized outside of the association.
	Work on getting publishing programs and others (such as government departments) to adopt our publications.
	Set up a directory for special-interest groups (for example, language, fiction, in-house): technical subgroups, lists of links, places to communicate.
	Make the membership list opt-out rather than opt-in.
Expand international outreach.	

*we will have:
A larger, more diverse membership list, that includes various editorial disciplines.*

Innovative and Agile

Let's be not afraid to fail: that can lead to wasting resources, money and energy. Let's change our perspective so we are no longer thinking, "I wonder what we should be doing?" Have a brainstorming session for members at the conference, just before the annual general meeting, to draw on the ideas of people coming to the AGM (and not necessarily to the conference).

Outcome	Actions
Innovative <ul style="list-style-type: none"> • Be the lens through which we act and see. • Try new things; don't be afraid to fail. • Come up with new courses, training, webinars. 	Seek outside expertise, find out what other organizations are doing and build on other people's innovations.
	Work to change the culture to one of "How can we do this?" Build this into our thinking.
Agile <ul style="list-style-type: none"> • Don't keep revisiting old stuff. • Get things done. • Start with the goals most easily achieved. • Don't proceed haphazardly, but use the right tool for the right job. 	Take advantage of projects that come up quickly.
	Be prepared to seize opportunities: put a contingency line in the budget.
	Discuss new business at the start of national executive council meetings, instead of at the end when everyone is tired.
	Make sure policies and procedures support the ability to be responsive and act quickly.



Communications and Marketing

Marketing and communications need resources, and we should have integrated plans. But a limited budget means we need to focus our efforts.

Outcome	Actions
Internal <ul style="list-style-type: none"> Members feel consulted on issues important to them. Members are well-informed about the association. Members have effective communication channels among themselves. 	Have a communications protocol for the national executive council and committees.
	Improve the website.
	Use social media better.
	Provide better support to branches and twigs.
External <ul style="list-style-type: none"> The website is inviting, and it accurately reflects the association. Our targeted communication activities reach potential members, clients and employers. 	Do continuous website development.
	Plan for communicating with potential members, clients (employers) and related partner organizations.
	Identify gaps, such as industries where we have a low profile.
	Continue our momentum in communications with partnering organizations.



Membership: Increased and Engaged

There is little understanding that Editors Canada is a member-run association. We need to communicate that better. There are many ways to volunteer and many different time commitments. Some people are not necessarily able to answer questions about volunteering when they join an association (how much time, what they want to do). Members often like to be asked personally to volunteer. Are there any options for discounts for volunteers?

We need a path to ensure that people stay members. Some join as students, take lots of training and then get in-house jobs. They leave at that point, because the organization offers little to keep them engaged.

Outcome	Actions
Increased membership <ul style="list-style-type: none"> • Increase our membership to 2,000 (members and affiliates). • Increase retention. 	Allow this to happen organically through the activities of the association and new services.
Engaged members, who do some of the following: <ul style="list-style-type: none"> • Talk about Editors Canada to others. • Volunteer (with upward progression or not). • Present sessions at conferences. • Go to meetings. • Interact on social media. • Help others by being a part of the community. • Attend the annual general meeting and vote. • Complete the member survey. • Contribute to a publication. • Use the association logo on their website and in their email signature. 	Create a welcome package with more on member benefits, including volunteering.
	Put a volunteer field on the membership form.
	Improve volunteer recognition/experience.
	Reach out to the non-engaged; ask for help/contributions.
	Solicit input for seminar and webinar topics.
	Increase digital options for votes and meetings.
	Make sure people know the distinction between the annual general meeting and conference attendance (members can attend the AGM even if they do not go to the conference).



Monitoring and evaluating the strategic plan

Many people can use the strategic plan as a guide for their work: committee chairs, branch executives, office staff and the national executive council. All of them should use the identified outcomes and actions when they are making yearly plans.

The national executive council should look at this plan every year to make sure that the association is on course and that the plan is still relevant. The council should also check to see how the association is performing on achieving the identified actions.

If membership increases, leading to increased income, the association could do strategic planning again in three years instead of following the five-year cycle we are using now.



Appendix 1: Expectations, strengths and strategy drivers

Expectations for the strategic planning session

In the first part of the strategic planning session, participants expressed their expectations for the session. Their responses are grouped into categories below.

Overall, the participants were interested in improving services, retaining and attracting members, and planning for the future. This is not surprising, given that members have been talking about these issues for a few years.

Theme	Comments
Our community	<ul style="list-style-type: none">• communicate with members• consolidate membership• help local groups
Our services	<ul style="list-style-type: none">• attract members• give value to members• make sure members know about services• retain members• provide services for francophones• serve as a useful place for senior editors
Our relevance	<ul style="list-style-type: none">• become the voice of Canadian editors, in reality and in perception• be relevant as a national organization in times of increased social media
Our profile	<ul style="list-style-type: none">• get industries outside the association to know about Editors Canada and come to it for expertise• grow the profile of the association• match members with clients/employers
Our partners	<ul style="list-style-type: none">• increase partnerships• increase international outreach
Our values	<ul style="list-style-type: none">• define what we stand for: our values
Our future	<ul style="list-style-type: none">• chart a direction/plan• be more than sustainable• create a succession plan for the next set of members coming up

Our strengths

Before looking at the issues facing Editors Canada, it was important for participants to remind themselves about the good work that has been done and areas where the association has shown strength and leadership.

The participants found it easy to create a list. Current members should see themselves reflected here.

Theme	Comments
Our community	<ul style="list-style-type: none"> • diversity within the association: editors, writers, indexers, translators, designers • national and bilingual association • strong sense of identity as a caring/sharing community with high standards that works cooperatively • successfully member run, with many volunteer hours logged
Our services	<ul style="list-style-type: none"> • certification • conferences: comprehensive slate of speakers, networking • good breadth of professional development/seminars by branches • networking: branch level, making friends, getting jobs • Online Directory of Editors • publications: make money, create legacy, preserve knowledge, provide learning resources • professional editorial standards in English and French
Our relevance	<ul style="list-style-type: none"> • volunteering as a benefit to membership: experience, professional development, networking
Our profile	<ul style="list-style-type: none"> • leadership role: standards, certification, international liaisons
Our partners	<ul style="list-style-type: none"> • partnerships with other organizations
Our values	<ul style="list-style-type: none"> • financially responsible • friendly atmosphere; support for each other • thinks big; strives to go forward • quality driven
Our future	<ul style="list-style-type: none"> • we have longevity (37 years old), which bodes well • we have stability and have survived (several founding members still belong)

Strategy drivers (environmental analysis)

The environmental analysis stage of strategic planning looks at the situation we are in and what is driving our strategy. Participants thought about the risks, vulnerabilities and issues Editors Canada is facing, internally and externally.

After several rounds of negotiation and paring down, the participants identified these as the most pressing issues for our association.

Internal issues

- poor member communications
- loss of focus (we get distracted by non-core projects; scattered; too many projects)
- slow adoption; fear of change
- weak bilingual services (which are a mid-thought or an afterthought)
- lack of human and financial resources (we need to make things easier: too much administration, too few people to provide same services for francophones)
- discord within the organization (for example, some favour a board-run business model whereas others favour a more member-driven model)
- need to be more inclusive (language, geography, types of editing)
- decreasing and aging membership
- poor visibility of member benefits
- no identified path for volunteers

External issues

- low organizational profile (not enough businesses know about Editors Canada)
- loss of relevance (especially to editors at different stages)
- competition from companies and organizations as a training provider

Appendix 2: Methodology and participants

Methodology

To develop this strategy, the national executive council used a recognized methodology for strategic planning, including working with a trained facilitator. A skilled facilitator makes sure that the typical steps in creating a strategic plan are followed. They also make sure that no one point of view gains control of the discussion.

This methodology included gaining as much input as possible before and at the planning session, while still having a manageable amount of information and a manageable number of participants. This meant

- interviewing people who represent diversity across the association: different locations, languages, length of membership and status (member or affiliate);
- inviting some local members to attend the planning session, also selected for the diversity they represent; and
- including the entire national executive council and the executive director in the planning session.

The people who were interviewed said that the next strategic plan should deal with two long-term organizational issues:

- Sustaining current members, especially those who are close to retirement age.
- Attracting new members: those who are beginning their careers and those who are established editors.

The interviews revealed eleven key themes:

- bilingualism
- certification
- decision making
- declining membership
- editorial standards
- financial stability
- governance
- member services
- online services
- publications
- rebranding

More details of the interview summaries are in Appendix 3: Summary of the interviews.

Thank you!

Participants

Editors Canada interviewees (interviewed before the session)

Wendy Barron (Vancouver, student representative)
Julia Cochrane (Wolfville)
Sandra Gravel (Quebec City)
Greg Ioannou (Toronto)
Frances Peck (Vancouver)
Tamra Ross (Calgary)

At the session *

National executive council

Elizabeth d'Anjou
Stacey Atkinson
Greg Ioannou
David Johansen
Breanne MacDonald
Patricia MacDonald
Anne Louise Mahoney
donalee Moulton
Marie-Christine Payette
Margaret Shaw
Gael Spivak
Michelle van der Merwe

Other Editors Canada members

Heather Ebbs
Elizabeth Macfie
Marion Soublière
Louise St-André
Kaarina Stiff

Executive director Patrick Banville

Recording secretary

Alexandra Peace

* The session was in English, but one of the small groups that participated was francophone.

Appendix 3: Summary of the interviews

This is a summary of comments given during the interviews, grouped by theme. The interviewer recorded them in such a way that no single person interviewed is identified. These were the personal opinions expressed by interviewees.

Overall comments

The next plan should deal with two long-term organizational issues:

- Sustaining current members, especially those who are close to retirement age.
- Attracting new members: those who are beginning their careers and those who are established editors.

Specific issues

Bilingualism

- Francophone members' needs were surveyed in 2011; many of the same identified needs have not been met.
- Editors Canada publications (design and content) require more clarity to ensure all members are adequately represented.
- This planning process should lead Editors Canada to become a culturally bilingual organization; put in place a plan and a process so that the association simply does things in a bilingual manner without having to think about what to do.

Certification

- Editors Canada maintains a distinction between the English and French programs.
- The French program centres on editorial competencies and therefore is different from the English program: 100 people took the first French exam.

Decision making

- Decisions are not always made with evidence-based information; the result is a decline in the number of members.
- The association was founded on the vitality of 20-year-olds; Editors Canada is run by 50-year-olds; power/leadership needs to pass to youth members.

Appendix 3: Summary of the interviews (continued)

Financial stability

- There is a need to shore up the association's finances and return the organization to a more stable and predictable financial footing.
- The certification program required a large financial investment to set up and to operate: this should be addressed.

Governance

- It's important for the national executive council and the overall organization to secure continued regional input.
- Many members have been lost (e.g., from the Prairie Provinces branch) and even more members will follow unless regional input is stepped up.

Membership

- Membership has declined.
- Editors Canada is operating in an information vacuum: the association needs to better understand why members are leaving and what needs to be done to reverse this trend, and needs to know why some long-term members have left the organization.
- We need to better analyze and use exit interviews being done by the branches.
- There is concern about the decline in membership and the impact a declining membership is having on programs and professional dollars.
- Not enough professional development and other activities are being done in the regions.
- French-language members are uncertain about the range of their benefits in a primarily English-language organization.
- There are not enough virtual programs and online activities.

Online services

- Editors Canada needs to do some serious thinking about offering many more online services in English and French.
- Members want increased online sessions: too many sessions are face to face, and therefore many members cannot attend; those living outside of major centres cannot access training/professional development.
- Too much emphasis is placed on face-to-face interactions.

Appendix 3: Summary of the interviews (continued)

Rebranding

- A lack of consultation with the membership created many problems.
- Some members thought that the rebranding resulted in a juvenile image/ approach for Editors Canada.
- The national executive was not sensitive to the situation and/or views of the members, with the result that some members (including long-time members) left the association.

Services

- The services we offer are no longer exclusive to Editors Canada; other organizations now provide the same or similar services.
- Some services are also available online, so Editors Canada needs to provide better and more relevant services to current and potential members.

Standards

- Revision in 2014/15 was not completed; too many prolonged internal discussions.
- Editors Canada is not part of the international conversation on standards, so is being left behind.



HEALTHY, VIBRANT
ORGANIZATION