



# CIRPA ACPRI

## Strategic Plan

2016-2021

Approved 7 November 2016

Revised 20 October 2016

## **INTRODUCTION**

### **CIRPA-ACPRI in Transition**

In many ways, CIRPA-ACPRI is an association in transition. When the Association was founded twenty-five years ago, Institutional Research and Planning (IRP) offices were commonly found only in larger comprehensive and research universities. In the ensuing years, however, shrinking government funding, increased demands for accountability, and an increasingly competitive recruitment market have made institutional research a priority for post-secondary institutions of all types and sizes.

These changes have been reflected in the membership of CIRPA-ACPRI over the past ten to fifteen years. While the Association still includes the large, mature IRP offices of larger universities, many of whom founded CIRPA-ACPRI, membership is increasingly composed of younger staff, often working in small IRP offices established within the last ten years. College and polytechnic representation in CIRPA-ACPRI has also increased significantly in recent years.

### **Strengths/Weaknesses/Opportunities/Threats**

The fact that CIRPA-ACPRI is a national association with a diverse membership representing post-secondary educational (PSE) institutions of many sizes and types is actually one of the Association's many strengths. CIRPA-ACPRI is also a relatively mature organization, financially sound and based on a model that has worked well in the past. Its culture is welcoming to young IRP professionals and newcomers, and its conferences are continuously improving in quality and content.

Despite its national scope, however, CIRPA lacks a prominent national profile and voice, and there is little awareness of the value of the Association among decision makers. Furthermore, annual membership is closely tied to conference attendance, which varies depending on the regional location in a given year, and there is little recognition of the value added by association membership outside of the conference. Membership is further threatened by funding cuts and budget restraints at PSE institutions throughout Canada, which are likely to impact on conference participation in the future.

Finally, the ability of the Association to develop and implement strategic action items is limited by the fact that it is administered by a volunteer board of directors, all of whom hold busy positions in various institutions spread across Canada.

### **The Planning Process**

With these points in mind, the CIRPA-ACPRI Board of Directors approached the planning process for the 2016-2021 strategic plan with certain guiding principles: the plan had to address the needs of the Association's diverse membership, ranging from seasoned veterans of large IRP offices to new IRP professionals working in small, one-person offices; it had to address the issue of membership; and, above all, it had to be realistic and achievable given the limited resources of the Association.

The planning and consultation process included several steps:

- Board of Directors strategic planning session (Halifax, April 2015)
- Survey circulated to 390 former and current CIRPA-ACPRI members with a 20% response rate, representing all member institution types as well as new and seasoned IRP professionals (September 2015)
- Planning update (including results of survey) and member consultation session (CIRPA Conference in Halifax, October 2015)
- Revised Mission and Vision Statements approved by Board (February 2016)
- Board of Directors strategic planning session (Kelowna, April 2016)
- Draft Strategic Plan reviewed by board (July 2016)
- Draft Strategic Plan circulated to members for feedback (September 2016)
- Strategic Plan approved at AGM (November 2016)

## **Mission and Vision Statement**

**Mission Statement:** CIRPA-ACPRI supports the professional development of its members through networking and knowledge-sharing to facilitate informed decision-making in Canadian post-secondary education.

**Vision Statement:** CIRPA-ACPRI will be a collegial community of institutional research and planning professionals with a broad, engaged national membership readily sharing knowledge and expertise.

## **Strategic Priorities**

**Strategic Priority 1: Building a community of institutional research and planning professionals with a broad, inclusive national membership**

As noted in the Vision statement, the plan focuses on establishing a membership reflecting the diversity of institutional research and planning in Canada -- its various jurisdictions, institution types, professional functions, and stakeholders. This is based on the principle that everyone benefits when knowledge, research, and best practices can be shared across jurisdictions and post-secondary education sectors.

In addition to building a fully inclusive national community of IRP professionals, we will also build strong relationships with related associations and external agencies and partners, such as:

- Federal and Provincial governments and agencies (e.g. Statistics Canada, HECQO, MPHEC)
- Professional and affiliated Associations (e.g. Universities Canada, CiCan, AIR, Polytechnics Canada, U15, CUSC)
- Private sector partners, such as consultants and software providers.

We believe that strengthening these relationships will increase Conference sponsorship as well as the national profile of CIRPA-ACPRI while also extending the value of membership beyond the annual conference by creating opportunities for special projects.

The goal of these changes is to increase the number of CIRPA-ACPRI members, in all likelihood doubling the current membership by 2021. As a result, this strategy will significantly broaden participation in Association activities and conversations, bringing in new voices and ideas, and creating greater continuity year over year.

### **Action 1A: Review the Current Membership Model**

To achieve the priority of building a more inclusive IRP community, the Board will conduct a review of the current membership model consisting of the following steps:

- Review the current membership categories to determine if these should be amended. For example, there is currently no “institutional membership,” which may be an option worth considering.
- Determine the appropriate fee level for each membership type, and in particular, whether CIRPA-ACPRI membership should be free for Canadian IRP professionals.
- Determine whether to separate membership from conference attendance.
- Determine the potential impact of CIRPA-ACPRI by-laws on changes to the membership model.
- Define a clear “membership proposition” for each category – i.e. a clear statement of the value of membership.
- Determine the process, resources and tools required to effectively manage a revised membership model, including communication, re-enrolment of current members, recruitment of new members, and renewals.
- Review the roles and responsibilities of the Board of Directors and determine if any changes are required to manage a revised membership model.
- Put in place a plan to monitor member satisfaction on a regular basis.
- Determine how best to leverage the functionality of the new Membership Portal on the website (see Action 2a below).

We anticipate that, if the review process determines that a new membership model is feasible, it will be in place by April 2017 to be ratified by the Board at that time.

### **Action 1B: Implement the new Membership Model**

If a new membership model is developed, it will be implemented over the remaining lifetime of the strategic plan, and the various strategies will be adopted accordingly. Year over year changes to membership will be monitored and reported annually at the AGM. During this phase, we expect that more time would be spent on membership engagement and cultivation, looking for ways to strengthen key partnerships, target growth in certain areas, and make changes based on member feedback. We will also conduct a survey of IRP offices to gain a fuller view of the roles, responsibilities, and areas of expertise of our members.

The success of this action will be measured by membership growth, and by gauging membership perception of the value of belonging to the association through a membership satisfaction and engagement survey.

**Strategic Priority 2: Supporting the professional development of CIRPA-ACPRI members through networking and knowledge-sharing**

As noted in the Mission and Vision statements, the plan focuses on serving the membership by providing professional development through networking and knowledge-sharing.

***Extend networking and knowledge-sharing beyond the conference***

Currently, the majority of professional development occurs at the annual conference, where members have an opportunity to attend and deliver presentations and workshops. It is also the place where people develop personal and professional networks, which can be invaluable when trying to solve a problem or research an issue.

While the conference has filled this role effectively, the benefit is limited to those who can attend the conference. Most other networking and knowledge-sharing takes place via Listserv posts (i.e. emails to membership), conversations via LinkedIn, or the occasional Board update or newsletter. The downside of these approaches has been the inability to capture the Listserv conversations, the limited participation on LinkedIn, and the infrequent communications from the board.

While the Board will continue to look for ways to improve the conference incrementally, we believe that extending year-round activities will provide significant benefits.

***Revitalizing Communications***

Improving year-round knowledge-sharing and networking requires better web-based communication tools, finding new ways to engage members in meaningful activities, and continuing to recognize the achievements of our members.

**Action 2A: Enhance the CIRPA-ACPRI website**

The CIRPA-ACPRI website was renewed in 2011 using an open-source platform (Drupal). Drupal has the advantage of being highly customizable; however there can be challenges integrating and optimizing the use of these components.

After reviewing several options, the Board decided to enhance the current website using a software product called Member365. This product, which meets recent web content accessibility guidelines, will provide CIRPA-ACPRI with an enhanced membership portal with self-service tools, discussion boards, and other communication tools that will seamlessly integrate into the existing CIRPA-ACPRI website while providing enhanced functionality.

Phase 1 of the implementation should be complete by the end of 2016. Phase 2 will include a review of the website to determine if further changes to the design and functionality will help achieve the priority of supporting the professional development of CIRPA-ACPRI members and through networking and knowledge-sharing.

The success of this action will be gauged by web usage (e.g. clicks) and on member feedback gathered through the membership satisfaction and engagement survey.

### **Action 2B: Improve sharing of knowledge and expertise using new tools and processes**

With enhancements to the website and a renewed focus on communicating with members year round, the Board will experiment with a variety of actions, such as:

- Improving Board communication through regular emails, online updates, and/or e-newsletters.
- Improving the way in which documents are stored on the website, particularly conference presentations, association records, and key links and resources.
- Leveraging CIRPA-ACPRI housed discussion boards in place of the Listserv and CIRPA-ACPRI LinkedIn group message boards.
- Initiating member-led special projects that could involve partnerships between IRP staff and external groups (Statistics Canada, CiCan, Universities Canada, CUSC, etc.).

The success of this action will be tracked by surveying members to gauge their satisfaction and gather feedback, monitoring the quality and quantity of activity in discussion groups, and tracking the growth of the resources available to members.

### **Action 2C: Build member engagement through new opportunities**

An engaged membership is crucial to the ongoing success of the association. When members are engaged, they are more likely to attend the conference, participate in discussion boards, support the association through volunteerism, run for a position on the Board, and engage in the ongoing development of the profession. More specifically, the Board will:

- Enhance and formalize a new set of volunteer opportunities, and reward volunteerism. Opportunities could include moderating discussion groups, taking the lead on special projects, and assisting with conference planning.
- Look for new ways to reward and recognize achievements on an ongoing basis, potentially through “badging” (e.g. tracking conference presentations, publications, etc.) and creating new ways of recognizing and rewarding achievement.
- Add or enhance other website tools such as “job boards”, calendar of training/webinars, IRP resources.

The success of this action will be tracked by surveying members to gauge their satisfaction, monitoring the growth of volunteerism, and tracking the growth of the resources available to members.

## **Summary**

The 2016-2021 Strategic Plan builds on the current strengths of CIRPA-ACPRI -- its national scope and history of collegiality – while encouraging greater sharing of expertise and forging links with new partners. It seeks to strengthen the CIRPA-ACPRI community by improving communication with and among members and engaging more members in Association initiatives. At the same time, its strategies are designed to be manageable and achievable with the resources of a volunteer association.