Canada's Archives

Taskforce Project Charter (v.1)

Awareness Strategy
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1. Project Overview

1.1 Statement of Intent

The Awareness Taskforce will:

1) Determine the most effective ways and means to increase and promote the public profile of archives in Canada;

2) Develop and recommend a coordinated strategy for advocacy, outreach communications, and marketing that will strive to empower advocacy activities in all sectors of the archival community including:
    a) individual archivists,
    b) small and large archival institutions,
    c) professional associations, and
    d) academic institutions.

1.2 Key Drivers

The key drivers for the successful completion of the work of the Taskforce are:

1) Strong Leadership: required for effective project management, assignment of member responsibilities and the realization of Taskforce goals and objectives.

2) Strong Membership: each member must be committed to the project goals and objectives, and effectively and efficiently carry out the related tasks assigned by the Taskforce.

3) Executive Support: SCCA administrative and adjudicative support are critical to the successful completion of taskforce goals and objectives.

4) Clear and Effective Communication ; in English and French of the Taskforce mandate and its goals and objectives.

5) Visibility and Engagement; the Taskforce will be transparent and forthcoming about its work and progress, and it will request input and response from the Canadian archival community and other stakeholders.

6) Adequate Funding: required to produce any deliverables requiring resources beyond the volunteer time of Taskforce members.

1.3 Project Goals and Objectives

The Awareness Taskforce draws its mandate from *Canada's Archives: A New Blueprint*, which stresses that "archives must be visible." In order to raise the profile of archives in Canada, the archival community must be equipped with the necessary tools and resources to coordinate messaging, increase engagement, and develop productive partnerships, with elected officials, community allies, private industry, academic institutions, and the general public. The Awareness Taskforce has two interrelated project goals:

1) Create a National Advocacy Strategy
Develop mechanisms to optimize and increase engagement and communications with partners and collaborators, including industry and governments, on issues that impact archives to influence policy and decision-making, legislation, technology, and systems development.

2) Create a National Public Awareness Strategy

    Develop mechanisms to increase awareness of, appreciation for, and public engagement with, archival institutions and the records they preserve.

The objectives to successfully meet goals for these national strategies are:

1) Identify and compare successful/unsuccessful approaches (local, national, international).

2) Identify target audience(s) and understand their needs, goals, behaviours, and/or perceptions with respect to archives.

3) Identify key results envisioned – what we want the target audience(s) to understand, do, or feel after engaging with the "outputs" of the advocacy or awareness strategy.

4) Develop relevant key messages and clear calls to action.

5) Develop communication strategies:
    a) identify appropriate communication channels and
    b) recommend tools/products/deliverables.

6) Identify outcome measures.

7) Identify existing mechanisms and groups that can drive the strategies.

8) Identify potential funding sources to implement the strategies (e.g. to enable tool development).

1.4 Guiding Principles

The Task Force efforts to develop national advocacy and awareness strategies for archives will be guided by:

1) The *Universal Declaration on Archives* of the International Council on Archives.

2) The Association of Canadian Archivists (ACA) *Code of Ethics ,* the *Code de déontologie* of the Association des archivistes du Québec (AAQ), and the *Code of Ethics.*of the International Council on Archives (ICA)

3) Respect for the diversity, capabilities, and needs of Canadian archival institutions and programs of all sizes and type of mandate.

4) A collaborative approach with archivists and stakeholders in the community, and among members of the Task Force, recognizing its bilingual and pan-Canadian mandate and its dedication to cultural diversity.

5) The need to create meaningful recommendations that are grounded in research, and that can be implemented by Canadian archival institutions and organizations.

2. Project Scope

2.1 In-scope

The following broad-in-scope activities have been identified at the outset of activities:

1) **Identify target audience(s):** Identify the target audiences for each strategy and conduct surveys, focus groups, and / or other activities to understand their needs, behaviours and /or perceptions with respect to archives.

2) **Identify key results**: Identify what we want the target audience(s) to understand, do, or feel after engaging with the "outputs'"of each strategy.

3) **Develop communication strategies** : This includes developing relevant key messages, identifying appropriate communication channels, and identifying the tools necessary to deliver these messages to target audiences.

4) **Draft advocacy and awareness strategy documents**: These documents to be informed by the research into various awareness approaches.

5) **Revise draft strategy documents:** Gather input on the draft strategy documents from our associations and with target audiences; revise the documents accordingly.

6) **Identify outcome measures.**

7) **Identify potential funding sources;** Funding sources will be required to implement the strategy (e.g. to enable tool development).

2.2 Out of Scope

The following activities are out of scope:

1) **Produce products for distribution** (e. g. Advocacy Kit): Though very useful to all, it is not the mandate of this taskforce to produce advocacy kits or any other promotional materials. These may derive from the strategies proposed by the taskforce.

2) **Prepare individual communications plans for each individual centre:** The strategy of the Taskforce could recommend that individual institutions create a communication plan, but it is not in the Taskforce's mandates to create such plans. The Taskforce will focus on creating global strategies..

3) **Lobby:** The Taskforce will propose a lobbying strategy, but will not be responsible for carrying out lobbying activities. National and provincial associations will most likely be responsible to implement the recommendations developed within the national advocacy and awareness strategies.

4) **Raise awareness for archives at the international level:** The mandate of the Taskforce is limited to raising awareness about archives preserved in Canadian institutions within the Canadian community. The public awareness strategy will not aim to raise awareness about Canadian archives at the international level.

5) **Updating Strategy** : The Taskforce mandate ends once the final national advocacy and public awareness strategies are approved by the SCAA. It will not be responsible for subsequent updating the strategies.

3. Project Timelines & Resources

3.1 Key Activities & Planned Resources

Task ID	Key Activity / Milestones	Completion Date	2017-2018 Planned Resources		
			Salaries	**O & M**	**FTE**
ACTIVITY I :					
1.	Literary review on various awareness activities and approaches and survey to institutions. Involve archival institutions to survey users	October 2017	N/A	N/A	N/A
ACTIVITY II :					
2.	Identify key messages and key target audiences	November 2017	N/A	N/A	N/A
ACTIVITY III :					
3.	Draft Strategies	March 2018	N/A	N/A	N/A
ACTIVITY IV :					
4.	Peer and community review of strategies	May 2018			
ACTIVITY V :					
5.	Final revision of strategies	November 2018			
ACTIVITY VI :					

6.					

3.2 Cost and Funding Approach

Note: There is no funding available from the Steering Committee for these initiatives. Rather, this area will attempt to capture the price of collaboration.

- The Taskforce Co-Chairs will investigate potential funding sources.

3.3 Key Milestones and Dependencies

Task ID	Key 2017-2018 Milestones
ACTIVITY I	- Research on awareness and archives
ACTIVITY II	- Drafting two strategies
ACTIVITY III	- Community review of strategies, revisions and adoption of strategies
2017-2018 Dependencies	
Key dependencies or external factors that can impact the project are following: Community participation Support from archival institutions and associations	

4. Project Risks, Assumptions & Constraints

4.1 Risks

This section outlines the risks identified at the start of the project. It includes a quick assessment of the significance of each risk (probability and effect) and how to address them..

No.	Risk Description	Probability (H/M/L)	Effect (H/M/L)	Planned Mitigation
1.	Lack of input from the Canadian Archival	M/L	H/M	Obtain support from national associations, provincial associations and other major players in the archival community to

	Community			encourage participation by the Canadian Archival Community. Provide on-line and in-person opportunities to engage with the taskforce work.
2.	Lack of input from other stakeholders	M/L	H/M	Identify members known personally by Taskforce members and use those connections to make further connections with various stakeholders in order to begin effective dialogue with the appropriate people.
	Some members of the Canadian Archival System may not be prepared or able to execute the strategies	H/M	M/L	Create strategies that promote collaborative approaches to advocacy and raising awareness so smaller institutions can benefit from the support of other institutions, thus allowing them to engage in the strategies.

4.2 Assumptions

This section specifies all factors that are, for planning purposes, considered to be true, real, or certain but without including proof.

1) We are currently under the assumption that all 12 members of the Taskforce will have the time required to carry out delegated assignments.
2) We assume that national associations will accept and use the strategies developed.

4.3 Constraints

The major constraints identified for this project are outlined below:

Funding – this variable has not yet been identified or solidified and will be one of the major foreseeable constraints to establishing the overall parameters of this project.

Community Engagement – considering the resources available to archives in general, identifying individuals and organizations across Canada with both the inclination *and* the time to engage with Taskforce members.

Time – Taskforce members are all volunteers who have a myriad of additional commitments for their time. It will be a challenge to balance project time required with available volunteer time.

Time Zones - Managing communication and group work across time zones.

5. Project Organization

5.1 Project Governance

In order to enable effective project decision-making, the following tripartite project governance framework will be adopted:

1) **The decision-making structure** – decisions reached will represent the collective views of the Taskforce or (in exceptional circumstances when consensus cannot be reached) a majority view; decisions taken by the Taskforce will be written as clear and unambiguous statements.

2) **The people within the structure** – the Taskforce consists of a 12-person team of professional Archivists, academics, and communications specialists from across the nation, each possessing experience relevant to this project. The Taskforce Co-Chairs are accountable for the success or failure of the project; the Co-Chairs will liaise with the SCCA Chair and will report directly to the SCCA as required. Further details on the responsibilities of the Co-Chairs are outlined in section 5.3 below; the roles and responsibilities of Taskforce members are outlined in section 5.3 below.

5.2 Project Team Structure

This section identifies the project team and stakeholders, including the names of the project sponsor, project director or manager, and specialists.

Title	Name	Organization
Member	Dominic Boisvert	Main associate and co-founder of HB archivistes Inc. and lecturer, École de bibliothéconomie et des sciences de l'information de l'Université de Montréal
Member	Sophie Desruisseaux	Conseillère à la mise en œuvre des programmes de subvention, au suivi administratif et aux communications au Ministère du Travail, de l'Emploi et de la Solidarité sociale du Québec
Co-Chair	Jacinthe Duval	Archiviste – coordonnatrice, Bibliothèque et Archives nationales du Québec
Member	Terry Eastwood	Professor Emeritus, School of Library, Archival and Information Studies, University of British Columbia
Member	Yves Frenette	Professor, Holder of the Chaire de recherche du Canada *Migrations, transferts et communautés francophones,* Université de Saint-Boniface
Co-Chair	Heather Gordon	City Archivist, City of Vancouver Archives
Member	Krista Jamieson	Digital Archivist, University Archives, University of Alberta
Member	Christine Lovelace	Academic Archivist, Archives & Special Collections, University of New Brunswick
Member	Emily Lonie	City Archivist, City of Coquitlam Archives
Member	Nancy Marrelli	Special Advisor on Copyright, Canadian Council on Archives; Archivist Emerita, Concordia University;
Member	Claude Roberto	Archivist, Retired from the Provincial Archives of Alberta and Chair of the ICA Expert Group on Advocacy
Member	Vicky Tran	Content & Engagement Strategist, University of British Columbia

5.3 Roles and Responsibilities

Co-Chairs – the primary role of the Taskforce Co-Chairs is to provide project leadership and direction, and to facilitate the setting and reaching of objectives in the context of established guiding principles and projected timeline. The Co-Chairs are also expected to carry out the following activities as required: to ensure that decisions reached represent the collective views of the Taskforce or (in exceptional circumstances when consensus cannot be reached) a majority view; to ensure that decisions taken by the Taskforce are clear and unambiguous, and that responsibility for taking forward action points is properly allocated; to monitor the implementation of agreements and action points from previous discussions; to ensure that (as far as possible) all members have the opportunity to contribute; to work closely with the SCCA Taskforce Liaison and to submit regular activity reports to the SCCA for review; to attend SCCA meetings; to compile and submit official Taskforce documentation and/or correspondence to the appropriate recipient (i.e. SCCA, granting agencies, community partners, etc.); to respect the individual worth and dignity of other Taskforce members, and maintain a high degree of professionalism; and to act as Taskforce ambassadors and spokespersons.

Members – the primary role of a Taskforce Member is to actively participate and contribute to the overall objectives of the Taskforce. A Member is also expected to carry out the following activities as required: to assume responsibility for the completion/facilitation of certain tasks or projects as allocated; to communicate regularly with the Chair and other Members of the Taskforce; to actively participate in the discussion and decision-making process (including the contribution to, and review of, draft documents); to respect that actions taken and recommendations made, reflect the majority view of the Taskforce; and to respect the individual worth and dignity of other Taskforce members, and maintain a high degree of professionalism. Taskforce members must communicate immediately with the Chair if they are unable to continue their service to the Taskforce.

5.4 Resources Consulted

TBD – this section will be filled out upon the completion of the Taskforce's research and consultation process.