PROJECT CHARTER
Archival Workforce Taskforce of the Steering Committee on Canada's Archives – Version 1

Presented by: Patricia Forget and Kathryn Harvey, Co-Chairs
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1. Project Overview

1.1 Archival practice

The project intends to study historical archives as well as administrative record and content management programs.

1.2 Statement of intent

The mandate of the Archival Workforce Taskforce of the Steering Committee on Canada's Archives is to gain a better understanding of the current and future state and composition of the Canadian archival workforce. The Taskforce intends to explore linkages between archival education programs offered by colleges and universities, on the one hand, and assess the issues and challenges experienced by workplace practitioners on the other hand. It will build on other related efforts undertaken within the Canadian Archival System in recent years.

1.3 Current state

Organizations are constantly seeking to improve the efficiency of their activities. This requires everyone to perform better at work and to have enhanced technical and information-behaviour competencies. Information disciplines are not exempt from these organizational requirements, and individual need to continually update their skills, competencies and practices, so that they can be more efficient and find ways to contribute to organizational performance.

Professionals in the field are also affected by the growing numbers of content creation and development technologies, as they become easier to use and become more accessible beyond their traditional reach. With the advent of the participatory web, users are now at the centre of all devices associated with the management and use of digital content.

This situation has a number of consequences for information professions:

- It disrupts the processes and tasks of the various information disciplines, blurring the boundaries that used to delineate them.
- It challenges the competencies required by these professionals to fulfil their roles within organizations and society, as well as the relevance of current education and training programs.
- It has a direct impact on society's expectations of information professionals, including as trusted third parties responsible for preserving what is important for society and as facilitators of content development.

1.4 Key factors

The Taskforce considers the following to be key success factors for the project:

1) **Shared project vision—**Required to keep all members focused on the objectives**.**
2) **Strong leadership**—Required to help navigate project management pitfalls and variables.
3) **Strong membership**—Every member's dedication to achieving the project's objectives is required to effectively and efficiently complete the work identified by the Taskforce.
4) **Support from senior management**—Administrative and decision-making support from the Steering Committee on Canada's Archives (SCCA) will be crucial throughout the process.
5) **Effective communication**—Required to raise awareness and engage various government authorities and professional stakeholders from various communities.
6) **Visibility and participation** — The Taskforce will transparently share its work and progress and seek feedback and responses from Canada's archival community.
7) **Sufficient funding**—Required to allow Taskforce members to work on specific projects and share their results in person with the archival community across Canada.

1.5 Project objectives

1.5.1 General

Provide courses of action to ensure that the competencies of archivists and information professionals are better aligned with the current and anticipated needs and challenges of the marketplace.

1.5.2 Desired state

- Critical competencies of archivists and information professionals are clearly identified.
- The current continuing training and teaching and support offerings in the field are identified.
- An accurate picture of the labour market workforce composition is obtained.
- The educational curriculum is developed in order to enhance the employability of archivists and information professionals.

2. Project Scope

2.1 Composition of the archival workforce

Develop a better understanding of Canada's archival workforce to provide a baseline for future planning within Canada's archival community.

a. **Develop relations with, and seek advice from,** government authorities and professionals working in archival practice or in records management, in order to survey available Canadian data.
b. **Conduct preliminary research/literature review** to analyze similar or related studies on our issues at the international level.
c. **Design and administer a questionnaire/survey** based on a specific methodology.

d. **Analyze the data and results** produced by this survey.

DELIVERABLES

e. Survey to be administered to institutions throughout the country containing archives and records management programs.

f. **Draft** a report on the archival workforce providing a demographic analysis of composition and identify trends/issues likely to impact the future workforce.

1. Composition of workforce within the national archival community including demographic profiles of major occupations i.e. age, gender, employment status (FT/PT/Casual/Seasonal), geographic distribution, education levels. and type of archives (government, academic, corporate, museum, historical society, etc.).

2. Analysis of data to identify key trends and issues impacting the current and future archival workforce such as future workforce supply issues i.e. impending retirements, recruitment and retention issues, changing employment settings, shortage of qualifications (vacancies) and education programming outputs.

2.2 Training programs

Compile information on various archival training programs (technical and specialized training, records management, information science, etc.) in order to identify the main strengths and gaps in initial or continuing education offerings (acquisitions, preservation, dissemination and access, electronic or integrated records management, legal constraints, etc.).

a. **Identify** all colleges, universities and professional associations providing training.
b. **Compile** information on entire offering (courses, workshops, seminars, etc.).
c. **Identify** training gaps in the fields of archival practice, records management, etc.

DELIVERABLE

d. **Draft a report on competencies and educational offerings**
    1. Critical competencies of archival professionals
        a. Information competencies (Information literacy)
        b. Technical competencies (Information technology)
        c. Etc.
    2. Identification and analysis of all archival education offerings

2.3 Employer needs

Compile information on employers' current and anticipated needs for professional resources required to fulfil the role of archivist.

a. **Compile** a list of all job advertisements relating to the archival profession.

b. **Collect and compile** information from employers and professional associations (through surveys or interviews) on current and future needs for knowledge and skills required for hiring.

DELIVERABLE

Draft a report that includes the research methodology and a results analysis.

1. Critical competencies of archival professionals
   a. Information competencies (Information literacy)
   b. Technical competencies (Information technology)
   c. Etc.
2. Current and anticipated (5–10 years) employer needs in terms of required professional resources

FINAL DELIVERABLE

- Final report
  - Synthesis of work
  - Recommendations on priority learning objectives and teaching and training offerings

Implementation approach

- Production of generic competency profiles
- Survey of existing studies on competencies, employability, etc.
- Periodic knowledge-sharing meetings
- Structured interviews of university and college program directors
- Web survey of field workforce
- Focus group with employers
- Symposium with all stakeholders

In scope/Inclusions

- Public and private sector continuing training offering
- Study of historical archives, administrative records management, management, records and content management
- Placement rate of graduates

Out of scope/Exclusions

- Specific information fields: big data, documentation, library science
- Promotional activities for professions, programs and training
- Professionals' competency evaluation
- Review of general public's information competencies

3. Project Timelines and Resources

3.1 Key activities and planned resources

i. Activity scheduling (by quarter, over two years)

	1	2	3	4	5	6	7	8
Organization: project, partners, indicators	■							
Identification of critical competencies of professionals		■	■					
Teaching and training offering: identification and analysis		■	■					
Drafting of competency report				■				
Study of workforce composition					■	■		
Identification of current and anticipated market needs					■	■		
Drafting of workforce report							■	
Drafting of final report and recommendations								■

4. Cost and Funding Method

Note: No funding is available from the steering committee for these initiatives. Co-operation will be leveraged in this section.

5. Project Risks, Assumptions and Constraints

5.1 Risks

- Scarcity of human resources
- Lack of financial resources
- Harmonious coordination of both taskforces (Anglophone and Francophone)
- Difficulty in maintaining commitment (isolation of resources—long-term project)

5.2 Assumptions

- It is important to differentiate between task-based training and academic teaching focused on the development of more generic competencies.
- Market needs cannot be anticipated in the long-term on the basis of the tasks to be performed, but rather on the generic competencies to master.
- There are generic competencies that are relevant to the mastering of various specific information disciplines.

5.3 Constraints

Chief constraints defined in this project include:

- **Funding**—This variable has not yet been identified or consolidated; it will be one of the chief foreseeable constraints to the establishment of general parameters for this project.
- **Time**—Taskforce members are all volunteers with several other commitments. The challenge will be to balance the time allotted to the project and volunteers' availability.
- **Time zones**—Managing the group's communications and work given the different time zones involved.

6. Project Organization

6.1 Project governance

In order to ensure effective decision-making for the project, the following tripartite project governance framework will be implemented:

1) **Decision-making structure**—Decisions made will reflect the collective opinions of the Taskforce, or (in exceptional circumstances, when a consensus is impossible) the majority opinion; decisions made by the Taskforce will be drafted as clear and unambiguous statements.
2) **Persons within the structure**—The Taskforce comprises a team of 14 professional archivists and educators from across the country, each one with experience relevant to this project. The Taskforce chair will be held accountable for the success or failure of the project. The chair will establish connections with the chair of the Steering Committee on Canada's Archives (SCCA) and will report directly to that Committee, as required. Further details on the chair's responsibilities are provided at section 6.3 below. The roles and responsibilities of members of the Taskforce are also outlined at section 6.3.

6.2 Project team structure

Two sub-groups were created to study both "archival realities" in Canada (Francophone and Anglophone communities).

1) The sub-groups are:
   a. Anglophone community sub-group (Association of Canadian Archivists), chaired by Kathryn Harvey
   b. Francophone community sub-group (Association des archivistes du Québec), chaired by Patricia Forget
2) Each sub-group will work independently until their work is pooled and similarities and differences are identified. Similarities will remain as drafted in their original language; differences will be translated.
3) The Taskforce will submit three reports to the Steering Committee on Canada's Archives, one for each of the above-mentioned objectives.

Francophone sub-group

Title	Name	Organization
Co-chair	Patricia Forget	Academic Archivist and Museologist, Head, Archives et gestion documentaire [Archives and Records Management], Secrétariat general [Executive Secretariat], Université du Québec en Outaouais (UQO)
Member	Nathalie Gelinas	Head, Section gestion des documents et des archives [Records and Archives Management Section], Service du greffe [Clerk's Department], City of Gatineau
Member	Hélène Laverdure	Curator and CEO, Direction générale des Archives nationales [National Archives Branch], Bibliothèque et Archives nationales du Québec
Member	David Rajotte	Archivist, Private Archives Branch, Library and Archives Canada
Member	Sylvain Sénécal	Consultant — Gestion du savoir-faire et compétences [Know-How and Competencies Management], Hydro-Québec
Member	René St-Pierre	Director, Archiv'ART, Archivist of the Fondation Armand-Vaillancourt
Member	Natasha Zwarich	Professor of Archival Management and Head, Records and Archives Management Certification, Department of History, Université du Québec à Montréal (UQAM)

Anglophone sub-group

Title	Name	Organization
Co-chair	Kathryn Harvey	Head, Archival and Special Collections, University of Guelph
Member	Inge Alberts	Assistant Professor, School of Information Studies, University of Ottawa
Member	Catherine Arseneau	Director, Cultural Resources, Beaton Institute

Member	Patti Bannister	Manager, Nova Scotia Archives
Member	Peter Huston	Archivist, Special Collections Librarian, Mount Royal University
Member	Victoria Lemieux	Associate Professor of Archival Science, University of British Columbia
Member	Shannon Perry	Photo Archivist, Library and Archives Canada

6.3 Roles and Responsibilities

Chair (co-position) — The key role of the Taskforce chair is to provide leadership and guidance, and to facilitate the establishment and achievement of objectives in a context where guiding principles and a timeframe have been identified. The chair is also expected to do the following, as required:

- Ensure that decisions made represent the collective opinion of the Taskforce or (in exceptional circumstances where a consensus is impossible) the majority opinion.
- Ensure that the decisions made by the Taskforce are clear and unambiguous and the responsibility for advancing the decision points be given to the appropriate persons.
- Monitor the implementation of the agreements and decision points resulting from previous discussions; ensure (as far as possible) that all members are given an opportunity to contribute.
- Work closely with the SCCA Liaison Office and submit periodic activity reports to the SCCA for review.
- Attend SCCA meetings; compile and submit the documentation and/or official correspondence of the Taskforce to the intended recipient (the SCCA, funding agencies, community partners, etc.).
- Respect the value and dignity of the other members of the Taskforce and maintain a high level of professionalism; act as an ambassador and spokesperson for the Taskforce.

Members — The main role of members of the Taskforce is to actively participate and contribute to the overall objectives of the Taskforce. Members are also expected to do the following:

- Take responsibility for completing/facilitating the specific tasks or projects assigned to them.
- Regularly communicate with the chair and other members of the Taskforce.
- Actively participate in discussions and the decision-making process (which includes developing and reviewing temporary documents).
- Respect the fact that the actions taken and the recommendations made reflect the opinion of the majority of Taskforce members.
- Respect the value and dignity of other Taskforce members and maintain a high level of professionalism.

Taskforce members are also invited to immediately contact the chair if they are unable to continue serving on the Taskforce.

6.4 Resources consulted

To be determined—This section will be drafted after our literature search and our consultation process have been completed.