



**Q**UEBEC  
**A**NGLOPHONE  
**H**ERITAGE  
**N**ETWORK

# STRATEGIC PLAN 2004-2009

June 7, 2004

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**Prepared with the assistance of GRUNDY MARKETING INC.**

## **TABLE OF CONTENTS**

<b>1. BACKGROUND</b>	<b>3</b>
<b>2. THE CONTEXT: STRATEGIC ISSUES</b>	<b>4</b>
<b>3. MISSION STATEMENT</b>	<b>7</b>
<b>4. PRIORITY GOALS</b>	<b>8</b>
<b>APPENDIX 1</b>	<b>13</b>

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## 1. BACKGROUND

This second draft of the 2004-2009 Strategic Plan was prepared following a planning session held on May 8, 2004 in Lennoxville, Quebec. The session was led by a planning facilitator (Susan Grundy) and assembled representatives of QAHN's board and administration. A list of participants attending the May 8th session is included as an appendix to this document. ***Further discussion is required with the Board of Directors to refine and build on these preliminary elements.***

The 2004-2009 Strategic Plan builds on the Plan adopted by the QAHN Board in 2001, which set out initial guideposts following the inception of the organization in the previous year. Some of the elements included in the 2001 Plan are less relevant today given the need at the time to provide direction to a newly created organization. Other elements remain significant. The accomplishments achieved over the past four years are impressive, particularly given the youth of the organization. To ensure continued success and growth, the Board and administration will need to commit the necessary resources to ensure that planning decisions remain focused and based on informed decisions and are continually evaluated.

The Plan follows the May 8th session, which began with a discussion on present day issues and challenges facing QAHN and the specific *strategic* issues that the organization will address over the next five years. QAHN's current mission statement was reviewed with the conclusion that an ad hoc committee of "mission writers" will present recommendations to the Board. Using the strategic issues and the mission statement as a guiding framework, priority goals were identified to provide focus for directing resources over the next five years. ***Further discussion is required to review these goals and develop supporting objectives and activities.***

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## 2. THE CONTEXT: STRATEGIC ISSUES

The planning process begins with an assessment of the current context or situation - the issues and challenges facing QAHN, whether within the internal structure or in the external environment in which the organization operates. This assessment provides QAHN with the necessary knowledge base to make informed planning decisions.

The Needs Assessment Survey of the Heritage Community (March 2004) reinforced the need for a provincial heritage organization.

*“There is strong agreement, across all regions and sectors, of the need for a provincial heritage umbrella organization and QAHN’s potential to fulfill this role is recognized. It is also acknowledged that this potential has not yet been fully realized, given the recent entry of QAHN.”*

The heritage community (through the Needs Assessment) recommends that in order to build a strong and effective provincial heritage organization, QAHN needs to consider the following (future direction).

1. Consult at the local level to build the trust and confidence necessary for a long-term working relationship.
  2. Increase visibility.
  3. Become a strong provincial voice.
  4. Create and promote a resource network.
  5. Adjust QAHN’s services with a focus on practical guidance and expertise/best practices including: grantmanship, fundraising and heritage research. Initiate province-wide projects that groups could not undertake alone.
  6. Partner with other organization. Define how to engage with the French-speaking community without losing sight of the English-speaking minority interests.
  7. Provide support to collections and archives.
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Based on the findings of the Needs Assessment report and on the discussions of the May 8th planning session, the following strategic issues were identified as priority issues to be addressed by the 2004 Plan.

**Strategic Issue: QAHN operates with inadequate financial and human resources.**

Current levels of operating funding are not adequate for QAHN to fulfill its mandate as a provincial umbrella group and network.

**Strategic Issue: The heritage community operates with inadequate financial and human resources**

Heritage groups, largely volunteer-run, are facing increasing pressure from declining (ageing) membership and limited funding. The long-term survival of some groups is threatened.

**Strategic issue: Visibility and awareness**

QAHN's communication efforts have, to-date, been limited by available resources (operating funds). Consequently, QAHN's mandate, as an umbrella group and network, has not been adequately promoted to the heritage community and outside. There is a need to promote this mandate and address the perception of overlap between QAHN and its individual members.

**Strategic issue: Network services**

The Needs Assessment suggests the need to review QAHN's services in an effort to place more emphasis on networking opportunities and practical assistance to managing a heritage organization. QAHN needs to put more emphasis on services and clear up the confusion as to why QAHN is undertaking projects.

**Strategic issue: Need to maintain and build QAHN's network**

It is recognized that QAHN has successfully built up its network of member groups over the past four years. There is a need to

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further expand this network to include a wider membership across the province.

### 3. MISSION STATEMENT

The general consensus of the May 8th session is to fine-tune the first paragraph of the current mission statement. Accordingly, an ad hoc committee of mission writers was appointed and presented a re-write to the Board. The mission statement now reads:

*The Quebec Anglophone Heritage Network (QAHN) is a non-profit, non-partisan umbrella organization whose mission is to help advance knowledge of the history and culture of English-speaking society in Quebec.*

The remaining text of the mission statement should be clear and concise, and explain exactly what results QAHN is aiming for.

*The Network aims:*

- 1. to encourage cooperation and improve communications among members; and*
  - 2. to assist them in obtaining resources and related services for their activities and facilities.*
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## 4. PRIORITY GOALS

Six (6) priority Goals were identified during the May 8th planning session to provide a framework for channeling energy and resources over the next five years.

- Goal 1: Nurture the development of QAHN's heritage network
- Goal 2: Strengthen communications within QAHN's network
- Goal 3: Seek a higher profile outside the heritage community
- Goal 4: Build and expand partnerships
- Goal 5: Pursue Board development
- Goal 6: Diversify funding

During e-mail discussions, these Goals were condensed to the following:

- Goal 1: Nurture the development of QAHN's heritage network
- Goal 2: Strengthen communications within QAHN's network
- Goal 3: Seek a higher profile outside the heritage community

The remaining goals became supporting objectives of these three larger goals.

These Goals support the fundamental mission of QAHN and reflect the heritage sector priorities of the Global Development Plan (GDP) for the English language minority communities of Quebec, which are to:

Establish a knowledge base on Quebec Heritage that can be made accessible to all interested parties.

Build capacity in the Heritage sector by providing financial, human and material resources for training and obtaining work experience.

Improve integration of efforts and networking at all levels.

Increase Youth involvement in the Heritage sector.

Secure sustainable funding for Heritage groups and projects.

The supporting objectives to achieve these priority Goals are presented in the following pages.

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**Goal 1: Nurture the development of QAHN's heritage network**

This Goal aims to strengthen the capacity of QAHN members through networking opportunities and member services.

**Supporting Objectives:**

1. Map out QAHN's network as it stands today; make greater efforts to attract new members and maintain existing ones.

2. Adjust QAHN's services to reflect the needs of the heritage community. For example:

Shift the emphasis from conferences to practical expertise;

Provide resource people where needed to specific groups;

Continue to spearhead province-wide projects as needed

3. Increase youth involvement in the heritage network through specific projects such as the Oral History initiative.

4. Evaluate the effectiveness of the network (ongoing needs assessment)

Reference to the 2001 Strategic Plan: Goal 1 is an extension of the 2001 goal, "Building the Membership Base". The following supporting objectives were identified, and have been realized, with the aim to build a QAHN network.

1. Formalize the membership structure
  2. Create an inventory of heritage groups
  3. Conduct a needs assessment
  4. Undertake a membership drive
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**Goal 2: Strengthen communications within QAHN's network**

This goal aims to encourage networking and exchange within the network; and improve mutual awareness of member groups; their objectives, experiences, strengths, etc.

**Supporting objectives:**

1. Promote use of QAHN's web site (under way)
2. Ensure effective information dissemination throughout the network. For example:

Promote availability of QAHN's holdings.  
Articulate a distribution strategy for all initiatives (e.g. Heritage Trails pamphlets)

3. Establish a mechanism for publishing

Develop a strategy for promoting awareness of Quebec history  
Develop and understand the long-term vision for the Heritage News (and any other QAHN publications).

Reference to the 2001 Strategic Plan: Goal 2 builds on the 2001 goal, "Facilitating Networking and Exchange" and the supporting objective of "Becoming an important channel of information".

1. Appoint a communications committee to oversee all related activities and ensure a cohesive approach.
  2. Build a bank of potential speakers  
This could be done through a committee or it could be the bailiwick of the communications director (or possibly both). In any event, we need to establish a mechanism for bringing all this info together.
  3. Examine opportunities for regional meetings between members (and non members) within a region as a means for networking and exchange.
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**Goal 3: Seek a higher profile outside the heritage community**

This Goal addresses the need to increase QAHN's visibility outside the heritage community, for example, with government partners, the francophone heritage sector and the community at large. Greater visibility will strengthen QAHN's role as an umbrella organization.

**Supporting objectives:**

1. Evaluate the opportunity to expand the Quebec Heritage News into a more elaborate and/or far-reaching English heritage publication with broader appeal.
2. Adopt a province-wide communications strategy to promote QAHN heritage news through community newspapers, radio, etc.
3. Continue to explore opportunities to reach children and to tap into the potential interest in heritage of teachers.

**Goal 4: Build and expand partnerships****Supporting objectives:**

1. QAHN will aim to strengthen existing partnerships with the FSHQ, ETRC, QCGN, and the Heritage Canada Foundation.
2. QAHN will define criteria for new partnerships and pursue these opportunities. These partnerships might bring in the dedicated archives and larger museums that do not see themselves as core members of the QAHN network.

Reference to the 2001 Strategic Plan: Goal 4 builds on the 2001 goal of "Developing Relationships with other organizations."

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### **Goal 5: Pursue Board Development**

This Goal aims to build Board effectiveness, with the recognition that QAHN is a young organization.

#### **Supporting objectives:**

1. Adopt a succession plan....
2. Assess both board effectiveness and how the board reflects regional and sectoral perspectives, as well as explore modifications to the existing structure and mechanisms.
3. Develop an orientation package for incoming Board members.

### **Goal 6: Diversify funding sources**

#### **Supporting objectives:**

1. Establish a separate foundation (and Board) with a charitable status (QAHN, as an umbrella organization, is not eligible for charitable status).
  2. Continue to pursue funding opportunities with the Provincial government.
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## **APPENDIX 1**

### **Participants at the May 8th Planning Session Lennoxville, Quebec**

Facilitator:

Susan Grundy, GRUNDY MARKETING INC.

Board representatives:

Roderick Macleod, President

Heather Darch

Philip McMaster

Georges Howson

Staff:

Valerie Bridger, Executive Director

Dwane Wilkins, Heritage Trails editor

Ron Ratcliff, Oral History Project coordinator

Matthew Farfan, Heritage Portals Project coordinator

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