



Canadian Council for the Advancement of Education | Le Conseil canadien pour l'avancement de l'éducation

Strategic Plan May 2020- April 2023

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About Canadian Council for Advancement of Education (CCAIE)

Vision

As the leading national organization, CCAIE enables advancement professionals, and the educational institutions in which they work, to fulfil their aspirations.

Mission

CCAIE strengthens the capacity, reach, and impact of the advancement community, through exemplary programs, resources, partnerships, and services.

Guiding Principles

The Canadian Council for the Advancement of Education (CCAIE) serves and represents advancement professionals employed in the educational sector at member institutions. The CCAIE is dedicated to:

- Developing programs and services that are inclusive, equitable and respectful;
- Serving the advancement community with a focus on innovation, value creation, and excellent service; and,
- Delivering exemplary program, resources and services that are research-based, data-driven, member-focussed, and appropriate to institution type and size, advancement discipline, experience level, and language (English and French).

Message from the Chair and President/CEO

Since 1993, the Canadian Council for the Advancement of Education (CCAIE) has been strengthening the capacity, reach and impact of the educational advancement profession in Canada. Serving a growing membership of 138 member institutions, representing over 3,500 educational advancement professionals, CCAIE is a non-profit organization with a dedicated staff team and an enthusiastic community of volunteers. We are committed to providing programs and services that support our member institutions, and enables individual professionals to fulfill their aspirations.

Three years ago, CCAIE launched an ambitious strategic plan that drove its organizational growth and enhanced its capacity to innovate and better serve the interests of its members. From our beginnings as a primarily volunteer driven organization with big ideas, CCAIE has grown into a trusted leader in the advancement sector, noteworthy for convening exemplary learning and engagement opportunities, and curating the most relevant content for Canadian professionals. Representing a membership that stretches across the country, CCAIE's initiatives are tailored to support and inspire professionals that span a variety of school types, disciplines or professions, regions, and professional experiences. CCAIE is dedicated to supporting our members as they seek to fulfill their roles in advancing the Truth and Reconciliation Commission's Calls to Action, and engaging in reconciliation with Indigenous peoples.

CCAIE is growing, and so is the global advancement community. In a rapidly changing world, new ideas, trends, and best practices are continually emerging. As a national organization with a diverse membership and links to the global advancement community, CCAIE is uniquely positioned to respond to changing realities and to serve as a catalyst for the growth and success of its members across Canada. CCAIE continues to nurture partnerships with national and global organizations to provide new and innovative research, information, tools, and thought leadership for members.

Building on the solid foundation of the past 27 years, and the milestones achieved through the vision and priorities of our most recent strategic plan, the Board of Directors embarked on a comprehensive planning process in August 2019. We sought to develop a strategic plan that would position CCAIE to respond to emerging trends and changing realities, while continuing in its role as *the* national leader in the educational advancement sector. To create strategies that will guide CCAIE into the future, we undertook personal consultations with senior leaders, surveyed our profession, and spent time examining the trends and emerging issues facing our members, national partners, and the sector.

CCAIE has emerged with a strategic plan that has been informed by our mission, vision, and commitment to our members. This plan has been shaped by volunteers, staff, members and national partners. CCAIE appreciates the engagement of the 160 individuals who took the time to participate and share their knowledge, experience and ideas throughout this process. CCAIE is energized by these new strategic objectives and how they will guide the work of strengthening leadership and building the capacity of advancement professionals and communities across Canada over the next three years and beyond.

Sincerely,

Gillian Morrison, Chair

Mark Hazlett, President & CEO

Executive Summary

Following a comprehensive engagement and planning process, the board of directors of the Canadian Council for the Advancement of Education (CCAIE) has developed a strategic plan that articulates CCAIE's goals for the next three years (2020-2023). For more information, please see [Appendix: Overview of the Planning Process](#).

Driven by the mission, vision, and guiding principles, CCAIE has established four areas of strategic focus. These broad strategies are designed to provide flexibility so that CCAIE can respond with agility to changes in the advancement sector. The four areas of strategic focus support CCAIE's core functions, align resources and structures, and help guide decision-making as CCAIE continues to implement evidence-based initiatives. Using these strategic objectives, CCAIE will create annual operational plans that identify clear tactics, measurements, roles, and responsibilities.

Areas of strategic focus:

- 1. Visionary Leadership
- 2. Inspired & Connected Community of Professionals
- 3. Engaged & Effective Member Organizations
- 4. Organizational Capacity

This strategic plan is an aspirational document that outlines a path forward. These strategic focus areas are ambitious, responsive to member feedback and the needs of the sector, and success will require organizational growth and community-wide support. CCAIE is excited for this next chapter of the story.

CCAIE May 2020- April 2023 Strategic Focus Areas



Strategy 1: Visionary Leadership

As educational institutions face a more complex and challenging environment, our members look to CCAE for leadership to help them remain at the forefront of the sector. CCAE is committed to being an innovative, visionary and trusted leader on issues of significance and relevance to our members through advancing new thinking, developing collaborative partnerships within the sector, both nationally and internationally, and bringing thought leaders together around the issues of the greatest value to, and potential impact for, member institutions and Canadian advancement professionals.

CCAЕ Commitments

- a. Continue to build and expand partnerships through collaborative and innovative projects on issues of major importance with regional, national and global organizations.
- b. Promote thought-leadership by sharing expertise and leading conversations with advancement professionals on best practices, sector trends, and relevant issues; and by accessing insights from within and outside the sector.
- c. Connect with advancement professionals, national partners, and sponsors on a regular basis to understand their needs and concerns, and seek perspectives, ideas, opportunities, and areas of improvement.

Strategy 2: Inspired & Connected Community

CCAЕ represents a growing and diverse network of advancement professionals. Recognizing that the strength of the network is derived from the broad range of skills, knowledge, expertise, and experiences of thousands of professionals, CCAЕ's primary purpose is to convene opportunities to connect, learn, and share. Through innovative and relevant programs and services, and timely, informative communications, CCAЕ will continue to harness the collective insights of the network, enable potential, and inspire new and experienced professionals to fulfill their aspirations.

CCAЕ Commitments

- a. Develop and deliver a vibrant annual curriculum of high-quality and dynamic professional development and knowledge-sharing opportunities, and support members to engage in communities of practice, mentoring, and peer-to-peer activities.
- b. Remain at the forefront of delivery approaches for education and learning, both in person and online, and ensure resources, programs and services reflect the diversity of advancement professions, school types and sizes, regions, disciplines, and experiences.
- c. Nurture career-long affinity with advancement professionals by generating awareness of CCAЕ membership advantages and opportunities.
- d. Connect through multiple communication channels with advancement professionals, national partners, and sponsors.
- e. Celebrate talent, innovation, and service by exploring new opportunities to enhance awards, fellowships, and scholarships.

Strategy 3: Engaged & Effective Member Organizations

CCAIE's member institutions, national partners, and sponsors are united in their commitment to the education sector, and to championing the role of the advancement profession within the post-secondary and independent school sectors. CCAIE supports the vitality of the sector through enabling members to continue offering high-quality opportunities for members and provide leadership within the sector.

CCAIE Commitments

- a) Demonstrate the impact of the Canadian educational advancement profession by curating and disseminating relevant research, analysis, policy, and best practices.
- b) Assist member institutions in promoting and enhancing the contributions of the advancement profession and its unique value with their campus partners, within their organizations, and broader communities.
- c) Where possible, expand offerings or provide support to include Presidents, Deans, academic leaders and other key internal stakeholders and volunteers that contribute to the success of educational advancement.

Strategy 4: Organizational Capacity

The hard work and high-quality efforts of CCAIE's staff team and volunteers are the foundation of its success. CCAIE is committed to enhancing its organizational strength and resilience by ensuring that skilled people are equipped with the resources needed to continue offering high-quality opportunities for members and provide leadership within the sector. CCAIE will continue to prioritize resources to meet member needs and seek opportunities to attract resources and support from national partners and sponsors.

CCAIE Commitments

- a. Ensure financial sustainability and incremental growth of the organization by exploring sponsorship opportunities, professional development, membership retention and recruitment, and engaging with potential supporters.
- b. Invest in human resources as necessary to support a healthy organizational culture. Ensure that staff have the right expertise and training to oversee and deliver excellent programs and services that meet members' needs.
- c. Explore IT systems and infrastructure that maximize organizational efficiency (i.e. data collection, analysis, stakeholder relationships, and communications).
- d. Recognize and celebrate the skills and expertise of volunteers and the impact they have in strengthening CCAIE's capacity.

Implementing the Strategic Plan

CCAIE is excited to launch its new strategic plan for 2020-2023. The board of directors commits to the following actions to ensure success in its implementation:

1. Support the President/CEO in the creation of annual operational plans and budgets.
2. Monitor and measure effectiveness of the strategic actions on an annual basis.
3. Communicate progress to members, volunteers, national partners, and sponsors on an annual basis.
4. Complete an annual review of the strategic plan to amend strategies if needed and ensure these are reflected in the annual work plans.

Appendix: Overview of the Planning Process

Under the leadership of the board of directors, CCAE initiated a robust strategic planning process, including comprehensive engagement with stakeholders and research into emerging trends and best practices. CCAE worked to ensure that the plan has a solid foundation, informed by experience, evidence, and perceptions.

Throughout the process, CCAE engaged with the members, advancement professionals, volunteers, and national partners. This feedback, enhanced by research and an environmental scan, has helped shape new strategies and develop objectives grounded in CCAE's promise statement, and guided by the vision and mission.

CCAЕ has a refreshed mission and vision, and a new three-year strategic plan that provides the organization with renewed focus and direction. The strategic plan is a guide that will lead CCAE forward in a significant way, one that maintains strong relationships with members and national partners, delivers meaningful resources and opportunities for advancement professionals, and bolsters the thriving advancement sector in Canada.

Engagement Overview

