

Post-Appointment and Continuing Education: Alberta's Five-Year Plan

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The Alberta Society of Archivists was incorporated as a provincial, non-profit society in 1981. Its purposes were to provide a forum for members to discuss professional matters of mutual interest, to provide education opportunities for its members and others interested in the preservation and use of records of human experience, and to be an agent for archival advocacy.

It quickly became apparent to the new society that member needs centred on post-appointment and continuing education. Many practicing archival art and science lacked formal education in archives. Many were volunteers. Others were part-time employees. All shared a real and growing need for various levels of education and training.

In response to this need, one of the first committees established dealt with education. The Education Committee consisted of two sections, a northern one and a southern one, each struggling to offer a balanced set of educational offerings within its region of the province. Further, with about one-third of the repositories outside of the two major population centres of Edmonton and Calgary, the committee attempted to respond to needs all over the province by offering activities outside the main Edmonton-Calgary corridor.

To the new committee, it appeared that the membership needed the following three types of training opportunities: an "Introduction to Archives" seminar; arrangement and description workshops; selective advanced seminars, workshops, and lectures. The first two were of interest to those working in institutions lacking in-house training programs, to volunteers, and to those who had assumed archival positions without any education or experience in archives. The third category had greatest appeal for members with some education or training in archives or with fairly extensive experience in archival administration.

Programmes offered by the Education Committee, both those in major centres and those outside the corridor, were immediately successful. Many sessions were over-subscribed. Registration fees were modest. Education activities served to increase the society's membership, as non-members were charged the price of a membership in addition to the registration fee, and thus became new members. Advanced workshops

ranged from computer applications, to ethics for archivists, and to archival media such as photographs and maps.

The education activities were, for a fledgling society, impressive. However, difficulties soon became apparent. Some members were concerned about the limited variety. Was there nothing more to archives than arrangement and description and photographs? Was using the limited resources of a volunteer society to run sessions in areas of the province with few archives an effective and efficient method of delivering education and training? Was a seemingly unconnected series of activities the most satisfactory method of delivering an education and training programme?

During the spring and summer of 1986, the executive of the Alberta Society of Archivists reviewed the society's first five years. It was the consensus of executive members that there was a need for a comprehensive education programme which would address issues of curriculum, funding, speakers, locations, and other aspects of professional education and training. The executive was united in the view that major changes were necessary, but did not as clearly recognize the exact nature of those changes. A comprehensive report on the education needs of the membership and a plan to reconcile those needs with the essential elements of archival education and training seemed to be the answer.

From the beginning, the task of developing an education plan was recognized as a major undertaking. In spite of the lack of Canadian archival experience upon which to draw, the ASA executive recognized that successful completion of such a project would depend on three things. First, it required the time and energy of a group of individuals who shared a belief in the need for such a plan. Second, it required on-going executive support and commitment. Finally, the project required financial assistance.

The first two requirements were met without difficulty. Funding posed a greater problem. The ASA, like other volunteer organizations, derives its income from membership dues and grants, neither of which are substantial. The executive applied for, and was successful in obtaining, funding from the Canadian Council of Archives. This support enabled the society to develop and implement a work plan for the education programme project.

The job of producing an education plan for the Alberta Society of Archivists was given to a special working group within the Education Committee. The Education Committee Planning Group consisted of five members: two from each of the northern and southern sections of the Education Committee, and one member of the ASA executive. The Planning Group was chaired by Margery Hadley and Bryan Corbett served as liaison with the ASA executive. Other members at various times were Michael Dawe, Helen LaRose, Claude Roberto, and Neil Watson.

Development of the programme proposal and the five-year plan took place over a period of fourteen months. The Planning Group's first report, the *Education Program Proposal*, was submitted to the ASA executive in March 1987 and endorsed by the membership one month later. The Planning Group was instructed to finalize programme details and its final report, the *Five-Year Education Plan, 1988-1993*, was approved at the 1988 annual general meeting. The Education Program was underway by the fall of that year.

The first step in this long process was a survey to determine education needs and interests of the membership. Statistical results and individual comments were compiled and a report was circulated for review among group members. Thirty-six percent of the surveys were returned. The results indicated a consistently high interest in workshops and other educational activities. Opinions on length, level, timing, costs, and content of activities varied.

Taking both membership and executive concerns into consideration and undertaking considerable brainstorming, the Planning Group drafted the *Education Program Proposal*. The proposal recommended that the workshop remain the basic unit of the society's educational activities and that a five-year programme of education activities be established. It outlined a programme whose components were (1) a core curriculum of sixteen workshops; (2) a series of special topic workshops; (3) an expanded system of self-study kits and the possibility of a home-study course; (4) a practicum programme; and (5) an outreach programme. The proposal also provided a preliminary cost analysis and recommended a cost-recovery system of fifty per cent user support / fifty percent ASA support.

The *Education Program Proposal* was accepted by both the executive and membership with suggestions for minor adjustments. The Planning Group was requested to refine the plan and submit a complete document for the 1988 annual general meeting. The Planning Group immediately drafted a work plan and, once again, the first item for action was a survey of the Alberta archival community.

The second survey, the "Human Resources Questionnaire," sought to assess the availability and skill-level of instructors, workshop assistants, and local arrangements personnel. There was a need for detailed information in order to establish the content and scheduling of the five-year programme, and detailed arrangements for the first two years. Response to the questionnaire convinced the Planning Group that the resources and enthusiasm were available within the province for the programme to run successfully.

During the remainder of 1987, group members worked individually on assigned portions of the plan and consulted frequently. Three work sessions were held to review material. The refined product, the *Five-Year Education Plan, 1988-1993*, was submitted to the executive in January 1988. Following acceptance of the plan by the membership at the society's annual general meeting in April, the Planning Group disbanded and a re-structured Education Committee, with terms of reference established by the executive, undertook to implement the plan.

One of the main concerns about the implementation of the five-year plan was quality of instructors and instruction. While the plan could require a minimum number of years of experience or a minimum level of education in the field of archives, few prospective instructors had extensive teaching experience. It was also recognized that instructing older adults might require different skills and approaches than would teaching in other settings, such as universities, community colleges, or high schools.

With these problems in mind, the Planning Group determined that a practical way of dealing with the matter of consistency was to ask all the selected instructors to attend a specially-designed training seminar. The four-day seminar, organized by

the Faculty of Extension at the University of Alberta, took place at Red Deer in March 1988.

The first half of the seminar dealt with methods used in educating adults. Suggestions were made on how to motivate adults and how to establish a stimulating learning environment, and the remaining time dealt with designing and delivering workshops and seminars. Once again, the Alberta Society of Archivists received assistance from the Canadian Council of Archives, which generously provided a grant to hold the training seminar.

The *Five-Year Education Plan, 1988-1993* outlines the Alberta Society of Archivists' Education Program. The plan is a detailed statement of the principles and purposes of the programme, programme features, schedule and details of core-curriculum workshops, programme implementation, and budgets. The main ways in which it differs from the 1987 proposal are the reduction of core-curriculum workshops from sixteen to fourteen and the redistribution of topics to accommodate the repetition of five fundamental topics within the five years.

The five-year plan includes detailed descriptions and budget proposals for scheduled workshops in the first two years, and basic predictions for the third, fourth, and fifth years. It also addresses travel grants, publicity and advertising, and a study kit program, and makes recommendations regarding a home-study course and practicum and outreach programmes.

The purpose of the ASA Education Program is to provide formalized educational and training opportunities for the membership of the society and for others interested in archival activities through the following activities:

1. *Core-Curriculum Program* of scheduled educational and training workshops covering basic functions and activities of archives administration (four per year);
2. *Special Topics Program* of unscheduled, but regular, educational and training workshops, seminars and lectures covering more advanced and/or special aspects of archives administration (minimum two per year);
3. *Self-study kits* of standard literature on basic aspects of archives administration; and
4. Other educational and training opportunities which are developed from time to time.

The programme is designed to be comprehensive, flexible, accessible, and professional. Participants are able to follow a series of basic and more advanced workshops and seminars over a period of five years. Registration is open to all ASA members and prospective members meeting basic entrance requirements. Sessions are held throughout the province. The programme is designed to high standards of archival professionalism. While no attempts are made at certification of archivists, participation certificates are given to each individual who takes part in a core-curriculum workshop or seminar.

The success of every plan of the magnitude of the ASA's Five-Year Education Plan depends upon secure funding. While generous Canadian Council of Archives funding supported the development of the plan, it was not clear what funding would be available for its implementation. The on-going financial viability of the plan was viewed by many as the key element for the programme's success.

The total cost was estimated at slightly more than seventy-three thousand dollars spread over five years. In addressing funding needs of this magnitude, and operating on the assumption that program participants and the ASA would each provide a fifty percent contribution, the Planning Group looked to two sources of revenue. The first source was a dramatic increase in registration fees. In the past, members paid as little as fifteen dollars or less per workshop. With implementation of a higher quality programme, the Planning Group felt that participants would recognize the value and be willing to pay substantially higher fees. The second proposed source of revenue was funds raised by the ASA through grants or increased membership dues. With only one hundred and twenty members, the latter option was not realistic; however, the Planning Group was confident that, with a realistic plan, the society would be able to raise its annual share of \$7,500.00 through grants.

A number of granting agencies and endowment funds existed from which the society could expect support. The Alberta Historical Resources Foundation has a broad mandate from the provincial government to assist in heritage education. The continued support of the Canadian Council of Archives, through its Professional Development and Training Cooperative Program, seemed assured.

In the end, financial concerns for the program were substantially reduced when Alberta's Minister of Culture and Multiculturalism announced a three-year lottery funds grant of three hundred thousand dollars to the Alberta archival community. From the Canadian Council of Archives, the society had received a grant in support of the first year of the five-year plan and some costs associated with program implementation. From the lottery funds grant, the Joint Committee on Funding of the Alberta Society of Archivists and the Alberta Archives Council set aside forty-two thousand dollars to assist in funding the programme. Registration fees from programme participants would cover the remaining \$21,400.00.

The first session of the society's programme took place in September 1988, when nineteen participants attended the seminar *Introduction to Archives*. As the basic workshop in the Core-Curriculum Program, it provides an access point for untrained and unskilled persons wishing to attend other core-curriculum workshops which require registrants to have some basic training or a specific level of experience. *Introduction to Archives* is scheduled to take place three times during the five years, although the programme allows and encourages additional sessions if demand is sufficient.

Other core-curriculum workshops and seminars held during the first year were *Acquisitions, Appraisal of Informational and Evidential Value, and Arrangement and Description I*. The second year began with twenty participants attending the introductory seminar and will continue with *Appraisal of Monetary Value, Arrangement and Description II, and Reference*. A number of special topic workshops and seminars are also scheduled for this year.

The third, fourth, and fifth years of the Core-Curriculum Program include, in addition to repetitions of the introductory seminar and a number of the basic topics covered in the first two years, the following: *Conservation (I and II), Copyright, Media Collections (I and II), Facilities, Security and Disaster Preparedness and Records Management*.

Response to the education programme has been excellent. All sessions held to date have been well-attended, and participant and instructor evaluations are positive and constructive. Anticipated reactions against fee levels (\$90 for two-day and \$50 for one-day sessions), locations (core-curriculum sessions are held in Edmonton, Red Deer, Calgary, and Lethbridge only) and durations (most sessions are two days, Friday and Saturday) have not materialized.

Several factors have contributed to the success of this programme. First, registrants receive study materials in advance of each core-curriculum session and are expected to review the material before attending. Distribution of study materials requires strict and early registration deadlines and a large time commitment from the education committee administering the programme. However, the benefits to both participants and instructors are considerable.

Team teaching is a second factor favourably affecting the success of this programme. Although initially intended only for very intensive hands-on workshops, all core-curriculum sessions to date, and those planned for the near future, are led by two instructors working together. The popularity of this approach with both participants and instructors was apparent from the earliest evaluations, with both groups noting variety, reduced stress, and greater enjoyment as the benefits. Finally, a third and major factor affecting the success of the ASA's education programme is the time and energy commitment of society members, who, through active involvement with executive and committee work or through sharing skills as volunteer instructors, have made this programme work.

The Five-Year Education Plan of the Alberta Society of Archivists has been well received by the Canadian archival community. The Ontario Association of Archivists recently completed a study of post-appointment and continuing education needs of its members. The committee which conducted the study investigated the ASA plan and, with some modifications, recommended adoption of the Alberta plan as a framework for an Ontario plan. Likewise, the Association of Manitoba Archivists has adopted a modified version of the ASA plan and is now implementing its programme.

Other organizations examining the Alberta plan have had varying reactions. Suggestions have been made that Saskatchewan archivists could participate in the Alberta plan. The Association of British Columbia Archivists concluded that the plan's basic elements would not be useful in that province. It has been suggested that the Alberta plan may be used as the basis for a national plan sponsored by the Association of Canadian Archivists or the Bureau of Canadian Archivists.

As the five-year education plan is in only its second year, a verdict on its success cannot yet be rendered. However, some general comments may be useful. One measure of the success of such a programme is the number of people who have entered the program with the intention of completing all the workshops and seminars over the five years. Approximately twenty-five percent of those who attended the first *Introduction to Archives* seminar have continued as regular participants at other seminars and workshops. Another measure of success is the degree to which other organizations have followed its example. The degree to which Ontario and Manitoba

are following the ASA's lead says something positive about the concept of the Alberta plan.

No plan for post-appointment and continuing education can ever meet all expectations. Quality and continued viability depend upon those who manage the plan, upon those who deliver the sessions, and upon continued funding. Every plan needs to be assessed and, where necessary, changed to meet changing needs, and the Alberta Society of Archivists will therefore be undertaking a critical assessment of the Five-Year Education Plan during its fourth year.