ADR Institute of Alberta (ADRIA)

Strategic Planning Session

September 27, 2014

Alberta Culture and Tourism Community Development Unit

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Background:

The ADR Institute of Alberta (ADRIA) scheduled a strategic planning session for September 27, 2014, to allow the board and staff to explore issues related to the operation of the organization, undertake a strengths and weaknesses scan (SWOT), and review and revise (if appropriate) their vision, mission, values, and strategies.

Delivery

The first planning session took place September 27, 2014, in Calgary.

Who attended – board members and the executive director of the ADR Institute of Alberta (ADRIA).

Rick Moyse of Alberta Culture and Tourism facilitated the session.

Results

During the session, participants reflected on the past and current work of the organization through a SWOT scan, reviewed their vision and mission, and slightly revised their value statement. They also discussed their three year goals, with a commitment to continue to review and if necessary revise their strategies and success indicators.

SWOT Analysis

Strengths

Internal strengths (internal resource and capabilities (what sets us apart? What helps us achieve our purpose?)

- An active, engaged board, staff, and office
- Members are more enthused
- Good stability, both from a human and financial resource standpoint (as long as we focus on revenue generation)
- There is a strong and growing support for ADR
- We have a clear vision and direction (foundation)
- Growing membership
- We are the only holistic membership organization in Alberta
- We have a better picture of the revenue generation world
- The commitment of board and staff
- Entrepreneurial spirit
- We have a long history
- We have a solid public educational program
- Broad, diverse membership
- Talent, harmony, lack of ego
- Belonging to a national organization
- Loyal and committed members and trainers
- Our volunteers

Weaknesses

Internal weaknesses (resources/capabilities) (what hinders us in achieving our purpose?)

- How can we implement what we want to be?
- Not having defined if we are a membership organization – an educational organization
- We haven't transitioned from an educational to a membership organization
- Staff are still dealing with older, legacy issues
- The new introductory mediator course
- Our programs have been confusing
- Our presence in Calgary is weak
- We haven't adequately tapped into the ADR market in the legal community
- Being able to quickly adjust
- There have been perceived barriers in training
- Lack of regulatory authority
- Resistance of high profile professionals to becoming involved
- Many practitioners see no benefit in joining or taking appropriate training
- Hurdles to designation
- We haven't educated the public around why they need special training

Opportunities

External opportunities (outside factors or situations that affect organization in a positive way

- Having an increased presence in Calgary, and other areas like Ft McMurray
- Partnering with other organizations in and out of Alberta
- Using technology
- Tendering transparency opportunities
- Getting involved in administration and roster opportunities
- Getting involved in legislative lobbying
- Influencing credential qualification for rosters, etc.
- Partnering with industry around transparency/anti-corruption issues
- Attend tradeshows/conferences to market ourselves
- Partnering with regulatory bodies
- Becoming a professional umbrella organization for ADR
- Promoting ADRIA contracting clauses
- For the board to pay more attention to marketing
- Having a good brand
- Deciding who to attract to ADRIA
- To blow our own horn

Threats

External Threats- (outside factors/situations that affect organization is a negative way)

- The devaluation of mediation (threatening the viability of the profession)
- Pricing issues when mediation is delivered at legal rates (public education issue)
- Lack of respect/recognition for ADR in the legal system, or they set up their own systems
- Free access to the justice system is a threat
- ADRIA is not well connected to ADR processes
- Decreasing educational standard
- The readiness of ADRIA to shift from education to membership given what is happening in other educational organizations
- Other ADR organizations providing free training

What do we need to stop doing, or do less of?
• Spreading ourselves too thin • Going wherever we are invited – we need to be more strategic • Chasing the educational institutions (let them come to us)
What do we need to start doing, or start doing more of?
• Increase our presence (membership and education) in Calgary and other parts of Alberta • More marketing – i.e. attendance at tradeshows • Roster development/selection (increased business opportunities for members, and funds for ADRIA) • Administrative rosters for a fee • Leveraging our board and board members

ADRIA STRATEGIC PLAN 2014 –2016
Revised September 27, 2014

VISION

ADRIA is the strongest, most vibrant Appropriate Dispute Resolution membership organization in Canada - recognized for advancing excellence in the field of ADR, its practice, and its professionals

***MISSION*:** To provide leadership and services in appropriate dispute resolution (ADR) to our members by:

- Fostering excellence in negotiation, mediation, arbitration, and restorative practices
- Supporting the viable practice of ADR in Alberta
- Providing excellence in ADR professional development
- Promoting the ethical use of ADR processes
- Maintaining accreditation standards, accountability and designations for the ADR profession
- Encouraging those practicing in ADR to join our organization

OUR VALUES:

Excellence: We challenge ourselves to deliver the highest quality programs and services. We stay abreast of new ideas and developments and seek out changes and innovations that help us continuously raise the bar in everything we do.

Uncompromising Ethics We treat others with honesty, openness, fairness and respect in every situation.

Collaboration: We value different views and ideas and believe that by working effectively together and with others we can reach our goals. We embrace the opportunity to explore mutual interests and new relationships. We welcome opportunities to leverage our resources through partnering.

Accountability: We steward our resources with diligence and care. We honour the commitments we make to others.

Leadership: We will promote new and important directions and opportunities for our profession and our organization, even though the path may be difficult. We recognize it is only through trying new ideas and learning from our failures that we can grow and move forward.

STRATEGIC DIRECTION	STRATEGIES	Success Indicators (Targets)
1. Enhance the value, awareness, reputation of and access to ADR services	a. Forge **strategic [1]partnerships** with government, courts, schools, businesses and other associations to support ADRIA members in working, teaching and coaching in the ADR field	2 new partnerships (Example Municipalities) per year
	b. Increase the value of ADRIA membership to ADR professionals and industry leaders (lower priority)	Increase Corporate membership earning by 10k per year
	c. Develop and implement a roster development plan with defined deliverables	ADRIA administers 3 new rosters per year
	d. Strengthen our partnerships with ADRIC and other *ADR organizations to promote the practice of AD*R	4 new initiatives per year
2. Strengthen our Profession	a. Continue to work with ADRIC to support development & delivery of National Mediation and Arbitration education programs for entry into the profession	1 new initiative or milestone per year
	b. Develop Partnerships with universities and colleges to offer ADRIA programs.(not presently being pursued)	1 partnership per year
	c. Integrate ADRIA accredited ADR courses into college and university certificate, diploma and degree programs	1 new initiative per year
	d. Increase partnerships with professions and occupations to create and accredit ADR courses for their Certification programs that will lead to Q.Med designations	2 initiatives per year
	e. Promote the value of ADRIC designations with organizations and the public who access ADR services	4 promotional initiatives per year

[1] A **partnership** is an arrangement where parties agree to cooperate to advance their mutual interests

STRATEGIC DIRECTION	STRATEGIES	Success Indicators (Targets)
3. Strengthen ADRIA as a Membership Organization **(**formerly: Increase the number of ADRIA MEMBERS across Alberta**)**	a. Increase access and value of designations to targeted groups to build membership (providing greater membership benefits, and improving the AGM experience)	2 groups targeted per year for Q.Med and Q.Arb designations
	b. Develop and implement a plan for increasing ADRIA's profile	1 profile initiative per region per year
	c. Develop and implement a plan to attract ADR professionals\ practitioners who are not members of ADRIA	1 target per quarter
	d. Increase ADRIA membership across Alberta	Increase ADRIA membership by 10% annually
4. Strengthen the long term sustainability of ADRIA as an organization	a. Develop and implement a mid- to long-term revenue stream strategy and targets for ADRIA	Line of credit paid off on revised schedule A reserve is created in 2014 and increases by 20k per year 1-2 revenue generating member services initiatives per year
	b. Develop and implement an effective mid-term organizational structure and human resources plan that aligns with 1-3 above	An HR structure for operational leadership and member support is fully implemented in 2014