

# Canadian Association of International Development Professionals (CAIDP) Strategic Plan 2019-2023





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## Message from the President

March 2019

*I am delighted to present the 2019-2023 Strategic Plan of the Canadian Association of International Development Professionals (CAIDP) which lays out the vision and goals we have set to enable our association to improve the effectiveness of Canadian international development assistance, promote professionalism in our community and give voice to the views of our members.*

*Our strategic planning process started with a wide-ranging survey of our membership undertaken in 2017 which examined the realities of our members and their vision for our association. The survey showed that our members are highly educated and have an average of over 10 years of experience. The skills and professionalism of our members is recognized worldwide. Almost 90% of our members receive more than a quarter of their income from work for non-Canadian development partners, with the UN agencies being the most popular, followed by the International Financial Institutions (IFIs). This trend is likely to increase.*

*Looking ahead, CAIDP Members said they want more programming, communication and networking, more engagement outside of the National Capital Region, a mix of conference and web-based sessions throughout the year and more information about what CAIDP does.*

*Over the course of several months in 2018, we took stock of our achievements over the last five years and reflected on the challenges and opportunities faced by our sector through strategic discussions with our members and key stakeholders. We also gathered for a facilitated strategic planning process in September 2018 which enabled us to draft a plan and bring it to our members for feedback and further input.*

*We are proud that this strategic plan lays out a vision of a connected, growing CAIDP that is reaching out to new members in new ways, developing new partnerships and finding new approaches to adapt to the changing development environment and the evolving realities of our members.*

*To bring this ambitious strategic plan to life, our volunteer Board of Directors and our Committees will be hard at work on your behalf. They will be served by a part-time Executive Assistant to ensure more prompt and professional communications, better organization and follow-up and enhanced services for our members. As always, CAIDP will continue to benefit from the generosity of both individual and corporate members through volunteering their time and expertise and providing pro-bono services.*

*In closing, I invite you to become more involved in the work of CAIDP through participation in our activities, as a member of our committees or by putting your name forward for a seat on our Board. With your continued support, expertise and participation, CAIDP will continue to be a strong, informed voice for our community.*

Sincerely,



Jean Lowry, President

Canadian Association of International Development Professionals (CAIDP)

## Introduction

The CAIDP Strategic Planning Committee organized a facilitated workshop on September 6, 2018 to explore CAIDP's future in light of its 25 years of history, accomplishments, context, assets and challenges. Fourteen (14) participants from the Board of Directors participated for the full day, with three in remote locations, offering a combined knowledge base of roughly 300 years of experience in international development.

This document is the fourth CAIDP Strategic Plan; each plan has covered five years.

## Background

The Canadian Association of International Development Professionals was incorporated as a non-profit organization in February 1993. It is a voluntary organization run by and for its members.

The objectives of the association are to:

1. Foster excellence in international development professionals
2. Promote the collective professional interests of international development professionals
3. Provide a forum for members to exchange professional information and engage in professional development
4. Give a voice to the international development consulting community.

## Challenge for the Future

CAIDP's 2017 member survey, supplemented by structured discussions with CAIDP members and informants identified a number of factors that affect the overall context for CAIDP's work in terms of the external environment. While CAIDP's management and

organizational structure has not changed dramatically, the environmental scan raised a number of important unfolding developments to consider and include in forward planning.

### ***External Development Context***

#### ***CAIDP and Canadian Expertise Continues to be Important***

- ✓ The broad development challenge has not changed much to resolve poverty and sustainability in an effective and lasting way. Problems persist in aid dependency, not enough success in building sustainable communities to help themselves. Interconnected dilemmas of ineffective political, social, economic, environmental problems continue, with growing intensity due to climate change, inequality, human rights abuses and so on.
- ✓ A broad questioning by society and donors of development impacts and whether and how local ownership and downstream capacity are present and sustainable.
- ✓ Funding sources are increasingly diverse, and private aid flows operate outside of policy norms and accountability and ethics frameworks (unlike donor-funded or mandated). For example, China's new development financing institution, new bilateral donors, and corporate foundations.
- ✓ Global Affairs Canada continues to have unpredictable and limited procurement processes and largely inaccessible funds for Canadian suppliers to contribute to the development agenda.
- ✓ Barriers to entry continue for Canadian development professionals, particularly an imbalance of emphasis on senior expertise, which excludes feeder-

track for new more junior skills for succession planning.

- ✓ GAC's continued trend for large-scale projects squeezes out opportunities for just-in-time technical assistance and capacity building assets by small and medium sized organizations.
- ✓ There is some concern that Canada continues to transfer more than half of Official Development Assistance (ODA) through multilateral organizations which do not (and cannot due to scale and systems) report effectively on impact and results and often fail to engage Canadians, which is critical for continued taxpayer commitment to ODA expenditures.

### ***Internal CAIDP Context***

*A legacy to build on ...*

- ✓ CAIDP is a recognized credible voice: increasingly drawn upon for policy and program deliberations
- ✓ Produces quality information products, tools, knowledge resources
- ✓ Professional development is valued, topical and pertinent (e.g. conference, webinars) and increasingly important in a complex world (attacks on aid workers, higher level of expertise requested as needs in developing countries moves up as skill levels in these countries increases) and consultants are expected to be fully informed and current in their knowledge.
- ✓ The mandate remains relevant for CAIDP to advocate, inform and champion the interests of Canadian development professionals due to low public, political, and private sector awareness of international development, effective aid and of the

important role and supply of Canadian talent.

*But more work to be done ...*

CAIDP has identified the following assets to build on and issues to address:

#### **Assets:**

- ✓ Valid mandate, mission and vision;
- ✓ Experience, credibility, influence;
- ✓ Financial resources, knowledgeable and dedicated leads;
- ✓ Potential to leverage, create opportunities for new collaboration;
- ✓ Use of information technology has the potential to expand engagement and reach;
- ✓ Unique niche, ongoing demand for professional development and continued services.

#### **Issues:**

- ✓ Value proposition for corporate members, new/young cohort could be clearer;
- ✓ Low membership base, barriers to entry may mean fewer new entrants to the sector;
- ✓ Strained volunteer capacity, administration and system sustainability;
- ✓ Low profile and awareness of CAIDP, gaps in communication including lesser use of French;
- ✓ Need for members to diversify focus;
- ✓ Use of IT and virtual meeting tools (GoToMeeting, Zoom etc.) is not a panacea, as it requires quality content and professional moderation;
- ✓ Unclear path(s) to member engagement.

## CAIDP Response to Date

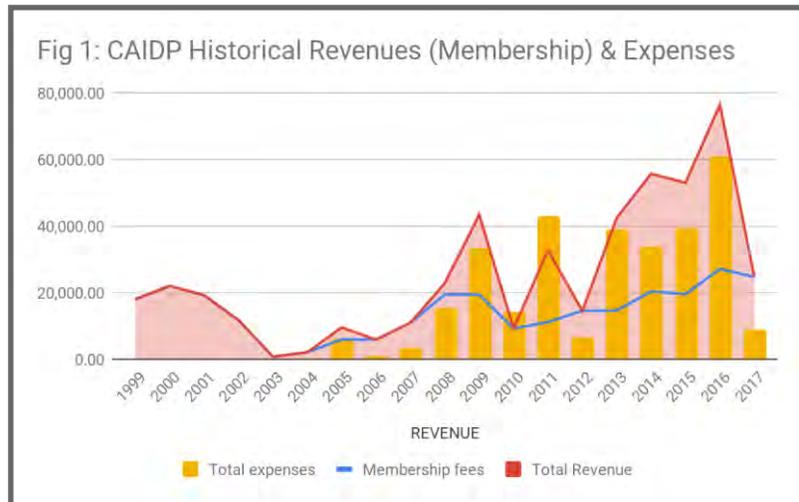
This year marks CAIDP’s 25<sup>th</sup> anniversary, confirming that its membership base and programs have stood the test of time.

**CAIDP’s financial base** is healthy going into a new planning era, due in part to its modest but steady operating expenditures.

Conferences every 2 or 3 years (Figure 1) are an important motivator for membership sales. CAIDP’s break-even model has allowed the annual surplus to grow from \$3k to \$15k since 2005, although the association is now running a small deficit<sup>1</sup>.

*The cumulative financial cushion is well managed and more thought to diversification and a policy on “reserve funds” would help allocate what is available for operations and programming and what is retained for corporate risks.*

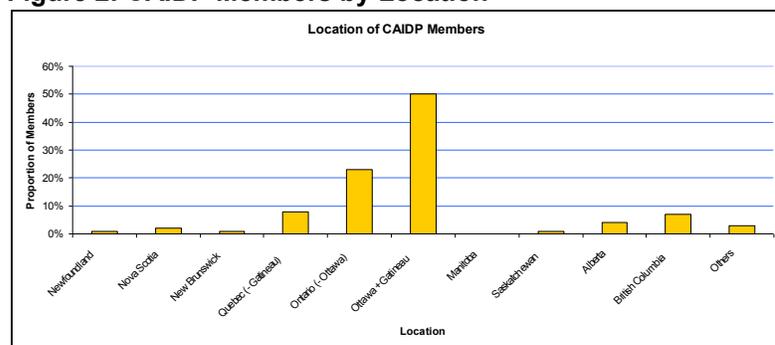
**Paid Memberships** peaked at 185 (at the time of the May 2016 Conference), roughly half are individuals and one quarter are corporate or associate members, and most are located in Ottawa and Gatineau (Figure 2). As memberships are the sustaining income, how does this translate into revenue for CAIDP?



**Table 1: Average Membership by Year**

Year	Average	Individual	Corporate	Student	Associate
2014	137	49%	20%	24%7%	N/A
2015	149	52%	16%	22%	10%
2016	179	47%	24%	21%	8%
2017	153	48%	27%	17%	8%

**Figure 2: CAIDP Members by Location**



Historically organizations and individuals working on Canadian ODA tended to cluster in the National Capital Region (NCR) to be close to the offices of GAC and its predecessors. The department is still an important client for most development professionals.

The use of information technology (GoToMeeting, Zoom, OneDrive) has the

potential to expand reach and engagement across Canada and beyond.

*If considered for professional development, skills are required to develop quality content / subject matter and moderate sessions for a quality experience.*

**A much wider audience of Listserv recipients (1,220) and Social Media followers** on FaceBook and LinkedIn (1,200) have access to CAIDP's public news and updates. Additionally, all Listserv subscribers (1,220) will occasionally receive information by email

on a specific CAIDP event or topic for promotion. No particular strategy has been used for social media marketing and engagement. While subscribers are not paying members, they can be considered potential members and a wider network for CAIDP to harness. Use of Twitter is irregular and unexplored as yet, for expanded profile. More targeted and consistent messaging about the benefits of membership, in terms of professional networks and other material perks (discounts etc).

### **CAIDP Achievements under Previous Strategic Plans**

**In terms of CAIDP's objectives and accomplishments** as laid out in its series of Strategic Plans 2011-2015, 2013-2018 and 2015-2018 update to the 2013-2018 Strategic Plan, CAIDP Annual Reports from 2012 to 2017 show that almost all objectives have been met. Workshop participants confirmed this, with the exception of "Public Recognition".

<b>Progress on CAIDP Strategic Priorities 2015-2018</b>	
Advocacy & policy influence	<ul style="list-style-type: none"> <li>GAC credible voice, input &amp; advice (Procurement systems; Eval; Cost Sharing Policy; Ops Coherence &amp; Directions; International Contracts) – new Procurement Working Groups (\$15k)</li> <li>Representation @ development fora and consultations (Agenda 2030; Foreign Policy Priorities; International Assist Rev; Action Plan for Women, Peace Security; Development Finance Institute; DAC peer review)</li> </ul>
Networking & communication	<ul style="list-style-type: none"> <li>Website &amp; – Social Media (FB, Twitter, LinkedIn)</li> <li>Listserv</li> <li>Quarterly News bulletins</li> <li>Responding to member concerns</li> <li>Org dialogue: Trade, EDC, Chamber Commerce, Procurement Ombudsman, Devex</li> </ul>
Knowledge, skills & tools	<ul style="list-style-type: none"> <li>Conferences 2015 (CCIC), 2016 – prep for 2018</li> <li>Webinars (GAC RBM Guide; contract tips)</li> <li>Online tutorials (So you want to be a Contractor?)</li> </ul>
Public recognition	<ul style="list-style-type: none"> <li>CAIDP prepared a media list and accredited media to conferences</li> <li>CAIDP approached by media for comments on some development issues,</li> <li>CAIDP authored op-eds appeared in publications</li> </ul>
Strengthen base	<ul style="list-style-type: none"> <li>Survey (2017)</li> </ul>

## CAIDP's Strategy 2019-2023

Based on the analysis above, workshop participants developed the following plan for the next five years.

### ***CAIDP Vision, Mission and Value Proposition***

CAIDP is confident that its Vision and Mission are still relevant, although some improvements to the Value Proposition could help sharpen the message about benefits of membership (relational and material – connections to people versus discounts to the OECD library, DevEx, etc.), and to further differentiate benefits for individual versus corporate members, while inviting new members to come forward (especially underrepresented groups).

The most unique draw to CAIDP is its people and the connections. CAIDP should confirm to what extent discounts and group benefits are valued perks, if and when used, keeping in mind that the experience from many other professional associations is that these are not sufficient to attract and retain members. Quality programs, timely information and opportunities, and access to resources and professional networks tend to be of most importance to membership-based organizations.

- **Vision:** effective international development through enhanced participation of professional Canadian development sector professionals from the private sector, NGOs and academia;
- **Mission:** promote Canadian excellence in achieving international sustainable development results; and
- **Value Proposition:** CAIDP is uniquely positioned to help Canadian international development professionals work and participate effectively internationally; our membership is growing and diversifying, we are building vital connections across the country and globally.

Reflecting on the outreach undertaken, our consultation with members, the deliberations in our facilitated planning session and using these statements as reference points the association has developed specific areas of focus, and targets for the next five-year Strategic Plan.

### ***CAIDP's Strategic Direction and Programming Areas***

CAIDP will focus on the following programming activities under this strategic plan:

1. Delivering quality professional development and services to our members
2. Representing the sector and advocate for Canadian development expertise.
3. Growing membership and expanding revenues.

### ***The Role of CAIDP Committees***

While CAIDP now has an Executive Assistant to help the board, and specifically the Executive Committee of the Board, in the execution of their duties, most of CAIDP's work is done by three standing committees. These committees are comprised of members of the Board as well as volunteers drawn from the CAIDP membership. These committees will bring life to this strategic plan through a variety of activities and initiatives that are designed to respond to our needs. A summary of their planned activities is included here.

### **External Relations Committee**

External Relations Committee's mandate is to advocate for the collective professional interests of Canadian development professionals and give them a voice. It has responsibility for CAIDP's representation and advocacy work and works on behalf of the Association to:

1. Raise awareness of the capacity and professionalism of Canadian international development consultants
2. Promote the involvement and influence of our professional community in issues relating to development policy and programming

Most of the work of the External Relations Committee involves engaging with other stakeholders with interests in the field of development including:

- Key representatives from Global Affairs Canada, for example organizing the participation of the CAIDP community in reviews of international assistance policies and programming and working with the department on improving the procurement of international development services or streamlining processes to improve the effectiveness of Canadian international assistance;
- Key representatives of other donor institutions, for example through liaison with the Canadian trade commissioner's at the Offices of Liaison with International Financial Institutions (OLIFIs) to ensure they are aware of and including the Canadian international development service sector in their work;
- Key representatives of other organizations and associations with an interest or stake in development, for example the Canadian Council for International Cooperation (CCIC),

the provincial councils, Canadian Association for the Study of International Development (CASID), Canadian Evaluation Society (CES), Canadian Council of International Law (CCIL), and others to share experience and information about the international development sector and, on an ad hoc basis, pursue joint advocacy on matters of interest to our communities;

- Key representatives of organizations in a position to support CAIDP in either advocacy or member services, including identification of job opportunities and marketing;
- Supporting Memberships, Marketing and Communications Committee with outreach to Canadian and other media as and when a need arises to give a voice to our community.

### **Programming Committee**

The mandate of the Programming Committee is to foster excellence in Canadian international development professionals and deliver quality professional development to CAIDP members. The Programming Committee works to help members develop the knowledge, skills and tools to be globally competitive by:

1. Organizing and promoting short webinars and programmes on specific topics to enhance knowledge;
2. Organizing and promoting conferences every 18 months to two years to bring members together for learning, sharing and networking;
3. Developing web-based learning products to ensure that members have access no matter where they are in the world.

The Programming Committee liaises with other members of the international development community to ensure that CAIDP members are abreast of new

ideas and knowledge throughout the sector. It often works on collaborative events with CAIDP partners.

The Committee's work includes:

- Refining our understanding of the international market place;
- Soliciting members on knowledge, skills and tools they can offer (as the "supply community"), and on gaps that need filling;
- Sourcing relevant professional development expertise/resources and make available to the membership through webinars, conference sessions, or other sponsored events; and
- Showcasing member knowledge skills and tools to other members through webinars, conference sessions or other co-sponsored events.

### **Memberships Marketing and Communications Committee**

The Memberships, Marketing and Communications Committee forms the core operational entity of CAIDP. Its mandate is to:

1. Increase and retain memberships

2. Promote membership involvement and participation in CAIDP through convening the Annual General Meeting and any Special Meetings of the Members, as well as through nominations to working committees and the Board
3. Provide services to members in order to enhance the value of membership.

The Committee's work includes:

- Member services, including setting the terms and conditions of membership and negotiating member benefits such as discounts on DevEx, DevAID, insurance products targeted to our members, access to the OECD iLibrary, etc.
- Marketing the association to build memberships, including providing information to prospective members in response to requests and running membership campaigns
- Developing and managing CAIDP communications products like the CAIDP Hub (ListServ), CAIDP Social media accounts, CAIDP website, CAIDP brochures, CAIDP art work and logos, and the CAIDP Quarterly Bulletins.

## **Institutional Arrangements**

CAIDP remains 100% reliant on the efforts of a volunteer Board of Directors as well as volunteers drawn from its membership. CAIDP is now served by an Executive Assistant on a part time basis. This has resulted in a more professional approach to governance, enhanced communications and the delivery of programs and services to members. However, existing memberships are not quite sufficient to fully fund this position.

## **Funding**

CAIDP is funded by membership dues and member sponsorships for its conferences. The organization will need to ensure adequate funding in order to support the maintenance of the Executive Assistant as well as new programming. The Board must ensure increased income from sponsorships, increased membership, and explore fund raising support from Global Affairs through the Programs Division or the Canadian Trade Commissioner Service, as well as other programs to be identified.

**Appendix I: CAIDP Strategic Plan 2019-2023 Highlights**



**CAIDP - RPCDI**  
The Canadian Association of International Development Professionals  
**Strategic Plan 2019-2023 Highlights**



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**Our Strategic Directions**



**1. To deliver quality professional development and services to our members**



**2. To represent the sector and advocate for Canadian development expertise.**



**3. To grow membership and expand revenues.**



**CAIDP - RPCDI**  
2019 Anniversary - 25th Anniversary

Annual CAIDP Memberships	149
List Serve Members	1248
Newsletter Recipients	1200
Monthly Website Visitors	5,834

## Appendix II: CAIDP Strategic Plan 2019-2023 Results Framework

 <b>CAIDP - RPCDI</b> The Canadian Association of International Development Professionals <b>Strategic Plan 2019-2023 Accountability Framework</b>											
Ultimate Outcome	<b>A vibrant and sustainable association of Canadian international development professionals:</b>										
Intermediate Outcomes	<b>Higher quality of communications, networking and professional development service:</b>					<b>Increased recognition of Canadian international development professionals:</b>			<b>Increased memberships and resources to support services for members:</b>		
Immediate Outcomes	<b>Increase information on the affairs of the association, sector news and networking:</b>			<b>Increased member knowledge and skills:</b>		<b>Improved representation of Canadian international development professionals:</b>			<b>Broaden membership and funding base:</b>		<b>Improved services:</b>
Outputs	Website improved	Use of CAIDP Hub increased	Member Bulletin enhanced and more interactive and user friendly for mobile devices	Delivery of more programs and webinars across country	Annual (biannual?) conferences and consultations to bring the community together	Advocate for improved efficiency of Canadian international development assistance	Increase awareness of Canadian international professional community	Enhance Partnerships	Membership campaign	Fundraising	Discounted Annual Medical Travel Insurance for CAIDP Members
	Improve navigation	More use by members	Use of web-based pulse-taking polls of members	Increase no. of recorded professional development events online		Ongoing consultations with SAC	Attend sectoral meetings and events	Partnership Strategy and priorities	More CAIDP Hub members become CAIDP Members		New discounts for other services relevant to CAIDP members
	Enhance search function (e.g. for member profiles)					Advocate for more visibility and opportunities for Canadian international development expertise	Update press list to enable proactive communication		Ads promoting benefits of CAIDP membership for ongoing use in small and Hub posts		Opportunities for Volunteer Engagement
	Broaden events postings								Outreach to SAC, OUPs, etc.		Explore Mentorship Program
	Improve on-line resources								Outreach to multilaterals		Technology audit to improve CAIDP
	Increase member generated content (forums, profiles, etc.)								Outreach to targeted Canadian political leaders		



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<sup>i</sup> Source: Fig 1, Fig 2 & 2017 Member % = CAIDP Member Database - "Financial Analysis" (Treasurer: August 21, 2018). 2000-2016 Member % = Annual Reports, CAIDP Website