



The Local Network

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Ryder Museum, Ryder North Dakota

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Strategic Planning for Small Museums

Many small museums operate with volunteer and non-professional staff. Some small museums are in caretaker mode - operating to keep the rood on and the doors open. They may not have had the opportunity to look to the future and make the best decisions for the organization in the long term..Strategic planning is an excellent way to start thinking about the future and improve the present.

Excerpted from an AASLH TECHNICAL LEAFLET #242 by Cinnamon Catlin-Legutko, this template is rooted in basic project management where it is important to determine tasks, resources, and deadlines ahead of the project's start date.

Why are Strategic Plans Needed?

A strategic plan is a map or chart that an organization agrees to follow for three or five years in order to reach their goals. Institutions need strategic plans to help direct efforts and resources in an efficient manner. Responding to community and audience needs requires a strategic plan.

Through strategic planning, major goals are defined. It is important to realize at the beginning that the strategic plan is a means to an end. It is a living document and as such, opportunities that are good for the organization should be considered with the plan in mind, but not completely disregarded because "it's not in the plan." *The Strategic Plan is the means (flexible) to an end (not flexible). It is a LIVING DOCUMENT.*

Is Your Museum Ready for Strategic Planning?

Conditions must be right for strategic planning to begin. Non of us have time to waste on planning if the board does not support it or if the goals are unachievably. The proper strategic planning conditions depend on the organization, but the primary indicators for readiness include board and staff commitment and a vision for the future. There are tow parts for guaranteeing the success of a strategic plan:

1. Creating a realistic strategy that matches current and anticipated resources.
2. Ensuring board and staff embrace the plan and agree on the articulated goals.

Before you get started, the director should evaluate organizational readiness. If the organization has serious issues - such as board in-fighting, major budgetary shortfalls, or cynicism regarding planning - take steps to resolve them before the process begins.

Strategic Planning has three key processes:

I. Preparation II. Facilitation III. Formatting

I. Preparation

1. Gain board support for strategic planning. One of the key functions of the board is to set the strategic direction of the museum and ensure that the resources are in place to realize the goals.

2. Select project leader/facilitator. The museum director serves as the project leader/facilitator in the absence of funding for the consultant. While it is better to have an independent party facilitate brainstorming activities and guide the overall process, this is often not feasible in small museums. To make sure the director has input in the process, he or she may meet with board members before the meeting, share ideas, and encourage them to spur these ideas during later brainstorming opportunities.

3. Determine length of plan. Decide along with the board whether this will be a three or five-year plan. If you are an all-volunteer organization a three-year plan might be more suitable. Volunteer energy needs to be replenished more frequently and the planning process can be a tool for reenergizing and refocusing. An organization that has board members not completely convinced with strategic planning may choose three-years to demonstrate organizational potential.

4. Identify five organizational categories. Identifying categories from the onset will help frame the over-all planning process and the later brainstorming activity. You will need to distill museum functions and projects into five categories at most. (Education, Administration, Collections, etc.) To guarantee the development of a feasible plan, limit it to five categories and use them as guideposts during the planning process and as the backbone of the final plan.

5. Distribute a “warm-up” activity. Before

the first scheduled strategic planning session, distribute a worksheet to participants to spur thinking about the future of the organization and prepare them for the brainstorming session. Email or mail the worksheet and instruct them to complete it and bring it to the first session.

II. Facilitation

1. Convene a brainstorming session. Ideally, the first gathering should be a five-hour session with clear agenda provided ahead of time. During the first gathering, the lion's share of board work is completed. Board members will be sharing ideas, thinking of new ones, and begin placing them into concise statements.

For the first session, you will need two flip charts (preferably the kind with adhesive) and several colors of markers. Do not use chalk board or dry erase board. You need to keep the notes throughout the entire planning process - you will refer to them during the second strategic planning session and you will need them as you draft the plan.

(To be Continued)

\$104,000

IN CULTURAL HERITAGE GRANTS AVAILABLE FROM STATE HISTORICAL SOCIETY OF NORTH DAKOTA

BISMARCK -- In 2009, the North Dakota Legislative Assembly authorized \$504,500 to the State Historical Society of North Dakota (SHSND) for the Cultural Heritage Grant Program. The program has been administered by the state's history agency since it was first created in 2003 and provides grant funding for local museums and historical societies.

The 2010 grant round will have up to \$104,000 of grant monies awarded. Interested and eligible organizations that have a project they wish to be considered for a grant award should thoroughly read the guidelines and submit the application to the SHSND before Friday, March 12. The completed application must be received (not postmarked) by the SHSND by 5 p.m. this same date of March.

Also available through the Cultural Heritage Fund

program are Heritage Training Scholarships and the North Dakota Museum Assessment Program (NDMAP). The SHSND has obligated \$30,000 to the Heritage Training Scholarship Program for the 2009-2011 biennium. Heritage Training Scholarships are available for local and county historical society staff members to participate in training opportunities and will be awarded until the fund is exhausted.

The NDMAP grants provide county historical societies an opportunity to do an in-depth review of their organization, develop long-range plans, and complete a project. The SHSND has \$30,000 remaining for the NDMAP grants and will award up to three organizations each a \$10,000 grant. The deadline for the 2010 NDMAP applications is Friday, March 12, 2010.

The Cultural Heritage Grant application is available on the SHSND's website at www.history.nd.gov or can be requested by contacting the SHSND's Grants and Contracts Officer Amy Munson at (701) 328-3573 or email at amunson@nd.gov.

The 3 Rs in North Dakota: Education from 1951 to 2010



Goodrich Public School is an example of a typical adaptive-use model school building of the period.

The State Historical Society's annual Governor's Conference to be held on October 29 – 30 continues the education theme begun this past year. The 3 R's in North Dakota: Education from 1951 to the Present will focus on change. Many changes in education, both good and bad, have occurred in the last 60 years. For North

Dakota school consolidation, laws impacting curricula, changes in extra-curricular activities and the tools available in schools have all changed the complexion of our state's schools. Dr. Mary Harris, former dean at the University of North Dakota, will be the keynote speaker on both Friday and Saturday. Panels on Alternative Schooling and Extra-curricular activities will round out the day on Saturday. Be sure to watch for the line-up of speakers and activities planned for this exciting event.

Reminder - The State Historical Society is seeking nominations in four categories of awards that recognize outstanding achievements in the field of history in North Dakota. Nominations must be received by the SHSND no later than September 17, 2010.

Nominations will be reviewed by a SHSND committee. Presentation of the awards will be made during the award's conference banquet held at the North Dakota Heritage Center in Bismarck.

Four Categories of Award Nominations:

- ✓ **Excellence in Local History** - This award is given to recognize and honor those individuals who dedicate their time, talent, and efforts to local and state history.
- ✓ **Association for Excellence in Local History** - This award is given to the association or organization whose activity in local and regional history serves as a role model of excellence to others.
- ✓ **Heritage Profile Honor** - This award is given in recognition of those individuals who have made a lasting or significant contribution in preserving, interpreting, promoting, researching and/or otherwise extending the knowledge and understanding of the history of North Dakota.
- ✓ **North Dakota Person of History** - This award is given in recognition of those individuals who have had a prominent role in the history of North Dakota. The award shall posthumously honor those individuals who have made a lasting or significant contribution to the growth, development and progress of the state, or the social well-being of its citizens.

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★ **May 16, 2010: State Historical Society of North Dakota (SHSND) Cultural Heritage Grant Workshop**, presented by SHSND Grants & Contracts Officer Amy Munson. She will explain how to write cultural heritage grant applications. Time still to be determined, North Dakota Heritage Center. For more information, call (701) 328-3578 or email amunson@nd.gov.

★ **May 22, 2010: Training workshop for the County School Project spearheaded by the State Historical Society of North Dakota (SHSND)**, presented by SHSND Architectural Historian Lorna Meidinger and Research Archaeologist Amy Bleier. Myra Museum, Grand Forks. Space is limited, registration required, fee is \$5 per person. For more information, call (701) 328-2089 or email lbmeidinger@nd.gov.

South Dakota's Black Hills region hosts MPMA's 2010 Regional Museum Conference.

Rapid City, SD: The Mountain-Plains Museums Association (MPMA) will hold its 2010 annual conference from September 13-17th in Rapid City. The event draws museum professionals and practitioners from a 10-state region in the heartland of America. The theme for the conference is "Monumental Visions: Carving the Future for Museums," playing off Mount Rushmore National Memorial and Crazy Horse Monument in the Black Hills. The conference will have many tours to local museums as well as to historic sites in the Black Hills region, Sturgis, Deadwood, and Spearfish. There will also be many sessions and workshops on topics of interest to museums and other entities interested in art, history, science, and tribal issues, along with sessions on geology and paleontology designed to assist delegates in identifying specimens in their collections.

For registration information, email info@mpma.net or www.mpma.net.

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