

**Maine Archives and Museums
Five-Year Strategic Plan 2014-2018**

Approved by the Board of Trustees January 13, 2014

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EXECUTIVE SUMMARY

The 2014-18 strategic plan for Maine Archives and Museums (MAM), approved by the board of directors on January 13, 2014, outlines a series of objectives, goals, and actions designed to enable the organization to fulfill its mission to “actively stimulate the flow of knowledge and support” among collecting institutions in the state and to achieve its vision “to be a leader in and an advocate for the field, contributing significantly to the strength, relevance, and sustainability of its members.” The plan is organized according to five main Strategic Objectives; following is an abbreviated list of goals and actions to be achieved in each area.

Finish the grant-funded Maine Cultural Institutions Outreach project and develop and incorporate new, advocacy-based data collection strategies

- Complete and launch Maine Cultural Institutions Outreach (MCIOP) database of all collecting institutions in the state
- Create and distribute a statewide Economic Impact Statement for the industry
- Take a leadership role in state, regional, and national initiatives: the State of Maine bicentennial, New England Museums Week, and Museums United

Tend to board culture and health, including issues of fiscal responsibility

- Draft and adopt an Ethics Policy and a Finance Policy
- Grow membership by reaching out to institutions identified through MCIOP and by revising membership categories and solicitation materials
- Increase revenue to support expanding the director’s hours

Engage more fully the community of collecting institutions in the state by working with and within their regions

- Continue to offer workshops and other programs throughout the state; explore options for offering the same program in several different areas
- Develop new conference partners by rotating the location among leader institutions in the state and working collaboratively with other membership organizations
- Re-boot the Regional Representatives program by working with existing regional and thematic consortiums of collecting institutions

Seek strong collaborative partners

- Foster formalized partnerships with allied initiatives like CERC (Maine); develop related collaborative programming
- Develop and launch low- or no-cost collaborative marketing initiatives
- Launch Values Assessment program statewide and explore options for taking it beyond the state

Increase and enhance digital communications, including distance learning and remote meeting attendance

- Strive for maximum utility of public databases (events, MCIOP) and work to get them onto the screens of users
- Develop and implement strategies for remote attendance of programs, the conference, and MAM board/committee meetings
- Improve website functionality and appearance

INTRODUCTION

This strategic plan builds on the strengths of MAM's 2009-13 Long-Range Plan, which identified areas of growth and direction for the organization. Having successfully addressed the objectives centered around increasing its professionalism and relevance, MAM is now poised to push toward larger goals of increasing its resources and outreach; becoming a leader in advocacy, communications, and professional development; and striving for long-term sustainability. This five-year Strategic Plan addresses specific actions and objectives related to those goals and to the vision for the organization articulated on page 5 of this document.

MAM is a membership-run organization, with a structure described as "bottom-up" rather than "top-down"; in other words, the organization's activities and priorities are determined by the needs of its membership. With that in mind, this document was developed by a team (please see *Acknowledgments*, p. 11) with extensive input from the membership at large. Over a two-year period, feedback was sought and compiled from MAM's membership and other stakeholders in the following ways:

- A survey of MAM's complete membership begun in late 2011 and "closed" in the spring of 2012, in which participants were asked to describe the main challenge facing their institution.
- Evaluation forms distributed at MAM's 2012 and 2013 conferences, each of which included a final question asking respondents to help set planning priorities for MAM.
- An evaluation questionnaire distributed to participants in MAM's 2013 Spring Workshops, specifically with this long-range planning process in mind.
- A survey administered as part of MAM's Maine Cultural Institutions Outreach Project, seeking largely demographic information from collecting institutions in the state that are not necessarily members of MAM.
- Minutes from a SWOT (Strengths, Weaknesses, Opportunities, Threats) exercise performed by MAM's board in June 2013.
- A planning retreat for the board (and other stakeholders) held on September 9, 2013, facilitated by Cinnamon Catlin-Legutko of the Abbe Museum.
- A lunchtime session at the 2013 conference, during which attendees were encouraged to respond to an early draft of this document.

The overall structure of this document and much of its content, including the Core Competencies outlined on p. 4, arose from the planning retreat on September 9, at which results from the above surveys were presented. This Strategic Plan, then, distills MAM's needs, challenges, resources, and ambitions—as identified by its membership and its leadership—into a series of objectives, goals, and actions for the next five years.

MISSION AND CORE COMPETENCIES

Mission

Maine Archives and Museums actively stimulates the flow of knowledge and support among organizations and individuals in Maine who identify, collect, interpret, and/or provide access to materials relating to history, living collections, and culture, in order to strengthen and promote all collecting institutions in Maine.

Approved by the Board of Trustees October 7, 2013

Core Competencies

MAM possesses a wealth of knowledge about the profession and is willing to share it with colleagues and the public.

MAM can rely on a dedicated corps of volunteers to ensure operations.

MAM is a convener of colleagues via programs and communications.

MAM is enriched by a diversity of organization type and size.

VISION

Maine Archives and Museums seeks to fulfill its mission by educating ourselves and the public through activities such as:

- Fostering the identification, preservation, and use of records, objects, and living collections of enduring value in Maine, both public and private, corporate and individual
- Improving the management, public awareness and understanding of such records, collections, and objects
- Sponsoring continuing professional education
- Providing a forum for the exchange of information among individuals and institutions
- Facilitating communication and cooperation with other organizations (local, regional, and national) and with individuals and groups representing allied disciplines
- Promoting member museums, collecting institutions, and archives to the public

MAM strives to be a leader in and an advocate for the field, contributing significantly to the strength, relevance, and sustainability of its members. Our vision is that, by looking to MAM for information and support, our members—and, indeed, all collecting institutions in the state—will be better equipped to fulfill their own missions and visions and to find and advance their place on what the American Alliance of Museums terms the “continuum of excellence.”

STRATEGIC OBJECTIVES

1. Finish the grant-funded Maine Cultural Institutions Outreach project and develop and incorporate new, advocacy-based data collection strategies

GOALS/ACTIONS	Responsibility	Timeline
Create and disseminate statewide Economic Impact Statement based on 2013 survey of institutional members	Director/President	February 2014
Send two MAM delegates to AAM conference for state museum associations	Director/Executive Committee	March 27-30, 2014
Complete MCIOP database of state collecting institutions	Director	May 2014
Offer spring programs in order to complete MCIOP grant	Program Committee/Director	March-May 2014
Create mechanism for making MCIOP database publicly accessible and fund its implementation	Communications Committee	Summer 2014
Submit final financial and narrative reports for MCIOP grant	Director	Summer 2014
Develop Advocacy PLAN (not policy), to include items such as: <ul style="list-style-type: none"> • Articulate ongoing role of Advocacy Committee • Develop plan for regular contact with elected officials; try for an in-person meeting with legislators • Reconceptualize annual membership survey so that we maximize responses and make the results relevant to current initiatives—possibly switch to a model more like “Library Snapshot Day” • Figure out how to become/remains aware of legislative issues (including state and local issues) that affect collecting institutions. 	Advocacy Committee/President	2014; to be revised annually thereafter
Take a leadership role in developing “New England Museums Week,” a New England Museum Associations initiative to be piloted in Rhode Island in 2014.	President /Program Committee/ Advocacy Committee	2014-on
Look into options for MAM representatives to attend/present/exhibit at regional and national conferences like AAM, NEMA, AASLH, SAA, Governor’s Conference on Tourism, etc.	Full board	2014-on
Participate fully in “New England Museums Week”	Full board	2015-on
Develop plan to take leadership role in Maine’s 2020 bicentennial	Executive and Program Committees	By 2018

2. Tend to board culture and health, including issues of fiscal responsibility

GOALS/ACTIONS	Responsibility	Timeline
Establish and convene a Finance Committee	Treasurer	First half of 2014
Create a Finance Policy	Treasurer	2014
Draft and approve an Ethics Policy, including Conflict of Interest guidelines	President	2014
Empower nominating committee to work on board development year-round, including planning for future leadership and identifying board training opportunities for current board members	President/Executive Comm./ Nominating Comm.	2104-on
Identify at-large Executive Committee member as board liaison, to work in part on fostering a lively and friendly board culture	Executive Committee	2014-on
Revise membership materials (printed and online) to reflect current categories	Membership and Communications Comm.	2014; then again after any additional changes (below)
Grow membership revenue by reaching out to all Maine collecting institutions (through MCIOP database) about MAM membership and programs; consider targeted approaches based on institution type	Membership and Program Comms.	Summer 2014
Look for ways to trim costs, including newsletter printing and delivery options	Executive, Finance, and Communications Committees	2014
Refine procedures for transitions and record-keeping in order to retain institutional memory	President, Director, Executive Committee	By end of 2014
Budget to increase director's hours and compensate director fully for each hour worked. Look into contract versus employee arrangement.	Finance and Executive Committees	2015
Explore new initiatives to increase revenue beyond membership	President, Finance Committee, Executive Committee	2015-on
Reevaluate membership categories, fees, and benefits—consider new categories like Academic memberships for colleges and universities	Membership Comm.	2015

3. Engage more fully the community of collecting institutions in the state by working with and within their regions

GOALS/ACTIONS	Responsibility	Timeline
Continue to offer and find funding resources for regional workshops focused on essential skills—though not just collections management skills. Among the program ideas suggested through feedback were digitization, digital skills (web development, social media), public relations, customer service, learning how to work with schools, fundraising, volunteer recruitment, sustainability, etc.	Program Committee	Spring 2014 and beyond
Explore options for additional types of programs beyond workshops—casual networking opportunities, formal lectures, museum site visits (“do it right” examples)	Program Committee	Spring 2014 and beyond
Explore options for remote attendance of workshops, including teleconferencing and live and archived webinars	Program and communications committees	Spring 2014 and beyond
Gather information about existing regional/thematic consortiums of collecting institutions in the state, including tourism- and economic development-based initiatives like Downtown Districts and Scenic Byways	Vice President/ Regional Rep Committee	2014
Work with such consortiums to offer MAM-sponsored get-togethers/networking sessions	Vice President/ Regional Rep and Program Committees	2014
Encourage participation by such groups in Regional Tourism meetings	Vice President/ Regional Rep and Communications Committees	2014-on
Consider offering select MAM programs as “franchises” that can be repeated/hosted/managed by such regional groups	Vice President/ Regional Rep and Program Committees	2015
Research models for how other meta-organizations (like AAM and SAA) work with regional groups	Vice President/ Regional Rep Comm.	2014-on
Create a “speaker’s bureau”—a vetted list of people who can give lectures or lead programs—for use both internally and among MAM members.	Program Committee	2015
Reach out to emerging professionals in the state through programs or pre-professional opportunities.	Program and Executive Comms.	2015-on
Develop toolkit for regional reps or affiliated regional groups	Vice President/ Regional Rep and Communications Committees	2015, 2016
Pilot new Regional Rep/Regional Associates program	Vice President / Regional Rep Comm.	2016
Evaluate and adapt new Regional Rep/Regional Associates program in order to best serve MAM’s constituents	Vice President/ Regional Rep, Communications and Advocacy Comms.	2017-18

4. Seek strong collaborative partners

GOALS/ACTIONS	Responsibility	Timeline
Partner with the Maine Cultural Emergency Resource Coalition to help collecting institutions with disaster planning through programs and informational resources	Executive, Communications, and Program Comms.	2014-on
Continue to offer annual conference and use as an opportunity to develop relationships with host institutions, sponsors, and organizations in affiliated fields: <ul style="list-style-type: none"> • American Alliance of Museums • American Association for State and Local History • American Library Association • New England Museum Association • Maine Library Association • Society of American Archivists • New England Archivists • Maine Office of Tourism • Maine Department of Transportation (Scenic Byways) • Maine Association of Non-profits • Northeast Document Conservation Center, etc. 	Program and Executive Committees	Fall 2014 and beyond
Consider partnerships with the above to offer collaborative programming	Program Committee	Fall 2014 and beyond
Consider partnerships with the above to offer combined/enhanced membership benefits and collaborative programming	Membership Committee	2015-on
Begin policy of rotating conference among host institutions that are MAM members and can provide the physical and remote attendance capabilities we need (i.e., larger colleges and universities that contain MAM member insitutions).	Program Committee	Fall 2014 and beyond
Pursue funding for implementation of Values Assessment program	Connecting to Collections Committee/Director	2014
Explore low- or no-cost collaborative marketing initiatives—suggestions have included franchising the “Rainy Day XXXX” initiative, or creating and distributing a Maine museum map	Communications Committee	2014-on
Improve grant/fundraising resources provided to members; more source research and updated deadlines	Communications Committee	2014-on
Launch Values Assessment program	Connecting to Collections and Program Committees	second half of 2014
Explore initiatives that would allow MAM to serve as a mini-grantmaker for existing programs like STEPS or AASLH’s Visitor Assessment program.	Director/President	2015, 2016

5. Increase and enhance digital communications, including distance learning and remote meeting attendance

GOALS/ACTIONS	Responsibility	Timeline
Work to make MCIOP database functional and user-friendly and to make it appear more regularly in relevant internet searches	Communications Committee	Second half of 2014
Encourage interactive use of events calendar on MAM's website (provide training for members?) and work to make it appear more frequently in relevant web searches.	Communications Committee	2014
Strengthen outreach to institutions using the Maine State Library's videoconferencing system; develop rotating schedule of board meeting sites that can provide such capabilities.	Vice President/board liaison	2014
Update and streamline database of media contacts, possibly through membership in Maine Press Association	Communications Committee	2014-on
Improve website functionality and appearance	Director, Communications Committee	2014-on
Look into mobile app versions of current or proposed initiatives such as those described within other Strategic Objectives: Rainy Day XXX, museum map, remote workshop/conference/meeting attendance, webinars/values assessment.	Communications Committee	2015 on

ACKNOWLEDGMENTS

This plan resulted from the work of the 2013 Strategic Planning Committee: Raney Bench (chair), Curator of Education at the Abbe Museum and MAM's Vice President; Erin Bishop, MAM's Director; Leigh Hallett, Director of the Newport Cultural Center and MAM Board Member, and Jessica Skwire Routhier, MAM's President.

The structure and sections of this plan, including the core competencies, were developed during a Strategic Planning Retreat at the Newport Cultural Center on September 9, 2013, which was facilitated by Cinnamon Catlin-Legutko, CEO of the Abbe Museum and co-editor of *The Small Museum Toolkit*. Workshop participants were:

Raney Bench, Curator of Education
Abbe Museum and Vice President,
Maine Archives and Museums

Jane Bianco, Associate Curator
Farnsworth Art Museum

Heather Moran, Curator
Camden Public Library

Erin I. Bishop, Director
Maine Archives and Museums

Ellen Dyer, Museum Consultant and Treasurer,
Maine Archives and Museums

Nissa Flanagan, President
Maine Library Association / Yarmouth Public
Library

Richard W Freethey, President
Brooklin Keeping Society

Kathy Goldner, Marketing and Development
Director
Penobscot Marine Museum

Candace Kanes, Curator and Historian
Maine Memory Network
Maine Historical Society

Elizabeth R LaForge, President
Corinth Historical Society

Abbe Levin, Cultural Tourism Coordinator
Maine Office of Tourism

Linda Lord, Director
Maine State Library

Kim MacIsaac, Former Director and Museum
Consultant
Fifth Maine Regiment Museum

Barbara J Marshall, Owner
Whispering Pines Museum

Teresa Myers, Principal Conservator
Teresa Myers Conservation Services

Susanne Noessel, Board Chair, Brooklin Keeping
Society

Janet Roberts, Grants Administrator
Maine State Archives

Jessica Skwire Routhier, President
Maine Archives and Museums

Lizz Sinclair, Program Director
Maine Humanities Council

Debbie Smith, Acting Executive Director
Stanley Museum

David Smith, Archivist
Kennebec Valley Community College Archives

Deborah Staber, Director
L.C. Bates Museum