 

# ASM/Museums Alaska Chat 61

## November 14, 2018

WebEx chat

| ATTENDEE | Message |
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| Anjuli Grantham | Welcome to Museum Chat! This month the focus of the chat is on strategic planning-- but feel free to bring up other topics or questions. |
| Della Hall | Hello! |
| Della Hall | Anjuli, did you have a powerpoint ready? Sorry, I should have asked... |
| Anjuli Grantham | No Powerpoint.  |
| Anjuli Grantham | Hi Amanda! |
| Della Hall | Hi Amanda |
| Amanda | Hi! |
| Della Hall | How's the weather in other parts of the state? We just got hit with our first \*real\* snow yesterday |
| Anjuli Grantham | Rainy. Dark. Daylight savings time. Bleh! |
| Amanda | Rain. Fog. Typical Kodiak |
| Della Hall | Haha precipitation all around! |
| Anjuli Grantham | I miss the sound of the fog horns on the buoys in Kodiak.  |
| Amanda | I love it |
| Anjuli Grantham | We'll see if anyone else joins in. But we might as well get started on the topic at hand. Strategic planning--- |
| Della Hall | Welcome, Lizzy! |
| Lizzy Walsh | Hello everyone! |
| Anjuli Grantham | Hi! |
| Della Hall | I know that I selfishly suggested this topic because Museums Alaska will be undertaking strategic planning in January. I'm curious if anyone else has plans to do strategic planning soon? Or recently worked on a strategic plan, and how it went? |
| Anjuli Grantham | ASM is amidst strategic planning right now. |
| Amanda | We did in September. The Alutiiq Museum I mean |
| Della Hall | Anything work(ing) well? Not so well? |
| Anjuli Grantham | At ASM, we had our planning retreat in October. We now are in the process of refining and deliberating what we came up with then. |
| Lizzy Walsh | The Clausen really really needs to develop a strategic plan, it is on the top of the pile of projects I'd like to undertake.  |
| Anjuli Grantham | The Friends of the Alaska State Library, Archives and Museums are also developing a new strategic plan. For both ASM and FoSLAM, it seems that the challenge is finding time to refine and finalize the plans. |
| Della Hall | Did SLAM/FoSLAM hire a consultant to lead you through it? |
| Amanda | We used a consultant (from Foraker I think), and I think that helped a lot. She knew what she was doing, and she just helped guide us. |
| Della Hall | We at Museums Alaska are also going to work with someone from Foraker. |
| Anjuli Grantham | Yes, both ASM and FoSLAM hired a consultant to facilitate the retreats. |
| Anjuli Grantham | That helped... but the consultant only got everyone so far.  |
| Lizzy Walsh | Was there much community involvment? is that a thing with strategic planning for a museum/arhcives/etc |
| Anjuli Grantham | There can be. Often "friends" of an org are invited to take place-- people who aren't staff or board members. |
| Amanda | We had board involvement, but I think that was the extent of "community involvement"...to my knowledge anyway |
| Della Hall | I just went through a strategic planning process for thr Coalition of State Museum Associations (I'm on their board) and we actually did not hire a consultant. However, one of our boad members really seemed like she knew what she was doing, and kept us all on track. I think it's important to have that person at your organization that keeps you on track! |
| Anjuli Grantham | Indeed, Della. |
| Anjuli Grantham | Also, orgs can issue surveys to gather feedback from visitors, community members, and others. |
| Della Hall | We've invited our members to participate through a pre-planning survey (I send it out in an email to our members, if you haven't seen it yet!) |
| Anjuli Grantham | That's what ASM and FoSLAM did as well. |
| Anjuli Grantham | The data from the surveys was really useful for evaluating programs/ services and helped us to see gaps. |
| Della Hall | I think it depends on your organization, Lizzy, and what your goals are. You might decide that's not something that would be helpful for you at this juncture for your org. For us, our members make the organization! So we feel it is important. |
| Anjuli Grantham | This is connected to what a major takeaway has been for me--- there are three stages to the strategic planning process, and each stage require time and need a champion. Planning, the strategic planning session itself, and follow-up/ finalizing the plan. |
| Della Hall | That's a great observation, Anjuli |
| Anjuli Grantham | Strategic planning is really helpful for prioritizing projects and building the case for funding/ grant support, Lizzie. |
| Anjuli Grantham | Many funders specifically ask how a project aligns with an org's strategic plan. |
| Anjuli Grantham | Amanda---do you know if the new strategic plan differs much from previous strategic plans at the Alutiiq Museum? |
| Della Hall | Did ASM and the Alutiiq Museum include all the staff people and board members? Or a select number? I could see "too many cooks in the kitchen" happening, in some cases. |
| Amanda | I honestly don't know. I think so, as the all the initiatives of the previous strategic plan had been met. We had fairly general board directives going in, and we narrowed those down to more specific projects.  |
| Amanda | We had an initial board retreat with executive leadership only, and then a second retreat with just staff and consultant |
| Anjuli Grantham | Ah-- I see! |
| Della Hall | That seems like a good approac |
| Anjuli Grantham | At ASM, most staff were involved, but some were out on vacation or sick. |
| Della Hall | \*approach |
| Anjuli Grantham | I've worked for places where staff were not involved in strategic planning, just the board. And I think that is a poor approach. |
| Amanda | I thought so. The first day of the staff retreat, we made general plans, and the second day was much more specific. I think keeping it somewhat generalized gives you a little bit of latitude if/when things change.  |
| Amanda | I agree Anjuli |
| Anjuli Grantham | It's true. Once pitfall I've noticed is that people get really caught up in strategies instead of keeping focused on the goals. |
| Della Hall | Yes, Anjuli. Involving your staff seems significant. |
| Anjuli Grantham | There are so many ways to accomplish goals--- but listing each method can create an overwhelming document. |
| Amanda | I think it also gives staff incentive to care. If I know what's on the line for the next five years, I'm going to invest a lot more of myself. I think, anyways.  |
| Anjuli Grantham | For sure. And know how your work matters to the whole vision. |
| Della Hall | How many years are your strategic plans for? Museums Alaska's last strategic plan was 2014-2020. |
| Anjuli Grantham | ASM is drafting a 5 year plan |
| Amanda | 5 I think |
| Della Hall | Do you list out the goals for all 5 years? I personally think that having a one-year specific goal document is more useful than a 5 year specific goal document. I'm just not sure how specific to get, and how quickly. |
| Anjuli Grantham | You can have both! But perhaps the 1 year document is for internal use, the the 5 year for external. |
| Della Hall | Good point |
| Anjuli Grantham | \*and the |
| Anjuli Grantham | It seems that orgs that really capitalize on their strategic plan use them as living documents. |
| Anjuli Grantham | During meetings, the goals and strategies are referred to and evaluated. |
| Amanda | Same here |
| Anjuli Grantham | I see one challenge with strategic planning is the balance between accomplishing what projects are already in the pipeline with the "new" objectives set forth in a plan.  |
| Della Hall | I have heard one organization even refers to the strategic plan in its financial statements and budgeting. Each line refers to how it directly supports the strategic plan. I'm thinking of trying that approach for our 2019 budget. |
| Anjuli Grantham | I like that idea. It's a good way to prevent mission creep, too. |
| Della Hall | Yes, Anjuli, it is important to pace yourself as an organization, and not tackle too many objectives at once, to prevent burnout. |
| Lizzy Walsh | This is something I've run into, there are so many projects and I'm at a loss sometimes as to what should be prioritized, I suppose that would be addressed in a strategic plan? |
| Della Hall | Absolutely, Lizzy! |
| Anjuli Grantham | It could help! Because if the project doesn't directly align with one of the values you articulated, it's easier to justify not moving forward with it. |
| Della Hall | You can lay out objectives, and then set dates for their accomplishment, and even assign who is responsible for tackling it (so it is not just you!) |
| Anjuli Grantham | Hopefully! |
| Della Hall | That's a good point, too, Anjuli. For example, you may have something on your to-do list that doesn't find a place in your strategic plan, so you can just set it aside as something not to tackle right now. Maybe it will make its way into your next strategic plan, but at least you can justify why you are not pursuing it right now. |
| Anjuli Grantham | Yes |
| Anjuli Grantham | Lizzie, in case you are needing financial resources for strategic planning, the Alaska Community Foundation's Strengthening Organizations grant supports activities like this.  |
| Lizzy Walsh | Thanks for the tip! |
| Della Hall | Does anyone feel there anything that Anjuli or I could be doing at ASM or Museums Alaska to help support or encourage your organizations in relation to strategic planning? |
| Amanda | Chats like these are really helpful in and of themselves I think |
| Lizzy Walsh | No worries Anjuli!  |
| Lizzy Walsh | I agree this chat is awesome! I look forward to them each month!  |
| Della Hall | That's great to hear! |
| Anjuli Grantham | Hooray! |
| Anjuli Grantham | Somewhat of a tangent-- I wonder what a statewide strategic plan for Alaska museums would look like? |
| Della Hall | Hmm interesting. Sort of like an advocacy plan? But broader? |
| Anjuli Grantham | Ya...What are values, goals, and objectives shared by museums across the state? And the vision for our museums? |
| Amanda | Ooohh that would be interesting  |
| Della Hall | I like that. Bringing people together over common goals to support one another. |
| Anjuli Grantham | Such a thing would be helpful for us (MA and ASM) to align our services. |
| Anjuli Grantham | .. with what museums need. |
| Della Hall | Anjuli, this sounds like a fantastic session or workshop at the conference in Kodiak next year.... :) |
| Lizzy Walsh | I agree! maybe somehting that could be some how incorporated into a future museum conference?  |
| Anjuli Grantham | Great minds think alike! |
| Amanda | Somewhat of another tangent....I'd be interested in a chat about Collections Committees...like what you expect from your advisory committees...term limits, quals, duties, etc.  |
| Anjuli Grantham | Great suggestion |
| Lizzy Walsh | what is a collections committee?  |
| Lizzy Walsh | \*Newbie question, sry |
| Anjuli Grantham | Often, museums have voluntary committees who review donations and determine if they fit the scope of the collection and should be incorporated into the permanent collection. |
| Amanda | So have a committee of community members that we put all of our potential accessions in front of. They give the yes or no on accessions.  |
| Amanda | Anjuli said it better. haha |
| Della Hall | Not all organizations have a collections committee. It depends, again, on your organization and what you need. |
| Anjuli Grantham | They can be really useful for helping to say no to collections that are suspect... and that board members or prominent community members are really insistent that you take. |
| Della Hall | Yes! Very helpful preventative measure. |
| Anjuli Grantham | Plus it's a fun volunteer opportunity. |
| Lizzy Walsh | ah I see, as of now my board of trustee is also the collections committee |
| Anjuli Grantham | Amanda's suggestion is a great one--- since there are so many ways that museums engage collections committees. |
| Lizzy Walsh | I agree! |
| Della Hall | That can work, too! I think Amanda is suggesting that a set of guidelines can be helpful, even for your board in acting in that capacity, to make sure there is clarity. |
| Lizzy Walsh | I'm always looking for more ways to engage with our community |
| Lizzy Walsh | yes that was something that the previous director implemented, a process of accepting or declining donations, it was a huge help.  |
| Amanda | It can be really great. You get expertise on a lot of different areas.  |
| Anjuli Grantham | And stop the potential flood gate |
| Amanda | Yes! |
| Della Hall | Well we're always looking for future topic suggestions for these chats! Also, Museums Alaska will be adding a resources section to our new website (coming soon), so if anyone has guidelines they want to share, that might be a way to do it. However we can help. |
| Amanda | Neat. That will great |
| Anjuli Grantham | Thinking about the idea of a session at the conference on a statewide strategic plan... it could be fun to use the Open Space model for facilitating. It's a hosting method where people host conversations about what matter most to them It's a good way of engaging many people in lots of connected conversations. <http://openspaceworld.org/wp2/explore/> |
| Anjuli Grantham | I'm already excited for Kodiak next fall :) |
| Amanda | Me too :) |
| Della Hall | me three! |
| Lizzy Walsh | me four! |
| Anjuli Grantham | Before we sign off-- here are a couple of strategic planning resources that might be useful:  |
| Anjuli Grantham | [http://download.aaslh.org/technical+leaflets/Tech+Leaf+242.pdf](http://download.aaslh.org/technical%2Bleaflets/Tech%2BLeaf%2B242.pdf) |
| Anjuli Grantham | That's from AASLH and it guides one through a DIY strategic planning session. |
| Amanda | Thanks! |
| Della Hall | That looks like a great resource Anjuli. Ok if I share it on Museums Alaska's website in the resource section? |
| Anjuli Grantham | I think so--- take a look at AASLH's use guidelines. |
| Anjuli Grantham | AAM also has posted guidelines on strategic planning: <https://www.aam-us.org/wp-content/uploads/2017/12/Developing-a-Strategic-Institutional-Plan-2018.pdf> |
| Della Hall | Great! Thanks for sharing those |
| Anjuli Grantham | Finally-- this blog post has some salient questions to ask while beginning the strategic planning process. <https://museumnotes.blogspot.com/2015/03/six-strategic-questions.html> |
| Anjuli Grantham | Happy to share! |
| Anjuli Grantham | Any other thoughts or questions before we head out? |
| Della Hall | I've got to hop off quick - thanks everyone for chatting today! |
| Anjuli Grantham | Bye Della! |
| Amanda | No. This was great. Thanks everyone  |
| Anjuli Grantham | Take care! |
| Amanda | Bye! |
| Lizzy Walsh | bye thank you! |