Strategy 2019/20

This strategic framework is intended to provide NEMA’s board and staff with a blueprint for excellence relative to engaging its audience and maintaining its sustainability. The Organizational Strategies provide a high-level view of NEMA’s intention to serve its audience, its organizational stability, its board, and its staff. The Programmatic Strategies lay out objectives that address the work of NEMA, each objective coupled with detailed tasks that specify the person responsible and, in most cases, a timeline. The Operational Strategies provide objectives and tasks that support NEMA’s internal capacity to accomplish its goals.

Many of these strategies are carried over from past strategic plans while many are new initiatives and marked accordingly.

This past year the board and staff participated in a strategic visioning process through the Visioning Task Force (VTF) and board meetings, which focused on six areas:

- advocacy
- risk taking
- member engagement
- DEAI (diversity/equity/access/inclusion)
- financial philosophy and sustainability
- technology.

Results of the visioning process are incorporated into this strategic agenda where they are marked with “VTF.”

**Mission Statement (adopted by the board June, 2014)**

NEMA inspires and connects people engaged with the museum field, provides tools for innovative leadership, and empowers museums to sustain themselves as essential to their communities.

**Vision (adopted by the board December, 2017)**

Museums are vital.
Values (adopted by the board December, 2017)

NEMA accomplishes its work by aspiring to professionalism and excellence in all we do.

- We are inclusive and model accessibility: Every museum matters. Every visitor matters.
- We value honesty: Truth-telling is important.
- We care about people, and the objects and places that they value.
- We are responsive: We serve the needs of our museum community.

LONG-TERM MACRO GOALS

1. Maximize the awareness and impact of NEMA’s mission throughout its constituencies; reflect mission in program.
2. Sustain an ongoing, transparent, and inclusive process for strategic planning and evaluation.
3. Create opportunities for powerfully meaningful in-person and online experiences of learning, networking, and participating for NEMA constituencies, regardless of their geographic location.
5. Develop ways to encourage inclusion, find ways to engage people from historically marginalized communities, diversify NEMA’s constituencies, and provide museums with tools to do the same in theirs, promoting field-wide equity and access.
6. Nurture an organizational culture of mutual respect and support between the NEMA board and staff, maintaining clarity of roles and unity of commitment to the mission.
7. Remain essential to the museum field.

Organizational Strategies

1) **VTF**  We will actively engage our audience of people who work in and with museums. We will do this by providing outstanding professional development programs, thought leadership, networking opportunities, and advocacy for the museum field. (Goal #1, 3, 4, 5, 7)

2) **VTF**  We will cultivate a diverse set of revenue streams that ensure NEMA’s financial sustainability while also serving our mission. These revenue streams will include funding from membership dues, program income, grants, donations, and income from our invested funds. The staff and board will use the annual budget process to assess the short- and long-term outlook for these revenue streams and explore opportunities for new ones. (Goal #2,6,7)
3) We will actively engage our board with meaningful work that benefits NEMA’s long-term health. Board work will center on developing and assessing organizational strategies and policies, along with ensuring NEMA’s financial sustainability. Each board meeting will feature a strategic component that contributes to NEMA’s ongoing planning process. (Goal #1, 2, 3, 4, 5, 6, 7)

   a. The Governance Committee will make recommendations on changes to the NEMA Bylaws and other items that appear on the “governance agenda” suggested by Starboard Consultants in June, 2018.
   b. The board will undertake a self-assessment in the 2019/20 time period.
   c. Create more intentional effort for board recruiting by hosting an information session at the 2019 Conference. The Governance Committee will take the lead supported by staff.

4) VTF We will cultivate an inspirational, supportive, and engaging workplace environment. NEMA staff will be encouraged to think big thoughts, take appropriate risks, challenge the status quo, and pursue NEMA’s mission with innovation. (Goal #1, 2, 3, 4, 5)

5) We will nurture a climate of teamwork between the NEMA board and staff by encouraging open and honest communication, respect, mutual support, and service to NEMA’s mission. This will happen through:

   a. Regular staff reports in consent agenda materials and other communications. (Goal #6)
   b. Joint board/staff committee work. (Goal #6)
   c. Board members volunteering their time as NEMA ambassadors. (Goal #6)
   d. The board, led by the Executive Committee, will undertake a review of the Executive Director during the 2019/20 time period with a process and assessment tool agreed to collaboratively between the board and ED. (Goal #6)

Programmatic Strategies

1. Nurture a sustainable and highly-engaged membership base that provides NEMA with stable financial support. (Goal #1, 3, 4, 7)

   a. Create and implement an updated membership survey to be undertaken in March 2020. Findings will be reported to the board at the June 2020 meeting. Scarlett will take the lead with support and involvement of all staff and the membership committee.

   b. Cultivate new institutional members and support existing ones by maintaining personal outreach with executive directors and trustees. Outreach will include personal visits, networking events, phone calls, and programs targeted to executive directors and boards. Dan will take the lead, supported by all staff.
c. **NEW** Investigate membership service practices by including in the survey questions on reviving the “Friend” category for individuals, launching a “Patron” category for institutions, and exploring “VIP Membership” interest. Scarlett will take the lead, supported by the membership committee, and present recommendations for inclusion in the FY 2021 budget.

d. Implement a fully-integrated membership card to increase efficiency in the process and workload productivity. Scarlett will take the lead.

e. **VTF/NEW** Explore options for further support of PAG chairs to increase their engagement, commitment, and sense of recognition. This may include a NEMA service stipend, access to reserved NEMA networking, a Community of Practice, reduced conference fees, or other logistical and professional assistance. Meg will take the lead.

2. Produce a suite of publications and communications programs in support of NEMA’s mission and audience engagement. (**Goal #1, 3, 7**)

   a. Publish three issues of *New England Museums Now* annually. Use the member behavior research (mentioned above) to better understand reader interest. Continue to expand the call for submissions to encourage more participation. Meg and Heather will take the lead supported by all staff.

   b. **VTF** Develop 2 – 3 benchmarking surveys in 2019/20 of interest to the field for publication in *Museums Now*. Current topics planned include: a self-reported diversity survey, evaluation, and fundraising. Meg will take the lead.

   c. Publish 12 monthly issues of NEMA Stats, plus an annual report, in 2019 and 2020 respectively. Heather will take the lead.

   d. Utilize social media to promote NEMA events and connect with NEMA’s audience. All staff will participate in this regularly.

   e. **NEW** Publish the 2020 NEMA Salary & Benefits Survey. NEMA will undertake a New England focused survey in 2019. The survey will be launched in the fall of 2019 and published in the spring of 2020. Heather will take the lead.

   f. **VTF** Utilize a cloud-based email platform and/or other technology to promote NEMA events and connect with NEMA’s audience, being mindful of potential oversaturation. Heather will take the lead.
g. **VTF** Utilize the NEMA website to promote NEMA events and connect with audience. Encourage use of NEMA Jobs and other aspects of the site. Explore a website upgrade. Explore a technology review feature for museum-related technology. Heather will take the lead.

3. Produce programs for professional development and support aligned with NEMA’s mission, membership value proposition, and audience engagement. Meg will take the overall lead supported by all staff. *(Goal #1, 3, 4, 7)*

   a. Produce the 2019 annual NEMA conference in Burlington, VT and the 2020 NEMA Conference in Newport, RI. Continue to seek excellence in the conference experience while optimizing revenues for NEMA. Continue marketing partnerships with MANY, MAAM and others. All staff will participate.


   c. With the PAGs, continue to produce a series of professional development workshops that address the needs of NEMA’s diverse community. Supplement the PAG-organized workshops with staff-generated workshops focused on “101-level” topics such as financial literacy, museum field standards, etc. Offer discounts for participating in multiple workshops and for institutions sending multiple attendees. Meg will take the lead.

   d. Continue to provide leadership education opportunities throughout New England for museum executive directors, senior staff, and trustees. Dan will take the lead.

   e. **NEW** Assess and expand the “NEMA 911” program, which provides confidential advice to leaders in NEMA member museums. Dan will take the lead.

   f. **VTF** Assess member interest in DEAI initiatives, which may include: DEAI PAG or Community of Practice, Diversity Connection program, an Equity Statement, and support for existing DEAI efforts in the field (CCLI, CANE, AAM initiatives, AAMD/Mellon, AAAM, Museum Hue, etc). Scarlett will take the lead supported by all staff.

   g. **VTF/NEW** Assess the NEMA Communities of Practice program piloted in 2019 with first-time executive directors; expand the program to other affinity groups in the NEMA audience; create a “COP Handbook” and solicit group facilitators. Dan will take the lead.

   h. Continue to produce monthly “Lunch with NEMA” free webinars that offer members and nonmembers quality distance learning and engagement with NEMA. Meg and Heather will take the lead.
i. Continue to offer the NEMA Executive Roundtable to executive directors of mid-sized NEMA institutional members. Dan will take the lead in conjunction with Larry Yerdon, who runs the program.

j. **NEW** Follow up on the 2019 conference Museums & Climate Change Think Tank session with a white paper/article in *New England Museums Now* and collaboration with the Boston Green Ribbon Commission and other groups, including NEMA’s commitment to the “We Are Still In” campaign.

4. Create and participate in advocacy programs that promote the visibility and political clout of New England museums. Meg will take the lead. *(Goal #1, 3, 7)*

a. Participate in national Museums Advocacy Day as a sponsoring partner in 2020 and 2021. Encourage participation of New England museum professionals, and organize networking events and resources to promote regional unity and collegiality.

b. Participate in state museum advocacy days as a planning and promoting partner (current plans for RI in 2020). Encourage participation of state museum professionals. Lead training, spread awareness of state-level advocacy issues impacting museums, and offer logistical support as necessary. Be an active and respected partner to state-level organizations and a perceived leader in the field. *(Per advocacy strategy approved by the board in 2017.)*

c. Create advocacy resources for regional use, such as themed fact sheets featuring museum services to target communities, or state specific infographics relating to state advocacy days as above. Update these as necessary and applicable to keep information current, relevant, and useful to NEMA members and their elected officials. *(Per advocacy strategy approved by the board in 2017.)*

d. Create region-wide advocacy training opportunities, such as advocacy workshops and conference sessions at non-NEMA events. *(Per advocacy strategy approved by the board in 2017.)*

e. Respond to legislative actions with email alerts and calls to action, rebroadcasting alerts from professional allies and also generating them ourselves as necessary. Create opinion papers and position statements on topics relevant to the museum field and in alignment with our mission, in consultation with the advocacy committee. *(Per advocacy strategy approved by the board in 2017.)*
f. **VTF/NEW** Create a ‘decision tree’ and risk analysis based on NEMA’s mission and values to add to the advocacy strategy. This will help staff and board determine which events and issues need what kind of response, in what time frame, if a response from NEMA is required at all. Meg will take the lead in consultation with the Advocacy Committee.

g. **VTF/NEW** Create a platform statement for public consumption on the NEMA website which outlines NEMA’s policies on when, where, and how NEMA gets involved with advocacy issues, whether matters of internal field interest, or external public policy. Meg will take the lead in consultation with the Advocacy Committee.

5. Coordinate award programs that honor NEMA members and contribute to membership engagement. *(Goal #3, 4, 5)*

   a. Produce the NEMA Publication Awards, recognizing creativity in museum communications. Create an award display at the NEMA conference. Scarlett will take the lead.

   b. Produce the NEMA Excellence Awards, recognizing individual NEMA members for excellence in museum practice. Present the awards at the NEMA conference. Scarlett will take the lead.

   c. Produce the NEMA Lifetime Achievement Award, recognizing a NEMA member for their career in service to the museum field and in support of NEMA. Present the award at the NEMA conference. Dan will take the lead.

**Operational Strategies**

1. **VTF** Continue to maintain an efficient financial management practices and transparent reporting procedures. Heather will take the lead.

   a. Align Quickbooks records with financial reports.

   b. Monitor cash flow in key categories. Share with finance committee monthly.

   c. Dan, Heather, and the Finance Committee will review investment performance quarterly and rebalance the portfolio annually at the end of the year as necessary.
2. **VTF** Expand and enhance NEMA’s capacity for philanthropy and development.
   
a. **NEW** Encourage board service in multiple facets by implementing a Board Member Pledge for the December 2019 meeting. Scarlett will take the lead.
   
b. Create more opportunities for sponsorship and advertising in conjunction with NEMA programs and communication vehicles. Scarlett will take the lead.
   
c. **NEW** Research the feasibility of developing a NEMA Planned Giving program. Cultivate retirement age museum folks for discussions and explorations around this topic. Scarlett will take the lead.

3. Enhance the program development and evaluation process. *(Goal #2)*
   
a. **VTF** Update the program strategy screen after pilot period, to better assess potential new programs, consider risks, and ensure their alignment with mission. Deadline for this is December 2019. Meg will take the lead.
   
b. Create an annual program evaluation process by which the staff can judge the effectiveness of NEMA programs in terms of impact on mission and budget. Staff will present the evaluation to the board at the December 2019 meeting. Meg will take the lead.

4. **NEW** Update the NEMA Personnel Policy. The Personnel Policy was last updated in 2015 and several sections need to be reviewed and updated due to changes in State and Federal laws. Heather will take the lead working with Dan, HR consultants, and the Governance & Ethics Committee.