INTRODUCTION

The Kansas Museums Association was formed in 1969 as a not-for-profit corporation, organized to create, foster, and promote interest in, advancement of, and appreciation for museums in Kansas. In addition, it was created to increase and disseminate knowledge about the museum field and encouraging cooperation among museums and those interested in them. (KMA By-laws, revised 2006)

Today, KMA has over two hundred members, and operates with a part-time Executive Director with an annual operating budget of $40,000. KMA’s annual conference rotates through the state’s four regions and is considered a major benefit to members. Other KMA services and benefits include its website, institutional grants to aid member organizations in their work, professional development scholarships, an awards program, and a certification program in museum studies.

BACKGROUND HISTORY

Like many other state museum associations, KMA began as an all volunteer organization. Revenues were generated primarily through membership dues and fees to cover expenses for workshops and conferences planned and organized by the dedicated volunteers. For many years, museums across the state contributed significant in-kind services of their staff time, space use, printing, postage and supplies to carry out the work of KMA. Membership in KMA fluctuated over the years, but stood at over 300 institutional and individual members in 2009.

Over the past two decades, as organizations were pressed to “do more with less,” many membership-based groups and state museum associations across the country began to pay contract worker to manage routine work for their organization including producing and mailing the newsletter, processing memberships, and assisting with conference logistics. KMA adopted this model in 1999 and a number of KMA members provided these services with a gradually increasing number of hours and responsibilities and the organization operated successfully using this model until late 2008. This success was due in large measure to the significant amount of time provided on a volunteer basis by the individual in this role, over and above the paid hours to manage KMA business. However, between the 2008 Fall conference and the 2009 conference a year later, the position changed hands three times and KMA experienced a significant drop in membership retention to under 200 members. Without consistent membership renewals or significant revenues over expenses
from other programs, KMA operated for two years in a row with deficits with expenses over revenues of ($9,793.43) in fiscal year 2008-2009, and ($1,370.20) in 2009-2010. The general downturn in the economy and changes in membership categories and rates during this same period also contributed to the drop when many institutional members opted to renew at individual rates instead of at the higher institutional rates. Cash reserves were used to cover the shortfalls in revenues.

The Board hoped that changing the staff structure from a part-time Coordinator/Director to hiring a part-time Executive Director would make the job more appealing to prospective candidates and resolve some of these problems. In 2008 this change took effect with the hiring of its first Executive Director. The new title reflected new expectations and responsibilities for the paid staff—with more emphasis on developing and strengthen partnerships with other organizations to increase KMA’s visibility within the state and build KMA’s capacity for serving its members and meeting its mission, while still managing the business affairs of the organization. Shortly after the first Executive Director was hired, it became apparent that the board’s expectation for this expanded role was not realistic given the limited funds that were budgeted for the position. By 2011, membership had evened out at about 200 members but the board and the new (third in short succession) Executive Director understood that other changes were needed if KMA was to expand its role and services to members for the long-term.

THE PLANNING PROCESS
In 2011, the Board and Executive Director recognized the need to evaluate the organization’s overall operation including current trends, to understand what strengths it could build upon and what weaknesses or threats needed to be addressed to stabilize the operation and what opportunities lay ahead for KMA. The Board and staff committed time, energy, and set aside financial resources to contract with an independent consultant to facilitate a planning process to establish a shared vision for the future, and a clear plan of action to guide the board, staff and volunteers.

Prior to holding a Retreat, the Consultant reviewed background materials including KMA financials, membership renewal and retention data, and program attendance to gain an understanding and assess KMA’s current operations, history, programs, trends, and use of resources. Board and staff were surveyed about issues, concerns, strengths, and areas needing improvement. The Consultant also conducted a telephone survey of six other state museum associations to establish some benchmarks for comparison to KMA.

A Retreat was held in January 2012, where the Consultant presented a summary of the survey findings and trends in finances and membership and a planning model for long-term viability and sustainability. Facilitated by the Consultant, the board discussed the trends evident in KMA’s recent operations, operating models of other state museum associations, and honed in on what they believe to be most important to make significant progress toward long-term viability and sustainability for KMA while meeting constituent/member needs.
The Board discussions at the Retreat focused on: 1) what KMA can do uniquely well, 2) identifying and prioritizing the most critical issues facing KMA today, and 3) articulating goals to address those issues. Finally, they discussed what characteristics and skills are needed on the staff and board to successfully achieve their shared goals.

### What can KMA do uniquely well?

A. **Provide Professional Development Opportunities within Kansas to serve Kansas museums.** (using various media including distance learning webinars as appropriate)

B. **Facilitate Connections between Kansas museum staff, boards and volunteers.**

C. **Provide forums for discussion of issues unique to museums.**

D. **Be the face of Kansas museums—serve as a clearinghouse for information about Kansas museums and “Celebrate the Success of Museums in Kansas.”**

### PRIORITIES FOR LONG-TERM VIABILITY & SUSTAINABILITY

The Board identified the following as KMA’s highest priorities in the next three to five years:

1) To continue to provide a high quality Annual Conference for members.

2) Strengthen KMA Branding/Identity & Communications

3) Continue to Offer and Make Institutional Grants to aid museums in conducting small projects that improve the quality of their museum operation.

4) Develop strategic state-wide and regional partnerships to diversify KMA’s revenues, and to support and deliver mission-based programming.

The next tier of priorities (considered by the Board to be less critical), are to focus more attention on:

1) Awards/Recognition of Good Work, and to
2) Review/revise the Certificate Program.

### NEXT STEPS

At the Retreat, the Board identified five areas that require that resources be focused over the next few years to strengthen KMA and make it both viable and sustainable for the long-term: Finance, Governance, Membership, Programming, and Communications. For each area, a goal statement was developed with specific objectives to address these, KMA’s
highest priorities. The group then established five planning sub-committees which were assigned the task of developing specific strategies to achieve each goal and presenting their recommendations to the Board in order to compile and present a comprehensive strategic plan draft to the membership at the Annual Meeting in October, 2012. The plan as outlined below reflects the work of the board and recommendations by its planning sub-committees. Timelines for completion, assignment of responsibilities for each task, funds required to implement each strategy, and projected revenues are outlined in detailed spreadsheets along with a preliminary 7-year budget projection for annual operations reflecting key elements of the plan.

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THE PLAN

FINANCE

Goal #1: Strengthen and Diversify Revenue Streams to Stabilize Operating Base and Increase Revenues to Support KMA’s Core Programs & Strategic Initiatives for Long-Term Viability & Sustainability.

Goal #1, Objective #1:

Develop a realistic annual operating budget model, setting specific targets for revenues and expenses in line with strategic goals and objectives. (Focus on highest priority programs and developing partnerships to grow and diversify revenue streams).

1. Establish a Budget Calendar; (a year long process) to provide deadlines for specific board actions.
2. Analyze the past year’s actual numbers to begin the budgeting process; request recommendations from all committees to assist in establishing the next year’s financial goals and objectives.
3. Establish a prioritized list of projects and programs to be included in the budget. This will include potential partners and revenue sources to help pay for these programs and projects.
4. Approve a balanced budget policy.
5. Present a budget to be approved at the September Board meeting each year.

Goal #1, Objective #2:

Increase revenues from existing revenue streams.

1. Establish overarching philosophy and policy regarding annual revenues vs. expenses to support the operation of KMA for the long-term.
2. Review/update goals, objectives and strategies for operations/programs for the next fiscal year.
3. Set specific target for each revenue stream annually and develop/create strategies to meet or exceed targets.
4. Review/revise annual conference model/pricing structure, set target for revenues.
5. Increase the number of active members by improving membership retention rates, and recruiting new members. Set annual targets for renewing members and number of new members.
6. Increase the number of sponsorships to 25 corporate sponsors within three years.

**Goal #1, Objective #3:**
Identify and develop new revenue streams to support annual operations, implement strategic objectives, and to support one full-time staff professional.

1. Establish a development committee distinct from the finance committee to develop new fundraising programs such as an annual giving campaign and endowment fund. In addition, this committee will work closely with the KMA executive director to court private donors, apply for grants, explore additional revenue streams and review existing revenue streams.

2. Establish/foster partnerships with allied agencies to broaden revenue streams and to be recognized as an entity that needs to be “at the table” regarding arts/culture/museums in Kansas (work with Communications Committee-see Goal #5, Objective #1).

3. Identify at least five organizations to partner with KMA to strengthen our revenue base and to broaden the program content offered to the membership.

**GOVERNANCE**

**Goal #2: Develop/Strengthen KMA’s organizational structure & systems to implement strategies and reach goals.**

**Goal #2, Objective #1:**
Revise board structure, terms, and board and staff responsibilities to ensure greater continuity of leadership, stability of operations, and follow-through on plans.

1. Review and recommend changes to by-laws related to board structure and terms to provide for stability and continuity of organization from year to year.
   a. Reorganize board representative structure and term limits.
      i. Establish new geographic boundaries for regional representative and add at-large positions.
ii. Develop clear, written responsibilities for regional and at-large representative positions on board
iii. Make recommendations for changes to full Board
iv. Propose changes to full membership
2. Review and restructure board committees outlined in by-laws and propose changes necessary for more effective leadership.
   a. Create a standing governance committee to oversee: board recruitment, nominations, orientation/training and evaluation.
      i. Establish clear, written expectations for nominating board members and officers
      ii. Create calendar of activities for evaluation, recruitment, selection, nomination process
   iii. Create a standing governance committee to oversee: board recruitment, nominations, orientation/training and evaluation.
      iv. Establish clear expectations for performance/follow-through for all current and incoming board members and officers
   iv. Review/revise job descriptions as needed for regional representatives; share expectations with current and future regional rep
3. Identify what is of value to members (white papers, regional meetings, working committees)

Goal #2, Objective #2:
Improve board effectiveness by developing systems and policies to stabilize operations and follow-through on plans.

1. Assess organizational structure and recommend changes as needed to provide for stability and continuity of organization from year to year (through transition of board and staff leadership changes.)
2. Review and revise the organization’s mission statement.
3. Build a Competent Board.
   a. Establish Board member assessment criteria.
   b. Establish Board Orientation program (including packet with by-laws, policies, procedures, handbook, meeting schedule, etc.)
   c. Revise board development process and procedures for recruitment, nomination, orientation, evaluation to build a stronger, active, effective board of directors for KMA.
      i. Identify talents, expertise, experience needed to complement current board skills, etc.
      ii. Recruit KMA members with needed talents, expertise & experience to serve on committees and leadership positions in KMA.
4. Develop Board Policies to ensure legal and ethical integrity.
5. Ensure opportunities for board development.
a. Fund line item designated for Board development and planning such as board retreats.
b. Fund line item designated for staff development.
c. Increase annual revenues to fund board development opportunities.

Goal #2, Objective #3:
Increase hours of paid staff to coordinate operations and to develop and maintain strategic partnerships.

1. Annually increase the number of paid hours for the Executive Director to coordinate KMA operations efficiently and effectively to meet KMA’s mission, goals and objectives. Revise staffing responsibilities, and expectations for ED position to match available resources.
2. Evaluate procedures and systems to determine roles of volunteers and part-time paid clerical support to maintain membership records and provide other support as needed to KMA Executive Director. (see Goal #3, Objective #3 below)
3. Review current annual budget, goals and expectations. Develop proposal for staffing structure to maximize resources utilizing volunteers to fill the gap and manage tasks that can be delegated effectively.

MEMBERSHIP

Goal #3: Strengthen KMA’s membership program to attract and retain more members.

Goal #3, Objective #1:
Establish a membership program conducted annually by KMA staff and Membership Committee which increases KMA’s retention rate to 98%, and increases membership by 20% in three years (2016)

1. Develop a membership operating manual that outlines KMA membership processes and policy. This manual should include:
   a. The annual calendar for membership renewals and solicitation, with Staff and Committee responsibilities outlined.
   b. Membership policies.
   c. A process for annually evaluating membership program effectiveness, setting goals, and estimating membership income and expense for budget.
   d. The record keeping process with a records retention schedule and a process for archiving permanent records.

2. Evaluate procedures and systems for recording/tracking/evaluating trends documenting membership payments, retention and renewals, and benefits/disadvantages of returning to having a volunteer or paid clerical support to maintain membership
records or to provide other support as needed. (collaborate/discuss with Governance Committee--see Goal #2, Objective #2 above).

a. Evaluate Staff membership process to determine time spent on clerical duties and record keeping. Evaluate cost and benefit to outsourcing some duties, and evaluate potential for volunteer help in part of the process.

b. Research membership/development software programs and evaluate the potential cost/benefit.

Goal #3, Objective #2:
Review, evaluate and revise as needed KMA’s membership structure, benefits and program costs.

1. Research other State Museum Association membership structure and benefits and evaluate KMA membership structure and benefits in relation to comparable programs.
   a. Make any recommendations for change to the Board of Directors.
   b. Develop a multi-year plan for retention of members and for recruiting new members that addresses different types of members and outlines strategy for recruiting them.

Goal #3, Objective #3: Increases the total number of members in KMA by 20%, and increase member retention rate to 98% within three years (2016).

1. Set targets to increase the number of active members (improve member retention rates, and recruit new members).
   a. Develop a multi-year plan for retention of members and for recruiting new members that addresses different types of members and outlines strategy for recruiting them.

2. Annually evaluate progress toward target numbers, and revise numbers and/or strategies to achieve success.

PROGRAMS

Goal #4: Promote the adoption and implementation of museum professional standards and best practice in Kansas museums by providing consistent, high quality, relevant and affordable programs for the Kansas museum community.

Goal #4, Objective #1: Continue to provide meaningful professional development opportunities through a robust Annual Conference.

1. Identify Host Sites for future Annual Conferences
2. Partner with other allied agencies and educators/educational programs to develop and present programs with qualified presenters.
   a. Strengthen relationships with current partners.
   b. Identify and recruit potential partners.

3. Recruit regionally and nationally recognized speakers for Annual Conference.

3. Expand conference scholarship program
   a. Identify additional funders
   b. Offer scholarships that cover registration and lodging expenses

Goal #4, Objective #2: Regularly provide and promote workshops and forums for discussion on issues relevant to museums in Kansas for KMA members and target specific sub-groups (directors, curators, etc.)

1. Create a Museum Training Think Tank
   a. Recruit representatives from university public history, museum studies, archives, etc. programs
   b. Recruit representatives from related non-profit organizations like the Kansas Humanities Council, Kansas Leadership Center, etc.

2. Schedule 2-4 Relevant and Meaningful Non-Conference Workshops Annually
   a. Continue Director Meeting
   b. Add Curator and Educator Meetings

3. Create and share calendar of KMA activities well in advance of events

4. Utilize new formats as appropriate for workshops
   a. Explore distance learning options
   b. Identify content delivery partners

Goal #4, Objective #3:
Support smaller institutional members in adopting and implementing professional practices through Institutional Grants.

1. Review Institutional Grants Program

2. Host Grant Writing Work Sessions
   a. Offer a session in each region
   b. Create networks of work partners in regions

3. Recruit experts to work with smaller institutions on a project basis
   c. Organize experts by discipline and region
   d. Consult KHC Grants program as possible model

Goal #4, Objective #4:
Celebrate the Success of Museums in Kansas by recognizing achievement by individuals and institutions.
1. Reinvigorate Annual Awards program at Annual Conference/Meeting.
   a. Review Awards program
   b. Add money to award
2. Actively seek out institutions and projects worth of recognition.
3. Actively encourage/promote nomination process on website, etc.

COMMUNICATIONS

Goal #5: Communicate with Internal and External Audiences, in a strong, unified voice.

Goal #5, Objective #1:
Develop a stronger brand/identity as the clearinghouse for information about Kansas museums.

1. Evaluate vehicles for communication (past and present) to develop strategies and systems to improve effectiveness of communications with members and other target audiences through electronic and print media.
   a. Communicate via e-newsletter on a monthly basis.
   b. Produce an annual report that includes highlights from previous and upcoming year’s calendar.
   c. Evaluate website and social media via focus group.
   d. Produce Conference Program/brochure annually.
   e. Retain miscellaneous print materials such as the save the date cards and as needed by other programs and committees.

2. Develop a communications plan and systems for effective communications with internal and external audiences.
   a. Articulate responsibilities for communication and develop policies on the dissemination of information.
   b. Communications Committee will facilitate checklists and timeline among the board committees.
   c. Communications Committee will serve as a liaison with all committees when communicating with the membership.
   d. Communications Committee will create a consistent set of collateral materials for all stakeholders/audiences.
   e. Develop content for the e-newsletter.

RESULTS
As a result of implementing the strategies outlined in this plan, KMA will emerge as a stronger membership organization better prepared to fulfill its mission using its resources more effectively and efficiently, with programs and services meeting the needs of both its institutional and individual members. Specific measureable results anticipated include:

1) Knowledgeable and engaged board and staff with a shared sense of purpose and direction for the organization.

2) Active membership, board, and committees working in partnership with the Executive Director and partner agencies to develop, promote and deliver engaging programs and services to KMA members.

3) Greater continuity of leadership at the board and staff levels, stability of operations, and follow-through on plans.

4) Annual membership retention rate increased to 98%, in three years. (by 2016)

5) Total number of members in KMA increased by 20% within three years (by 2016).

6) Total operating budget revenues increased to $83,000 by 2020 to offset increased operating expenses and include a half-time Executive Director position to lead and manage KMA’s operations and programs.

7) A balanced budget with a cash reserve of at least 25% of the total annual operating budget by 2020.

8) Increased number of sponsorships to 25 corporate sponsors by 2017.