

Guidelines

RETIRING MUSEUM PROFESSIONALS PROGRAM (RMP)

Guidelines

**FOR CREATING YOUR OWN
MUSEUM RETIREMENT PROGRAM**



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Guidelines

FOR CREATING YOUR OWN RETIREMENT PROGRAM

MPMA created a retirement program for museum professionals with an IMLS grant. Your association can do this, too.

These guidelines are for that purpose. They were extracted from MPMA's White Paper submitted to IMLS in its final report on the retirement program that was created with grant funds. This version of that paper is intended to provide guidelines to associations wanting to utilize retired museum professionals in their museum planning. The title of MPMA's retirement program utilizes the acronym RMP. This is purposely parallel to the acronym most museum associations use with the emerging museum professional, EMP, and created with the hope that it can enter the lexicon of words used by museum associations everywhere.

The guidelines follow the White Paper intentionally because MPMA felt it might better help associations formulate their own programs if they could understand the process that MPMA went through. Throughout the grant process, MPMA stayed true to IMLS' objective for grant recipients to make their project replicable by others. We hope associations find that this program *is* replicable and easy enough for associations to create so that it can become a nice addition to what is offered to members and the museum field, as it has at MPMA.

We thank IMLS for allowing us to create this program with its funds and for having the foresight in its grant philosophy to encourage grant recipients to create programs that others can use.



Think Tank Members Joe Schenk and Steve Friesen listen to a presentation during the MPMA conference in Oklahoma City.



Retirement Session at MPMA's 2016 conference

... "I'd like to volunteer in a museum..."

Guidelines

Project Summary of MPMA's RMP Program

Retirees, from all walks of life, wish to spend their time in fulfilling and substantive ways. In fact, "I'd like to volunteer in a museum" is a predominant phrase uttered by people envisioning their retirement. Retired museum professionals wish to volunteer in museums, as well. These retirees have extensive knowledge about the museum field and are excellent resources on a wide range of topics such as board relations, staff development, fund-raising, and legislative advocacy.

Due to the considerable feedback MPMA has received over the years about its members wanting to stay involved with the museum profession upon retirement, MPMA decided to develop a retiree program. With the IMLS Sparks! Ignition Grant, MPMA was able to ascertain several things: its members' wish to stay involved; they want to continue using their wisdom and knowledge to serve the museum field; and museums desire retiree involvement in a variety of areas. Given these findings, MPMA set about to devise a program that could satisfy these interests and be replicated by other museum associations.

Using the Sparks! Ignition Grant, MPMA developed the Retiring Museum Professionals Program (RMP) to provide a structure and framework by which other associations may facilitate the engagement of retired museum professionals. The RMP is low-cost and mindful of the limited staff of most museum associations. MPMA's program focuses on developing and maintaining a network of potential museum retiree volunteers to provide mentoring, advocacy, and coaching to museum professionals and institutions. The elements of the RMP are:

- **Establishing a "Staying in the Game" Network:** A database is built of retirees and soon-to-be-retirees interested in volunteering their services to the museum field consistent with MPMA's current systems. It is continuously added to through MPMA's existing system of "Professional Interest Networks."
- **Sustaining the Network:** The network is sustained by creation of a position on the MPMA Board and subsequent creation of a committee. The chair of the RMP Committee, in coordination with the MPMA Executive Director, will oversee all aspects of the program, from database management to matching mentors and coaches.
- **Providing Advocacy for Museums:** Ways and means will be explored through which museum retirees can advocate for museums and mentor or coach museum professionals in effective advocacy.
- **Mentoring:** MPMA's existing mentoring program for museum professionals is expanded as a result of the RMP. It now taps the expertise of retired museum professionals and is year-round.
- **Coaching:** Museum institutions can avail themselves of the skills and knowledge of retired museum professionals through MPMA's database.

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Process

MPMA assembled a retirement “Think Tank” of MPMA members supported by a Project Director. The Project Director reported directly to the MPMA Executive Director, Monta Lee Dakin, who conceived the idea for the retirement program and wrote the initial IMLS grant. Five Think Tank members took the lead in developing the retirement program assisted by an “advisory” group. In total, there were nine retired and working museum professionals, some of whom were nearing retirement. They represented a broad cross-section of MPMA’s membership, are recognized leaders in the museum field, and understood MPMA well as an organization having served on its Board and/or committees.



The IMLS Sparks! Ignition grant work began in earnest at the MPMA Annual Conference in October 2016. The MPMA President, in his welcome address, informed the 450 conference attendees of the IMLS grant and what it was intended to accomplish. Mark Janzen urged attendees to complete the brief survey that was in their conference packet designed to provide the Think Tank with some preliminary feedback. Thirty-one responses were received; many respondents were not yet thinking about retirement or were soon-to-retire. This is when the group realized that they had to build the program not just with those who had already retired but with those who were about to retire. That last group was an important one to “catch” before they retired and became “lost” to MPMA.

The Think Tank’s visibility at the conference was aided by a Round Table session, “Not Out to Pasture Yet...Keeping Retirees in the Field.” The session was moderated by the Project Director and Think Tank members were the featured panelists. About 25 conference participants attended and there was a lively discussion about expectations and perspectives about retirement and volunteering in the museum field. Also at the conference, the Project Director attended the Small Museum Committee lunch and spoke about the grant with the 40 attendees who overwhelmingly supported the need to take advantage of the skills of retired museum professionals as their budgets and staffs are minimal.

However, the heavy lifting was done by the Think Tank when it met for a full day in Oklahoma City before the annual conference. During this meeting, all agreed that a future program needed to:

- be low-cost and mindful of museum associations’ limited staff resources
- not involve activities that competed with museum consultants
- be easily replicated by other museum associations

Process



Early in the day, the Think Tank heard from an Oklahoma City representative of SCORE, a volunteer mentoring program for small business owners overseen by the U.S. Small Business Administration. The SCORE presenter had the added advantage of focusing on entrepreneurs aged 50+. Also of note, the grant group learned about SCORE's "Ethical Guidelines" and concluded that such a tool was necessary for the RMP volunteers.

The remainder of the day was spent agreeing on logistics and a calendar of activities to further accomplish the grant work. But the key focus was identifying the areas of emphasis for what has become the Retiring Museum Professionals Program. (See above in "Project Summary;" detailed descriptions are linked to in "Resources").

Following the groundwork laid in Oklahoma City, the Think Tank met via monthly conference calls. The group accomplished specific tasks such as defining the project further with developing the "Ethical Guidelines" and "Agreement for Services between Provider and Receiver" and hashing out details of the RMP implementation.

In January, the Think Tank developed an electronic survey to receive feedback on its work from MPMA's 650 members and MPMA's interest lists (3,000+ contacts). There were 170 responses, many with detailed written comments. The survey responses confirmed the need for a museum retiree program as well as the direction the grant group was pursuing, with one exception: the Think Tank wanted to expand MPMA's existing mentoring program to focus on mid-career professionals as they often have the thorniest questions and dilemmas relating to supervisors and careers. However, survey respondents were overwhelming in their support for a year-round program that supported ALL professional levels. Thus, the grant group made a **mid-course correction** to accommodate mentoring for professionals of all career levels.

The following quotes come from the numerous comments in the January survey.

I can't wait until I can retire and only do the jobs I want to do, like give programs for school kids, not administer them.

I think retirees can provide valuable suggestions and assistance in core areas such as career development, strategic planning and financial development.

I think coaching is a great way to describe how a retired person could point a volunteer professional or an emerging professional to helpful resources.

Process

I may be wrong, but my experience with museum staff and volunteers, while I performed MAP and AAM accreditation reviews, leads me to believe that retirees have valuable information, skills, and strategies that may be useful for professionals at any stage of their career or development – it depends on the person, not the ‘stage’.

Advocacy is the single most important thing retirees can do as they are no longer affiliated with one organization that may be government funded. They are free to talk to whomever they wish and say whatever they want.

I think the mentoring and coaching would be the most valuable and win-win programs for both parties, retirees and museum professionals.

In addition to the surveys, a letter was sent electronically to regional and state associations informing them of the RMP and requesting information about if/how they track retired or soon-to-be retired museum professionals. Twelve responses were received. Few of the associations track retired members and most of them were very supportive of the RMP; they, too, wanted to know how they could involve retired museum professionals in the museum field. MPMA’s director also reported on the RMP at this year’s CRA meeting. This is what a few of the associations had to say:

I had not considered this group of people [retirees], but now that it has been brought to my attention, I think we are really missing out on something! I will see how quickly I can add a new membership category for retired people, which would at least get the ball rolling. I think this is BRILLIANT! Please continue to share more with us.

- Michigan Museums Association

We have a student/retiree membership option that many people have taken advantage of over time. Unfortunately, it isn’t always clear which one of those they are.

- Mid Western Museums Organization

What a great project! We may have more retirees who identify as ‘trustee’ or ‘volunteer’ in their membership registration, but we have no way of tracking that.

- New England Museum Association



Charles Middleton, Oklahoma City SCORE Vice Chair

*“I think
this is
BRILLIANT!...”*

Process



MPMA reached out separately to the Texas Association of Museums (TAM) when it learned that TAM was considering a program for retirees. MPMA wanted to be sure that TAM was fully aware of the IMLS-funded work so that TAM could avail itself of MPMA's findings.

Throughout the grant period contact information was collected for 60 people expressing interest in the RMP. While not all of these contacts will translate into retiree volunteers for the RMP, they form the core of the RMP database and will be tapped for the RMP mentoring, coaching, and advocacy work. And while some may think 60 is a small number, MPMA considers it to be a good starting point and expects it to grow bigger as people start to hear about the program.

An important task assigned to the Grant Group was to figure out how to get retirees to sign up for the RMP. It reviewed how members join MPMA's professional affinity groups and decided to follow that process. In this way, the framework for MPMA's Professional Interest Networks (PIN) - already in place - provided an easy way for retirees to join the program. Now an official PIN, the RMP is listed on MPMA's website.

Non-members are allowed to join the PINs and a filtering process has been installed to alert non-members interested in becoming a coach or a mentor that they must join MPMA as they would be representing the organization. Likewise, if an individual or institution wishes to avail themselves of RMP services, they must join MPMA.

MPMA has long offered reduced membership and conference registration rates for retirees as MPMA believes that retirees benefit from membership and conference participation. These discount programs were reviewed by the grant group, Board, and staff and all felt they provided adequate incentives to retirees and did not need to be changed.

Other activities the Think Tank used to test ideas, inform members, and engage regional partners involved:

- The MPMA Midwinter Board Meeting: Strategic planning is the focus of this meeting. The Project Director presented an update on the RMP, feedback was received by the Board, and the project was included as a strategic goal.
- MPMA's Quarterly Newsletter: Distributed electronically to over 600 individuals and institutions. The newsletter featured progress reports on the RMP work and was a vehicle to solicit feedback from the MPMA community.

Process

The second, important **mid-course correction** involved the allocation of grant funds to facilitate RMP implementation. As the details of creating a program were established, it became obvious that efficient communication about and registration in the program was needed. At this time MPMA was developing a new website and membership management system. These launched in January 2017 and enhanced the organization's ability to disseminate updates and programmatic information and allow for easy sign-up for the RMP (the old website and membership management system did not have the functionality for this). To assist with this, MPMA hired a webmaster to create online outlets for the retirement program. As a result, MPMA assigned grant funds to cover the cost of this work that accomplished the goals of the grant and created a program that would be viable, accessible, and sustainable.

As with all new programs, the MPMA board, volunteers, and staff held many discussions about the appropriateness and sustainability of a retirement program. Enthusiasm was high and the awarding of IMLS funding for program planning and implementation brought legitimacy to the idea and recognition that the program would be viable for MPMA and also contribute toward the good of the larger museum community. The RMP is now an important part of the MPMA strategic plan.



Think Tank Members L to R: Mark Janzen, Rick Stryker, Michael Smith

Project Results



It is a testament to the Think Tank’s experience and “finger on the pulse” that the RMP elements identified in Oklahoma City survived largely intact after conducting surveys, queries, and testing.

Key findings/recommendations:

- *The grant work supported MPMA’s anecdotal evidence that museum professionals wished to stay involved with the Museum field upon retirement.*
- *The importance of having a well-functioning database and sign-up process for the RMP.* MPMA had to create a customized database to collect and maintain data for the retiree network. It is worth mentioning that we strive, to the greatest extent possible, to capture personal contact information for the database before a museum professional retires.
- *The importance of enhancing the functionality of the MPMA website as the major vehicle for executing the RMP.* The development of the RMP coincided with a major upgrade of MPMA’s website thus making it easier to incorporate the requirements of the new RMP.
- *The need to interface with MPMA’s existing organizational structure.* RMP elements need to be implemented in coordination with MPMA’s existing committees such as those focused on mentoring and advocacy.
- *The RMP needs a champion at the Board level.* This Board member provides oversight for the program to ensure that the program is robust and coordinated with other MPMA committees.
- *Avoid planning paralysis.* Detailed planning was important, but the Think Tank and MPMA staff decided to launch the RMP once it became a PIN so that it could be tweaked and improved based on real-life experience.
- *The RMP is easily replicable by other museum associations...but having one’s electronic “ducks in a row” is of paramount importance!*

In addition, there was discussion about building a bigger, more accessible network of retirees with a broad geographic distribution in the MPMA region. All involved acknowledged that closing the distance between those offering services and those receiving services is an important future goal.

“The RMP is easily replicable by other museum associations...”

Think Tank Member Elisa Phelps discusses a point with MPMA Director Monta Lee Dakin

Final Steps

MPMA's Think Tank took its key findings and determined how to make the program viable over a span of many years. MPMA did this with an eye toward the fact that regional and state museum associations have limited budgets and staffs. Here are the steps taken towards that end:

- The MPMA Board will act upon recommendations to have a committee overseeing the program led by a chair or co-chairs. The RMP chair(s) will coordinate with existing committees relative to mentoring and advocacy.
- The Think Tank pointed out the weakness of the advocacy page on the MPMA website. This page will be revised to offer more resources on the state and Federal level; this is a crucial step before MPMA fully activates the RMP advocacy element.
- MPMA continues to pursue a number of tasks to ensure smooth implementation of the RMP, including how to facilitate participation by people who move into the MPMA region after retirement. Many of these tasks involve the internal functioning of the website and people's ability to sign up either as a retiree volunteer or to request the assistance of a retiree volunteer.

Elisa Phelps, Think Tank member, expressed the enthusiastic sentiments of the group when she said the following during their final conference call: *"We kept IMLS requirements at the forefront as we did the grant work and the process worked well. The program evolved and now we have concrete results that will serve the museum community."*

*"We kept
IMLS
requirements
at the
forefront..."*



*Think Tank Members Henry Crawford and Jay Smith along with
Score Rep Charles Middleton*

Grant Participants



RMP Think Tank Members:

- Henry Crawford, retired Curator, Museum of Texas Tech University, Lubbock, TX
- Elisa Phelps, Director, Collections/Library Division, History Colorado, Denver, CO
- Joseph Schenk, Director, Art Museum of South Texas, Corpus Christi, TX
- Michael Smith, retired Director, Nebraska State Historical Society, Lincoln, NE
- Rick Stryker, retired Director, Corpus Christi Museum of Science and History, Corpus Christi, TX

Assisted by an “advisory” group including:

- Steve Friesen, Director, Buffalo Bill Museum and Grave, Golden, CO
- Mark Janzen, Director, Museum Studies, University of Central Oklahoma, Edmond, OK
- Jay S. Smith, State Museum Director, Museum of the South Dakota Historical Society, Pierre, SD
- Rick Young, Museum Manager, Fort Caspar Museum, Casper, WY

Staff:

Monta Lee Dakin, Former Executive Director, Mountain-Plains Museum Association, and Director Emeritus; Deborah B. Arenz, Executive Director, Mountain-Plains Museum Association

Project Director:

Patricia Cronenberger

Resources

These resources are on MPMA’s Website – www.mpma.net

- White Paper
- Project Templates
- January Survey Summary
- Ethical Guidelines
- Agreement between Provider and Receiver of Services document
- Convening Agenda
- Calendar

Administrative Information

Organization: Mountain-Plains Museum Association (MPMA)

Project Name: Retired Museum Professionals in Service to the Field Program; MG-45-16-0025-16
Amount Awarded: \$19,331

Project Dates: August 1, 2016 to July 31, 2017

Authorized Certifying Official: Monta Lee Dakin

Project Director: Patricia Cronenberger

Would you like to Create a Retirement Program?

If you would like to create a program, MPMA would be happy to help you. Contact the director at director@mpma.net. Or visit MPMA’s website at www.mpma.net

Here are the links to those resources:

Retiring Museum Professionals Program (RMP), Mountain-Plains Museum Association website: [LINK](#)

MPMA IMLS Grant Project Templates : [LINK](#)

MPMA IMLS Grant Project Survey Summary: [LINK](#)

Ethical Guidelines document: [LINK](#)

Agreement between Provider and Receiver of Services document: [LINK](#)

MPMA IMLS Grant Project Convening Agenda: [LINK](#)

MPMA IMLS Grant Project Calendar: [LINK](#)

SCORE, mentoring program of the U.S. Small Business Administration: [LINK](#)

The RMP Contact Form: [LINK](#)



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