

# Project Template

Date: December 22, 2016

**1. Project Title:** #1, “Establishing a Staying in the Game Network”

**2. Project Leader:** Rick Stryker

**3. Project Participant:** Mike Smith

**4. Project Overview:**

This project will explore how to create and maintain a network of volunteer retired museum professionals.

**5. Project Description:**

Enlist retirees, soon to become retirees (retirees who plan to retire within the next 5 years), and other seasoned museum professionals who are contemplating leaving the profession into a network of volunteers providing informal, short term, and ad hoc input for active professionals and small institutions in need of expertise and/or experience. The intent is to incorporate this service into the already existing MPMA structure including the web site, various communications to members, membership recruitment, and data gathering. The only additional responsibility contemplated is developing and maintaining a spread sheet data base of retirees and their skill sets upon which to draw to fulfill requests for assistance. The responsibility of sustaining this program will be integrated into various relevant board member job descriptions.

Issues:

1) Any solicitation or explanation of this project should include the understanding that this service does not include responsibility for extensive research or preparing a formally written report. It should be clear that the outcome might well include a recommendation that the individual or institution engage a paid consultant or pursue other sources of assistance such as a MAP grant.

2) Establish that this is for and about museum professionals (retired) who have the experience and skills to provide peer to peer advice, organizational coaching and other assistance in the field for a variety of museums in terms of size, mission and resources over a limited time. It is expected that participating retired museum professionals would engage in a limited number of such projects perhaps 1 to 3 such projects each year.

3) Metrics to measure success of the Project:

Metric 1: A database of participating retirees amounting to a number equal to 5% of the individual members (approximately 30 active participants)

Metric 2: A database of potential participants approaching retirement decisions who might be interested in participating amounting to a number equal to 10% of the MPMA individual members (approximately 60 potential participants)

**6. Project Design:**

(1) Create a questionnaire to compile data on retirees in the network.

(2) Post a “Staying in the Game Retiree Supplement” to the Individual Membership Form on the MPMA web site. In this simple and brief questionnaire, each potential retiree volunteer in service to the field would list their: a) professional training and b) recent work experience and c) areas of expertise where they feel their

experience might be most useful. Request and compile in the membership database personal/private contact information (in addition to professional contact information for active professionals) to avoid losing contact as people transition into retirement, private consulting, or to employment outside the profession.

(3) Compile data into a simple spread sheet database that will be done at no cost by an MPMA Board member volunteer.

(4) Through the MPMA Membership chair and staffer, identify and reach out to retirees, about-to-be retirees, and those transitioning to work outside the profession to inform them about the opportunity and solicit their interest in volunteering as short term mentors for museum professionals, coaches for small museums, and/or resources for volunteer boards. Make them aware of the discounted retiree membership category that makes them eligible to participate in this MPMA program.

(5) Capture the attention of about-to- retire museum professionals, individuals transitioning out of the museum profession, and professionals from other regions through newsletter articles, Facebook announcements, etc. Promote the program through MPMA's website. Create a page on MPMA's website specifically for the Retirement Program. Include announcements, images and information.

(6) Reach out through MPMA State Representatives to state associations within the MPMA region. Make them aware of the program and enlist their assistance in reaching out to retirees in their states who might not be members of MPMA. Develop letters of understanding with state associations who have similar programs to make MPMA's program available within the state in a way that compliments their goals and programs while avoiding points of conflict.

(7) To achieve geographic diversity with participants and to avoid conflicting with state museum associations, inform the state associations about the project and invite their feedback and participation in the project.

(8) Enlist the assistance of MPMA's data manager to compile and manage the program data.

**7. Is the project suitable for institutions?** Yes, it is likely most useful for institutions with few paid staff and institutions that are staffed by volunteers.

**8. Is the project replicable by associations?** Yes, although it requires a certain level of structure to adapt this project without additional expenses.

**9. Can the project be rolled out within the grant period (before July 2017)?** Yes

**10. Does the project fit the expectation of no or low financial investment by the host association?** Yes

**11. Recommendations to make the project successful:** Collaboration with state associations and developing structured tools to facilitate cooperation.

**12. Additional Comments:**

# Project Template

Date: December 23, 2016

**1. Project Title:** #2 “Sustaining Networking”

**2. Name of Project Leader:** Joe Schenk

**3. Names of Participants:** Steve Friesen

**4. Project Overview:**

This Project involves two elements: first - sustaining the network via a “Retired Museum Professionals (RMP Group)” group within the Association and second - recognizing continued service to the field via an “Awards” program.

**5. Project Description:**

Within the “Retired Museum Professionals” element, our Project will focus on (1) creating engagement strategies; (2) finding and retaining leadership within this group; (3) communicating effectively with those in the group and outside of it (through a page on the Association website, a specific Facebook page, and/or submissions to the Association newsletter); (4) supporting the group through fundraising, sponsorships, and/or scholarships focusing on sustainability; and (5) offering relevant and retiree-oriented programs at specific times at annual conferences and other appropriate opportunities.

The “Awards” element of our Project would focus on recognizing commitment and efforts in support of the Association through advocacy, service, and leadership. It will provide recognition to retirees who have continued their contributions to the museum field in general and the Mountain-Plains Museums Association in particular. The awards would have a specific name and criteria and would be awarded as deserving individuals are identified (not necessarily presented annually).

**6. Project Design (implementation steps):**

Once the network is established via Grant Project #1, the structure for Project #2 would involve (A) creating a Chair position to coordinate efforts of the Retired Museum Professionals Group and (B) forming a RMP Group Committee which would become a specific part of the Mountain-Plains Museums Association. It would be created and sustained by appointments and volunteerism.

**7. Is the project suitable for institutions? YES**

**Explain:** It can definitely be modeled and/or modified to meet the needs of specific institutions.

**8. Is the project replicable by associations? YES**

**Explain:** The goals will be such that this project can be scalable and used by state, regional or national associations.

**9. Can the project be rolled out within the grant period (before July 2017)? YES**

**Does the project require roll out over time (beyond July 2017)? YES**

**Explain:** It is dependent on identification of retirees and solicitation of their participation and involvement which may or may not require additional time past the July grant period.

**10. Does the project fit the expectation of no or low financial investment by the host association? YES**

**Explain:** For the first element, the costs could involve some staff time to establish the group, provide for contacting them, and creating a communications framework. Costs for the second element will potentially involve purchasing an appropriate award(s), but there is an opportunity for sponsorship of this element by a retiree, institution or business in the field which may find merit in sponsorship. In any event, these costs should be relatively minor and the return on these investments could be much more significant, long term.

**11. Recommendations to make the project successful:**

It will definitely require a series of communication tools and activities that must be coordinated and implemented on a continuing basis.

**12. Additional Comments:**

# Project Template

Date: December 30, 2016

**1. Project Title:** #3, Providing Advocacy for Museums in the MPMA Region

**2. Name of Project Leader:** Michael Smith

**3. Names of Participants:** Michael Smith and Rick Young

**4. Project Overview (2-3 sentence “elevator speech”):** This project is exploring ways and means through which museum profession retirees can advocate for museums, their purposes, roles, values and needs within the MPMA region both in terms of individual museums and the field as a whole.

**5. Project Description (feel free to use this space to add more information including any challenges, issues or concerns):** This project will use the skills and experiences as developed over a career/lifetime by those now retired from the museum profession, applying those to the on-going and everyday challenge of communicating the role, value and needs of a museum, a group of museums or the museum field to communities, governments, funders and societal thought leaders (elected officials, bloggers and other social media figures, newspaper editors, foundation executives, etc.). This will be done by the retirees themselves and through message development and training of active museum board members and staff in order that those leaders may carry forward with effective advocacy in an improved and more confident manner.

**6. Project Design (implementation steps):**

- a. Further define the program to include qualifications of a “retiree advocate” and “the voice” with which project participants should speak.
- b. Creating an ethics statement and a series of checks and balances for the advocacy process to include protecting both the retiree advocate and the MPMA itself.
- c. Setting up a formal relationship/involvement between the retire advocates and the MPMA Advocacy Committee.
- d. Define the process for advocacy engagement from the where, when and what of the advocacy action to the transmission of initial and follow up reports to the Advocacy Committee as well as the means by which the Advocacy Committee will archive the work.
- e. Developing the first cohort of retiree advocates and providing training.
- f. Implementing a first series of advocacy actions.
- g. Assessing the project and the outcome.
- h. Making such adjustments as necessary.

**7. Is the project suitable for institutions? Yes NO Explain:** Every institution or organization needs to be an effective advocate for its value, role and needs as a museum while at the same time advocating for the field of museums. Using the knowledge and experience of retired museum professionals can aid

institutions in conceptualizing their advocacy message, developing the skills needed to be successful advocates and taking the first steps or new steps to gain confidence and thus success in getting their message across.

**8. Is the project replicable by associations? Yes NO Explain:** This project and its success in defining advocacy and outlining the role that retired museum professionals can play, within the context of the overall role of retired professionals in continuing to serve the museum community, will provide a template for other museum associations.

**9. Can the project be rolled out within the grant period (before July 2017)? Yes No  
Does the project require roll out over time (beyond July 2017)? Yes No**

**Explain:** Time is needed to recruit and orient experienced museum spokespersons now retired along with the selection of an initial cohort of interested museums who can work as a team (retiree and museum) to identify individuals or key targets to whom this team can deliver the advocacy message that can assist the selected museums in meeting their needs such as continuing and expanded funding, increased understanding of the mission and effectiveness of the museums, etc.

**10. Does the project fit the expectation of no or low financial investment by the host association? Yes NO Explain:** The project, however, will require the development of a limited financial investment in that there be a means of covering the retiree's expenses such as travel or creating printed or electronic messaging pieces to be distributed to county commissioners, etc.

**11. Recommendations to make the project successful (for example, does it require a robust e-blast system or database?):** A core group of retirees experienced in advocating for museums must be developed. This core group, perhaps a minimum of one retiree in each of the MPMA's ten states, will need to further develop this project as set forth in section 6, above. Key to this for the MPMA will be its standing Advocacy Committee under the leadership and guidance of its Chair(s).

**13. Additional Comments:**

## MPMA IMLS Grant 2016-2017

Staying in the Game: Engaging Retired Museum Professionals in Service to the Field

# Project Template

Date: December 23, 2016

**1. Name of Project:** #4 Mentoring *(Note: This project was first envisioned as mentoring for mid-career museum professionals. However, after the January 2017 survey the Think Tank determined that it should apply to museum professionals at all stages of their careers.)*

**2. Name of Project Task Group Leader:** Henry B. Crawford

**3. Names of Participants:** Henry B. Crawford, Jay Smith

**4. Project Description:** Project involves developing a framework for a year-round mentoring program for museum professionals. Our goal is to seek both formal and informal ways to assist museum professionals that are soon to or have already retired to engage, advise and assist their working colleagues regarding career/professional issues. We expect this mentoring to occur through individual and group discussions as well as through phone and online communication in a manner that is agreeable to both parties.

### **Our Project will focus on:**

(1) creating formal and informal engagement strategies for mentoring mid-career colleagues through advising and assisting on pre-retirement and post-retirement professional issues and volunteering possibilities within the museum profession.

(2) creating appropriate and effective ways for mentoring to occur (group discussion, phone, online chatter)

(3) finding ways to compliment MPMA's current Mentoring Program

(4) finding and retaining leadership within this group

(5) communicating the mentoring program (through a page on the Association website, aligning with Project #1 and #2 goals for communication strategies, submissions to the Association newsletter);

(6) offering meaningful programs at annual conferences on mentoring

(7) maintaining an ethical approach to dispensing advice and sharing ideas, while also not competing with the paid consultancy sector

### **5. Main issues or questions:**

**Will a mentoring program help museum retirees feel useful to the profession?**

Yes

**How can/will mentors be recruited or selected?**

Mentors will be recruited from the existing body of retirees interested in participating, and matched to museum professionals' needs according to their areas of interest and expertise.

**What areas exhibit the greatest need for mentoring?**

That will be determined through an analysis of survey data.

**6. Is the project suitable for retirees? Yes NO Explain:**

Yes, retirees may also benefit from participation in the program as mentorees.

**7. Is the project suitable for Institutions? Yes NO Explain:**

No, however, institutions may well benefit directly and indirectly from an individual's mentoring experiences.

**8. Is the project suitable for MPMA? Yes NO Explain:**

Yes. MPMA has a prototype mentoring program for new and emerging professionals, for which this one may serve as a companion project.

**9. Can the project be rolled out within the grant period (before July 2017)? Yes No**

Possibly

**Is it better to phase the project's roll out over time (beyond July 2017)? Yes No**

**Explain:**

I can't specifically answer that, however, there would be no harm in launching the program after July 2017 if the mission and structure of the program prototype have been completed and approved by that date.

**10. Is the project easily replicable by other associations? Yes NO Explain:**

Yes. One of the goals is to make this project a prototype which can easily be adapted to other state and/or regional mentoring needs.

**11. Does the project fit our expectation of no or low financial investment by the host association?**

**Yes NO Explain:**

Yes, the mentoring is unlike a paid consultancy in that no fees are charged and no written project report is expected.

**12. Recommendations to make the project successful:**

Keep it relevant to sea changes in the social, professional, political and economic climate.

Maintain a consistent presence through annual conference meet-ups and discussions as well as announcements and updates in the MPMA website and appropriate communications.

Sharing information and encouraging a continuing dialog about the program directly with MPMA state organizations.

**13. Additional Comments:**



## MPMA IMLS Grant 2016-2017

Staying in the Game: Engaging Retired Museum Professionals in Service to the Field

# Project Template

Date: December 22, 2016

**1. Project Title: #5, "Coaching"**

**2. Name of Project Leader:** Elisa Phelps

**3. Names of Participants:** Mark Janzen

**4. Project Overview (2-3 sentence "elevator speech"):** This project matches members of the MPMA retired professionals network who have specific expertise with museums that lack that expertise. The retirees provide coaching in response to the museums' identified needs. The museums benefit from established professional guidance not otherwise available to them.

**5. Project Description (feel free to use this space to add more information including any challenges, issues or concerns):** At a time when available resources are frequently overmatched by institutional needs, experienced museum retirees can provide short term coaching on issues such as policy development, board and staff relations, and participation in professional advancement programs such as AASLH StEPs or the American Alliance of Museums Museum Assessment Program (AAM-MAP). Having spent many years developing and honing skill sets in different areas, negotiating operational issues, and implementing similar advancement programs in their own institutions, museum retirees can provide perspective, real world knowledge, and experience-based advice ranging from how to get started developing a collections management policy or trustee handbook to how to prepare for reaccreditation and many other aspects of professional museum operations. The program is not intended to provide a tangible product or a consultant service.

**6. Project Design (implementation steps):**

1. Identify expertise of participant retirees through questionnaire (project #1).
2. Identify a means of determining what expertise museums need.
3. Create a mechanism to set up coaching relationships.
4. Develop training for retirees on how to serve as coaches to museums.
5. Communicate availability of coaching program through MPMA website, newsletter, state organizations to align with Project #1 and #2 goals for communication strategies.
6. Identify and retain leadership within the coaching program retiree participants.
7. Establish an ethics policy for program participants (programs #3, #4, and #5).
8. Offer meaningful programs on coaching at the annual meeting.

**7. Is the project suitable for institutions? YES NO Explain:** Yes, it is particularly useful for institutions with few paid staff and institutions that are staffed by volunteers.

**8. Is the project replicable by associations? YES NO Explain:** Yes, with an investment of time to put a structure and process in place.

**9. Can the project be rolled out within the grant period (before July 2017)? YES NO**  
Some infrastructure elements of the project can be put in place and rolled out within the grant period but full blown implementation and "matchmaking" will roll out over time.

**Does the project require roll out over time (beyond July 2017)? YES NO**

**Explain:** Some aspects of recruitment of participant museums and retiree training will occur at the annual meeting in the fall of 2017.

**10. Does the project fit the expectation of no or low financial investment by the host association?**

**YES NO Explain:**

**11. Recommendations to make the project successful (for example, does it require a robust e-blast system or database?):** Active communication and promotion of the coaching program to potential participant institutions is an important element of success—must have both retiree and museum participants to make successful and productive matches.

**13. Additional Comments:**