



ASSOCIATION OF CHILDREN'S MUSEUMS

What Does Strategic Planning Look Like Now?

A. J. Rhodes
R & L Consulting



If it feels messy and provisional, you're probably on the right track. Here's how one North Carolina museum is navigating both the process and the uncertainty.

Sarah Macey, R&L Consulting

Let's have a show of hands: How many of you absolutely love the strategic planning process? OK, got it. And how many of you really hate it? Yep. Got it.

Now, let's get specific: What exactly do we love and hate about it? When I posed this question recently on LinkedIn, I received the variety of responses seen in the chart below.

As one colleague put it: "I think that E. B. White [author and essayist] captured perfectly the tension between strategy and planning: "I get up every morning determined to both change the world and have one hell of a good time. Sometimes this makes planning my day difficult." Ha!

Strategic Planning

Ideally, planning the future of your museum should be an opportunity to gather folks together, pull out the butcher paper and markers, and let the ideas fly. Candid input from the community is woven throughout. The process is refreshing, affirming, satisfying, and fun. (Yes, it really should be an enjoyable exercise.) There is sufficient time to generate ideas, revise, and add to those ideas; dig into relevant data to back things up; and secure buy-in across the organization. The resulting plan is enthusiastically embraced, referenced, and discussed by everyone with impressive frequency.

Back to reality.

Even before the pandemic, the strategic planning process was rarely ideal. It could move at a glacial pace. It could be unwieldy and tedious. It could be expensive—particularly if an outside consultant was involved. It could feel top-down. It could (perhaps unknowingly) turn a blind eye to the needs and interests of the community. It could feel focused on fundraising. And most of all, it

LOVE	HATE
Taking steps away from the daily grind and visioning the big picture.	Wordsmithing!!!! And wordsmithing as a large group!
Engaging the whole team for great ideas.	When things don't get implemented.
Engaging in conversations that really matter and experiencing that feeling when your values align with those of your organization & colleagues.	The onerous process of gaining consensus among team members.
Focused time looking at challenges and opportunities.	When the documents created to guide strategy lose relevance/are shelved/don't actually guide practice.
Gathering, the reset button, different voices, new perspectives, stepping away from struggle thinking into strategic thinking.	A plan so large that it becomes hard to manage or follow.
The luxury of time to listen and think.	The problems that result when goals shift and the plan isn't revised.
Pondering the future, anticipating the challenges, and proposing responses to meet them.	The absence of accountability when things don't get done.

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Sarah Macey, R&L Consulting

For those who completed a strategic planning process in 2019 or a bit earlier, an additional less-than-ideal characteristic emerged: The plans are brittle. When everyone closed their doors in March 2020, most strategic plans went right out the window. Most had been developed with the assumption that there was a single future ahead of us, which we thought would be more or less like the present, only farther away.

could feel like an organizational obligation: a box to be checked. After all, funders and granting agencies will expect to see it and it will be used to shape annual staff reviews.

For those who completed a strategic planning process in 2019 or a bit earlier, an additional less-than-ideal characteristic emerged: The plans are brittle. When everyone closed their doors in March 2020, most strategic plans went right out the window. Most had been developed with the assumption that there was a single future ahead of us, which we thought would be more or less like the present, only farther away.

Now it's 2023. The pandemic lingers on. Our doors have reopened. Do museums still need strategic plans?

Yes, and it's more crucial than ever. So the question then becomes: How can we maximize the best parts of the strategic planning process, minimize the least effective ones, and ensure we don't make the now-naïve mistake of believing we'll arrive in the future we want to see by following a narrow and linear path?

The answer: Change things up. Fortunately, we've all become adept at doing just that over the past three years.

Case Study: Kaleideum

When Elizabeth Dampier, director of Kaleideum in Winston-Salem, North Carolina, contacted me last March about work-

ing with her on the museum's next strategic plan, I was both pleased and...uncertain. R&L Consulting has provided specialized services to the museum and nonprofit community for twenty years. Since 2015, we have worked with Dampier on several projects. My uncertainty? No surprise, there just hadn't been a big demand for strategic plans during the pandemic. On top of that, I knew this latest collaboration wouldn't be business as usual.

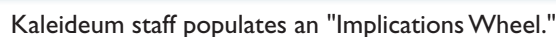
Things certainly weren't business as usual for Dampier. "We've experienced a lot of change as an organization over the past several years," she says. "In July 2016, our local science center and children's museum merged to form what is now Kaleideum with the intention of building a new center in downtown Winston-Salem. In our initial planning, we looked three years out to make sure we could sustain ourselves as an organization but we didn't think we'd need to look ahead seven fiscal years due to the pandemic! When we looked at our strategic planning process this time around, we knew we needed to have several scenarios for how the same goal might be achieved, all while realizing that other environmental factors could come into play that we hadn't thought about."

Enter Elizabeth Merritt, vice president of Strategic Foresight and founding director of the Center for the Future of Museums at the American Alliance of Museums (AAM).

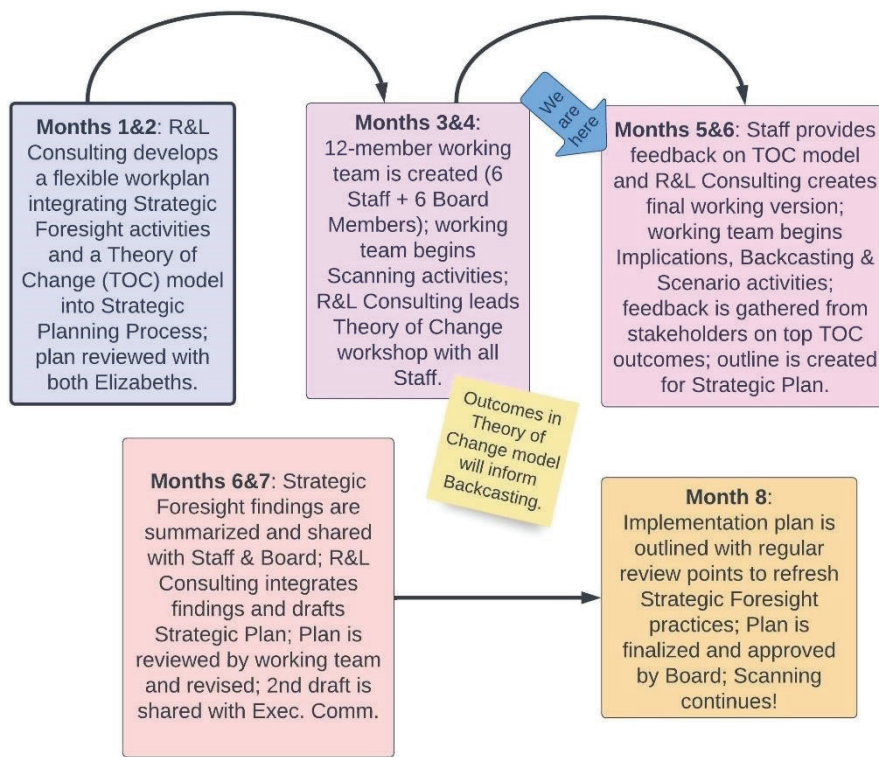
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Foresight Is More Important— and Harder—Than Ever

Scenarios: The future is not singular—at any point in time, we face many potential futures, some likely, some less so, but all plausible. To combat our tendency to assume the future is one inevitable thing, futurists create scenarios—stories describing a set of distinct, plausible futures that encompass the potential environments the organization may face.



While Dampier and I were both enthusiastic about the toolkit's resources and activities, it wasn't immediately clear how it could systematically support the strategic planning process as museums began to pick up the pieces after a year or longer of lock-downs. So, I decided to go straight to the source: I called Merritt, described the project with Kaleideum, and asked if she could advise us on integrating the toolkit. R&L Consulting contracted with Merritt to provide guidance and coaching to the team and we were off



and running.

“The board asked many questions about this experimental process before they committed to it,” Dampier says. “Ultimately, part of the pitch was the idea of being able to contribute to the field and live our values of taking risk and trying something in a different way.”

Putting a New Model into Practice

To start, R&L Consulting created an eight-month work plan beginning with a Theory of Change (ToC) workshop for Kaleideum staff to set the context for implementing toolkit activities. A ToC workshop is a useful exercise for nonprofits to help staff identify the changes they want to bring about as a result of the work that they do. Kaleideum’s workshop resulted in a written ToC model that reflected buy-in across the organizational chart, prompted discussion,

and provided an arena for developing shared understandings. (It also revealed where more internal work needed happen around definitions of important terms like “family.”)

Next, Dampier recruited a group of six staff and six board members to work side by side with us for the duration of the project as we shifted our focus to the toolkit. Because gathering a dozen people for regular Zoom meetings is unwieldy, we decided to divide the group into six pairs of one staff person and one board member in each pair. We began Scanning activities by giving each pair a specific focus aligned with categories commonly used by real futurists: STEEP (Science, Technology, Economy, Ecology, and Politics/Policy). The sixth pair—Dampier and the incoming board chair—scanned for all five STEEP trends through the lens of the museum’s Winston-Salem home.

In some ways, this new process is similar to doing a traditional SWOT analysis,

except this is a deeper dive into the “Opportunities” and “Threats” quadrants, while “Strengths” and “Weaknesses” are transformed into actionable outcome statements.

As 2023 begins, the working team is using Scanning results to create implications plotted on templates of concentric circles (see chart on p. 3)—one implication leading to another. In the coming months, as begin Backcasting, we will use some of the key outcomes from the ToC model as “preferred futures.” From there, we’ll plot out several future Scenarios for Kaleideum. After that, the working team will generate a summary of their findings to discuss as a group. This information will then shape the first draft of the strategic plan.

Though the development of Kaleideum’s strategic plan is still very much in process, Dampier is enthusiastic about the results so far. “I don’t think this way will be easy,” she says. “Many of us have preconceived notions of what we should do or what the end result will or should look like. I do believe, in the end, we will come up with a better product that will allow us to be well-prepared for the next few years and be better-prepared to do this type of thinking with future questions and decisions.”

Merritt is optimistic that theory can be put into practice. “Kaleideum is modeling the foresight-driven planning that will be essential to the success of museums in coming decades,” she says. “AAM looks forward to using Kaleideum’s planning process as a case study to help speed the adoption of this emerging best practice for the museum field.”

A.J. Rhodes, owner and principal of R&L Consulting, has worked with museums for thirty-seven years. Before becoming a consultant, she led the education departments of the Lied Discovery Children’s Museum (now DISCOVERY Children’s Museum) in Las Vegas, Nevada, and the Albuquerque Children’s Museum in New Mexico (before it became part of Explora! Science Center and Children’s Museum).

RESOURCES

THEORY OF CHANGE...a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context.

—Center for Theory of Change

STEPS FOR CREATING A THEORY OF CHANGE

1. Define the problem, including the identified root causes and stakeholders.
2. Define the desired end-goal (impact)
3. Define outcome and output results needed to achieve the desired end-goal (impact).
4. Map activities that could lead to the short- and long-term results.

—Tools4Dev

Tools4dev.org/blog/theory-of-change-steps/

DIIGO

A fee-based social bookmarking website that allows users to bookmark and tag web pages, highlight any part of a webpage, or attach sticky notes to specific highlights or to a whole page. Annotations may be kept private, shared with a group within Diigo, or forwarded to via a special link. The name “Diigo” is an acronym from “Digest of Internet Information, Groups and Other stuff.” (Wikipedia)

Strategic Planning: Reflections on a Clear Path Forward

Lesla Bush, Emily MacDonald, and Charlie Walter
Mayborn Museum



Aligning an organization is like preparing for a long sailing trip. First you select your destination (the mission and goals) and your route (the strategy). Then you figure out what boat you need (the structure), how to outfit it (the systems), and the crew mix (skills).

—Michael Watkins

Courtesy of Mayborn Museum

Strategic planning answers three questions:

- 1) Where are we now?
- 2) Where do we want to go?
- 3) How are we going to get there?

The questions are simple, but the process to get honest answers is not. At its best, strategic planning is an opportunity for your museum's staff to be highly reflective. While it can be hard to pause busy day-to-day operations, there are some basic exercises that will help set you up for success for your three-year journey.

Recognizing how fast the world is changing, we chose a three-year planning window over the more traditional five-year window. However, we also think a plan that covers less than three years is perhaps more reactive than strategic.

Review Mission, Vision, Core Values

These statements form the foundation of everything your museum does and should be supported by the goals you set. At one natural history museum, a new director found the museum's mission statement didn't match staffing patterns and exhibits. Their mission statement focused on broad natural history, but the exhibits were dinosaur-focused and all the institution's curators were paleontologists.

During their strategic planning process, the staff polled community members and found they overwhelmingly wanted a broad natural history museum that addressed both past, present, and future in the region. The mission statement was affirmed and the museum moved forward with new exhibits on current natural history and climate change, and the hiring of an aquatic ecologist as a new curator. Without taking time to reflect on their mission statement, the museum would not have met the expectations of their community.

The same reflection on vision (longer term outcomes) and core values (how staff engage and approach their work) are important to create focus and define the work environment.

Some Tools to Support Effective Planning

A moon group should form the backbone for this planning process, either reporting to the board or a planning committee of the board.

The best plans are developed over a period of six to eight months to allow time for ample dialogue and data gathering without disturbing normal museum operations. Data gathering should include:

■ **A Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis of current operations.** This will give the planning team their first systemic look across the institution. These should be prepared by staff in department- or division-wide presentations.

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■ **A Membership Survey brings in feedback from visitors who utilize the museum the most.**

- Which exhibits are their favorites?
- Which do they not rate highly?
- Which programs do they utilize most?
- What suggestions do they have for future exhibits or programs?

■ **A Market Analysis compares admission and membership fees of other museums and attractions in the area.** In some cases, a one or two-dollar increase may make you more competitive with other organizations in the region, or, your fees may already be too high.

■ **A Benchmark Analysis compares your operating data with three other museums willing to share theirs.** Comparing budgets, attendance, facility size, and staff size gives you insights into efficiency, effectiveness, and possible areas to invest in or reevaluate.

■ **Focus Groups are perhaps the best data collection strategy for strategic planning.** Recommended groups to speak with include board members, museum staff, volunteers, area educators, tourism and economic development professionals, and city leaders. These focus groups should include six to eight individuals to allow time for discussion. Some standard questions to ask include:

- What do you see as the three main strengths of the museum?
- What would you like the museum to build upon or return to?
- What have you observed to be the top three weaknesses or challenges that the museum is facing?
- What would you like to see the museum achieve over the next decade?

Putting it All Together

After the museum's moon group spends time reflecting on the data obtained from the

activities above, they should make recommendations related to areas of opportunity and concern. This is not a linear process, it will take time to reflect on all the data, but there are often patterns in the feedback that rise to the top. It is good practice to have an extended goal-setting meeting to set ini-

What's a "moon group"?

If we were going to replicate this museum on the moon and had limited space on our rocket, which staff would be essential for a successful mission? In our case, the moon group stayed together to monitor progress during the months the plan unfolded.

tial recommendations, and later schedule a second and perhaps even a third meeting to revisit recommendations and rescan the data to see if something important has been overlooked.

For the final plan, all of the data should be summarized in a strategic plan narrative to capture all major issues and patterns noticed in the feedback. While this document may be the most read part of the plan because of its "executive summary" nature, it is important to keep your meeting notes and data collected as appendices to assure transparency. A board member reading the narrative may want to verify the thoughts it contains and having these supplementary documents readily available will allow this.

Ultimately goals, action steps, and measurable outcomes are set to address major areas noted in the narrative, and individual staff are appointed to lead each goal. Some institutions today adopt a "strategic framework," outlining major areas of focus without identifying specific action steps. This approach can point you in the right direction, but it lacks the specificity of a strategic plan. Nevertheless, some institutions still feel that this general direction of focus is enough, as it keeps you nimble in our fast-changing world. They also point to the fact that many strategic plans sit on a shelf and are rarely looked at as another reason



Courtesy of Mayborn Museum

In support of the Mayborn's Big Idea #1—support Baylor's pursuit of receiving Research I/Tier I (R1/T2) recognition—one of the museum's strategic goals is to disseminate Baylor research through the museum's exhibits and programs, supporting broader impact goals on national research grants and increasing the number of participants working directly with Baylor scientists.

Big Ideas	Status	Prog...	Primary Responsibility
- Big Idea 4: Strengthen our corporate culture and operations through our core values, policies, organizational capacity, and identity awareness.	In Progress		
+ Goal 1: Create a strong internal identity of 'who we are' as a museum.	In Progress		Senior Management Team
+ Goal 2: Promote team culture of continuous improvement, reflection, and growth.	In Progress		Senior Management Team
+ Goal 3: Strengthen museum-wide safety protocols (Goal: Strengthen museum-wide safety protocols by implementing routine safety drills and trainings that instill confidence in each employee's ability to protect themselves and the museum's visitors)	In Progress		Museum Operations Manager
+ Goal 4: Create systems and processes in a project management system (SmartSheet) that eases communication across the museum.	On Going	●	Associate Director of Education and Programs and Museum Operations Manager
+ Goal 5: Smithsonian Affiliate Application	Complete	●	
+ Goal 6: Prepare and Plan for the Mayborn 2022 All Staff Retreat	Complete	●	

A snapshot of the Mayborn Museum's SmartSheet tracking Tool. Yellow-highlighted blocks show work areas in which progress has been made in the past month.

to just focus on the big ideas presented in a framework. Using a project management tool to keep the details in focus will prevent your strategic plan from going stale and help to assure forward movement across its many details.

Using an Innovative Tool to Keep the Institution Focused on Progress

Imagine going to a sporting event with no score board. How could you tell if the team was winning or losing? How would the coach know where to focus to make improvements? Without a scoreboard, would the fans be excited? How would you know when the game ended?

Just like the scoreboard for a game, you need a scoreboard to track progress on your museum's strategic plan. Otherwise, how to do you give updates to your board? How does your staff know where to focus their energy? How do you understand the amazing work done in the museum? How do you truly see the systemic nature of your work? How do you celebrate together? How do you find issues that might be holding up progress?

Creating a strategic plan is challenging work. Once you've created the plan, you

don't want it to just gather dust on a shelf. This plan should guide your work and staff should see the importance of the plan and how it fits into their daily work. You also want a way to measure progress. In thinking through all of this and examining other strategic plans, we noticed the most successful plans have a way of measuring and tracking movement.

Finding the Right Tool

With these thoughts in mind, we created a tracking sheet for our museum using a program called SmartSheet. SmartSheet describes itself as "a modern project and work management platform that offers a rich set of views, workflows, reports, and dashboards to capture and track your plans, resources, and schedules." The fact that Smartsheet is so customizable was a key factor for us in creating something that would fit our needs and evolve with us as we learn.

It took time to set up our tracking system within SmartSheet and, in our reflective practice, we continue to refine the sheet. After creating our strategic plan, we took the five big ideas and determined goals within them. These goals were then broken down into specific action items. Action items were

further broken down into specific tasks. By breaking down the big ideas into smaller chunks we were able to assign specific work to staff and track movement.

Regular Meetings

Regular meetings are an important part of tracking progress of your strategic plan and learning together. Focusing on one or two big ideas at a time, we ask the following questions of staff who oversee specific goals. What progress was made since our last meeting? If we are not working towards this goal, what is holding us back? What are critical constraints or limiting factors for growth regarding your goal?

In addition to our monthly meetings, we hold quarterly meetings with all staff to share a quick report out of progress. The goal of this meeting is to track movement on the Mayborn's strategic plan, ensure our big ideas are not lost in day-to-day work, celebrate progress, and communicate the great work being done across the museum. Within our day-to-day operations, it can be easy to become siloed. Taking time to communicate and share access to our tracking sheet allows all staff the opportunity to see and understand work happening across our operation.

A CLEAR PATH FORWARD:

2023 Mayborn Museum Strategic Plan

Benefits

Tracking our strategic plan in SmartSheet has benefited our operation in various ways. When new employees are hired, it allows them to see an overview of the work being done museum wide. It guides managers in making annual work plans for their teams, it has encouraged more strategizing together before making decisions, and it ensures we are reflective in our practice by making changes as new information is brought to light. One benefit we didn't foresee was that this scoreboard, just as in a real game, allows us to celebrate together as we move through our work. Our tracking sheet also gives us a simpler way to create annual reports for our constituents. While there are many benefits, we did learn some tough lessons through the process.

Lessons Learned

No plan is perfect. In reflecting on our strategic plan and tracking system several thoughts come to mind:

- Those of us working with this project management tool have unintentionally added the role of IT to our job descriptions. Luckily, SmartSheet has a great support program and they have recently updated this service to make it even easier for people to utilize.
- Project management programs can be great, but only if you have systems and processes in place for them to be effective, otherwise you may be adding more confusion to your staff, while also implementing change across the museum.
- We knew going in, that not everyone had a common language around goals, action items, and tasks. Setting the expectations in the beginning is essential.



Courtesy of Mayborn Museum

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- We need to work towards developing an annual plan driven by our budget linked to our strategic plan to give us a more focused yearly approach to our work.
- Working together to have a clear understanding of what should be added to the sheet, by whom, and when is essential and something that takes time to work through.
- Determining how to lead the meetings was/is a struggle. We need to report out on progress but in this fast past world, we also needed to take time to strategize together.
- Some staff feel that their work is not evident within the plan, but this does not mean that their work is not important to the day-to-day operation.

Reflection is a vital part of how we work at the Mayborn. We strive to be an institution that celebrates change and values feedback. In reflecting on the tracking of our strategic plan within SmartSheet, we have learned valuable lessons and have made great progress on our current plan. With this knowledge in mind, we are making improvements for our next strategic plan. Our process is ever evolving. We will continue to reflect to help us move toward distinction, leading us systematically forward in making a difference in the lives of our visitors and our staff. 🧢

Lesa Bush is associate director, Emily MacDonald is museum engagement coordinator, and Charlie Walter is associate director of the Mayborn Museum at Baylor University in Waco, Texas.

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A Small Museum's COVID-Interrupted Strategic Planning Process

Ray Radigan and Susan Brady
Amelia Park Children's Museum

The hardest part of the strategic planning process is getting started. We know because we did it twice in two and a half years.



By the end of 2019, we determined we were ready to begin creating a new strategic plan. Staff and board leadership took a thorough look at the organization: the new executive director, who had been part of the museum's exhibit staff for three years, had settled in, we were financially secure, and we did not foresee any more major changes on the horizon.

Time for a New Plan

For a small museum like ours—only 10,000 square feet with an annual budget of about \$250,000—creating a strategic plan can seem like a luxury. Founded in 1994 by a group of teachers and parents, the museum moved to its current location in 2008. Attending to the basic day-to-day concerns of opening for visitors, maintaining our facility, managing staff, paying bills, sending membership renewal reminders, and generally keeping everything afloat, was already stretching our resources. So, when our last strategic plan ended in June of 2019, drafting a new plan was added to our to-do list somewhere between approving a new budget and getting the floors waxed. It got bumped even further down the list a month later when our executive director left. Still, it remained on our radar.

Six months passed. By the end of 2019, we determined we were ready to begin creating a new strategic plan. Staff and board leadership took a thorough look at the organization: the new executive director, who had been part of the museum's exhibit staff for three years, had settled in, we were financially secure, and we did not foresee any more major changes on the horizon.

How Did We Start?

As a small museum with a small budget, we knew we would be leading the process ourselves rather than hiring someone to

guide us. Fortunately, our board president and our executive director both had experience with strategic planning. Most of our board members, however, had not. Educating them on what the work would entail and expectations for the final product was a necessary step. One misconception among board members was that a strategic plan needed to be a lengthy tome full of museum-speak that would take months to draft. Many board members were relieved to learn that the final plan could potentially be two pages long and it did not require an exceedingly long time to prepare.

We gave each board member articles on strategic planning for small organizations to demystify what we would be trying to achieve and how. The best resource we found was an article titled “DIY Strategic Planning for Small Museums” from the American Association for State and Local History.

Our board president began the process by sending a survey to all board members seeking their insights into the board, the organization, and areas of potential growth. Survey responses varied widely. The simple question, “What is the biggest obstacle the museum will face in the next five years?” elicited responses including programmatic additions, developing new exhibits, improving various funding sources, strengthening the museum's role in the community, and increasing visitation. This range of responses needed an in-depth discussion of organizational priorities.

To begin that conversation, we held a

full-day board retreat in February 2020. The goal was not just to seek solutions, or even identify long-range goals, but to define who we thought we were as an organization. It took six hours (and a lot of coffee), but we were able to identify the primary areas that defined us:

- mission
- audience
- staff
- board
- technology. (Including all types of interactions with visitors—analogue, electronic, screen-based.)

At our next meeting, we intended to delve deeper into each category to determine where we stood and where we saw opportunities for growth.

Pause

Remember when we said we didn't see any major changes on the horizon? In an instant we went from long-range planning to crisis management. Six weeks after the February board retreat, we closed our doors, lost 85 percent of our revenue, and furloughed almost all of our staff due to the COVID-19 pandemic. Strategic planning was no longer anywhere on our to-do list.

Recover, Regroup, Restart

Although we were forced to abandon that first attempt at strategic planning without getting very far, we never forgot what we started.

Over the next two and a half years our board leadership and many of our board members changed. The museum slowly recovered from an eight-month closure and then a year of mandated occupancy caps and pandemic-related visitor hesitation. By the fall of 2022 we were finally ready to expand our focus beyond day-to-day survival and return to long-range planning. Determining that once again we had the organizational capacity to handle both, we decided that it was the time to restart the process.

How do we know we're ready this time? We took another look at our organization but through a wider lens. Our staff and board are operating smoothly. Our finances



Marc St. Onge

...we held a full-day board retreat in February 2020. The goal was not just to seek solutions, or even identify long-range goals, but to define who we thought we were as an organization...Six weeks after the February board retreat, we closed our doors, lost 85 percent of our revenue, and furloughed almost all of our staff due to the COVID-19 pandemic.

Strategic planning was no longer anywhere on our to-do list.

have recovered from the pandemic. We have a team in place that can create and implement a plan. We have the organizational capacity to handle day-to-day operations while charting future goals.

Pick Up Where We Left Off?

Because so much had changed over the previous two and a half years, both within our museum and beyond, we opted to restart our strategic planning process anew rather than pick up where we left off in 2020. Still, we used that first attempt as a guide for the process: what had worked and what hadn't?

The first aspect that we are repeating is board member education. Operating without a strategic plan for over three years, we have new board and staff members. Everyone involved now needs to understand what we are trying to create, how we will achieve

Because so much had changed over the previous two and a half years, both within our museum and beyond, we opted to restart our strategic planning process anew rather than pick up where we left off in 2020....We are beginning the project not with self-analysis but with listening.

it, and why it is important. We are sharing many of the same articles about strategic planning that we referenced in 2020.

But, for several reasons, we're not gathering the full board into one room for a six-hour retreat, as we did in 2020. First, requiring this full-board attendance is too cumbersome. Second, as a small museum, we ask a lot of our board members already. Expecting all of them to be closely involved in every aspect of the strategic planning process isn't realistic or productive. And third, making this a board-centered initiative leaves out so many other voices. We need our new plan to be inclusive on many levels. So, this time we formed a small committee of six people: four board members, the executive director, and the finance manager. The board vice president is leading the process.

Post-COVID Approach to Planning and Progress

We are beginning the project not with self-analysis but with listening. We have developed a list of constituencies that we want to involve in addition to board members and museum staff: museum members, other nonprofits in our region, educators, neighboring organizations, and that one easily overlooked group—children.

Methods for soliciting input from each group will vary. For some, such as other nonprofits and educators, we can speak one-on-one with individuals. For museum members and board members, we will use surveys, as we don't expect one or two individuals to speak on behalf of the much larger groups. Finally, for our little advisors, we plan to gather eight children, ages four to six and each accompanied by a caregiver, for the "meeting." Children will be invited to participate in hands-on activities based around some of the themes of the strategic planning process. For example, drawing activities will include prompts about what they like about the museum, what would make it more fun, what they love to play with at home, etc. We're saving this group for last because we want to have a pretty solid idea of where the strategic plan is headed before discussing it with the children.

The process will begin with a survey of our board members. Even though we plan to heavily rely on feedback and suggestions from people outside our organization, we want to assure all board members that, as the museum's leaders, their insights and ideas are highly valued.



Marc Str. O'nege

Data-Informed Decisions

We estimate that collecting information from all of our constituencies will take three months. Our committee will then review it and begin the work of selecting a few key areas of operations. Which areas need improvement? Where do opportunities for organizational growth exist? For each identified area, we will define a goal and identify manageable steps to achieve it.

For example, we foresee that diversifying our revenue sources will be a strategic priority, an ongoing effort since 2019. Progress has been made in increasing our contributed revenue, but there is still room for improvement.

As part of the strategic planning process, we will analyze the percentages of museum revenue that come from admissions, memberships, events, grants, individual contributions, etc. Goals will be set to increase the revenue in each targeted area through incremental steps for each year of the plan. Simple though this may sound, inherent in the process is all the foundational work that needs to go into boosting any one of these revenue sources.

Quality, Not Quantity

When it comes to measuring success, we know we need to look beyond numbers.

Though we are only at the beginning of our latest strategic planning process, we have already changed the thinking of the organization. What's happening in our community is just as important as what's happening inside our building.

Achieving goals like participating in regional events, creating new programmatic offerings, developing a new exhibit, or altering our staffing structure cannot be solely judge on numbers. Success might also be measured by qualitative feedback from both inside and outside the museum.

In order to track our progress, we will clearly define each goal and make it actionable. We want to be realistic in our expectations and acknowledge the incremental action steps needed to achieve them.


When the Plan is Done, Then What?

Once the plan is complete, one of two things can happen. It can collect digital dust on a hard-drive or it can become the guiding document for all major organizational decisions and operations. To assure the latter, our strategic plan will be a central part of, and a visible guiding document for, our museum leadership. Goals assessment will be incorporated into our regularly sched-

uled board meetings. Are we seeing progress? Do we need to adjust our outputs? We will keep our strategic planning committee active after the plan is complete to assess progress and report back to the full board.

With our new strategic plan in place, our biggest challenge will be balancing our efforts towards achieving our long-term goals and managing

our day-to-day operational requirements. Too much focus on one will negatively impact the other.

Though we are only at the beginning of our latest strategic planning process, we have already changed the thinking of the organization. What's happening in our community is just as important as what's happening inside our building. We're now firmly focused on the future, and our strategic plan will be the roadmap to get us there. 

Ray Radigan joined Amelia Park Children's Museum in Westfield, Massachusetts as the assistant director in 2018; he became the executive director in 2019. Susan Brady began volunteering at the museum in 2018; she joined the museum's board of directors in 2021.

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Why do some strategic plans move museums forward, while others sit on shelves or hard drives—or worse, become a nagging bone of contention for the board and/or staff? If everyone involved in developing and ultimately implementing the plan is not fully invested from the beginning, then it is doomed to follow one of the last two paths.

Where the Rubber Meets the Road: The People behind the Plan

Barbara Leggett

You've just finished your strategic plan. Are you excited for the new possibilities that lie ahead? Or feeling overwhelmed leaving a familiar path? Or the opposite, stuck in the same old rut?

Why do some strategic plans move museums forward, while others sit on shelves or hard drives—or worse, become a nagging bone of contention for the board and/or staff? If everyone involved in developing and ultimately implementing the plan is not fully invested from the beginning, then it is doomed to follow one of the last two paths.

The answer is simple: it's the people. But simple doesn't mean easy, and people—even one or two—can make or break both the creation and implementation of the most carefully thought-out plans and prevent them from coming to fruition.

What ensures that a plan will come to fruition? Honestly, nothing. We all saw that with COVID: the best laid plans...however, through, proactive consideration, we can avoid some crucial pitfalls that commonly occur in any group of people working on a project together:

1. People arguing
2. People people-pleasing
3. People shutting down
4. People making simple things complicated
5. People applying logic when we need emotion
6. People applying emotion when we need logic
7. People undermining the process
8. People trying to control the process
9. People actively resistant to change
10. People rushing the process
11. People wanting to be heroes and doing too much.

Everyone—staff, board, and outside facilitators—needs to pay attention to the people who are involved and invested in the

plan's success. If one or more of the behaviors listed above threatens to derail the process, leaders need to diplomatically identify it and realign the group dynamic. Most importantly, they need to diffuse these stress reactions as quickly and calmly as possible. Many times, that can be done by acknowledging what is happening and validating people's perspectives. Attention during the planning process in the present can prevent future problems.

Who Are You Working with and Why Are They There?

Several key components help nurture a productive strategic planning effort. The first is to become aware of—and openly acknowledge—that everyone involved in the process brings their own personal perspectives and agendas to the table. For example, the director of education may be more focused on serving the audience through programming, while the board treasurer may be focused on reducing expenses. Ideally, working together, both people will learn to accept that these concepts are not in conflict but when hitched to the same yoke can become a stronger collective goal of sustainable programming.

When we leverage a shared reality to strengthen the process, more honest and open discussions can happen. When unacknowledged motivations or behaviors are suspected to be manipulative or focused on internal politics, the process can become a nightmare.

Start by focusing on each team member's



From *The Joy of Leadership* by Tal Ben-Shahar
and Angus Ridgway

individual perspective as it contributes to the collective mindset. What do they see as important for the museum's future? What are their expectations going into planning? What matters most to them in the planning process? What do they see as potential pitfalls?

Buy-In or Purpose?

In my work leading people through change, I'm usually hoping for shared buy-in—that universally accepted phrase that suggests everyone is on board. But buy in, defined as agreeing to support a decision, seems to belittle the goal of getting everyone heading purposefully in the same direction with a sense of passion and commitment.

Start with the Why

Check out the work of Simon Sinek, author of *Start with the Why: How Great Leaders Inspire Everyone to Take Action*.

He also presents his ideas in the TEDX Talk of the same name

https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action

Sinek argues that great leaders and organizations focus on **WHY** they do what they do, instead of **WHAT** they do and **HOW** they do it.

Questions to ask:

- Are the strategic plan's mission, vision, values, and goals completed to date meaningful to the board and staff?
- Do the people involved in developing and implementing the plan understand why the museum exists?
- Do we all have some collective vision of our impact?
- Are our goals the right (meaningful) goals?

To get commitment, focus on a simple question: "What do our staff members need now to be successful, and how do we incorporate that into our strategic plan?" Five years ago, I probably would have asked, "What do we need to do to ensure that our museum is successful?" But people are still struggling to recover from the pandemic; the 2022 version of this question is more related to capacity building.

Reactions and Responses to Change

Everyone knows that we have experienced so much change over the past several years, and there is more to come. People react to change that is out of their control, that they perceive as negatively impacting them, or don't fully understand in several ways, including the following negative reactions, which are all stress responses.

- **Fight:** I'm going to argue, disagree, and make things difficult. How about if I stir the pot while I'm at it?
- **Flight:** I'm going to "quiet quit." How about if I just do the bare minimum and ignore everything else?
- **Freeze:** I'm not going to do anything. How about if I sit at the meetings, say nothing and look like a deer in headlights?
- **Fawn:** I'm going to please people. I'll listen to you all, one by one, nodding my head the whole time, just to make sure everyone is calm. How about if I get us all some chocolate?

The difference between negative reactions and productive responses is profound:

Reactions (quick, visceral, stress-based) come from "survival" perspective (and the parts of our brain associated with that survival). They are often based in judgment (this idea is good or bad, I like/hate this person, I trust/don't trust them).

Responses (thoughtful, creative, energized) come from the parts of our brain focused on executive function. They are based on discernment (I can see all the options, understand potential outcomes, and decide which I think is best). They can be made quickly, but are done so in a calm, almost detached way.

Eliciting productive responses starts with how potential changes and the rationales behind them are presented. Shifting someone from stress reactions to calm responses starts by listening to their questions, acknowledging and validating their perspective and adding it all to the discussion. We can't get authentic commitment from someone who is highly stressed.

When all the foundational work has been done at the beginning of the process, we can build on that knowledge, creating opportunities for people to say, "That goal might be too big for us," or "Who is going to do this extra work?" Everyone involved

Instead of "buy-in", let's consider purpose. Psychologists Tal Ben-Shahar and Angus Ridgway developed the chart on the previous page to define purpose in both work and life.

Now let's explore this chart in relation to strategic planning and implementation:

- **Purpose:** When people are working with purpose, the mission is deeply meaningful to them and they have a high level of commitment to doing the work needed to fulfill that mission.
- **Dreaming:** When people are dreaming, the mission is deeply meaningful, but they have a lower level of commitment to working hard on the goals.
- **Drifting:** When people are drifting, the mission holds little meaning and they are not committed to working on the goals.
- **Grinding:** When people are grinding, the mission holds little meaning, but they will work hard towards the goals set for them.

Meaning and Commitment

Every person involved in developing a strategic plan comes into the process with a different level of commitment and different perspectives on what meaningful work might be for this process. Some people might be dreaming, some drifting, some grinding. Only a few are working with purpose. Our initial step should start with honest conversations about the impact of our work. Early in the process we need to either enhance or create meaning for all of those involved.

By starting the planning process with a focus on meaning—why does our museum exist, what do we want our museum's impact to be—we can develop a shared language and vision. When people feel their perspectives and voices are truly heard and acknowledged in the process, they are more likely to be committed to working on the goals.

Focus on the People

To encourage change, we need to understand and focus on what motivates a person or system to go in a particular direction. Trying to push people or organizations might get short-term responses, but the effort is often counter-productive and can do long-term damage.

Some leaders recognize that starting with people—not goals—will ultimately lead to an organization's success. Without people, there is no work...

Some leaders recognize that starting with people—not goals—will ultimately lead to an organization's success. Without people, there is no work, which comes to my final point.

Put People First

Author and management consultant Peter Drucker once said, "Plans are only good intentions unless they immediately degenerate into hard work." According to Dictionary.com, degenerate means "to diminish in quality, especially from a former state of coherence, balance, integrity, etc." How do lofty ideals and ambitious goals degenerate into hard work? Over time, I mentally shifted "degenerate" to "re-generate" which means to re-create, reconstitute, or make over, especially in a better form or condition.

Translating a strategic plan's lofty ideals into achievable goals is hard work. For example, when I was director of Explore & More, one of the museum's strategic objectives was: "The museum will experience continuous and strategic growth." Working together with staff, we applied the broad goal into each individual staff member's

in the planning process needs to be able to think creatively and talk honestly about different goals, strategies, and tactics. A strategic plan created under these circumstances will have a much better chance of securing the commitments needed on the staff and board to implement it.

You Can't Push a Rope


When I was learning to sail, my dad used to say, "You can't push a rope." Ropes work best when pulled, not pushed, meaning I had to learn about wind and tides and how to work with both to get to where I wanted to go and not waste energy pushing against either one. At age eleven, I thought he was just talking about sailing but now I know better. Simply exerting force is ineffectual (like pushing a rope). I'm not suggesting we just wait for people to do the things they feel like doing, without assigning them work goals, ensuring they are meeting deadlines, and checking the quality of that work. To encourage change, we need to understand and focus on what motivates a person or system to go in a particular direction. Trying to push people or organizations might get short-term responses, but the effort is often counter-productive and can do long-term damage.

When implementing a new strategic plan, organizational leaders need to focus on inspiring and motivating people, alert to their connection to meaning and commitment. Each of us has different values, priorities, and things that are most meaningful to us. Our goal as leaders is to make sure that we enable and encourage people to find that meaning in the work that is assigned to them.

**Pushing leads to stress reactions
(and all those people problems).**

**Pulling leads to strategic responses
(and ultimately, success).**

work. We looked at everything, from new exhibits and programs, to increased income (earned and raised), to a structured volunteer program, to more donors and members, an expanded staffing structure, and greater media reach. Staff on all levels could clearly understand how this goal was more than just part of their work – it was their work. And the board gained clarity on how they could best support that work.

A well-designed strategic planning process that is meaningful to each person involved unites an organization in moving forward. That united vision – and a structure which puts people first – can make implementation easier – and ultimately more successful. When we put people first, the strategic plan becomes an inspiring road map to collective success. 

Barbara Leggett is a certified professional coach. Previously, she served for twenty-five years as the executive director of Explore & More in Buffalo, New York.

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Strategic Planning in the Age of Everything All at Once

Joy Bailey-Bryant, US Lord Cultural Resources

PRECIS: The impact of the ongoing global COVID-19 pandemic, the racial, social, and pay equity movements, and the resulting financial crises have forced changes to the ways that arts and culture organizations' boards, staff and stakeholders approach the strategic planning process...and the resulting strategic plan. Once considered a means to an end, the strategic planning process was primarily a trustee function geared toward achieving alignment among board members. Today, the process includes greater, more in-depth participation from staff on all levels, and close stakeholders.

WHAT: Strategic planning is an organizational tool used by corporations and nonprofit organizations, alike. In a nonprofit organization, the actual strategic plan is a document that identifies the goals or direction of the organization for a specific period of time—often three to five years. Plans are useful because they streamline efforts. They

identify clear goals and set forth a path to achieve or realize the them in the determined time. Each path identifies the tasks, responsibilities, necessary partners, timelines and costs. Metrics to evaluate or track the effectiveness of tasks are added to strategic plans early in the life-cycle of the plan for accurate tracking of progress or to identify a need to change course.

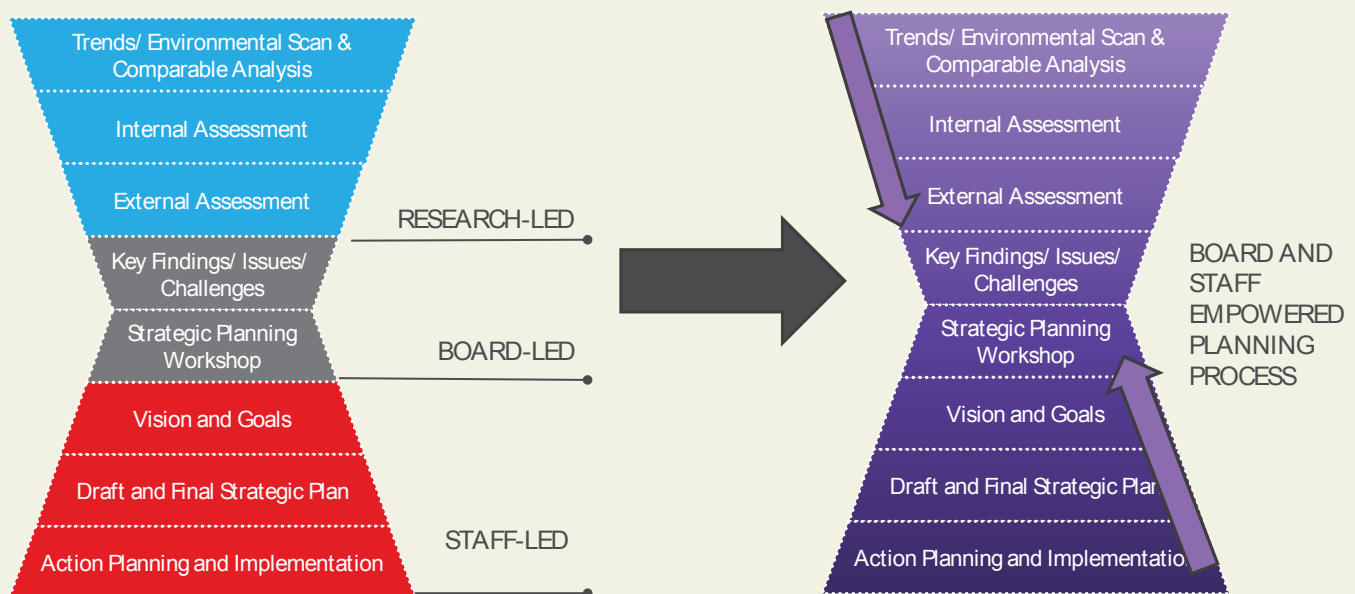
The strategic planning process has emerged as a focal-point of the success of the plan. A plan is only as good as its process and, of necessity, this process is changing. Because the process, more than the plan, creates an opportunity to build board and staff teams and camaraderie, especially in organizations with new leadership.

WHY: Public-serving arts and culture organizations—museums, gardens, libraries, parks, and affiliated organizations such as associations, serving them—have a mandate to show that they have a positive impact on their community. Strategic plans, broadly and

succinctly, give organizations a road map to communicate to communities—neighbors, supporters, users, audiences, organizational staff, and leaders—the outcomes they will achieve, who they will serve and, how they will do both responsibly and sustainably.

An evolving 'who': Strategic planning originated as a for-profit, corporate concept: a tool intended to outline revenue goals and efficient paths to achieve them. A small number of owners and investors would work together quickly to reach agreement on the revenue targets and the markets to be pursued. They even determined the systems needed to make the changes in a short period of time and immediately move to implementation.

In the nonprofit landscape, where social impact rather than excess revenue is the primary goal, the creation of a strategic plan requires many more voices to be effective. The "voices" include the communities identified by the organizations themselves, broadly in three categories; 1) communities of practice, those affected by the work of the organiza-



The diagram shows the way that the leadership of the strategic planning process is evolving from equal parts research, board- and staff-led to a mix, incorporating board, staff, research and even stakeholders in all parts of the process.

Following the changes spurred by the global pandemic, the voices, and volume to which they are heard, are changing even more. Traditional planning methods agreed that the people overseeing the operations of the organization—board members with fiduciary responsibility—are the most consulted and have the largest decision-making power. In the past three years, as many organizations relied on public dollars—payroll protection plans, shuttered venue funding and the like—for sheer survival the spotlight on public organizations of all types has increased.

tion, 2) geographic communities, physical areas designated by distances as small as a city block or as large as the globe, and 3) organizational staff and leadership.

Following the changes spurred by the global pandemic, the voices, and volume to which they are heard, are changing even more. Traditional planning methods agreed that the people overseeing the operations of the organization—board members with fiduciary responsibility—are the most consulted and have the largest decision-making power. In the past three years, as many organizations relied on public dollars—payroll protection plans, shuttered venue funding and the like—for sheer survival the spotlight on public organizations of all types has increased.

The diagram shows the way that the leadership of the strategic planning process is evolving from equal parts research, board- and staff-led to a mix, incorporating board, staff, research and even stakeholders in all parts of the process.

How the work gets done: In order to prove that they are worthy of public investment, arts and culture organizations recognized the need to address all of their communities more equitably. Today's communities demand that the staff of arts and culture organizations reflect the communities they serve and that workers are compensated equitably. This new focus has brought attention to staff in myriad ways.

Ironically, in many strategic planning processes, because of their corporate origins as an owner/investor function, one of the least heard voices is staff. Moving beyond listening sessions, this rapid change requires inclusion of staff in strategic planning in a more frequent and intentional way.

By allowing the strategic planning process to evolve beyond the board level, the entire organization—board, senior leadership, and all levels of staff—have better alignment, resulting from an understanding of differing perspectives and even a shared language.

For example, the Association of Children's Museums' (ACM) strategic planning process included a steering committee composed of board members and senior staff as well as a staff working group that shepherded the organization and the consultants in their work from the beginning of the process.

The result is a strategic plan focused on specific areas that must be addressed (increasing revenue, for example, towards the goal of sustainability) while expansive enough to harness new (appropriate) opportunities that may surface in the future.

Joy Bailey-Bryant is president of the US company of Lord Cultural Resources, a consulting firm dedicated to making the world a better place through arts and culture. Through the creation of strategic, business, facilities, and other plans, Lord works with artists, arts and cultural organizations, and their communities to plan for responsible, sustainable, and impactful change. Lord is proud to have facilitated ACM's strategic planning process to articulate its transformational new Strategic Plan for 2023-2028.



A New Chapter

Board Members Talk about ACM's New Strategic Plan

*When your dreams turn to dust,
vacuum.*

— Desmond Tutu, on resilience

Brenda Baker

*Madison Children's Museum
Madison, Wisconsin*

Putter Bert

*Kidsquest Children's Museum
Bellevue, Washington*

Crystal Bowyer

*National Children's Museum
Washington, DC*

Joe Cox

*Museum of Discovery & Science
Fort Lauderdale, Florida*

Tanya Durand

*Greentrike
Tacoma, Washington*

Felipa Peña

*Children's Museum of Brownsville
Brownsville, Texas*

On January 19, 2023, the Association of Children's Museums announced its new five-year (2023-2028) strategic plan. (For a complete copy of the plan, go to <https://childrensmuseums.org/about/>)

At its core, ACM's strategic plan for its future has four inter-related priorities:

1. Elevating the children's museum community.
2. Lifting up children and families.
3. Advancing the field through advocacy, policy, and research.
4. Strengthening the organization.

In addition, all the work in every priority will be evaluated through the two overarching lenses of diversity, equity, accessibility, and inclusion (DEAI), and environmental resiliency and regeneration.

With the new plan comes revised mission and vision statements to better encapsulate ACM's new strategic directions and to articulate the aspirational priorities, goals, and objectives of the organization.

Mission: We champion children's museums and together enrich the lives of children worldwide.

Vision: A world that prioritizes the rights of all children to playful learning and a healthy, safe, and equitable future.

In adopting this approach, ACM will not only continue but increase its decades-long emphasis on early learning through hands-on, interactive exhibits that stimulate curiosity and motivate learning as we promote the power of play to help children learn, grow, and thrive.

The organization and its members are poised to expand creative reach and influence beyond traditional boundaries to bring our values and knowledge to bear on the broader societal issues affecting young learners' social and educational development.

"Revisiting and re-envisioning ACM's strategic direction is integral to ensuring that our values align with the current and future needs of the field and our intention to do more to lift up children and families," shares Arthur G. Affleck, III, Executive Director of ACM. "Now more than ever children and families need quality and dependable places to experience hands-on, interactive, and playful learning experiences and exhibits to further their growth, development, and well-being. By sharing this strategic plan, ACM reaffirms our commitment to supporting the children's museum field and the children and families that we support together."

Beginning in April 2022, the ACM board, working with Affleck and guided by Lord Cultural Resources, spent months developing the plan. The resulting document reflects thousands of hours of group conversations, debates, informal feedback, survey reviews, and individual ruminations. The plan is done, but the work begins.

A group of board members was asked to think about the process just completed and offer their insights on how the plan came to be and what it means for ACM, for children's museums, and for the families and communities we serve.

HOW WOULD YOU DESCRIBE THE CURRENT CLIMATE OF ACM AND THE FIELD?

BAKER: I am feeling especially positive and enthusiastic about both. ACM has an ambitious new director, terrific leadership on staff and board, and the momentum to begin addressing social issues affecting the lives of children and families in more strategic ways. Our field has not only survived pandemic upheavals, but museums serving young children and families have found ways to experiment, rebound, and reinvent themselves, and create even greater impact in their communities.

BERT: Both the association and the field are climbing out of a COVID fog. ACM has been reinvigorated with new leadership. Last year, we worked hard to bring the membership together in an extensive planning process, and that bonding will benefit the field as we navigate under the new plan. The need for children's museums in our communities is more important than ever; our role is clearer now to parents, educators, city and town governments, and donors. We have found our "necessary."

BOWYER: ACM and the children's museum community feel very hopeful and ambitious right now. Our institutions went through a very difficult time during COVID, but like the young learners we serve, children's museums are resilient. Coming out the other side, children's museums, anchors

in their communities, are more appreciated for the vital role they play in the learning ecosystem and cultural landscape.

COX: Three years ago, children's museums changed forever. Our doors shuttered, we wondered whether they might ever again be filled with that happy hum of learning that defines our spaces. Using the same skills that we encourage in our visitors, both ACM and the field looked at the problem, tested ideas, came up with solutions, and flexed our creativity in ways that allowed us to stay engaged with our audiences.

ACM and the children's museum community feel very hopeful and ambitious right now. Our institutions went through a very difficult time during COVID, but like the young learners we serve, children's museums are resilient.

—Crystal Bowyer
National Children's Museum



Jessica Caso Photography

Our doors have re-opened, and both ACM and children's museums have emerged more dedicated than ever to serving our communities. Attendance numbers have soared as our visitors return to the places they love.

DURAND: Energized and focused! We're back, and we're back with purpose. The pandemic taught us lessons about operations, audience needs and wants, and how to care for our teams in new and important ways. Children's museum directors focused on harnessing play's power to help families care for and educate their children during lockdown. Most of us discovered new purpose and relevancy in our communities. Taking the field's lead, ACM is leaning into work that will have monumental impacts on children and families, especially important as we help young children and families navigate their post-COVID struggles.

PEÑA: Resilient and adaptable. During the past few pandemic years, the association and the field as a whole have shown a strong ability to navigate significant challenges and come out even stronger. Despite the changes and disruptions that have occurred, we remain united in our dedication to our collective mission, and we continue to support one another through the strong relationships that have been formed during this time. We are determined to continue to move forward and make a positive impact on the communities we serve.

PRIORITIES & LENSES

Board members weigh in on why each of the four new plan priorities is important for the field and how each one will affect ACM's work.



Priority 1 Elevating the children's museum community

BERT: Both the lenses and the priorities connect us as a field—in conversations, in partnerships, and frankly for joint funding opportunities. Power and purpose!

Priority 2 Lifting up children and families

DURAND: I love the famous Mike Spock quote that children's museums are "for somebody, not about something." We have a fundamental responsibility to support parents in the important work of raising children and to give voice and agency to

those children. Many of our young visitors can't verbalize their thoughts and needs, but we can understand them if we pay attention. However, amplifying a community's hopes must be infused with action. Rather than barraging families with "you should" messages about how to raise their children, children's museums can share what they learn from parents and children and start spreading "you should" messages to the adults who control the systems and policies that surround children and families. This effort will deepen the trust and connection families have with children's museums, and in turn, elevate the role of our institutions in our communities.

WHERE DO YOU THINK THIS NEW STRATEGIC PLAN WILL LEAD ACM? WHAT TOOLS WILL BE USED TO ENSURE ITS IMPLEMENTATION?

BAKER: The new plan provides a road map to ensure greater transparency for the organization, a more inclusive approach to supporting children's museums across the globe, and an outline of our commitment to champion the issues that most affect children and families now and into the future. ACM's new mission and vision statements recenter our work on audiences by recognizing the needs of diverse children and families in a rapidly changing climate.

The board will monitor oversight of the plan's vision while supporting its implementation, but ACM staff is developing the tools and strategies to make it come to life, ensuring that each part has measurable outcomes.

BERT: We asked ourselves over and over, where does ACM want to go, how do we support children's museums and stop apologizing for the play and informal learning we champion? Children are not our future, they are our now. Continuing to engage the field beyond the board and staff will be a must if we are to achieve the goals we have identified. But this plan feels positive, more grounded in building on the work children's museums are already doing and not just what we *should* be doing.

BOWYER: The children's museum community is incredibly collaborative and supportive of one another. This strategic plan capitalizes on those strengths to elevate the field as a whole and position ACM as a conduit for idea sharing and collective action that will amplify our work.

The plan is being shared widely with members (and beyond) so that we can support the implementation and help hold each other accountable. People in children's museums are scrappy, hardworking community

ACM understands that the science is settled on climate change and that we have a responsibility to take action and make changes. Institutions serving children, who will be affected physically and mentally by climate change events at rates far higher than adults, have an even greater responsibility in this effort.

—Brenda Baker
Madison Children's Museum



servants. We have done tremendous work with limited resources. These new initiatives will help expand our impact by providing access to more tools and opportunities.

COX: As we developed the new plan, we considered the many challenges that face young learners and their families. From climate change and gun violence to learning loss caused by the pandemic, families are increasingly dealing with issues of living in a troubled world. ACM is committing to support our communities even more and to help children and families by immersing them in the intellectual and social-emotional learning opportunities offered by our museums.

To achieve our goals, we will align ourselves with partners and supporters who share our vision of a world that prioritizes the rights of all children to playful learning, and a healthy, safe, and equitable future.

DURAND: I hope ACM's new strategic plan will change the way we care for and educate young children, putting play and inquiry-based learning at the center. This will require research, partnership, and advocacy—all embedded in the new plan. With so much research, including the work of Dr. Kathy Hirsh Pasek, on the efficacy of play-based approaches to learning, our case will be strong, but we must find like-minded partners and join forces to advocate at all levels—local, state and national—for education reform. This is a social justice issue.

Priority 3 Advancing the field through advocacy, policy, and research

BOWYER: For years, children's museums have not had the same government support opportunities as other cultural institutions. Through advocacy, policy, and research, we plan to ensure children's museums are well-recognized as leaders in the arts and culture world and important contributors to children's education and early childhood development. By championing the value of play-based, hands-on learning, as well as the importance of an early emphasis on STEAM education, we'll open new doors for the field.

Priority 4 Strengthening the organization

COX: Our plan is ambitious, and challenges abound. To achieve our goals, we need to create a sustainable organization by strengthening ACM's infrastructure—our people and our processes. Through new strategic partnerships and an enhanced culture of philanthropy, the association will attract the critical resources needed to support and strengthen our diverse membership and communities.

Lens 1 Environmental resiliency and regeneration

BAKER: ACM understands that the science is settled on climate change and that we have a responsibility to take action and make changes. Institutions serving children, who will be affected physically and mentally by climate change events at rates far higher than adults, have an even greater responsibility in this effort.

With our new strategic lens, we are calling on our field to find new ways to create a regenerative future, one that values sustaining life on earth. This is more than simply doing more recycling or making our offices paperless, but taking the time to reflect on how we can live and work differently in ways

PEÑA: The new strategic plan, poised to take the association to new heights by focusing on key areas essential to our mission, will help us to better understand and serve the needs of our community, give a stronger voice to children and families, and advocate for the field as a whole. Additionally, by strengthening the organization's core, we will be better equipped to achieve our goals and make a lasting impact.

Implementing this plan will require a comprehensive approach and the use of a variety of tools—data collection and analysis, stakeholder engagement, and ongoing monitoring and evaluation—to ensure that we stay on track and achieve our objectives. The strategy also puts emphasis on building a strong collective voice, so that we can show the importance of our association and its impact on the community.

WAS THERE ANYTHING DIFFERENT ABOUT THIS PLANNING PROCESS FROM OTHERS YOU HAVE BEEN INVOLVED WITH?

BAKER: The board took extra time to examine the organization's mission and vision at the start of the process, and then revised both statements to more closely align with the reason children's museums, and ACM, exist in the first place. Both statements get to the “why” of children's museums, and address the fact that our museums are about far more than learning through play.

Our doors have re-opened, and both ACM and children's museums have emerged more dedicated than ever to serving our communities. Attendance numbers have soared as our visitors return to the places they love.

—Joe Cox
Museum of Discovery and Science

BERT: The ACM board is not a shy bunch! We asked ourselves hard questions and started all over again if need be. We wanted to change the old ways of doing things and not just think differently, but completely reframe the questions and strategies.

BOWYER: The strategic planning firm did a great job benchmarking other associations and the field in general to identify needs. The varied perspectives of the board members, representing museums of all sizes and from all parts of the country sparked robust dialogue. Children's museum leaders from around the world were also engaged in the development process during InterActivity. All of this groundwork resulted in a well-balanced strategic plan.



PRIORITIES & LENSES

that have net positive outcomes for children and the planet. This lens repositions our work with an eye toward not stealing the future from children, but healing their futures.

The American Academy of Pediatrics issued a policy statement warning that climate change poses threats to “children's mental and physical health,” and that “failure to take prompt, substantive action would be an act of injustice to all children.” We cannot continue with business as usual. Current research shows that 87 percent of the museum-going public wants museums to educate and act on change. Our audiences want more from us.

Lens 2 Diversity, equity, accessibility, and inclusion (DEAI)

PEÑA: ACM strives to support diverse communities, and it is crucial that we all continuously learn how to better foster inclusive environments and create more inclusive and equitable institutions around the world. By incorporating DEAI into all aspects of our organization, from hiring practices to board membership, we are conveying the value and importance of this mindset to our members and strengthening the association as a whole.

WHAT'S THE DIFFERENCE BETWEEN A PRIORITY AND A LENS, AND HOW WILL THEY ALL WORK TOGETHER IN THE PLAN'S IMPLEMENTATION?

BAKER: Priorities outline the strategic objectives; lenses inform the methods employed to achieve them. For example, using both lenses, fulfilling a priority #1 objective—serve as a convenor to the field about issues affecting children and families—would mean that all convenings are inclusive and welcoming, and that ACM works to increase the diversity of those attending, while also reducing the environmental impact, perhaps making them regional or virtual, in order to decrease carbon emissions.

COX: In a world dealing with issues from climate change and mental health crises to food insecurity and an awareness of the importance of addressing DEAI, this strategic planning process had to be different. While children's museums will always emphasize early learning and the power of being in spaces where families play, learn, and dream, our broad engagement with the field during the process supported our belief that we had to also address the fact that the pandemic laid bare many deficiencies in our society.

DURAND: This was the fastest and most inclusive process I've ever seen. When Arthur started at ACM a year ago, we set the ambitious goal to get the plan done in one year, and we did it. We were able to leverage opportunities, including the CEO forum at InterActivity in St. Louis, to include many thoughts and voices. Aggregate input validated our ambition to take ACM's purpose beyond the care and feeding of children's museums to the critical role we all play in the development of our children.

PEÑA: Elements such as data collection, presentation of findings, and support for the development of the plan were consistent with previous planning processes. However, each planning process is unique and bring its own set of challenges and learning opportunities.



Jason Dixon Photography

We asked ourselves over and over, where does ACM want to go, how do we support children's museums and stop apologizing for the play and informal learning we champion?

Children are not our future, they are our now.

Continuing to engage the field beyond the board and staff will be a must if we are to achieve the goals we have identified. But this plan feels positive, more grounded in building on the work children's museums are already doing and not just what we should be doing.

—Putter Bert
Kidsquest Children's Museum

PEÑA: Our lenses are the important beliefs and resonating ideologies that will help shape and strengthen our approach to advancing our priorities.

COX: As we worked with internal and external stakeholders to develop the strategic plan it became clear that while each priority could be clearly defined, there were two themes that had to be woven into each one, to strengthen the entire plan. These themes, or lenses—DEAI and environmental resiliency and regeneration—will influence each decision made by our association, from hiring practices and governance conversations to planning InterActivity. We will amplify our work of inclusivity, and work with our community to create a regenerative future for our children.

BOWYER: Every aspect of our work included under the plan's priorities will be infused with both lenses, each vital to a child's healthy development.

