White Paper: Developing a Strategic Plan for SPNHC

Long Range Planning Committee, May 2011[1]

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Introduction

The mission of SPNHC is described as:

"Improving preservation, conservation, accessibility and management of natural history collections to ensure their continuing value to society"

A strategic plan for the Society should address the question of how do we do this, expressing the answers as a series of short, medium, and long term goals.

The Scope of SPNHC Activities

Arguably there are three areas in which SPNHC should be active.

Promoting best practices

Best practices are methods, processes, and techniques that have consistently shown results superior to those achieved with other means, and which are used as benchmarks to strive for. Best practices are most effective when developed by the community, communicated widely, promoted through training, and subject to regular review and revision. Best practices are critical to ensuring the long-term preservation and conservation of natural history collections, and to providing efficient and effective strategies for their use and management.

Improving Accessibility

The value of collections to society can only be realized through use and access. Use can encompass academic research in the sciences, arts, and humanities; education, including kindergarten to graduate, postgraduate training, and life-long learning; or simple entertainment via museums. Access can be either physical, through collection visits, loans, or exhibits; or virtual, encompassing on-line access to specimen images and data.

Advocacy

The ongoing health of collections is dependent on society's recognition of their value provisioned through sufficient public funds to ensure long-term preservation, continuing maintenance, and a level of accessibility that meets the needs of society. Advocacy can be general, through promotion and outreach, or focused, through direct interaction with legislative and other decision-making bodies on specific issues.

Our strategic plan needs to consider how the Society can best go about addressing these functions.

SWOT Analysis

A SWOT analysis is a strategic planning method used to evaluate the **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats involved in a project or in a business venture. It involves specifying the objective of the business venture or project and identifying the internal and external factors that are favorable and unfavorable to achieve that objective.

Strengths

Characteristics of SPNHC that give it an advantage in pursuing its long term goals.

- Membership: we have a diverse international membership, highly committed, with a wide range of expertise covering collections management, conservation, curation, and research.

- Knowledge Base: collectively our membership represents an enormous knowledge base for training, education, policy formulation, etc.

- Meetings: our well-established program of annual meetings provides us with a focus for community building and a platform for disseminating best practices and other information.

- Publications: we have the only peer-reviewed journal devoted to the field of natural history collections care, a substantial bi-annual newsletter, and a well-regarded and growing catalogue of reference books.

Weaknesses

Characteristics of SPNHC that place the Society at a disadvantage in achieving its goals.

- Time: as a volunteer society, our members have limited time available to devote to SPNHC activities. This negatively impacts our ability to achieve ambitious goals in timely manner.

- Finances: the Society has only limited financial reserves, which restricts our ability to take on new initiatives.

- Perception: we are still seen in certain quarters as a society of workers rather than leaders. This may adversely impact our ability to be effective advocates for policy changes at the highest levels.

- North American dominance: our claims to be an international society are weakened by the fact that 67% of our members come from the USA or Canada.

- Overlaps with other societies: many potential SPNHC members define themselves by disciplinary specialization or only belong to a more general organization (e.g., AAM), reducing our potential pool of members.

Opportunities

External chances for SPNHC to advance its goals

- Social Networking: the development of technologies like blogs, Facebook, Twitter, etc provides us with opportunities to reach out to new audiences.

- Collections Digitization: national and international efforts in collections digitization have the potential to massively increase the accessibility and utility of collections.

- International Interest: successful meetings held in the UK and the Netherlands have raised the international profile of the society and attracted considerable interest.

- Heightened Profile: SPNHC participation in U.S. and Canadian digitization efforts, the Global Biodiversity Information Facility, and in the SciColl initiative has raised our profile with policy-making and funding bodies both nationally and internationally.

Threats

External elements in our working environment that could prevent SPNHC achieving its goals

- Financial: worldwide financial retrenchment in recent years has led to huge cuts in public services, including support for museums and universities and the availability of funds for members to attend our meetings.

- Political: -Collections can be seen as relatively non-essential, especially if associated with issues (climate change, conservation, evolution) that have a political dimension that is controversial.

- Digitization: Could divert scarce resources away from care of physical collections.

A Strategic Plan for SPNHC

Ideally a strategic plan for the Society would strengthen SPNHC by matching our strengths to existing opportunities and find ways to convert our weaknesses into strengths and the threats into opportunities. In cases where the threats or weaknesses cannot be converted, we should develop strategies that minimize or avoid them.

1) Matching Strengths with Opportunities

Best Practices

Draw on the knowledge base represented by our membership. Utilize existing mechanisms of dissemination – our publications and the website – and develop new ones based around social networking technologies. Develop training and mentorship programs that help to spread knowledge globally and use these as a tool to expand the Society's international membership. Build on existing levels of international interest by regularly holding meetings outside North America. Because best practices are most effective when developed by, and applied to, the widest possible community, use the breadth of our membership as a tool to

build collaboration with other stakeholders, including collection users and relevant professional societies (AIC, AAM, discipline-specific societies). Rather than reinventing the wheel, embrace what has already been done by others and work collaboratively to improve.

Accessibility

Support and participate in national and international initiatives aimed at improving collections accessibility on-line (GBIF, ADBC, SciColl) and the development of metadata standards to improve interoperability (Darwin Core, NCD, TDWG) and publicize these through our meetings and publications. Develop best practices for collections digitization and training resources, including workshops. Promote and publicize efforts that lead to improved physical accessibility, including innovative uses. Collaborate with other stakeholders (GBIF, TDWG) to ensure the most effective use of our resources.

Advocacy

Develop resources for collections advocacy that make use of the breadth and accumulated knowledge of our membership. Use SPNHC's existing suite of publications and emerging networking technologies to publicize these resources. Use opportunities presented by large-scale programs (e.g. collections digitization, Museums Count) to engage directly with funding bodies and raise the profile of the Society. Develop a press office or partner with other like-minded organizations to publicize stories relating to collections. Develop active partnerships with other collections stakeholders (AAM, AIC, NSCA/AIBS, discipline-based societies, ICOM-CC) for more effective lobbying.

2) <u>Weakness and Threat Conversion</u>

Perception: the diversity of our membership, which includes not only senior administrators and curators, but also front-line staff, students, and volunteers, gives us a "real world" perspective that other societies lack. Our expertise runs the full range, from hands-on collections care to strategic planning and policy formulation; and not just in North America. This should be stressed in the promotional material for the Society and in our public presentations – we can speak with unmatched authority on collections issues.

Overlaps with other societies: the overlaps between SPNHC and discipline-based societies open up opportunities for collaborative efforts that benefit both parties. They also significantly increase SPNHC's ability to reach a wider audience of interested parties, improving our effectiveness as collections advocates. Instead of trying to increase our membership at the expense of other societies, we should find ways to share members (e.g. through bundled membership packages).

Financial: in times of financial retrenchment, there is an even greater need for best practices that allow more efficient use of scarce resources. SPNHC should be seen as a source of solutions, e.g. for the problem of orphaned collections. SPNHC can leverage the resources of its membership to provide cost-effective training and training resources for collections staff

and travel grants to enable student participation in meetings. [write grants on behalf of the Society to take burden of our own resources; we really need to start doing this...]

Political: the flipside of hostile political attention is that it provides an opportunity for more outreach to policy makers. SPNHC can develop resources that show how collections contribute to wealth and job creation, education, public health, and national security. Once again, the Society should look to its existing publications and to new media to disseminate this information as widely as possible and should partner with other collections stakeholders to do so.

Digitization: well-curated, accessible collections and knowledgeable collections staff are essential for rapid digitization. The development of large-scale digitization initiatives provides SPNHC with an opportunity to re-state the necessity for investment in physical collections.

2) Weakness and Threat Minimization/Avoidance

Time: one way to reduce the burden on members is to increase the number of members that are actively participating in the running of the Society. SPNHC should consider ways of doing this. Another option would be to focus the scope of the Society's activities in specific areas with well-defined targets. Consideration should be given to the economics of paying for office support for a number of critical areas of the Society's operations..

Finances: better financial planning, including investments, marketing, and setting realistic targets in the strategic plan could enable the Society to make better use of its resources. Increasing the membership of SPNHC is another area that would need to be carefully considered in the development of a strategic plan, as is the potential for obtaining grant funding to support projects.

Process

For a strategic plan to be effective, it has to be embraced at all levels of the Society. This White Paper is intended to act as a stimulus for discussion that will take place within:

1) the SPNHC Executive

2) the Society's Council

3) Standing Committees

It is also important that the Society's membership have the opportunity to study the White Paper and make comments. For this reason, we envisage an open planning process that will make extensive use of social networking technology.

Outline Timetable

1) Draft White Paper is discussed within LRP Committee at 2011 Meeting. Comments are incorporated into final White Paper

2) White Paper is circulated to SPNHC Council for comment. Committee Chairs are asked for comments about how they see the White Paper impacting their committee goals and operation.

3) White Paper is posted on a dedicated blog site and circulated via the SPNHC Newsletter. Comments are invited from the Society's membership (can be made on-line or emailed directly to LRP Chair)

4) LRP uses comments and White Paper to develop framework for Strategic Plan, including short (2 year), medium (5 year), and long term (10 year) goals

5) Framework document circulated to SPNHC Council

6) Standing Committees consider how existing committee activities may address strategic goals, what new activities need to be undertaken, and the funds that will be required to support this work program

7) Standing Committees send LRP a summary of their proposed activities under the plan, expressed in terms of short, medium, and long term goals and with an outline budget for the work program.

8) LRP incorporates Standing Committee submissions into draft Strategic Plan. Draft plan is circulated to SPNHC Exec for comment.

9) Draft plan plus budget is sent to Finance Committee for comment on financial sustainability of Plan. If necessary, the plan is sent back to Standing Committees for revision of budgets.

10) Draft Plan is circulated to SPNHC Council and posted on blog-based site for membership comments.

11) LRP combines comments, revised goals, budgets, etc. into final Strategic Plan.

12) Plan is approved by Council. Committees are formally tasked with activities set out in the Plan. If necessary, sessional committees are set up and tasked with areas requiring more intensive/focused activity. Plan is published in SPNHC Newsletter and posted to SPNHC website.

13) Plan is reviewed by LRP on an annual basis, with major reviews at 4 and 8 years.