



**SPNHC**

ADVANCING COLLECTIONS CARE

**Society for the Preservation of Natural History Collections  
(SPNHC)**

# **Strategic Plan**

January 2013

## **Introduction**

The Society for the Preservation of Natural History Collections (SPNHC) is an international society whose mission is to improve the preservation, conservation and management of natural history collections to ensure their continuing value to society. The purpose of SPNHC is to:

- Provide for and maintain an international association of persons who study and care for natural history collections. SPNHC also facilitates cooperation between the natural history collections community and its stakeholders in technical, professional, governmental, and non-governmental organizations.
- Promote research and training on best practices in the preservation, storage, study, and educational usage of natural history collections. SPNHC seeks to recognize and reward contributions to our understanding of natural history collections care.
- Publish a professional journal and encourage the dissemination of information about natural history collections. SPNHC publishes technical materials related to natural history collections, including a peer-reviewed journal, *Collection Forum*; semi-annual newsletters; technical leaflets; best-practice guides; and reference books.
- Hold annual meetings and sponsor symposia and workshops to foster the exchange of ideas and information

SPNHC was created in 1985 to “meet the concerns of a growing number of individuals involved with the development, management, and care of natural history collections.” The bylaws of the society were originally drafted in 1988 and comprehensively revised in 1994. Leadership of the Society is provided by its Council, with a voting membership made up of six officers (President, President-Elect, Past President, Treasurer, Secretary and Managing Editor) and 6 Members-at-Large.

Operational tasks are undertaken by Standing and Sessional Committees. The structure of the Society’s committees has been revised on a number of occasions, when it has become apparent that various services and functions were being duplicated or overlooked. As of 2012, 16 standing committees (Archives, Best Practices, Bylaws, Conference, Conservation, Documentation, Elections, Executive, Finance, Legislation and Regulations, Long Range Planning, Membership, Professional Development, Publications, Recognition and Grants and Web) continue the work of the Society. A Sessional Committee has recently been tasked with again, reviewing this committee structure.

SPNHC has, from the outset, been collaborative in nature, with individuals and committees working with other organizations, societies, agencies and national “umbrella” organizations to develop content of broad appeal and support its membership. After 27 years of existence, the Society continues to be unique among natural history professional organizations, because of its international scope and multidisciplinary approach to collections management and care.

From humble beginnings, with an initial meeting of six individuals, the Society has grown in both membership and international representation. The most recent meeting held at the Yale Peabody Museum in New Haven, CT (our 27<sup>th</sup>) elicited our highest attendance figures to date - 429 attendees from 14 countries with 105 oral presentations and 47

poster presentations. The Society now has over 590 members, drawn from approximately 270 institutions in 25 countries.

With success comes new challenges and in 2011 the Society's Long Range Planning Sessional Committee was charged with articulating a new Strategic vision for the Society – to address the question of how we will fulfill our mission over the next 5 years, in terms of short, medium and long term goals.

## **Process**

In 2011, the Long Range Planning Committee published a White Paper on strategic planning (Appendix 1). This paper identified three main areas where SPNHC should be active (promoting best practices, improving accessibility, and advocacy). It discussed the strengths and weaknesses of the Society in addressing these areas, and the opportunities and threats that we were likely to face over the next 5 years. Finally, the White Paper set out a timetable for completion of the plan.

In February of 2012, a two-day strategic planning meeting was held in New Haven, Connecticut, involving chairs of committees and representatives from Council and the Long Range Planning Committee. Based on these discussions, a Framework Strategic Plan was drafted in April 2012 and circulated to Committees for consultation and comment. The Framework document was also presented to the Society's membership at the 2012 Annual Business Meeting in June.

The Framework Plan formed the basis of the final Strategic Plan, which was drafted in July/August of 2012.

## **Plan**

The SPNHC Strategic Plan envisages four main goals for the Society

- To show leadership
- To communicate
- To provide value for money
- To work internationally

Within each of these goals, there are a series of objectives, set out in terms of short (1-2 years), medium (3-5 years), or long term (5 year plus) actions. These are set out in detail over the following pages.

# **Show leadership in defining and developing the profession of natural history collections care.**

## **1. Become a leader in Professional Development**

### **(a) Within our Society**

Develop within the Society an active pool of potential leaders for Council and Committees; identify talented individuals within the Society and promote their development, benefitting themselves, SPNHC, and the wider natural history collections community.

- Short term: develop a strategy to help identify potential leaders within SPNHC. Develop the Fitzgerald Grant scheme as a vehicle for supporting and promoting future leaders.
- Medium term: introduce term limits for committee membership to encourage turnover and create opportunities for new members. Improve advertisement of opportunities for committee membership and executive positions.
- Long term: work with local organizing committees to increase visibility of committees at the annual meeting and improve attendance by all members of the Society.

### **(b) Within our Community**

Take an active role in developing training resources and opportunities for professional development within the natural history collections community.

- Short term: secure the future of the Fitzgerald Grant scheme through sponsorship. Explore the possibility of developing a Future Collections Leaders course. Develop a plan for a professional mentorship scheme, with supporting infrastructure of regional nodes.
- Medium term: develop a business model for the production of training resources by SPNHC. Implement professional mentorship scheme.
- Long term: implement regional nodes. Offer training packages in selected areas.

## **2. Increase Professionalism**

### **(a) Within our Society**

Work efficiently, increase the professional capacity of the society and present a professional face to the community.

- Short term: review the report of the Sessional Committee on Publicity & Outreach for outstanding actions. Review and improve website content and plan for Phase 2 of website development. Review the governance of the Society in the light of the strategic plan and make recommendations regarding committee structure.
- Medium term: implement structural changes arising from the governance review.

- Long term: implement Phase 2 of website development, including regional node features.

(b) Within our Community

Build on the reputation established by SPNHC to secure our position as the authoritative voice on matters relating to the care and use of natural history collections.

- Short term: develop a topic-based schedule for review and publishing best practices in collections care, along with web-based infrastructure for comment and dissemination. Review existing Masters Courses in taxonomy, etc., for collections content and review opportunities for module, course, or workshop development.
- Medium term: build strategic partnerships with other stakeholders in the natural history collections community, e.g. production of training resources. Develop and promote a distinguished speaker program for museum studies and other courses.
- Long term: launch selected training courses in partnership with other stakeholders aimed at educating the next generation of collections users (e.g. in systematics and organismal biology).

# **Communicate the activities of the Society to its membership, stakeholders, and the general public**

## **1. Make effective use of technology**

### **(a) Enhance the role of NHCOLL-L as a tool for recruitment and communication**

Increase the overlap between NHCOLL-L subscribers and SPNHC members, recruiting new members into the Society while at the same time improving the Society's ability to communicate with its members via NHCOLL-L.

- Short term: improve functionality of NHCOLL-L. Heighten profile of Society in posts and send out monthly recruitment emails. Monitor progress in increasing overlap.
- Medium term: review progress and revise strategy as appropriate.

### **(b) Realize the full potential of the SPNHC website**

Develop the Society's website to better support the long-term goals of SPNHC, including delivery of best practices information, support of the mentorship program, international outreach, and reduction of administrative costs.

- Short term: expand and enhance basic web content for members. Plan development and implementation of Phase 2 of website development. Store and deliver material generated from annual meetings.
- Medium term: develop regional nodes with targeted web content. Enhance existing on-line member directory for use as a communication tool. Turn the directory into a knowledge base.
- Long term: Based on funding availability (or lack thereof), some of medium term goals may become long term.

### **(c) Make use of social networking technologies**

Harness the potential of the explosion in use of social networking technologies to find new ways to engage with SPNHC members and the wider public.

- Short term: carry out a cost-benefit review of the options for social networking. Implement as appropriate
- Medium term: explore the possibility of incorporating interactive functionality into Phase 2 of the SPNHC website.
- Long term: review and revise as necessary, especially given emerging technologies.

## **2. Use the Society's publications as an outreach mechanism**

### **(a) Shift to e-publication**

Improve the ability of the community to access and search SPNHC publications on-line, while reducing the costs of production and distribution.

- Short term: review production and distribution expenses and produce a cost-based model for e-publication with POD options. Explore options for Kindle and other e-based formats for SPNHC reference books.
- Medium term: calculate and implement revised dues scale based on POD versus electronic-only options. Incorporate electronic publication options into planning of future book projects. Add Collection Forum to BioOne.

### **(b) Make the Newsletter and Collection Forum into tools for outreach**

Capitalize on the success of Collection Forum and the SPNHC Newsletter to improve SPNHC's reach and impact on stakeholder communities.

- Short-term: review options for member/non-member access to publications through the SPNHC website. Incorporate proposed changes into planning for Phase 2 of website. Explore potential for generating impact ratings for Collection Forum.
- Medium term: expand the scope of SPNHC publications to encompass a wider range of topics in collections care and museums (i.e. beyond just natural history) and advertise this to relevant communities.

## **3. Make better use of SPNHC meetings as a showcase for the Society**

### **(a) Grow the Society's annual meetings**

Build on the established success and high community profile of the Society's annual meeting by increasing attendance and attracting stakeholders from related professional communities.

- Short term: develop a plan to increase meeting attendance and work more closely with local organizing committees to implement this. Hold more joint meetings, targeted at particular societies and coordinated with SPNHC's professional outreach activities.
- Medium term: explore the potential for regional meetings at all levels (nationally, internationally).

### **(b) Provide more time and exposure for the Society's programs**

Make better use of SPNHC meetings as a platform to publicize the activities of the Society and the natural history collections community.

- Short term: work with local organizing committees to create meeting themes that address issues of wide community concern and programs that give exposure to SPNHC initiatives.

Explore ways of attracting press coverage. Develop the website as a tool to disseminate meeting outputs.

#### **4. Use professional development as an opportunity for outreach**

##### **(a) Offer a program of SPNHC-branded training resources**

Develop a coordinated approach to the produce of training materials that highlights the leadership role of the Society in developing and promoting best practices.

- Short term: review the marketing of SPNHC publications to museum studies courses and other training venues. Reflect the needs of course organizers in putting together a plan for future publications.
- Medium term: consider options for development and marketing of courses and workshops by SPNHC. Develop a business model for training through SPNHC. Provide one-off resources for course organizers, including a distinguished speaker program.
- Long term: offer training opportunities in selected pilot areas. Review cost versus benefit and consider expansion if appropriate.

##### **(b) Leverage mentorship as an outreach opportunity**

Exploit synergies with SPNHC's leadership goals to strengthen the Society's program of outreach.

- Short term: enlist Fitzgerald recipients as "ambassadors" for the Society through publication and involvement in new member outreach. Develop model for SPNHC involvement in grant-funded/project based internships.
- Medium term: implement professional mentorship scheme and regional nodes. Use mentorship participants to build regional SPNHC membership and lead local outreach efforts.

#### **5. Improve Networking**

##### **(a) Within our Society**

Make it easier for SPNHC members to make professional connections and establish fruitful collaborations.

- Short term: review annual meeting programs and work with LOCs to improve opportunities for networking. Establish Wiki sites.
- Medium term: enhance existing on-line member directory for use as a communication tool. Turn the directory into a knowledge base.

##### **(b) With other societies**

Reach out to discipline-based professional societies to promote best practices, attract new members, and raise the profile of SPNHC.



- Short term: develop 5-year schedule and budget for conference booth and promotional materials, based on a review of opportunities for offering Best Practice sessions at meetings. Work with local organizing committees to identify opportunities and partners for joint meetings.
- Medium term: explore options for bundled membership packages with other societies.
- Long term: launch of first bundled membership schemes.

(c) With stakeholder organizations

Strengthen SPNHC's partnerships with other organizations active in the field of museums and collections care.

- Short term: review existing relationships and identify opportunities to expand/strengthen. Explore and develop partnerships with museum studies and other courses
- Medium term: build international partnerships with other organizations. Review sponsor/donor relationships as part of overall review of development.

(d) As an advocate for collections

Improve the Society's ability to pursue advocacy in the areas of collections care and use, both generally and on specific issues.

- Short term: Identify potential barriers or restrictions on advocacy. Review relationships with other organizations having an advocacy mandate (e.g. AIBS, NSCA). Develop a coordinated public relations strategy for the Society. Identify key members of Council to Horizon Scan for potential upcoming issues.

# **Make the most efficient possible use of the Society's financial resources in order to support the wider goals of SPNHC, while providing value for money for our members.**

## **1. Optimize the Society's revenue stream**

### **(a) Increase funding available from membership dues**

Set membership dues that better reflect the aims of the Society, the services provided to members, and professional societies in associated fields, while continuing to ensure value for money and not placing an undue burden on members. Increase membership through improved outreach, recruitment and retention.

- Short term: implement the recommendation of the P&O Sessional Committee to increase individual member dues. Develop a long-range plan for scaled increases in dues based on membership benefits and Society deliverables. Increase membership through targeted outreach. Continue and expand on student/new member events at annual meetings.
- Medium term: implement an annual review of member dues, including amendments to scheduled increases. Develop a plan to increase membership linked to the review of member dues. Improve retention rates through improved email contact and follow-up with new members.
- Long term: revisit dues and membership targets and revise as necessary.

### **(b) Increase funding available from publication sales**

Approach the marketing and sales of SPNHC publications in a systematic way, which meets the Society's mission of education and training while ensuring a consistent and robust revenue stream.

- Short term: review the publications portfolio of the Society; identify opportunities for new publications and new/revised editions of existing ones. Consider new publication types such as e-books and Print-on-Demand and review production costs versus likely sales. Identify potential commercial and not-for-profit partners and discuss potential for improved publishing, marketing, and distribution.
- Medium term: develop and implement a business plan for the Society's publications, which encompasses both production and marketing and sets out a schedule for new publications
- Long term: review publications business plan and revise as necessary.

### **(c) Maximize funding available from the Society's investments**

Invest and steward the funds of the Society in a responsible and ethical manner, balancing risk and opportunity so as to ensure a stable revenue stream that can be used to support the mission of SPNHC.

- Short term: strengthen existing investments, rebuilding the Society's Schwab Money Market Account by transfer of funds to offset up-front costs of recent projects. Grow account by active transfer of book profits, unrestricted donations, etc.
- Medium term: develop and implement a long-term plan for future investment, including a review of existing investments, assessment of possible alternatives, and identification of future investment opportunities.
- Long term: review investment plan in the light of returns and revise as necessary.

(d) Increase funds received through gifts and sponsorship

Develop a coordinated approach to development, including identification of opportunities for one-off donations or planned giving and improved stewardship of sponsors and donors, which will support the Society while not diverting sponsorship funds from annual meetings.

- Short term: review sponsorship and giving opportunities within SPNHC, including balancing needs of the Society and local organizing committees for meetings. Produce and implement a development plan for SPNHC with goals for the next 5-10 years.
- Medium term: institute and carry out an annual appeal for giving. Modify on-line membership form to make it easier to donate when renewing.
- Long term: review development plan and revise as necessary.

(e) Generate funding from courses and workshops

Investigate the potential to self-support the Society's wider mission of training and promoting best practices by developing and marketing courses and workshops that capitalize on the expertise present in our membership.

- Medium term: consider options for development and marketing of courses and workshops by SPNHC. Develop a business model for training through SPNHC.
- Long term: offer training opportunities in selected pilot areas. Review cost versus benefit and consider expansion if appropriate.

## **2. Reduce expenditure on real and in-kind operating costs**

(a) Reduce production costs for the Society's publications

Liberate the substantial funding currently spent on printing and mailing the SPNHC Newsletter and Collection Forum by utilizing e-publication and Print-on-Demand options.

- Short term: review production and distribution expenses for Collection Forum and Newsletter and produce a cost-based model for e-publication of Collection Forum with POD options. Shift to electronic-only production of Newsletter.
- Medium term: calculate revised dues scale for POD versus electronic-only distribution of Collection Forum. Implement new dues structure.

(b) Reduce the administrative burden on the Society

Minimize the actual and in-kind costs incurred in the day-to-day administration of the Society, allowing more funds and effort to be devoted to delivery of the Society's mission.

- Short term: review the current operations of SPNHC, quantifying costs in both dollar amount and time commitment by Society officers and members. Produce a cost-based model for proposed changes (e.g. moving to all-electronic dues payment). Implement changes as appropriate.
- Medium term: institute regular reviews and revisions to operational procedures as necessary.

(c) Improve the Society's financial planning

Make better use of the Society's limited resources by carrying out short, medium, and long-term financial planning. Enable better prioritization and improve the clarity of decision making for the membership.

- Short term: move to a five-year budget cycle for Council and committees. Make committees responsible for developing a five year plan and individual budgets on an annual planning cycle with target days for delivery. Simplify/clarify the presentation of the Society's budget to Council and the membership.
- Medium term: develop and implement a comprehensive business plan for the Society's operations, incorporating publications, training, and other activities.
- Long term: carry out regular review and, if necessary revision, of budget arrangements and business plan.

# **Work internationally to further the goals of the Society**

## **1. Increase value to all our membership**

### **(a) Improve benefits for members outside North America**

Make it easier for international members to participate in, and benefit from, membership of SPNHC.

- Short term: Assess demand for resources in languages other than English. Expand and enhance web content for members. Find non-North American meeting venues for 2019 and 2022. Assess potential for regional meetings.
- Medium term: build regional partnerships with other organizations. Develop regional nodes with targeted web content. Explore possibilities for translating publications and online materials.

### **(b) Improve access to training and mentorship opportunities**

Use training and professional development as a way to build bridges with the international collections community.

- Short term: grow the Fitzgerald Grant scheme through sponsorship to make it easier to support suitable international candidates. Explore the possibility of developing a Future Collections Leaders course. Develop a plan for a professional mentorship scheme, with supporting infrastructure of regional nodes.
- Medium term: develop a business model for the production of training resources by SPNHC. Implement professional mentorship scheme.
- Long term: implement regional nodes. Offer training packages in selected areas.

## **2. Raise international profile**

### **(a) Strengthen international promotion and outreach**

Find novel ways to engage with audiences internationally and promote the activities of the Society and the benefits of membership.

Short term: produce plan for international outreach. Consider other models for international organizations, e.g. ICOM.

Medium term: develop promotional materials (booth, leaflets, etc), budget, schedule, and support infrastructure for PR activities outside North America. Build regional partnerships with other organizations. Develop a schedule of sponsored conference sessions at relevant meetings.

## **3. Attract and retain members from beyond North America**

(a) Grow membership internationally

Increase the proportion of SPNHC's membership that is drawn from countries outside North America.

- Short term: undertake targeted outreach to non-SPNHC NHCOLL-L subscribers. Develop strategy to maximize recruitment opportunities at SPNHC meetings outside North America
- Medium term: review opportunities for bundled membership packages or reciprocal membership with international organizations.

(b) Improve retention of new members

Address loss of members who join to participate in international meetings and then allow their membership to lapse.

- Short term: consider the specific issue of international retention post meeting sign-up and develop a strategy for improved retention rates.
- Medium term: carry out targeted follow-up for new members recruited in 2014 (Cardiff meeting) and 2016 (Berlin meeting).

## **How We Will Do This**

### **1. By working through our standing committees**

SPNHC depends on the hard work of standing committees, whose members are drawn from the Society's membership. The efforts of all these committees will be necessary to achieve the goals set out in this plan. The plan itself reflects an increased emphasis on the role of standing committees within the Society, making individual committees responsible for developing a five year plan, with targets, and submitting an annual budget for their activities.

### **2. By establishing sessional committees**

Certain areas within the strategic plan will need more focused effort, cutting across established committee boundaries, and requiring specialist expertise. In these areas, we will set up fixed term, sessional committees. Those already identified as necessary for the plan include:

- Mentorship (ongoing, through 2014)
- International Relations (ongoing, through 2014)
- Development (projected, 2013-2014)
- Publications (projected, 2014-2015)
- Courses & Workshops (projected, 2014-2015)

### **3. Through partnership**

The strategic plan places a strong emphasis on working in partnership with other organizations. This includes other organizations with a focus on natural history collections (e.g. NatSCA, NSCA/AIBS, ICOM-NATHIST); general conservation, collections care, or museum bodies (AAM, AIC, ICOM-CC); discipline-based professional societies; government agencies; and other stakeholders.

### **4. Guided by our membership**

The strategic plan seeks to improve the clarity of communication between the Society's executive and the membership. It aims to improve transparency of decision making and give members a better sense of how SPNHC is working on their behalf. Going forwards, we will actively seek the input of our members into the planning process, on-line and through our Annual Business meetings, and we urge members to get involved in the running of the Society by joining standing committees, attending committee meetings, running for election to Council, and by questioning your elected officers, committee chairs, and members at large.

# APPENDIX 1

## White Paper: Developing a Strategic Plan for SPNHC

Long Range Planning Committee, May 2011<sup>1</sup>

### 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. 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 the value of collections and the provision of 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. We may need to modify our present levels of general vs. focused advocacy.

---

<sup>1</sup> Long Range Planning Committee: Chris Norris (chair), Laura Abraczinskas, Andy Bentley, Jean-Marc Gagnon, Ann Molineux, Bethany Palumbo, Rich Rabeler, Richard Sabin, Deb Trock, Clare Valentine



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 in 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., American Association of Museums, Museums Association, International Council of Museums), 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: in the current financial environment, collections can be seen as relatively non-essential, especially if associated with issues (climate change, conservation, evolution) that have a political dimension.
- Digitization: could be a threat as well as an opportunity if it diverts 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 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 (how regular?). 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 (American Institute of Conservation, ICOM Conservation Committee, Natural Sciences Collections Association, AAM, discipline-specific societies).

### *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, AIBS, NatSCA, ICOM-CC, discipline-based societies) for more effective lobbying.

## 2) Weakness and Threat Conversion

*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.

*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.

## **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. 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.