MUSEUM EDUCATION ROUNDTABLE

KNOWLEDGE IN *ACTION* ™

Strategic Framework
2016-2020

Background: Our Path To This Point

Where we started
Founded in 1969, MER is one of the longest-running museum education service organizations. Although longevity can be a valuable asset, navigating organizational life cycles can also be challenging. There are key points at which every organization must move forward, stagnate, or die. Sometimes these points are obvious, and sometimes the organization must be paying attention. Around 2010, the MER board decided we needed to take stock of where MER was and where we wanted to be. Although we had our share of challenges, thankfully we were not in crisis mode – but that was the point. We didn't want to wait until we were. And with that, our small, mostly volunteer non-profit organization waded into the path of renewal.
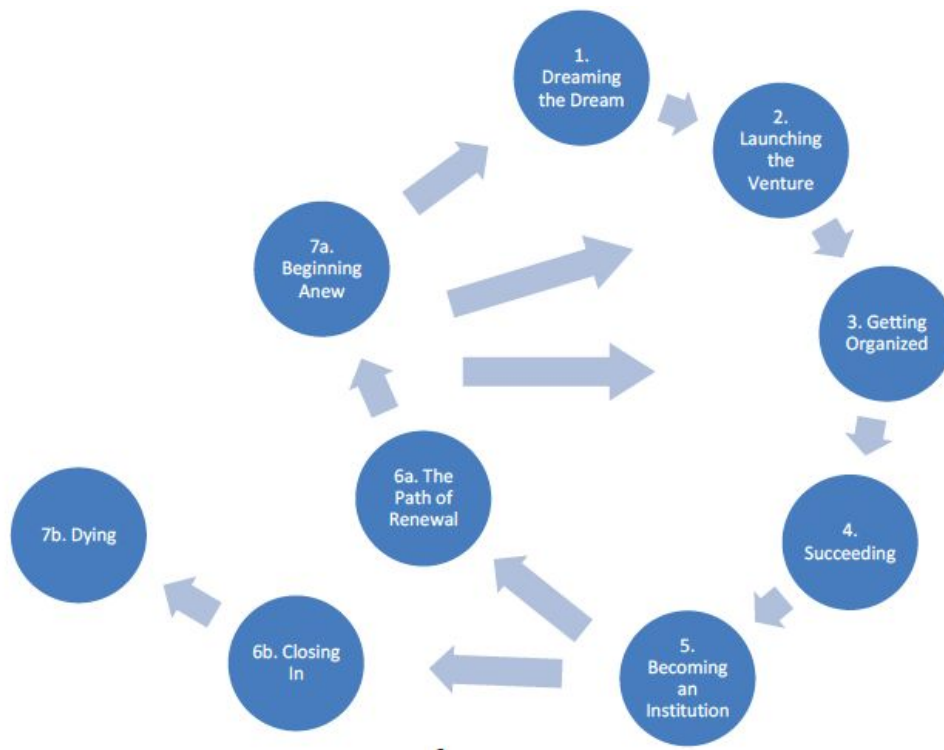
"Choosing the Path of Renewal." Organizational lifecycle graphic from William Bridges, *Managing Transition: Making the Most of Change* 2nd ed (Cambridge, MA: Da Capo Press, 2003), 88.

What we have accomplished: 2010-2015
This was a period of significant growth and positive renewal for MER, marked by a focus on zeroing in, streamlining, and reorganizing, in which we:

- **Achieved clarity in our mission by:**
  - o Identifying the Journal of Museum Education (JME) as our most unique and effective tool for serving the museum field, and aligning all of our organizational efforts around supporting this product.
- **Strengthened the JME and expanded its reach by:**
  - o Putting a robust editorial team, editor-in-chief, and publisher in place to support the JME.
  - o Navigating a smooth and successful transition from Left Coast Press to Maney Publishing, and then negotiating a new contract with Taylor and Francis.
  - o Beginning compensation of JME editors, underscoring the professional nature of the position and helping us to retain talent.
  - o Developing new protocols for the peer review process.
  - o Redesigning the JME, graphically and editorially.
  - o Redesigning all remaining programs and developing new products around JME content, including Reader Guides, the EdCom Virtual Book Club partnership, the JME40 blog, and social media posts.
  - o Charting the lifecycle of a JME in the "JME Thruline" document and a master calendar.
  - o Increasing communication about the JME to the whole Board and creating more opportunities for Board involvement.
- **Improved our membership process by:**
  - o Hiring a professional Membership and Marketing Manager.
  - o Upgrading our database technology to Wild Apricot.
  - o Evaluating the membership cycle/process and developing new reports and benchmarking for tracking.
  - o Refining our on-site sales strategy for the AAM and other conferences.
  - o Creating a schedule for new and renewing membership solicitations in alignment with JME publications, other important MER events, and member anniversaries.
- **Built a strong financial future by:**
  - o Reversing a downward trend in our membership, and growing our membership to exceed our upper target of 550 members!
  - o Negotiating a favorable publishing contract that fundamentally shifted MER's business model from paying to publish to being paid to publish.
  - o Developing a reserve.
  - o Achieving 100% board giving.
  - o Assessing our fundraising needs and opportunities and developing a financial growth plan for the organization.
  - o Developing a calendar and infrastructure for regular solicitation campaigns (annual board campaign, annual member drive, a new graduate member drive) and gift memberships.
  - o Developing a better tool for online giving through Wild Apricot.
  - o Developing an ad for MER in the JME.

o   Assessing and developing a protocol for following up on contributions.
o   Developing a recommendation for changing the pricing of MER memberships (for only the second time in the organization's history).
- **Improved organizational efficiency by:**
  o   Using a rigorous strategic planning process to develop a plan for 2010 to 2015, and elevating the importance of strategic planning as an organizational process.
  o   Developing an Action Team and Task Force structure to lead the core activities and incubate new ideas for the organization.
  o   Improving productivity and communication across Teams and Task Forces with intra-team liaisons, improved consent agenda and reporting formats, annual board reflections, and strategic use of the annual retreat.
  o   Conducting a major update to Bylaws that included:
    ▪   Changing voting processes and clarifying the timeline for new Board member and Officer selection.
    ▪   Allowing for two Vice Presidents.
    ▪   Incorporating the new Action Team and Co-Chair formats.
    ▪   Changing the second board term to a flexible length.
    ▪   Allowing for retreats to be held outside of D.C.
  o   Implementing a new online file-sharing system (Proofhub) and completing the migration from Yahoo.
  o   Resolving outstanding issues with our corporate status, adding professional accounting support, and engaging pro bono legal support.
  o   Placing greater emphasis on leadership development and succession planning, to ensure MER's progress through the natural course of Board turnover.
  o   Began using a board skills matrix and more strategic recruitment to identify new board member candidates in alignment with strategic goals.
  o   Creating more opportunities for Board members to engage in meaningful, big picture thinking related to the field of museum education as well as the nuts and bolts of running a non-profit.
- **Began rebuilding our communication strategy and brand presence by:**
  o   Preparing and distributing annual reports on a regular basis, in tandem with the winter annual appeal.
  o   Launching the JME40 Blog.
  o   Instituting targeted appeals and coordinating messaging around membership growth or member engagement.
  o   Developing a calendar of external communications that has bolstered our social media activity and member engagement.
  o   Developing new communication channels and collateral (i.e., launched use of Twitter for engagement, increased Facebook traffic, developed a new MER business card)
  o   Represented MER at Advocacy Day, at the AAM Council of Affiliates, at EdCom, and in national initiatives (e.g., AMECO, AAM's "Future of Education" gathering).
  o   Developed a new tagline and began discussion around defining our brand.
  o   Gaining and analyzing survey data from members and the MER Board about the design and functionality of the MER website.

- **Strengthened and clarified our relationship with AAM and EdCom by:**
  - o Differentiating MER from EdCom through our clarity and focus on the JME as our niche product.
  - o Growing our AAM conference programming (JME-related sessions, happy hour, social and networking time) and membership sales.
  - o Joining AAM's Council of Affiliates.
- **Increased our understanding our audience by:**
  - o Mapping our stakeholders.
  - o Gaining and analyzing survey data from members on how they perceive, use, and value MER.
  - o Engaging in branding activities related to understanding our audience.

Our Current Context: Guiding Principles and Business Development Priorities

MER's Guiding Principles

As evidenced by the key accomplishments of the past five years, MER's efforts to *zero in* the JME as our core product, *streamline* our organizational activities around the JME, and *reorganize* the way we work together propelled the organization into a position of strength. In order to maintain momentum and a positive growth trajectory, the next phase of MER's development will shift in focus to: deepening, diversifying, and promoting.

- **Deepen –** Over the past few years, we have created new ways of working, tested new products, and began collecting data to inform our decision-making. How can we continue to build upon these efforts and further grow our membership, expand the reach of the JME, engage our audience, and improve organizational performance (and meaningful board service)?

- **Diversify –** The MER board has committed to diversification on many levels: in MER board composition and audience development, in JME contributions and content, and in helping advance the issue of diversity and inclusion in the museum field. We are also interested in how we can tailor the JME and related offerings to different segments of our audience, in order to better meet specific interests and, at the same time, broaden what we have to offer.

- **Promote –** A lot has changed with MER in the past several years, and will continue to change. It is important to reveal that work from behind-the-scenes, and better define and convey the "new MER" with improved branding and communication. We also feel we have an opportunity to strengthen our voice in the field, and to play a greater leadership role in identifying and discussing critical issues facing our colleagues and the museum field as a whole, as it relates to education.

So, over the next few years, as MER Board members and staff think about their work, they can do so through the lens of asking how their different tasks are deepening, diversifying, or promoting/sharing the work of MER.

Business Development Priorities
As part of our strategic planning at the 2015 retreat, we used Ansoff's Matrix as a framework for assessing our business development priorities. The Matrix provides four options for growth:
- Offering more of same products, to the same audiences (market penetration – generally the most efficient use of resources)
- Seeking new audiences for existing products (market development)
- Creating new products to existing audiences (product development)
- Seeking new audiences for new products (diversification – typically the hardest to do)

For FY16, the Board prioritized the opportunities for growth in the following order:
1. Seeking new audiences for existing products (market development)
2. Creating new products to existing audiences (product development)
3. Offering more of same products, to the same audiences (market penetration)
4. Seeking new audiences for new products (diversification)

There was interest in all four elements, but #1 and #2 were the top priority. This can be helpful in checking in to make sure we are allocating our time to our state priorities for MER business development.

Furthermore, the Board identified discipline (e.g., bolstering participation from science museums) as the top priority for audience growth/diversification in FY16.

Voting prioritization for diversification of new audiences was as follows: discipline (15), experience (9), attitude-influencers (8), geography (8), organizational culture (2), museum size (1), audience (1), and social media (1).

MER's Strategic Issues and Goals: 2016-2020
1. How can we advance diversity and inclusion within MER and the museum field?
2. How can we continue to strengthen and further leverage the content of the JME?
3. How can we more deeply engage with and serve MER members and the broader JME readership?
4. How can we continue to strengthen MER's organizational development and meaningful board service?
5. How can MER better convey its brand and promote MER activities and membership?

CORE PRINCIPAL

Continue focus on JME production and quality; now adding audience growth and diversity

Acronym Key:
LT – Leadership Team
RE – Reader Engagement Team
ED – Editorial Team
RR – Resource & Revenue Team
BSD – Branding Strategy and Development (used to be R&R)
COM - Communications Team (used to be BSD/RE)
TF - Task Force of Board members, usually convened around a specific project

Strategic Issue #1	How can we advance diversity and inclusion within MER and the museum field?	
By 2020 Goals	• Diversify MER board • Diversify JME Content and Contributors • Diversify MER membership/readership • Help advance the issue of diversity and inclusion in the field	
FY16 Focus Goals	• Develop and test strategies for diversifying MER stakeholders (members, JME contributors, board members, etc.) with a focus on disciplines other than art and history. • Plan a JME edition to coincide with the opening of the National Museum of African American History and Culture.	
FY16 Related Actions	• Prioritize discipline as part of the board matrix for new board member recruitment and assist with recruitment efforts • Leverage and communicate varying levels of membership (student, etc.) to increase access and awareness of MER member benefits	RR
	• Broaden inclusion of discipline specific-content to the social media rotation beyond art museums. • Identify and engage via social media with diverse professional affinity networks and thought leaders with direct or indirect ties to museum education	RE
	• Focus on strategic solicitation of writers and editors to better represent the current and aspirational diversity of the field. • Strategic recruitment of diverse board members—with a specific focus on racial, gender, and ethnic diversity.	ED

FY17 Related Actions	• Continue intentional efforts to diversify board through Nominations process • Consider opportunities to diversify the reach of the JME through partnerships	LT
	• Work with guest editor for issue 42.2 on a program around race & inclusion (Boston Forum) • Create a VSI on race & inclusion in advance of AAM	ED
	• Diversify who we follow on social media	RE/ BSD
	• Use data available through the membership survey and membership and social media analytics to identify opportunities,	

	patterns and social media use across variables like geography, institution type, career level etc. ● Use this data to target particular member and non-member segments through communication on social media	

FY18 Related Actions	● Facilitate process of exploring DAEI in the specific context of MER and outline actionable steps to advance this work	LT/TF
	● Continue to diversify and expand the institutions and individuals MER follows on social media ● Track specific metrics on a quarterly basis to measure success across platforms. This year, we will focus on **Age** and **Location** because they are easily pulled from Facebook, Twitter, and MER website analytics. ● Identify gaps in diversity of membership (e.g. Living Collections) and tailor social media messaging to these groups.	COMM
	● Promote MER and the JME across the broadest possible networks of colleagues and organizations	MER Board

FY19 Action Steps	● Develop and administer a budget that supports DAEI work, including new board stipends	LT
	● Develop a Unity Statement (DAEI TF) ● Research and define a DAEI Fund/Endowment (DAEI Fund TF) ● Re-define Nominations as Board Recruitment, with a specific DAEI focus (Board Recruitment TF)	TF
	● Continue to diversify and expand the institutions and individuals MER follows on social media ● Track specific metrics on a quarterly basis to measure success across platforms. This year, we will focus on **Age** and **Location** because they are easily pulled from Facebook, Twitter, and MER website analytics. ● Identify gaps in diversity of membership (e.g. Living Collections) and tailor social media messaging to these groups. ● Partner with other groups and organizations on our efforts - including guest bloggers ● Undertake strategies to make the blog and social media more accessible (looking into compatibility with audio description and screen readers)	COMM

	● Prioritizing any areas that are not accessible, look into how can budget for next year ● Participate in cross-committee DEIA Task Force to craft a MER Unity statement	
	● Participate in cross-committee DEIA Task Force to craft a MER Unity statement ● Develop systems for taking in and publishing articles written by speakers of other languages and practitioners whose lived experience should constitute scholarship ● Broaden our contributing base internationally (ie, editors, authors, reviewers) ● Create a shared document of resources ● Consider creating a paid internship (maybe a full-board task)	ED

FY20 Action Steps	• Integrate DEAI initiatives and processes into the larger MER framework and shift away from siloing this work in the Equity Task Force. • Focus on recruitment and the Equity Fund. • Revisit and refine how we define inclusive, accessible and antiracist practice, internally and externally, for MER.	LT/TF
	• Continue commitment to accessibility by using image descriptions and alternative text in social media posts and blog posts • Use blog to solicit writing from people who might not currently contribute and/or see MER as for them (POC, LGBTQ+, People with Disabilities, Emerging Professionals, etc.) ○ Achieve 50% of posts from outside of MER board members and alumni • Promote blog and social media authorship to recruits as perk of board service	COMM
	• Explore diversifying content in JME; interviews, more reviews, opinion pieces or first-person narratives; developing polyvocality in non-thematic areas • Include translations services in MER budget and use the funds to increase readership and inclusion efforts • Transparency in peer review process and pool of reviewers; audit the pool to gauge if any gaps in knowledge and lived experiences are present; recruit, with Editor-in-Chief, to fill gaps • Increase transparency of publication process; outreach with Editor-in-Chief to recruit new authors and demystify the process of publishing an article • Continue to participate in the cross-committee in DEAI Task Force	ED

Strategic Issue #2	How can we continue to strengthen and further leverage the content of the JME?
By 2020 Goals	• Ensure a smooth transition to publishing quarterly with Taylor and Francis, and leverage this relationship and their resources. • Increase the quality of the JME and submissions to the Journal. • Develop new ways to engage with JME content before and after publication. • Increase digital access to JME content.

	● Be proactive about the future of digital publishing and its impact on the JME and MER.	
FY16 Focus Goals	● Transition successfully to T&F and quarterly publishing. ● Continue assessment and development of the Reader Guides, the post 40th celebration blog, and Virtual Book Club partnerships.	
FY16 Related Actions	● Continue to highlight easy access to JME content membership communications ● Three year Editor-in-Chief Contract	RR LT & RR
	● Adopt and actively utilize collaborative communication tools such as HootSuite and the capabilities of ProofHub to support efforts around timely, strategic and coordinated social media posts ● Conduct a social media audit ● Coordinate social media efforts with R&R, T&F marketing and social media	RE
	● Continue assessment and development of the Reader Guides, the JME40 blog, and Virtual Book Club partnerships with EdCom. ● Develop new engagement tools such as Virtual Special Issues and strategic programming partnerships with other organizations. ● Develop evaluation process for the various products we develop, including analytics collection.	ED
	● Promote JME at local and regional conferences	MER Board

FY17 Related Actions	● Work closely with Hollis on the website redesign project ● Create author guidelines and protocol for T&F author prize money ● Quarterly meet with T&F to discuss progress, new ideas, any concerns	LT/BSD LT/ED LT
	● Reach out to current and potential authors through social media ● Promote JME themes, articles and authors	RE/BSD
	● Create a Reader Guide for issue 41.4 in collaboration with guest editor ● Continue in the steering, guidance, and solicitation of blog posts from authors, board members, and guest editors (ongoing)	ED

	• Better integrate the topics of non-solicited articles into blog posts (ongoing) • Develop a strategy for encouraging authors to leverage their own networks to promote content, MER membership (ongoing) • Continue to monitor T&F transition (double-check allotments and costs of color pages) • Work with Cynthia on potential new article categories for the JME	
	• Ongoing encouragement of JME article submissions and theme proposals • Continue JME trends discussion started at Retreat	MER Board

FY18 Related Actions	• Quarterly meeting with T&F to discuss progress, new ideas, any concerns	LT
	• Integrate the Editorial Team's production calendar into the Communications Team calendar so that monthly Social Media representatives can more easily promote/share current and upcoming JME content. • Leverage relationship with EdCom/AAM + Center for the Future of Museums in content production and readership outreach (social media)	COM
	• Finalize and implement author/editor guidelines and protocol for T&F author prize money - announce 2017 awards, plan for 2018 awards • Work with COM on blog strategies including integrating the topics of non-solicited articles into blog posts, solicitation of blog posts from authors, board members, and guest editors • Continue to expand options for JME articles and features, including new options for using color pages in JME • Work with COM to develop a strategy for encouraging authors to leverage their own networks to promote content, MER membership • Create advocacy-themed VSI that includes articles promoting diverse and inclusive education techniques	ED
	• Promote JME at local and regional conferences • Actively engage with MER on social media	MER Board
FY19 Action Steps	• Quarterly meeting with T&F to discuss progress, new ideas, any concerns	LT

	● Three year EIC contract ● Partner with EIC to define and hire Assistant Editor position	
		TF
	● Reorganize the Communications Team into two smaller, more nimble action teams: Social Media Action Team and Blog Action Team. Develop clear written workflow for each team in order to ensure MER's external communications are lively and relevant in leveraging JME content. ● Experiment with new modes and fresh formats, on social media and blog teams. ● Continue to integrate the Editorial Team's production calendar into the Communications Team calendar so that monthly Social Media representatives can more easily promote/share current and upcoming JME content. ● Leverage JME content within social media posts monthly, alongside conferences and reach out to presenting authors and articles more regularly ● Leverage JME content within blog posts, thinking about how to more creatively integrate JME content into blog.	COMM
	● Explore renaming the Reader Guide to help make clear its purpose. ● Explore additional ideas for raising profile of Reader guide including asking readers who used it to share their process, and hosting local, in-person JME "book clubs" ● Move responsibility of the blog into a cross- team sub group. ● Continue to work with COM to develop a strategy for encouraging authors to leverage their own networks to promote content, MER membership ● Continue to create advocacy-themed VSI that includes articles promoting diverse and inclusive education techniques ● Explore expanding themes of VSI to include science, natural history and living collections to expand readership. ● Work with Kate on how VSIs are presented on MER's website ● Explore podcasting, for instance: Offer to do a podcast about Reader Guide for NEMA on Museum People/; look into budget, technical expertise, and time needed to start our own podcast with authors of RG. ● Explore possibility of Reader Guide being reposted on other blogs like Incluseum.	ED

	● Make a packet and how-to of our collection of Reader Guides for new members, including how to set the stage for a productive, inclusive discussion (using the RGs). ● Create a VSI in mid-winter/early spring on a topic TBD	
	● Preview the articles for each issue, when they are shared by the EIC pre-publication to help seed ideas for leveraging the forthcoming content in advance of its public availability ● Promote JME at local and regional conferences ● Actively engage with MER on social media	MER Board

FY20 Action Steps	• Provide free memberships to MER for guest editors as part of usual protocol • Celebrate authors and guest editors through the Excellence Awards	LT/TF
	• Create stronger social ties to authors and institutions by linking handles in social posts and hyperlinks in blog • Provide blog post(s) that provide counterpoint to an article (current or past) or revisit articles written from long-ago past • Respond to JME issues using related topics from both in- and outside the museum field	COMM
	• Embed alt text into digital copies of JME • Increase communication and collaboration between the two MER teams to ensure JME content is leveraged appropriately on social media and on the website • Better situate VSIs on the website; add in backstock of VSIs as a member incentive	ED

Strategic Issue #3	How can we more deeply engage with and serve MER members and the broader JME readership?
By 2020 Goals	• Define MER's audiences and develop JME content or ancillary products targeted to various segments. • Develop a regular/on-going pattern of gathering data/soliciting feedback from our members. • Help museum educators identify common issues and solutions across the field. • Develop and implement a digital strategy for communicating with our members. • Assess (and refine accordingly) the value/use of member services/resources such as the reader guides, JME40 blog, Virtual Book Clubs, etc. • Build our voice in the field and create opportunities to lead more timely discussion. • Determine if a larger name change and shift in focus, with a focus on expanding to new audiences, is in the best interest of our audiences and feasible for the organization.

FY16 Focus Goals	• Draft a digital strategy for audience engagement. • Finalize the profile of current MER audiences.	
FY16 Related Actions	• Consider the possibility of bi-annual survey (i.e. how is the T&F experience?)	RR
	• Draft a digital strategy that includes: -Increasing activity around JME content with social media -Employing guest tweets and other types of things by key influencers or MER/JME alum -Effective use of promoted (paid) posts	RE
	• Assess (and refine accordingly) the value/use of member services/resources such as the Reader Guides, JME40 blog, Virtual Book Clubs, etc.	ED
	• Website redesign - including improving MER member portal, live tweets, author highlights, easier JME content sharing	Website TF

| FY17 Related Actions | • Assess and evaluate readership of the blog (post web-redesign, postponed to FY18)
• Pursue opportunities for collaborative programming including but not limited to AAM's EdCom (state and regional service organizations, upcoming conferences, etc.) (ongoing)
• Increase pool of peer reviewers (need science and children's museum educators in particular) (ongoing) | ED |
| | • Spark and facilitate online discussions around topics raised in JME articles, in addition to sharing news of JME content.
• Develop a schedule to post regular communications through social media – to include blog posts, membership pushes, Reader guides and newsletter
• Identify targeted content for all communications
• Use data available through the membership survey and membership and social media analytics to identify communication opportunities, trends in membership patterns and social media use. | RE/BSD |

FY18 Related Actions		LT
	• Create, update, and share 'Style Guide' (or Communication Plan) for MER social media in order to support board members' social media shifts and share with the larger board. • Maintain and refine a clear schedule for social media	COM

	● Continue to diversify and expand the institutions and individuals MER follows on social media ● Integrate national conference schedules into Communications calendar in order to tag and engage with OTHER major organizations of interest to MER members.	
	● Pursue opportunities for collaborative programming including but not limited to AAM's EdCom (state and regional service organizations, upcoming conferences, etc.) (ongoing) ● Increase pool of peer reviewers (need science and children's museum educators in particular) ● Lay groundwork for moving responsibility of the blog to Comm team (with cross team representatives/liaisons)	ED
	● Take MER/JME materials to meetings, conferences, etc., wear MER name badge, and proactively network with current and potential members, readers, peer reviewers, and authors.	MER Board

FY19 Action Steps	● Implement auto-renewal option with M&M Manager	LT
	● Track specific metrics on a quarterly basis to measure success across platforms. This year, we will focus on **Age** and **Location** because they are easily pulled from Facebook, Twitter, and MER website analytics. ● Identify gaps in diversity of membership (e.g. Living Collections) and tailor social media messaging to these groups. ● Partner with other groups and organizations on our efforts - including guest bloggers ● Undertake strategies to make the blog and social media more accessible (looking into compatibility with audio description and screen readers) ● Reorganize the Communications Team into two smaller, more nimble working teams: Social Media Action Team and Blog Action Team. BAT will develop clear written workflow for each team in order to ensure MER's external communications are lively and relevant in leveraging JME content. ● Experiment with new modes and fresh formats, on social media and blog teams. ● Social Media Action Team will establish digital conversations on relevant topics with aligned organizations that go beyond simply following one another. SMAT will also be more intentional with collaborating with other organizations. ● Blog Action Team will work closely with ED Team to ensure seamless evolution of MER's Blog as it moves from ED to COMM.	COMM
	● Pursue opportunities for collaborative programming including but not limited to AAM's EdCom (state and regional service organizations, upcoming conferences, etc.) (ongoing) ● Increase pool of peer reviewers (need science and children's museum educators as well as internationally based professionals in particular) ● Support Communication team on the Blog	ED
	● Take MER/JME materials to meetings, conferences, etc., wear MER name badge, and proactively network with current and potential members, readers, peer reviewers, and authors.	MER Board

FY20 Action Steps	• Do a survey of membership to understand how their concerns and conditions have shifted during global crisis • Explore options of a sliding scale for membership	LT/TF
	• Create comments section on website for blog comments, and further engage with our followers via comments/messaging in social media channels • Breakdown/demystify how to become a guest editor and/or author for the JME with clear examples	COMM
	• More strategically use Virtual Special Issues to support current or upcoming issues relevant to the Field; Summer 2020 VSI on the ADA at 30. Consider doing press releases for VSIs with T&F. • Consider how to engage more people with Reader Guides; virtual events or Twitter chats	ED

Strategic Issue #4	How can we continue to strengthen our organizational development and meaningful board service?	
By 2020 Goals	• Develop and implement a new staffing plan. • Revise the mission and vision. • Maintain/continue refining meeting and communication structures. • Update the MER pricing structure. • Ensure new financial model is working as envisioned, and make necessary adjustments. • Actively use this plan as a guide/reference point for the next four years. • Involve the board in more types of activities from peer reviewing to social media while managing board commitment levels. • Document key procedures/process for each Action Team area.	
FY16 Focus Goals	• Finalize a new mission, vision, strategic plan and brand for MER. • Create and begin implementation of a new staffing plan for MER. • Decide on a potential MER membership price increase and implement, if approved (plus include in communications campaign). • Implement and assess the new financial model for MER. • Maintain growth in MER membership. • Maintain focus on strategic planning, efficient cross-team communication, strategic board member recruitment, and leadership development/succession. • Expand involvement of board members in developing the Reader Guides.	
FY16 Related Actions	• Lead review of and implementation (if accepted) of change in membership fee	RR

	● Consider the possibility of bi-annual survey (i.e. how is the T&F experience?)	
	● Engage actively with current and past board members on their own social platforms (follow, retweet, etc.) and also as guest live tweeters at conferences, etc. ● Work closely with R&R to support efforts to increase membership	RE
	● Maintain focus on strategic planning, efficient cross-team communication, strategic board member recruitment, and leadership development/succession. ● Expand involvement of board members in developing the Reader Guides and Virtual Special Issues, writing for blog, participating in virtual programming. ● Strategic recruitment of diverse board members—with a specific focus on racial, gender, and ethnic diversity.	ED
	● Identify staffing needs, vet proposal by board, begin hiring process. ● Continue succession planning for leadership roles on board	LT & RR LT

FY17 Related Actions	● Create and monitor new Publication Strategist 18-month position ● Support role of Treasurer now the R&R has been changed to BSD ● Develop travel guidelines for using T&F travel stipend ● Consider updating by-laws for FY18 with team changes and job descriptions ● Encourage 100% board donations this year ● Review T&F contract	LT
	● Continue to use and update the Proof hub calendar of deadlines to better streamline communication across the Board and to members ● Collaborate with the Leadership Team to define job descriptions ● Use Proofhub calendar to more effectively tie together the operations of different committees by way of the communications schedule ● Develop and maintain more effective means of monitoring incoming revenue, especially tracking T&F payments	RE/BSD
	● Pilot and oversee workflow on the JME between Editor in Chief, JME Production strategist, and ED team ● Ongoing practice of regularly scheduled efficient team meetings	ED

	● Proactively invite other board members to participate in ED team activities & "juicy conversations" (ongoing)	

FY18 Related Actions	● Update by-laws for FY18 with team changes and job descriptions ● Encourage 100% board donations ● Review T&F contract ● Work on renewal of EIC and Production Strategist contracts ● Work towards 100% retreat participation ● Research liability and/or board insurance needs	LT/TF
	● Develop a meeting template in order to offer consistency and structure to board members in monthly COM meetings ● Clearly articulate roles and responsibilities for social media shifts ● Develop a 'Style Guide' for MER social media in order to support board members' social media shifts. ● Continue to diversify and expand the institutions and individuals MER follows on social media ● Encourage experimentation with social media e.g. Sign some SM posts with poster's initials/name in order to offer MER's human face ● Succession Planning for next year's COM team	COM
	● Continue to evaluate and adjust workflow between Editor in Chief, JME Production strategist, and ED team with an eye towards hiring a second editor and succession planning ● Ongoing practice of regularly scheduled efficient team meetings ● Proactively invite other board members to participate in ED team activities & "juicy conversations" ● Share agendas with Comm Team members to assist cross team collaboration.	ED
	● Be an actively engaged board member -- attend meetings, share expertise, step up and volunteer for projects	MER Board

FY19 Action Steps	- Encourage and orchestrate deliberate cross-team collaboration - Renew EIC contract - Work with EIC to hire Assistant Editor - Allocate resources in the budget to expand M&M Manager role to include social media coordination - Work towards 100% Retreat participation - Administer new Board Stipends	LT
		TF
	- Reorganize the Communications Team into two smaller, more nimble working teams: Social Media Action Team and Blog Action Team. Develop clear written workflow for each team in order to ensure MER's external communications are lively and relevant in leveraging JME content. - Experiment with new modes and fresh formats, on social media and blog teams. - Social Media Action Team will establish digital conversations on relevant topics with aligned organizations that go beyond simply following one another. SMAT will also be more intentional with collaborating with other organizations. - Empower all COMM Team members to share and post with early access to FB admin privileges and shared working document to guide planning. - Blog Action Team will work closely with ED Team to ensure seamless evolution of MER's Blog as it moves from ED to COMM.	COMM
	- Continue to evaluate and adjust workflow between Editor in Chief, JME Production strategist, and ED team with an eye towards hiring a second editor and succession planning - Ongoing practice of regularly scheduled efficient team meetings - Use the "consent agenda" model for meetings. Send out agendas and reports in advance of meetings allowing meetings to be "work" meetings - Proactively invite other board members to participate in ED team activities & "juicy conversations" - Share both agendas and minutes with Comm. Team - Revise agendas to include social media opportunities that arise from the meeting	ED
	Be an actively engaged board member -- attend meetings, share expertise, step up and volunteer for projects	MER Board

FY20 Action Steps	- Continue to build transparency in board service and leadership, through 1) Conducting mid-year board member survey and one-on-one phone calls to actively learn about board members' interests and roles for next year - Create google drive with coherent folder structures, and work towards a migration of MER archives from Proofhub - Convene an Strategic Plan Task Force and seek outside consultants to develop MER's next 5 year strategic plan - Recontract with Editor and Assistant Editor - Redistribute duties from Publications Strategist to Marketing and Membership Manager and Assistant Editor positions. - Convene an Editorial Succession Plan Task Force - Work with Recruitment chair to recruit and onboard new board members in FY21 with focus on colleagues who hold underrepresented identities and skills.	LT/TF
	- Developing workflows for shared authority so that authors of blog and social media must come from all board members, not just communication team - Social: Create master conference calendar and encourage board members attending to live tweet from the event - Blog: Further establish workflow and promote authorship to recruits as perk of board service - Receive table of contents/list of authors for JME issues that are 6 months out in order to craft deeper blog posts	COMM
	- Be proactive in offering professional development opportunities for Board Members through free webinars, travel grants, etc. - Increase cross-collaboration with other board members for creation of Reader Guides, VSIs	ED

Strategic Issue #5	How can MER better convey its brand and promote MER activities and membership?
By 2020 Goals	- Redesign the website. - Identify a brand strategy and related visual brand. - Continue to grow membership. - Develop ambassadors out of key influencers and MER/JME "Alumni."
FY16 Focus Goals	Finalize the MER brand and begin to develop a related visual identity with standards for the board to implement.

	● Develop and roll out a communications campaign to announce our new publishing arrangement and the changes plus benefits to members/subscribers. ● Plan and begin implementation of a revised MER website.	
FY16 Related Actions	● Highlight MER activities and members in quarterly communications	RR
	● Make an effort to include visuals in all social posts include images of people (move beyond just logo) ● Support the re-branding and its rollout on our social media platforms	RE
	● Support the branding process, provide input, ensure JME remains central to the MER brand.	ED
	● Create a plan and begin implementation of website re-do	Web TF
	● Develop branding report, determine consultant needs	Branding TF
	● Creation of revised Mission/Vision statement	Mission/ Vision TF

FY17 Related Actions	● Make sure ED team's interests are represented in the rebranding process (esp. blog and reader guide design, easy links to content) ● Pull quotes and teasers from articles for website usage (ongoing) ● Liaise effectively with BSD/RE team for better scheduling and branding opportunities (Elisabeth has taken this on) ● Support the Journal Manager in JME cover redesign to align with rebranding efforts ● Use the allotted color pages (16 total) in each issue	ED
	● Develop style guide to shape a consistent voice that better conveys our brand ● Develop training for Board members on social media takeovers ● Continue to work with Hollis to clarify and meet the needs articulated in their site map and proofs, especially photography and style guide preferences ● Refine, approve and implement Hollis brand recommendations for MER ● Identify quarterly targets for membership growth and collaborate with the RE team to leverage social media and analytics toward these goals.	RE/BSD

	● Encourage colleagues to join MER	MER Board

FY18 Related Actions	● Provide oversight for maintaining and promoting new brand identity	LT
	● Develop a 'Style Guide' for MER social media in order to support board members' social media shifts. ● Integrate branding tools in all social media posts and newsletter ● Integrate metrics from Twitter, FB, and other social media tools to inform COM's monthly social media focus. ● Continue to diversify and expand the institutions and individuals MER follows on social media ● Social Media: Promote membership by asking 5-10 personal contacts to join MER (COM)	COM
	● Use the allotted color pages (16 total) in each issue or pool for one larger color piece (possible photojournalism essay) per year. 4 pages allotted for MER ad (redesigned, full color) 1/issue. ● Pull quotes and teasers from articles for website usage ● Create & complete second call for proposals/papers for 43.4	ED
	● Encourage colleagues to join MER	MER Board

FY19 Action Steps	● Provide oversight for maintaining and promoting new brand identity (ongoing)	LT
	● Create strategy guide for the blog (including experimental formats) - push past 40th anniversary and rethink the name. If the "Medium is the Message" then how can the blog's name and format immediately communicate MER's inclusive identity? ● Reorganize the Communications Team into two smaller, more nimble working teams: Social Media Action Team and Blog Action Team. Develop clear written workflow for each team in order to ensure MER's external communications are lively and relevant in leveraging JME content. ● Experiment with new modes and fresh formats, on social media and blog teams.	COMM

	• Social Media Action Team will establish digital conversations on relevant topics with aligned organizations that go beyond simply following one another. SMAT will also be more intentional with collaborating with other organizations. • Blog Action Team will wor • k closely with ED Team to ensure seamless evolution of MER's Blog as it moves from ED to COMM.	
	• Use the allotted color pages (16 total) in each issue or pool for one larger color piece (possible photojournalism essay) per year. 4 pages allotted for MER ad (redesigned, full color) 1/issue. • Pull quotes and teasers from articles for website usage	ED

FY20 Action Steps	• Provide oversight for maintaining and promoting new brand identity (ongoing) • Promote Board Member Representation at conferences by reviewing travel stipend requests on a rolling, and monthly basis	LT/TF
	• Utilize (or create) an alumni list/archive who we can mine for writers for the blog or provide professional connections to writers • Leverage the blog as a platform to engage new, potential members • Utilize the blog as an opportunity to drive participation to the forum • Expand Advertising reach	COMM
	• Continue to work with Comms Team to live tweet events like conferences, meetings, etc. • Proactively represent MER at professional events; wear nametag, bring business cards, etc.	ED

Updated 8/2020