



INDIANA HISTORICAL SOCIETY COLLECTIONS ADVISOR

A RESOURCE FROM IHS LOCAL HISTORY SERVICES

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INTEGRATING COLLECTIONS INTO YOUR STRATEGIC PLAN

By Tamara Hemmerlein, director, IHS Local History Services

As pressures on cultural institutions grow, it is becoming more important for those institutions to show their stakeholders that they are working to increase their sustainability. One of the best ways, but certainly not the easiest, is to develop and implement a strategic plan. A good strategic plan sets mission-centered goals for the institution, provides action steps for meeting those goals, outlines the resources necessary to accomplish the actions, assigns responsibilities and shows how progress toward the goals and success will be measured.



[John Herron Art Institute Sculpture Gallery, 1911](#) (Bass Photo Co Collection, Indiana Historical Society)

Each function of the institution should be represented in the strategic plan. If your organization is a collecting institution, it is very important to be sure that collections stewardship is fully integrated into the overall plan. Keep in mind that even a slight shift in direction for the organization, a common result of strategic planning, can lead to a shift in how the collection is utilized or added to in the future. The following is a list of questions to ask as your organization moves through the planning process that can help keep the collection in mind.

- Do your collections support your mission, and vice versa?
- Do you have a written and board-approved collections management policy?
- Do you have a written and board-approved collecting plan?



ONLINE RESOURCES

[American Alliance of Museums](#)

[American Association for State and Local History](#)

[Connecting to Collections Online Community](#)

FROM OUR LENDING RESOURCE CENTER

[AAM Guide to Collections Planning](#)

(James Gardner and Elizabeth E. Merritt)

[The NonProfit Business Plan: The Leader's Guide to Creating a Successful Business Model](#)

(David La Piana, et. al.)

[Field Guide to Nonprofit Strategic Planning and Facilitation](#)

(Carter MacNamara)

[Leading the Historical Enterprise](#)

(Bruce W. Dearstyne)

UPCOMING TRAINING AND PROGRAMS

[Digital Stewardship Fundamentals](#)

Jan. 9 -
Lyrasis webinar.

[Managing Resources for Collections Storage Projects: Strategic Planning to Completion](#)

Jan. 16 -

- Are your collections management policy and collections plan reviewed annually?
- Do you have a written emergency/disaster preparedness plan that includes collections?
- If you have a current strategic plan, how is collections stewardship addressed?
 - Are collections included as a separate objective?
 - Are collections integrated into other strategic plan objectives?
- Do your plans and policies adhere to current museum standards and best practices?
- Will you need to invest more time, people, space and money in the following aspects of collections stewardship?
 - Research
 - Acquisition
 - Documentation
 - Conservation
 - Cataloging
 - Storage
- Where do other museum functions overlap with collections?
 - Technology
 - Exhibits
 - Access
- Are collections addressed in the outward-facing strategic plan objectives?
 - Use of collections
 - Public/researcher access

Connecting to
Collections Care
webinar.

[Making History Relevant](#)

Jan. 19 -
AASLH webinar.

[Textiles 101](#)

Jan. 24 -
Wisconsin Historical
Society webinar.

Whether or not you are currently involved in strategic planning, these questions can help with discussions about collections stewardship, how your collections fit into the daily and long-term activities of your institution, and the answers could lay the foundation for a stand-alone collections plan. After completing a strategic planning process, remember to look back at collection documents and ensure every part of the institution's policies are in line with the new plan for its future. Collecting institutions have a responsibility to their collections, make sure they are not forgotten during important planning processes.

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