

the S A M N O B L E
O K L A H O M A M U S E U M
of N A T U R A L H I S T O R Y



M E M O R A N D U M

To: UMAC Board Members and Members of the WG for Strategic Planning
From: Peter Tirrell, Chair, UMAC Working Group for Strategic Planning
Date: August 1, 2008
Re: 2008 Revisions to UMAC Strategic Plan

Dear Cornelia, Ing-Marie, Nick, Aldona, Panu, Lyndel, Kate, Hugues, Peter (S.), Peny, Sally, and Nathalie

Over the past several months I have been working with Members of the Working Group for Strategic Planning (WG) and with Cornelia to revise the Strategic Plan (SP) and prepare an Operational Plan (OP).

The new version of the SP is available on the UMAC website (see: <http://publicus.culture.hu-berlin.de/umac/strategicplan/?id=planning>). With help from Members of the WG and Cornelia, I believe that we have revised the SP to make it a simple outline form (see attached Update). At Cornelia's request, and my full agreement, I also modified the strategies and action steps to create an Operational Plan (OP).

The OP aims at providing details about management of our SP such as Suggested Strategies and Actions, Responsibility & Time Commitment, Start Date, End Date, Financial Commitment and Status & Remarks. It looks similar to our old Plan.

You will notice that the OP does not have all the information and all the details in some of the categories. I need suggestions from you and the Board in order to complete the categories of the OP. We will talk about this when we meet in Manchester. The most important point is that we have 1) identified and refined our goals and strategies and 2) we have been taking actions to reach our goals. This is the result of our original questions that we posed in 2005-06: 1) "What do we want?" and 2) "How do we get it?"

I am pleased to say that in 2007 -2008, we have made a great deal of progress towards our goals through our strategies and actions (see also the AGM Report). I have indicated the areas of progress by putting the text in *red oblique text* (see Strategy 3.3 Create a "Help" section on the Web Page). I anticipate that we will make additional progress before our Conference in September. I also put major revisions to the Strategic Plan in *red oblique text* (see Strategy 1.5 Solicit New Information). I used yellow highlight to indicate where Goals have been shifted or changed significantly. I also indicated the status of the Strategies and Actions with the words such as "Ongoing", "Done" and "No Action". Lastly, I downgraded former Goals 4, 5, and 8 and changed them to Strategies. I did this because we have taken no action with these Goals. They do not seem to be as important as when we established them in 2006-2007. There has been no action on these goals. They seem to be better suited as Strategies. We should consider eliminating them.

I wish to point out that I have added Strategy 5.4 Create a Budget for 2007 - 2010. Cornelia and I think that this is very important. As a Committee, we are making decisions to spend money (e.g., contract for electronic journal services). Financial planning must be part of our overall SP.

There are several important items to discuss regarding the SP and the OP. These include:

1. Are the Goals still valid? What ones are most important?
2. Are the Strategies and Suggested Actions appropriate?
3. Can we choose Actions and assign Responsibility and Time Commitment, Start Date, End Date, and Financial Commitment?
4. What new ideas do you have?

I ask that you review the Strategic Plan and the Operational Plan. Please send your comments to me, the rest of Board Members and the Members of the WG. We can discuss our comments by email and in person when we meet in Manchester.

As we continue to revise and refine our Plan, it becomes clearer to see what we want to do and how we will do it. We have prioritized several of our goals and strategies and we have improved our services. The planning process also becomes easier as we discard ideas that are not important or that we cannot do.

I am very appreciative of your help and look forward to your comments and seeing you in Manchester.

If you have any trouble opening the attachments, please let me know.

Best,

Peter T