

## Step 2 - Clarifying the Current Position

It is critical to fully understand your current position so you can plan for your future success. You may have already thought about these areas and detailed their needs and objectives in a strategic plan or discussed these questions at a planning meeting. If this is the case, you should refer to your strategic plan or other relevant forward planning documents to help you complete this section or you can use this workbook to inform your strategic plan.

In order to understand the situation of your society, consider these three areas: society management (the people responsible for leadership and governance in your society), society people (members and volunteers) and society activity (what you do).



Reflect on the following questions and add your own for your situation. Jot down notes on your answers to assist you in filling out the template.

### Management (the management or executive committee)

- Does your management committee work well as it is? If not, what is it about the current structure that doesn't work?
- Do they have the right skills and expertise or are there skills or expertise missing?
- What is the make up of your management committee? Do you have women, young people and/or culturally diverse voices being heard?
- Does your management committee reflect your membership base?
- Do you engage with the local community?
- Are there clear lines of communication between the management committee, subcommittees, society members and volunteers?
- Do you have paid or contract staff – how are these people managed?

- What is the management committee turnover like? Have committee members been there for a long time? Is it too long? Or do people come and go too quickly? Consider the reasons for this pattern.

### People (members and volunteers)

- Do you have enough members to make your society viable? Are participation rates satisfactory or are you looking for new members?
- Do your members and volunteers have the right skills and experience?
- Are your members happy with the society and does your society have a positive society culture?
- What skills/expertise might you have access to through your members or volunteers that you are not making the most of?
- How long do most volunteers stay in the society?
- Do you have trouble attracting members or volunteers for the long term and is your recruitment process working well?
- Do you currently provide support to your volunteers and invest in their development through offering training, mentoring etc?
- What might happen in the next 2-5 years that will have an impact on your volunteer or membership base (e.g. volunteers retiring, loss of skills, members fees going up, digital forms of doing history that exclude some members, other forms of engagement that draw volunteers away from your society)?

### Activity (the activity of the organisation)

- What does your society do really well?
- Who is this servicing – the members, the community, online visitors etc
- Is competition for your services strong?
- How many inquires do you receive? What level of community participation do you have? Do you have an online presence? How many visitors come to your historical society/museum?
- What types of historical activity are you undertaking (eg collections; running a museum, research, publications, events)?
- Do you undertake research and do you engage with current historical scholarship?
- Are your members undertaking historical activities able to undertake the tasks adequately? Do your active members have access to good support?
- Do you have regular activities and events – too many/not enough?
- Do you have the appropriate venues for your research/collections/meetings etc?
- Does your society have access to enough resources (money, equipment, storage etc.)? Or do you need to access better/more resources?
- Is your society thriving?
- What changes do you want to see to the activities of the historical society in the next 2-5 years?

- Are there other changes that you desire in the activities of the historical society in the next 5-10 years?

Thinking about these questions will help highlight what you need to do to fulfil your intended mission and thrive as an organisation. It also helps you see the long-term needs of the society.

You may also wish to address changes you want to see over the longer-term over the next 5-10 years.



## 2. The Society Position

Identify the things your society does well, the things you would like to do better and the changes you want to see happen in the next 2-5 years.

	<b>Things your society does well (Strengths)</b>	<b>Things you would like to do better (Weaknesses)</b>	<b>Changes that need to occur in 2-5 years (Opportunities)</b>
<b>Management</b> Governance responsibilities that guide the operations of the organisation	1. 2. 3.	1. 2. 3.	1. 2. 3.
<b>People</b> Skills essential for your organisation to deliver its services	1. 2. 3.	1. 2. 3.	1. 2. 3.
<b>Activities</b> Society activities that fulfil your goals	1. 2. 3.	1. 2. 3.	1. 2. 3.