



**Common**

**Service**

**Model**

**for State Museum  
Associations**

**2023 Edition**

# Acknowledgements

- Members of Coalition of State Museum Associations (COSMA) National Endowment for the Humanities (NEH) Grant Advisory Committee, all of whom moderated breakout sessions at the Convening and were responsible for editing specific sections of the Common Service Model (CSM):

Rusty Baker, PA Museums (Advocacy)

Dixie Clough, Museums Alaska (Communications)

Lauren Daughety, Oklahoma Museums Association (Governance)

Janice Klein, Museum Association of Arizona (Financial Stability)

Casie Vance, Iowa Museums Association (Member Services)

- Grant Project Team

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# Introductory Note

This Common Service Model (CSM) for state museum associations (SMA) was developed by the Coalition of State Museum Associations (COSMA) through multiple consultations with the entire SMA community. A grant from the National Endowment for the Humanities allowed us to create a comprehensive written survey and hold two virtual focus group convenings, which provided us with fundamental information about how SMAs function. All 45 SMAs were invited to be part of the process, and we are proud that every one of them participated.

The CSM addresses best practices across all areas of museum association administration. However, there are actions that are not listed in the model that are foundational to the operation of each SMA, and it is expected that they will be completed before any further activities or programs are initiated.

These include:

- Incorporate and file Bylaws and other documents as required by state law.
- Apply for 501c status and create and maintain records required by the IRS 501c statutes.
- File required annual paperwork to state and Federal government to maintain this nonprofit status.
- Create basic financial systems, including a business bank account.

These guidelines focus on SMA administration and services. In addition to the activities listed in the CSM, there will be others that your organization undertakes or deems important. Each state has unique membership and challenges. Individualized programming and services should come from direct member need.

There is also no expectation that every SMA will take on every one of the activities in each category. Each SMA should choose what is appropriate for their state.

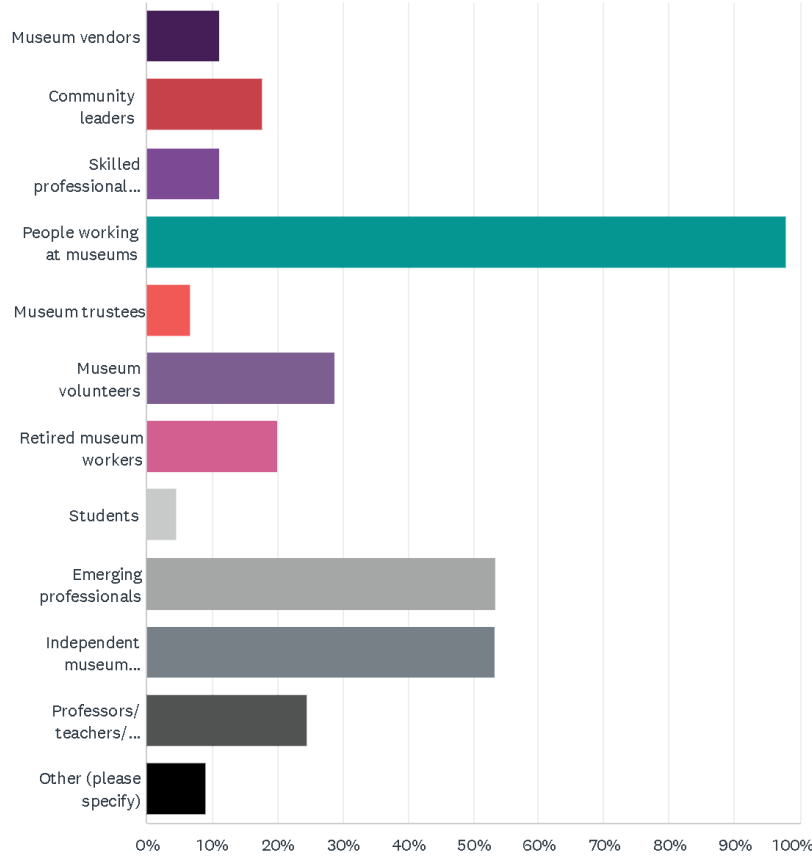
If you have any questions, please reach out to [ourcosma@gmail.com](mailto:ourcosma@gmail.com).

April 15, 2023

# Section I: Governance

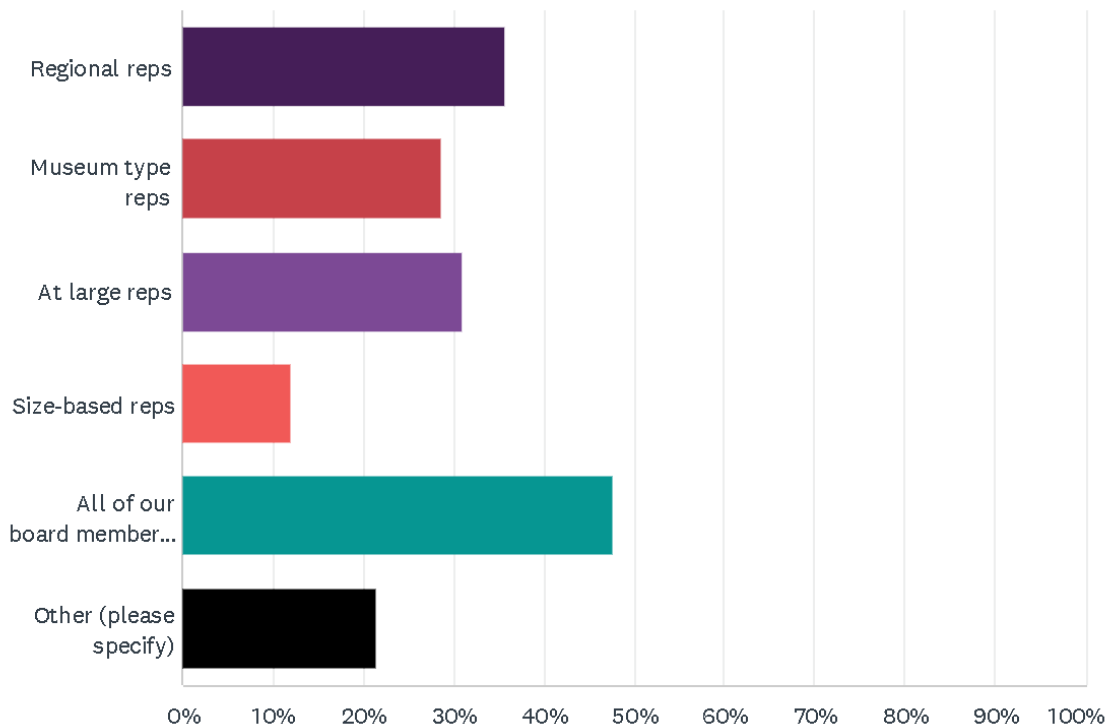
Where are we now? Here are some snapshots from our survey:

What types of individuals sit on your board? (Select all that apply)



Museum vendors	(11.11%)	5 SMAs	Students	(4.44%)	2 SMAs
Community leaders	(17.78%)	8 SMAs	Emerging professionals	(53.33%)	24 SMAs
Skilled professionals that help with process on our board (i.e. lawyer, accountant)	(11.11%)	5 SMAs	Independent museum professionals / consultants	(53.33%)	24 SMAs
People working at museums	(97.78%)	44 SMAs	Professors / teachers / non-museum educators	(24.44%)	11 SMAs
Museum trustees	(6.67%)	3 SMA	Other (please specify)	(8.89%)	4 SMAs
Museum volunteers	(28.89%)	13 SMAs	<ul style="list-style-type: none"> <li>• Development Professionals, Tourism Professionals</li> <li>• A variety, but most are paid museum professionals</li> <li>• Louisiana Endowment for the Humanities staff</li> <li>• Only one non museum professional, marketing person</li> </ul>		
Retired museum workers	(20%)	9 SMAs			

## How are your members represented on your board? (Select all that apply)



Regional reps (35.71%) 15 SMAs

Museum type reps (28.57%) 12 SMAs

At large reps (30.95%) 13 SMAs

Size-based reps (11.90%) 5 SMAs

All of our board members are at large (47.62%) 20 SMA

Other (please specify) (21.43%) 9 SMAs

- we use a matrix to try to rep as many area(s) as possible - geography, museum size, career, gender, race, etc
- While we do not have official representatives of particular regions, museum types, or sizes, we strive for geographical, size/type, and point-in-career representation on our board

- state historical agencies and university
- We have a board development matrix which takes into account the factors above, as well as board member areas of professional expertise.
- We have a set of representation and expertise board characteristics that we use to identify needs for new board members. They include a variety of areas including region, size, and type of museum plus quite a few more areas.
- By-laws state Museum Type reps but have plans to amend by-laws and change to Regional reps this year
- We don't have "quotas" but work to build a diverse board based on geography, type of museum, area of expertise, museum size, plus personal demographics
- We track region, museum type, gender and try to balance the board.
- We are just changing to all at-large as regional did not work

# Standards

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## BASIC

Develop a board structure that is inclusive and diverse, to ensure that the membership is represented as fully as possible, such as by discipline and by geographic region.

Write a basic job description or guidelines for board members to help them succeed in their roles.

Ensure that board members fully understand and embrace the purpose and mission of the organization.

Guide board members in following applicable state and federal laws governing nonprofits.

Hold regular board meetings that provide a transparent review of ongoing operations.

Encourage board members to engage with the organization, with each other, and with other museum professionals.

Confirm that by-laws include board membership criteria, terms of office, and other particulars of service.

Create a board agreement for members to sign annually that outlines responsibilities including attendance at meetings, expected giving, and other particulars of service.

Develop a plan for passing along important organization-related materials to new incoming board members, to ensure stability and continuity.

## GOOD

Obtain D&O (directors & officers) insurance to protect the board members and organization.

Conduct an orientation for new board members and those moving into officer positions.

Urge all board members to contribute to fundraising efforts for the organization in order to achieve 100% donor participation from the board. (to ensure inclusive boards, this contribution can be set at any amount).

Create basic policies to govern the work of the board, staff, and others representing the organization, such as financial policy, conflict of interest policy, code of ethics and social media policy. Maintain a shared drive where all these policies live, so all board members have access.

Write job descriptions for board committees, any staff and working groups; ensure that reporting structure is clearly laid out.

## **BETTER**

Create templates and instructions for incoming board members to take over leadership of important tasks that are already in progress.

Review the organization's by-laws every three to five years.

Create a matrix to track the skills, affiliations, and demographics that each board member possesses in order to recruit new leadership to fulfill needed representation.

Provide ongoing training for the board members on association management and governance.

Develop board recruitment strategies.

## **BEST**

Conduct an annual board self-assessment.

Host annual board retreats for team building and planning.

Develop a long range/ strategic plan and review it annually with the Board.

Set up a board mentoring program, so that experienced board members can work with new board members and help them coalesce as a team.

Further develop a board recruitment strategy, to include a pipeline of future leaders and holding interest meetings for potential board members.

## Resources to Help You Succeed

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Links to toolkits, other articles that might help with this area of your organization.

[COSMA webinar, Applying Lysol to the Stench of Power: Ten Basic Rules of Board Behavior](#)

[Boardsource.com, Board Assessment Tools](#)

[Boardsource.com, Worksheet to include in Board Manuals](#)

[Boardsource.com, Board orientation checklist](#)

[National Council on Nonprofits, Hosting a Good Board Meeting](#)

[Hubspot.com, Leadership Tips for Presidents Building Buy-In and Crafting Vision](#)

### For Your Bookshelf

#### **Beginner:**

[The Governing Board: Key Responsibilities for Association Boards and Board Members](#)

#### **Advanced:**

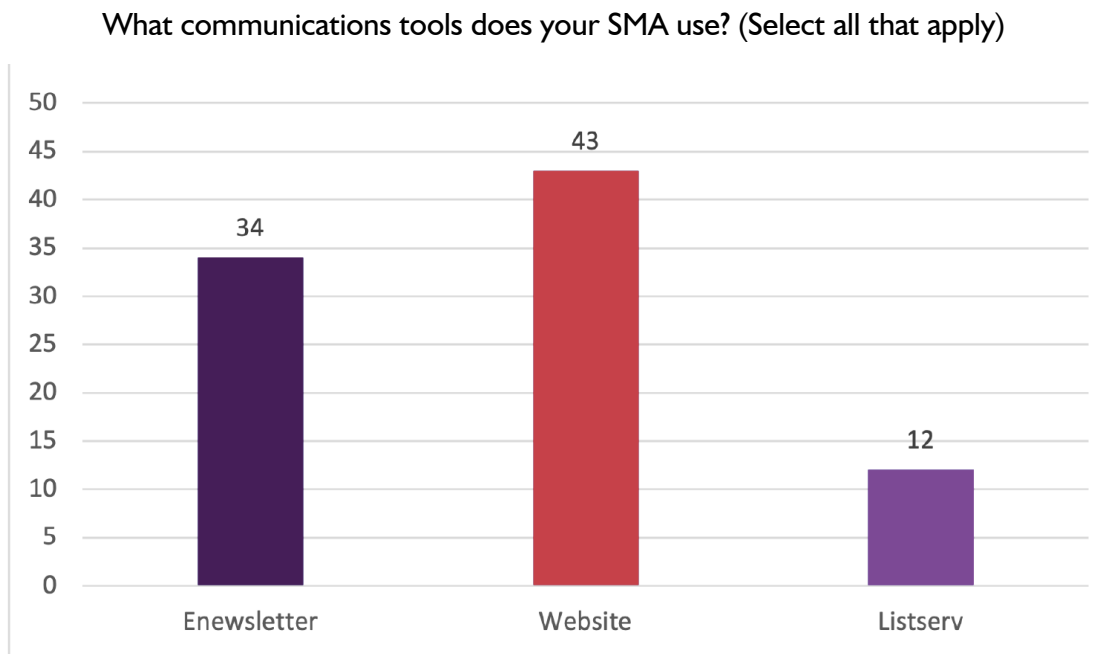
[Transformational Governance: How Boards Achieve Extraordinary Change](#)



## Section 2: Communications

Where are we now? Here are some snapshots from our recent survey:

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## Standards

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### BASIC

Establish reliable contact information for the organization including phone number, email address, website, postal address, and physical address. Check and update regularly.

Maintain a basic website presence that provides information about the organization including purpose, leadership, and contact information.

Create accounts on one or more social media platforms to post organizational information and add those links to the website.

Use programs like LastPass to create a shared list of usernames and passwords of all communications platforms and tools for succession and emergency use; only the person handling the accounts should have access, as well as the Executive committee.

Know what Federal and state rules are related to communication; specifically, ensure that you are following email rules—do not email people without permission, and offer members a chance to unsubscribe.

## GOOD

Send regular emails to members with news about the organization, programs, and the state's museum community.

Include helpful resources on the website, such as an events calendar, member directory, blog posts, background on the organization, and links to other resources. Have someone assigned to keep this information up-to-date.

Develop and implement communication-specific policies for the organization to ensure that staff, volunteers, and other participants adhere to standards when creating, approving, and sending/posting communications. This should include a policy designating who should speak publicly for the organization.

Ensure you are sending emails to nonmembers as well as members, to let them know about the organization. Nonmembers can include museums and staff, but might also include other community organizations or legislators.

Create a brand for the organization. Design a logo, choose standard colors and fonts, and use them consistently in all communications that represent the organization.

Regularly check who has access to your social media accounts, shared drives, etc., and remove those who no longer need access.

## BETTER

Present an annual report to members and supporters each year and post it on the website.

Use a platform or program that allows you to segment and track your email audience based on membership, donations, etc., so you can properly target your emails and other communications.

Compile a statewide media contact list for news releases and letters to the editor and update it after each use.

Include a line item in annual budget for communication, to ensure that this remains a priority.

## BEST

Maintain an annual communications calendar covering all platforms and messaging methods.

Track data analytics and make changes to your communications strategy according to the results.

Create and regularly update a communications strategy and plan, including all platform your organization uses, like social media, email, advertising, etc.

Reach new audiences with targeted (or paid) advertising for programming, membership, and advocacy campaigns.

Use an association management system (AMS) or member management database to operate the website, email communications, member lists, and donor information.

## Resources to Help You Succeed

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Links to toolkits, other articles that might help with this area of your organization.

[5 Steps for Improving Your Website](#), Techsoup

[Nonprofit Communication Plan Template](#), from COSMA Toolkit

[Successful Social Media](#), from COSMA Toolkit

[Using Social Media Metrics to Improve Audience Engagement](#), COSMA Webinar

[Value Propositions](#), from COSMA Toolkit

### For Your Bookshelf

#### **Beginner:**

[Nonprofit Marketing Guide](#)

[Marketing Nonprofit Organizations](#)

#### **Advanced:**

[Branding Nonprofits](#)

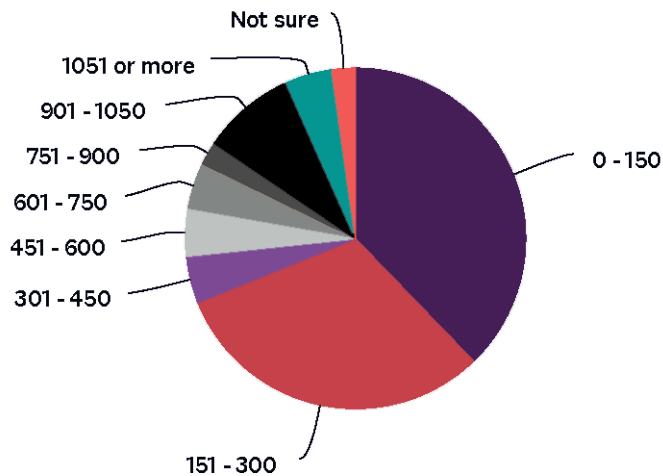
[Storytelling in the Digital Age](#)

[Strategic Communications](#)

## Section 3: Member Services

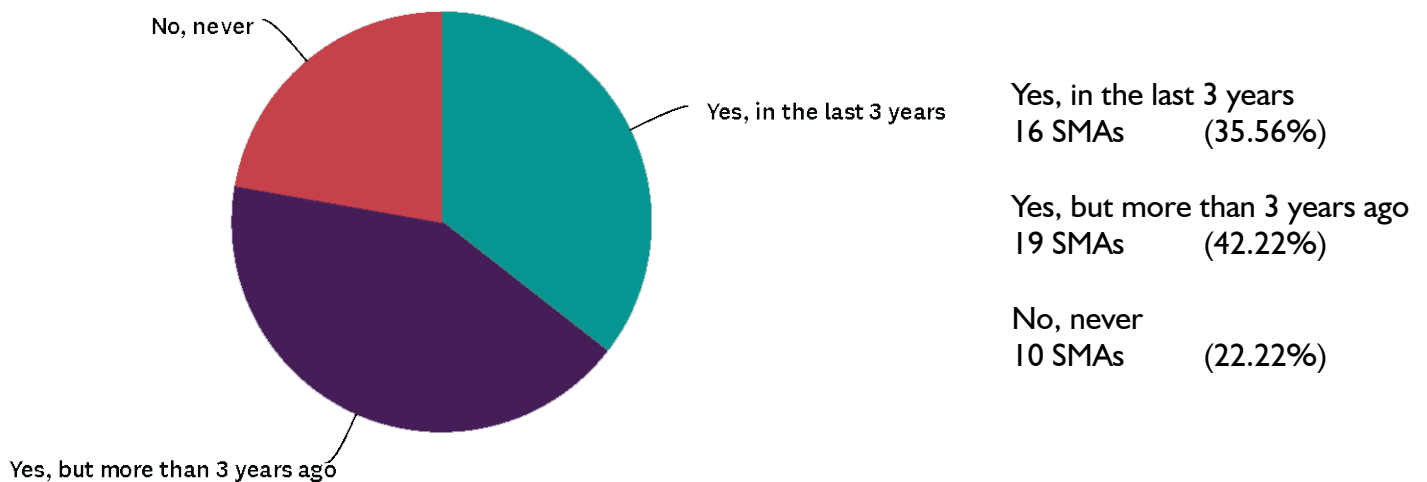
Where are we now? Here are some snapshots from our recent survey:

Please estimate the total number of members of your SMA. Include all membership categories.

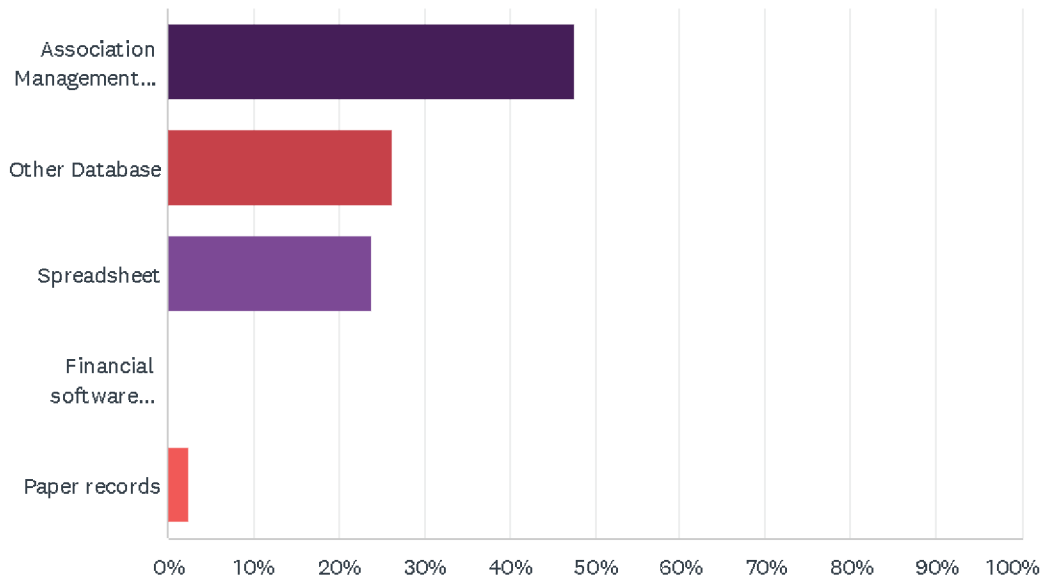


Not sure	(2.22%)	1 SMA	601-750	(4.44%)	2 SMAs
0-150	(37.78%)	17 SMAs	751-900	(2.22%)	1 SMA
151-300	(31.11%)	14 SMAs	901-1050	(8.89%)	4 SMAs
301-450	(4.44%)	2 SMAs	1051 or more	(4.44%)	2 SMAs
451-600	(4.44%)	2 SMAs			

Have you conducted a survey of all your members (who they are, what they need & value)?



## How do you track your members?



Association Management System (AMS)	20 SMAs	(47.6%)
Other Database	11 SMAs	(26.2%)
Spreadsheet	10 SMAs	(23.8%)
Financial software program	0 SMAs	(0%)
Paper records	1 SMA	(2.4%)

## Standards

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### BASIC

Clearly define member levels and benefits for each level

Host an annual meeting (does NOT need to be tied to a conference, can be a simple meeting) with members, virtually or in person, to meet 501c nonprofit guidelines.

Maintain an up-to-date membership contact list including email, postal address, and phone.

Employ a system for annual membership renewals.

Provide information to members on professional development opportunities in the field (from AAM, AASLH for example).

## **GOOD**

Maintain an organized list of contacts to include potential members, and update the list at least annually.

Ensure new and renewing members are welcomed and acknowledged in a timely way.

Create one or more programs or professional development opportunities for members each year, virtual or in-person.

## **BETTER**

Identify potential new members and undertake a membership recruitment campaign.

Survey the members every 2 or 3 years and use their feedback to improve the services.

Plan accessible programming (could be in person in different areas of the state or virtual).

Develop a way to make your professional development programs more accessible to those who cannot afford to attend.

Act as a central hub for members to communicate with each other, perhaps utilizing a listserv, Facebook group, or other online community.

Devise a membership retention plan to include touchpoints and engagement.

## **BEST**

Review membership categories and fees yearly to ensure the structure and pricing are appropriate.

Establish and administer a mentor or assistance program for the members to help each other.

Develop an established slate of programs for the members based on their interests and current issues.

Develop partnerships with businesses that can support your organization and offer services to your members.

## Resources to Help You Succeed

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Links to toolkits, other articles that might help with this area of your organization.

[Why you need a membership agreement](#) (includes a sample), from Wild Apricot

[Making the Most of SMA Data](#), COSMA webinar

[Mentorship Programs](#), COSMA Webinar

[A series of COSMA resources](#) related to AMS systems

### For Your Bookshelf

#### **Beginner:**

[Membership Essentials](#)

[The Art of Membership: How to Attract and Retain Members](#)

[Event Planning and Fundraising for Events and Conferences](#)

#### **Advanced:**

[The Decision to Join](#)

[The End of Membership as we Know It](#)

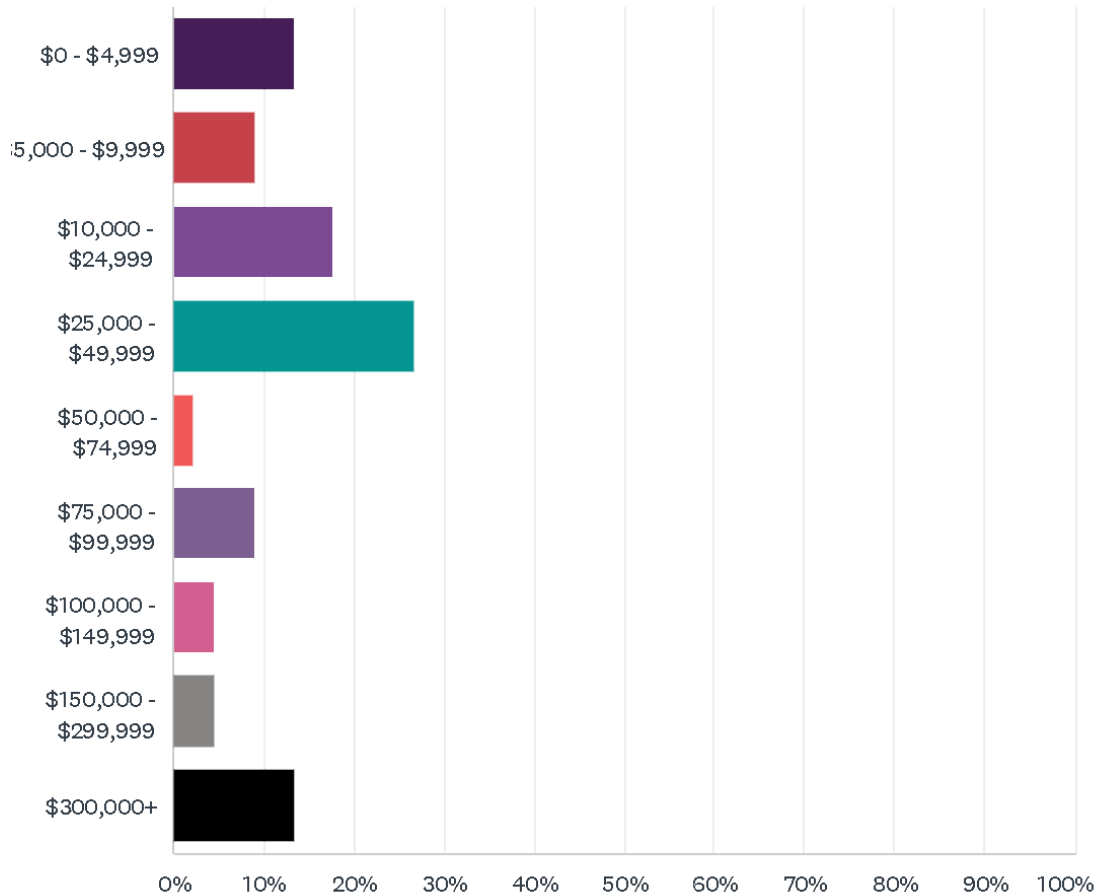
[The Power of Participation](#)



## Section 4: Financial Stability

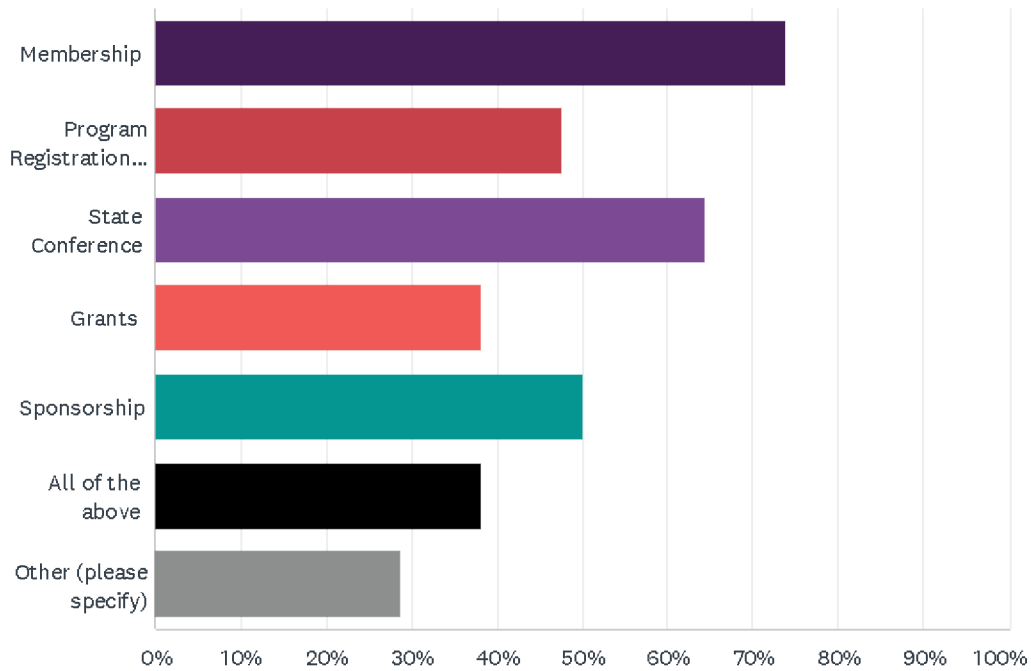
Where are we now? Here are some snapshots from our recent survey:

What is your SMA's total operating budget for the most recently completed fiscal year?



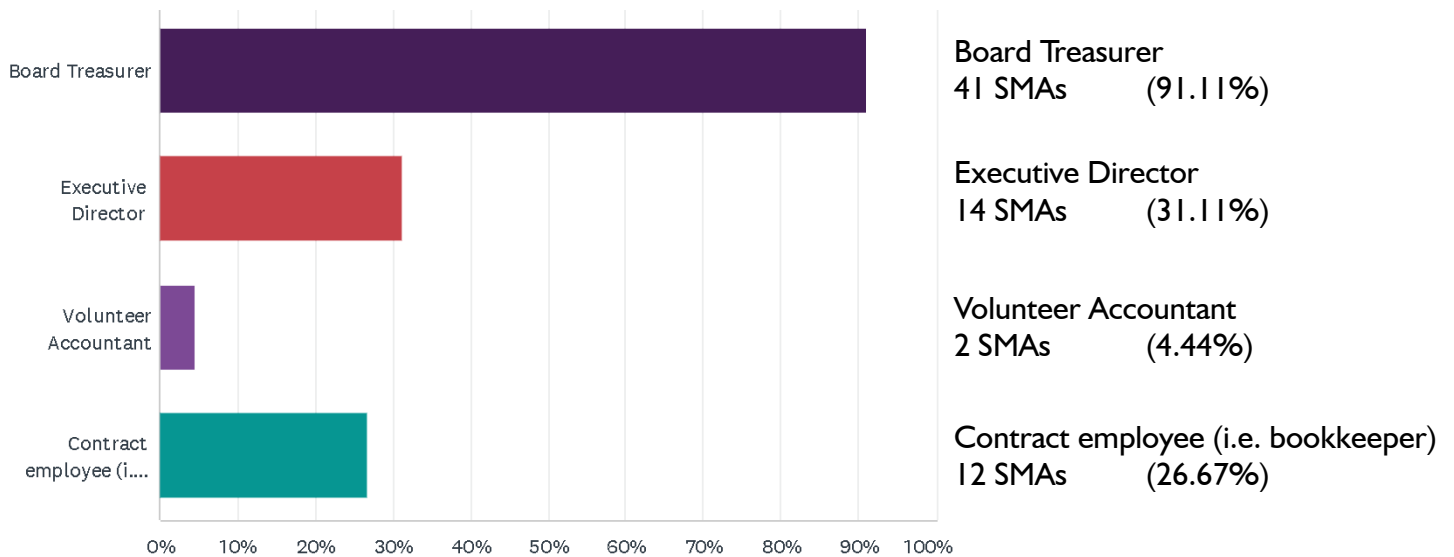
\$0 - \$4,999	(13.33%)	6 SMAs	\$75,000 - \$99,999	(8.89%)	4 SMAs
\$5,000 - \$9,999	(8.89%)	4 SMAs	\$100,000 - \$149,999	(4.44%)	2 SMAs
\$10,000 - \$24,999	(17.78%)	8 SMAs	\$150,000 - \$299,999	(4.44%)	2 SMAs
\$25,000 - \$49,999	(26.67%)	12 SMAs	\$300,000+	(13.33%)	6 SMAs
\$50,000 - \$74,999	(2.22%)	1 SMA			

What are your sources of funding? (please check all that apply)



Membership	31 SMAs	(73.8%)	<ul style="list-style-type: none"> <li>• Annual giving, fundraising auction, and we used to sell ads in our newsletter, though that was discontinued after the end of the 2021 fiscal year.</li> <li>• We also have an investment account as well as an endowment, though we are not drawing from either right now so they can grow.</li> <li>• Nothing since I have been around. We can not seem to get it off the ground. Have around \$1000 in an account from memberships years ago when they tried to get something going.</li> <li>• Donations</li> <li>• Annual Appeal</li> <li>• Third-party partnership stipends</li> <li>• Consulting fees</li> <li>• Advertising in electronic publications</li> <li>• live/silent auctions, tshirt/swag sales, specific donation categories</li> <li>• Fundraisers</li> </ul>
Program Registration Fees	20 SMAs	(47.6%)	
State Conference	27 SMAs	(64.3%)	
Grants	16 SMAs	(38.1%)	
Sponsorship	21 SMAs	(50%)	
All of the Above	16 SMAs	(38.1%)	
Other (please specify)	12 SMAs	(28.6%)	
<ul style="list-style-type: none"> <li>• Endowment. No current revenue coming in from any source other than endowment and interest from the endowment.</li> <li>• Donations</li> <li>• Interest</li> </ul>			

### Who handles your finances? (select all that apply)



## Standards

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### BASIC

Generate an annual board-approved budget.

Track income and expenses, either manually or electronically.

Maintain records of income and expenses for seven years.

File annual tax forms and other corporate reports as required by state and Federal authorities.

Identify the designated leaders who will approve expenses and sign checks.

Make sure the full board understands its fiscal responsibilities, and ensure that the designated financial officer provides regular reporting to the board.

## **GOOD**

Use online financial software, such as Quicken or Freshbooks, which allows access for more than one person to review financial reporting.

Create a formal policy to guide all financial that includes the process for producing, approving, and implementing the annual board-approved budget.

Provide financial information such as annual budget and tax forms to membership to ensure transparency.

Implement checks and balances for all financial activities, to ensure transparency and protect the organization.

## **BETTER**

Contract with a part-time bookkeeper to increase the level of financial expertise.

Research grant opportunities regularly.

Establish a savings account to begin setting aside money for “rainy day”.

Explore options for raising non-dues revenue, including sponsorships and annual fund campaigns.

## **BEST**

Create development plan, including options for non-dues revenue. and incorporate into annual planning strategy.

Conduct an annual review of the financial activities by an outside accounting firm to ensure compliance and transparency.

Establish an investment account or endowment to build reserves for emergencies or future capital projects.

Initiate a formal, board-approved investment plan.

Develop a planned giving campaign.

## Resources to Help You Succeed

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Links to toolkits, other articles that might help with this area of your organization.

[Monthly Giving: Your Nonprofit Sustainability Plan](#), COSMA Webinar

[Fiscal policies and procedures](#), COSMA Toolkit Resources

[Financial Policy](#), COSMA Toolkit Resources

[What Makes a Good Board Treasurer?](#), Propelnonprofits.org

[Work Plan for a Board Finance Committee](#), Managementhelp.com

[Forecasting Financials 101](#), COSMA Webinar

### For Your Bookshelf

#### **Beginner:**

[Financial Management Handbook for Nonprofits](#)

[Fundraising without Fear](#)

#### **Advanced:**

[Achieving Excellence in Fundraising and Leadership Management](#)

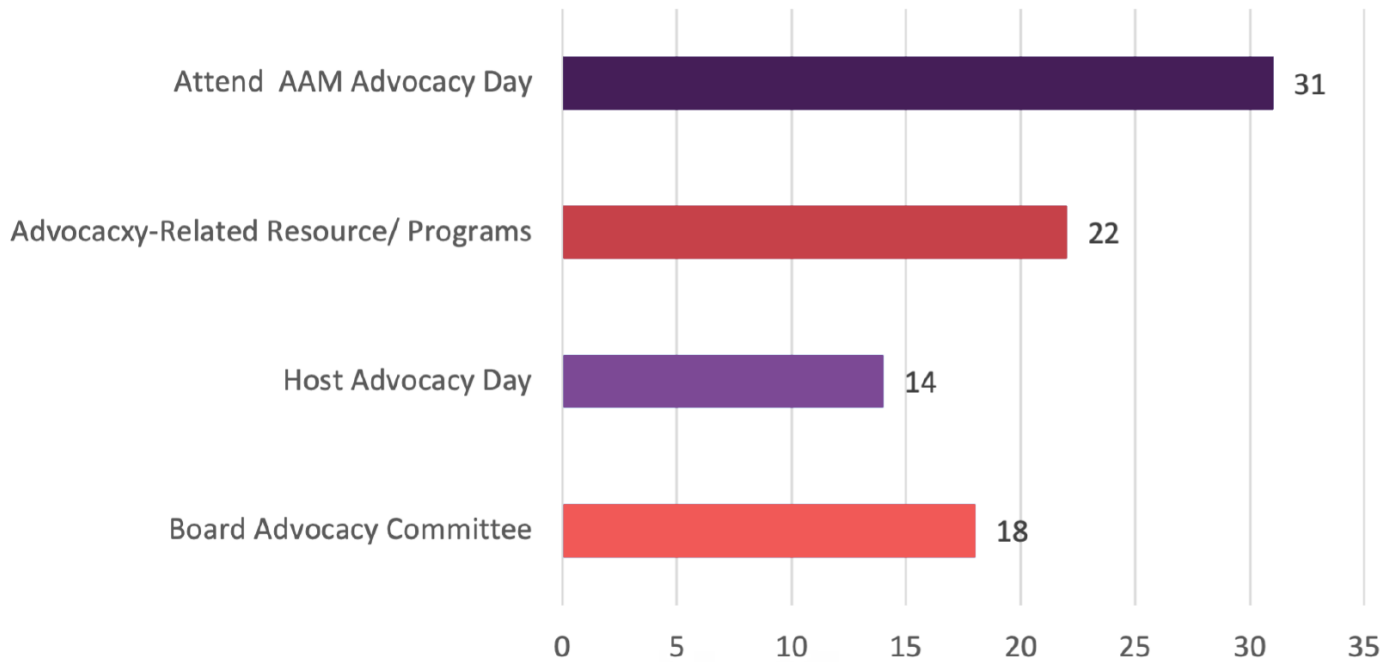
[Successful Grantwriting for Your Nonprofit](#)

## Section 5: Advocacy

Where are we now? Here are some snapshots from our recent survey:

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What advocacy related activities does your SMA participate in?



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### Standards

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#### BASIC

Add state and local legislators to communications lists so they get to know the organization.

Share AAM advocacy updates with members.

## GOOD

Provide legislative updates during the state legislative session to inform members of relevant issues, and make sure members know how to determine who their legislators are and how to reach them.

Maintain an advocacy page on the website that links to resources, including AAM and state legislative information.

Establish an advocacy committee or affinity group.

Help your members to participate in AAM's annual Invite Congress activities as a way to introduce them to state and local officials, and to advocacy.

## BETTER

Conduct ongoing training about advocacy with the members.

Invite legislators and local officials (i.e. mayor, city council) to come to the organizations' conference to participate in a meal or session.

Plan year-round advocacy activities for the members, to include training on reaching local officials.

Write an advocacy policy that provides guidelines for making statements about political controversies or legislative actions.

Attend AAM's Museum Advocacy Day, and share the important work of your SMA and your state's museums.

Keep track of the museums and members in different state districts, so that you can target communications around specific lawmakers if necessary.

## BEST

Host an annual state-wide museum advocacy day.

Assist member museums in participating in AAM's Museums Advocacy Day.

Make the organization available to state legislators to provide testimony for museum-related issues.

Participate in advocacy coalitions with partners to achieve shared goals.

Serve as a media source for museum-related issues on the state and federal levels.

Depending on your 501c status, consider hiring a lobbyist to help with statewide advocacy efforts, and to help you work on specific legislation to assist museums in your state.

Include advocacy as a line item in your organization's annual budget, to make sure it remains a priority.



## Resources to Help You Succeed

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Links to toolkits, other articles that might help with this area of your organization.

[Approaching the Powers That Be: SMAs and Advocacy](#), COSMA Webinar

[Is Virtual Advocacy Easier or Harder](#), COSMA Webinar

[Demystifying Advocacy](#), COSMA Webinar

[Economic Impact Reports for Advocacy](#), COSMA Toolkit

[Advocacy Resources](#), COSMA Toolkit

### For Your Bookshelf

#### **Beginner:**

[Speak Up for Museums: The AAM Guide to Advocacy](#)

#### **Advanced:**

[How Change Happens](#)

[Impact Every Day: The Vital Role of Associations](#)