

2012

STRATEGIC PLAN



ARCHAEOLOGICAL INSTITUTE *of* AMERICA

Executive Summary

As the Archaeological Institute of America has evolved and taken on more initiatives, two issues have become apparent. To achieve maximum impact, we must focus our resources judiciously and we must ensure that opportunities are exploited in a prioritized fashion. To address these challenges, AIA President Elizabeth Bartman appointed a Task Force consisting of Cathleen Asch, Brian Heidtke, Peter Herdrich, Andrew Moore, Thomas Morton, and Doug Tilden, with Meredith Anderson Langlitz as secretary, to join her in a strategic planning exercise designed to review the operations of the AIA and provide a method for success as the Institute moves forward.

The Task Force met twenty-four times, including a two-day-long en face discussion, to understand how the AIA operates, to define the mission and goals of the organization, and to provide strategies on how to achieve mission fulfillment. This document summarizes the Task Force's recommendations.

The process began with a consideration of the AIA's Mission Statement, and the proposed update will be submitted to Council in January of 2013 for approval. The Task Force defined ten goals for the AIA. Six goals pertain to programming success and encompass advocacy, education, membership, Professional Services, Site Preservation and Publications, and Societies. Four goals are administrative, including financial excellence, collaborations, technology, and governance. Each goal is supported by strategies, which were developed with input from the AIA staff. Those strategies were then prioritized. Metrics and deliverables to measure success will be developed next.

The ten goals are recognizable in the current operations of the Institute. When discussing the goals, the Task Force identified financial excellence, membership, and advocacy as first among equals and they will receive particular attention in the coming year.

The strategies outline many important initiatives, including:

- Advocacy: Testifying at CPAC hearings; expanding National Archaeology Day.
- Education: Creating a Task Force to evaluate programs and create a plan to move forward.
- Membership: Increasing membership to 11,000 by 2020.
- Professional Services: Improving the Placement Service; supporting fieldwork start-ups.
- Site Preservation: Creating additional grants for circum-Mediterranean sites.
- Publications: Expanding our digital presence.
- Societies: Implementing a rewards-and-recognition system.
- Collaborations: Creating a Task Force to define which collaborations best support our mission.
- Finance: Continuing balanced budgets; building the foundation for a capital campaign.
- Governance: Initiating a governance assessment; reviewing the bylaws.
- Technology: Implementing new digital strategies.

The Task Force believes that the Strategic Plan will guide the actions of the staff in support of the mission and enable the AIA to thrive in the face of future challenges. In conclusion, the Task Force asks for the Board's endorsement of the Strategic Plan.



Peter Herdrich, CEO

Introduction to Strategic Plan Report

Like all vibrant institutions, the AIA has changed markedly during its 133-year history. Today's AIA is a far cry from the nineteenth century gatherings of tuxedo-clad Brahmins who heard tales of archaeological expeditions over brandy and cigars. To help ensure a successful future for the AIA during its next century, I appointed a task force in April of 2011 to develop a Strategic Plan to guide the Institute forward. For the past year, we have been engaged in a strategic planning process, which was frequently an exhilarating exercise and, to our knowledge, the first in the AIA's history.

Beginning with a freshly-articulated mission statement, we set goals and established the diverse means by which to achieve them; determining metrics and costs was the next step. Throughout the process, we repeatedly consulted with staff and fellow board members, incorporating their ideas at each stage. We present the final version of the Plan in the following pages. By setting goals and prioritizing the strategies by which to achieve them, we provide a road map for the AIA's board and staff as they lead the Institute over the next five years or so. Through this document, our aspirations acquire the fiscal and logistical overlay that will transform them into reality.



Elizabeth Bartman, President



MISSION STATEMENT

The Archaeological Institute of America promotes archaeological inquiry and public understanding of the material record of the human past to foster an appreciation of diverse cultures and our shared humanity. The AIA supports archaeologists, their research and its dissemination, and the ethical practice of archaeology. The AIA educates people of all ages about the significance of archaeological discovery and advocates the preservation of the world's archaeological heritage.

GOALS

1. To recommit the AIA to **advocating** the importance of archaeology in public understanding and the preservation of the world's archaeological heritage.
2. To design, pilot, and replicate more **education** offerings for both K-12 and interested adults.
3. To increase **membership** and inspire AIA members to greater levels of engagement.
4. To increase **Professional Services** for our core constituency of professional archaeologists.
5. To improve AIA's ongoing initiatives and successes with **Site Preservation** and **Publications**.
6. To promote and invigorate AIA's **Society system**.
7. To foster **collaborations** and **partnerships** as a core competency that advances our mission.
8. To reinforce and sustain the **financial strength** necessary to support the AIA's mission.
9. To repurpose and redesign the **governance**, volunteer, and management structure of the AIA around mission fulfillment.
10. To expand the role of **technology** as a core component within the AIA's activities that aspires to be best in class for learned societies.



STRATEGIES

1. To recommit the AIA to **advocating** the importance of archaeology in public understanding and the preservation of the world's archaeological heritage.
 - 1.1 *Testify at all Cultural Property Advisory Committee hearings on Memoranda of Understanding regarding trade in antiquities.*
 - 1.2 Monitor world events and speak out when appropriate.
 - 1.3 *Promote and expand National Archaeology Day.*
2. To design, pilot, and replicate more **education** offerings for both K–12 and interested adults.
 - 2.1 Reenergize the Education Committee to work with staff on this goal.
 - 2.2 Evaluate current resources and programs; create a plan for moving forward.
 - 2.3 Work with Societies to encourage archaeologists and graduate students to make presentations in K–12 classrooms; assist in educating other non-traditional students.
 - 2.4 Encourage Societies to emulate successful models for this type of outreach used by other Societies.
3. To increase **membership** and inspire AIA members to greater levels of engagement.
 - 3.1 *Achieve membership goals by 2020:*
2,500 professional archaeologists
6,000 amateur enthusiasts
2,500 college students

Professional Archaeologists

 - 3.2 Communicate better with archaeologists about current AIA support; reimagine the section for professionals on the AIA website.
 - 3.3 Reach out to a broader constituency of prospective professional members.

Amateur Enthusiasts

 - 3.4 *Expand benefits and emphasize AIA's mission successes in order to convert ARCHAEOLOGY subscribers and travel participants into Society members.*
 - 3.5 Reach more archaeology enthusiasts for membership through innovative adult education.
 - 3.6 Reach more archaeology enthusiasts through special interactive excavation site tours.
 - 3.7 Expand benefits for lay members at the Annual Meeting.

Students

 - 3.8 Increase student participation in the Annual Meeting.
 - 3.8.1 Encourage more students to present papers and posters in regular sessions.
 - 3.8.2 Expand opportunities for students to participate in scholarly activities.



3.8.3 Offer more professional development programs for graduate students at the Annual Meeting and during the year.

3.9 Invite students to advise on and participate in AIA initiatives.

3.10 Develop the Student Affairs Interest Group such that it assumes an active advisory role in the AIA.

3.11 Convince faculty members to introduce the benefits of AIA and local Society membership to their students.

3.12 Enhance the Societies' emphasis on student member volunteerism and its value.

4. To increase **Professional Services** for our core constituency of professional archaeologists.

4.1 Expand and diversify professional development programs at the Annual Meeting and during the year.

4.2 Employment

4.2.1 Review and improve upon the Placement Service to ensure that it is truly serving the needs of AIA members.

4.2.2 Reach out to a much wider range of prospective employers (cultural resource management, museums, and other kinds of jobs in/near archaeology in North America and overseas) and invite them to advertise through the AIA.

4.2.3 Consult members, especially students and young professionals, on their employment needs.

4.3 Reevaluate the Fellowships program to ensure that it meets the needs of the AIA's professional membership now and in the future.

4.4 Consider ways to revitalize and improve the Interest Groups.

4.5 Prepare a white paper that would advocate the value of archaeology in general education curriculums in colleges and universities.

4.6 *Establish an endowed fund to support fieldwork start-ups by AIA professional members.*

5. To improve AIA's ongoing initiatives and successes with **Site Preservation** and **Publications**.

Site Preservation

5.1 *Turn experiences and successes from site preservation projects into best-practice standards and publications, and eventual "gold seal" site certification.*

5.2 *Further articulate AIA's position via participation in professional conferences and collaborations with other professional bodies.*



- 5.3 *Expand the number of site preservation projects, and create, over the next three years, an additional grant category to support preservation and conservation projects required by national authorities at circum-Mediterranean archaeological sites.*

Publications

- 5.4 Continue Publications' recent successful tactics, while still monitoring closely for any changes in the print market and new modes of communication.
- 5.5 *Expand digital presence, post more materials, and widen the market to increase international visibility.*
- 5.6 Explore options for expanding the *American Journal of Archaeology* in an online environment to better serve research needs and to cultivate new subscribers.
- 5.7 Reevaluate AIA's strategy for presenting new primary archaeological data.
- 5.8 Assess the feasibility of a new online journal on best practices in Site Preservation and deliver an informed recommendation.

6. To promote and invigorate AIA's **Society system**.


- 6.1 Identify, develop, and promote diverse Society models.
- 6.2 *Implement a rewards-and-recognition system that favors active Societies that are creating more programs and increasing membership.*
- 6.3 Continue to build on the successful lecture program.
- 6.4 Develop a survey for members of local Societies and possibly former members of local Societies.
- 6.5 *Pilot a virtual Society.*

7. To foster **collaborations** and **partnerships** as a core competency that advances our mission.

- 7.1 Develop criteria and/or a list of aspirations to help staff select which collaborations or partnerships are most immediate and best support AIA's mission.
- 7.2 Develop a target list of key opinion making organizations with which we should partner.

8. To reinforce and sustain the **financial strength** necessary to support the AIA's mission.

- 8.1 Target balanced revenues and expenditures annually.
- 8.2 Increase contributed income relative to earned income.
- 8.3 *Build the foundation for a future capital campaign through internal support tools/capabilities and necessary external potential contributor relationships.*
- 8.4 Increase unrestricted revenues, endowment assets, and the number of large gifts.

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- 8.5 *Develop “earned income” as a core competency to diversify revenue streams, piloting new ideas that have positive margins and also support other programming, distribution, and public awareness goals/strategies.*
- 8.6 *Establish special project-funding campaigns for the priorities in this new strategic direction and align fundraising with program initiatives.*
- 8.7 Continue to draw down an appropriate percent of AIA’s endowment fund to cover operating requirements and needed investment in new ideas.
9. To repurpose and redesign the **governance**, volunteer, and management structure of the AIA around mission fulfillment.
- Governing Board
- 9.1 Complete a comprehensive governance assessment on practices, outcome effectiveness, and leader satisfaction (i.e. conduct a Board survey).
- 9.2 Rewrite the expectations of trustees; ensure that adequate policies are in place on personal giving, and attendance at Board meetings and fundraising activities; hold Board members accountable; and emphasize resource generation as a role of Board members.
- 9.3 Offer standing trustees as mentors to new trustees.
- 9.4 Introduce ongoing learning about finance and non-profit governance best practices.
- Member volunteerism and committees
- 9.5 Rewrite expectations and charges of all committees and duties of committee chairs, requiring annual goals to be developed. Reevaluate committees annually to assess their success in meeting goals and in advancing the organization’s current needs.
- 9.6 Revisit the nature of annual reports and consider additional means of communication and accountability.
- 9.7 Improve communication within and among committees as well as with the Council and Board of Trustees.
- 9.8 Charge staff to use relevant committees more effectively.
- 9.9 Use more time-sensitive task forces on urgent topics versus assignment to a standing committee.
- Staffing
- 9.10 Rebalance the efforts of the staff in support of the mission and goals of the AIA.
- Council
- 9.11 Assess the role and function of Council.
- 9.12 Undertake complete review of existing bylaws to ensure they serve the current and future needs of the AIA.
10. To expand the role of **technology** as a core component within the AIA’s activities that aspires to be best in class for learned societies.
- 10.1 Form a task force to look at implementing digital strategies throughout all aspects of the AIA.

Note: Strategies in italics require additional funding for implementation.

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