Stretch Your Operational Wings:
Tools for Assertive Engagement

This is a list of questions that can help your organization with your assertive engagement efforts. Remember, assertive engagement is achieved when an institution is confident in its mission and can clearly communicate what it wants from a collaborative project and what it can contribute to a collaborative project. If you are not confident in your mission, and you cannot adequately communicate the parameters of a project, you risk falling into non-assertive engagement practices.

When Considering a Possible Partnership

1. Will this partnership enhance or improve the public's access to our collections or programming?
2. Will this partnership align with our mission, or will it detract from our mission?
3. Will this partnership negatively affect the reputation of our institution?
4. Will this partnership improve philanthropic support for our institution?
5. How does this partnership influence our budget?
6. If collection items will be lent out for this project, does this potential partner have the means to protect the items? Can we trust them to properly handle the items and return them to us in good condition?

Guiding Principles for Your Toolbox

Your operational toolbox can be broken down into 3 distinct areas:

1. An honest assessment of how your institution functions internally and externally.
2. A collection of up-to-date administrative documents.
3. A record of your strengths and accolades.

When you approach potential partners (or are approached by potential partners), having these 3 areas in order will enable you to confidently answer questions about your institution. You will have a starting place for putting processes in place for seeing a project through from start to finish.

Checklist for Administrative Documents

This is a non-exhaustive list of documents that you should have on hand, both for the support of your own operations and to provide to potential partners who are interested in your institution. Not all institutions will need all these documents, so consider your institution's specific needs. Revisit and update them as often as necessary.

- ☐ Governance (Board of Directors, Key Funders, etc.)

- ☐ Budget and/or Financial Policy

- ☐ Educational Mission

- ☐ Strategic Plan

- ☐ Emergency Plan

- ☐ Code of Ethics

- ☐ Collections Management Policy

- ☐ Public and Private Programs Policy

- ☐ Staff List (Roles & Hierarchy)

- ☐ Templates (MOUs, Donation Solicitations, Thank Yous, Surveys, etc.)

- ☐ Physical Plant/Facilities (everything from printers to chairs to conference rooms, etc.)