

Museums & Galleries NSW

Strategic Planning

Heritage organisations like all businesses must be managed properly. Management strategies advised by many funding agencies for arts/heritage projects are not unlike those required of schools, commercial enterprise, industry and government departments. No doubt members of your committee will have management expertise in strategic planning, but bear in mind that heritage interpretation is a professional discipline with methodology specific to the special needs of museums and collections.

It is important to plan for the long term to ensure the integrity of your collection and site will be preserved for future generations. The process of strategic planning encourages all those involved in managing your site to define where you are today, and where you want to go in future. Strategic planning is extremely beneficial as it encourages you to communicate your aims and objectives, identify priorities and define your short and long term goals.

A strategic plan will establish set goals for your management committee to work towards and provide an essential framework from which annual progress can be reviewed. It is essential that this process involves all personnel in the development of strategy and the recognition of shared goals. As such it will become a vital management tool and a guide for the journey ahead. The process may appear to be enormously time-consuming at the outset, but the benefits of clarifying your position and plans will lighten the load for later.

When developing the plan you will need to address the following areas:

- your purpose or mission
- the scope of the collection
- your resources:
 - financial
 - physical
 - human resources
- your audience
- the level of support within the community
- benefits to the local community

You will need to consider all aspects of museum management when assessing your current situation and how you would like to see your museum develop over time. This would include:

- management and administration; including your volunteer program
- marketing and business development; including merchandising and cafe
- interpretation: exhibitions, guiding, education and public programs
- collections development: management and research
- conservation

With your aims and objectives clearly stated for each area of operations you'll be able to plot your long-term vision for your museum. From this, priorities can be identified and allocated into yearly action plans - your short term goals. Budgeting is possible once you have determined specific goals. For each goal you'll need to ask:

- Is it possible within the resources (financial, physical, human resources) currently available?
- How long will it take to gather the resources necessary for this project?
- When is the best time for this project to happen?
- When are results required/When do we aim to achieve the desired outcomes?

Work out an achievable timeframe for each project and plot that into the year's action plan. Each project will require someone to be identified as responsible or accountable to ensure the goals are met. It is good management practice for every area of your activities to be included in your strategic plan and managed according to conditions described by the plan.

You could, for example, schedule the following tasks:

1. the cleaning of the building and its contents
2. establishing good record keeping and preventive conservation practices
3. completing the inventory and the photographic record of the collection
4. clarifying the purpose and functions of the museum; developing a mission statement and a museum operational plan
5. establishing your collections management policy and procedures; for managing the scope, development and documentation of your collection/s
6. researching the history of the site and intact collection, and establishing appropriate access to this information for the benefit of all interpretive projects
7. developing interpretive strategies including guiding, exhibitions, signage, public programs, brochures and publications
8. establishing contact with networks (local, regional, state, national) for assistance, advice and resource sharing
9. developing your volunteer program including training needs

10.fundraising and developing revenue generating programs

11.raising your public profile and developing your audience; marketing

NB: These tasks and the numbering order are examples only and will not necessarily satisfy your museum's priorities.

A clear and informative strategic plan will assist all aspects of your operations and developments. It will be extremely useful when applying for grants.

It can be beneficial to have a facilitator guide your group through some of stages of strategic planning. You will find more information on planning in technical sheet #1.5 in your copy of *Museum Methods*. The following guidelines refer to the presentation of a strategic plan using the pro-forma enclosed.

Format and Content

Presenting a strategic plan in tabulated form synthesises the information and can make it easier to read at a glance. Many sections of government use this kind of format, so, should you need to present your plan to a government agency (eg. for funding purposes) they will take more note of a clear and well organised document with distinct divisions. This format can communicate your intentions easily. The most effective strategic plans feature a minimal amount of text and a summary of the plan.

Executive summary

An executive summary can be placed at the beginning of the plan to summarise the overall push of your plans. Although positioned at the beginning, this summary should not be thought of as an introduction. It is a means of 'bringing it all together' and should be written after the main body of work has been completed. This summary should be brief, no more than a page.

How to Complete the Table

You could use one table for each distinct area of your museum operations e.g. exhibitions. Therefore head the table with the name of the section it deals with.

strategic direction : Provide each table with a simple sentence that sums up the direction your organisation wishes to take in relation to the area being analysed.

objective : Each aspect of the strategic direction should have an objective. These objectives should be relatively broad but at the same time clarify the museum's position.

actions : In this area the objective is broken down into a number of concrete actions that need to be taken for the museum to meet the stated objective. These can be treated as steps to identify distinct activities that will need to be performed. The strategic plan will generally record more actions than objectives.

performance indicators : These state how you will know the objective has been achieved.

cost; other resources : It is useful to separate financial costs from other resources such as human resources, equipment, support-in-kind etc.

timeframe : Indicate the period of time required to achieve results.

responsibility : Ensure that each area of activity is assigned to a sub-committee and if possible elect a project coordinator to take responsibility for managing that project.

A strategic plan is not a discussion paper. It is a plan that has resulted from your planning processes, so the debates for prioritising the strategic developments has already taken place. The essence of a good plan is one that is not only brief but communicates clearly to your organisation.

It is an essential guide to help you all keep on target and to evaluate your progress.

We suggest you request samples from within your local Council, or another key player associated with your activities.