

Foreword

Museums Australia's *Strategic Planning Manual* is a publication designed to assist all kinds of museums in all kinds of circumstances.

Strategic planning is increasingly necessary, as it assists museums to perform better in operational and conceptual terms. The *Strategic Planning Manual* is designed to provide information on critical issues, among them: how to determine an appropriate vision and how to embark on a review of operational activities. The publication is particularly useful for smaller institutions hoping to adopt more professional procedures.

It is hoped that the *Strategic Planning Manual* will be widely used across regional and metropolitan Australia.

In this small volume you will find information presented carefully and clearly, in a simple and user-friendly format. The author, Jennifer Colbert, has worked hard to ensure that the processes, while challenging, remain achievable and exciting. I would like to commend her work.

Museums Australia, as the national association of museum workers and institutions, is grateful to the Department of Communications and the Arts for providing so generously for the funding of this important project, which is another publication under the *Caring for Our Culture* program. I would like to thank, in particular, Annabelle Cameron, for her assistance.

Museums Australia recognises the importance of smaller museums in the preservation and presentation of Australia's diverse cultures, both historical and contemporary. I wish you well with your strategic planning.

Dr Sue-Anne Wallace
President

Contents

Introduction	2
What is a Strategic Plan?	3
Why do it?	3
Who should be involved?	4
How?	4
Step 1 Situation Analysis	
WHERE ARE WE NOW?	5
Stakeholder Analysis	5
SWOT Analysis	5
Facilities Audit	5
Trend Analysis	6
Step 2 Goal Analysis	
WHERE DO WE WANT TO BE?	6
Vision	6
Mission	7
Goals	7
Step 3 Strategy Analysis	
HOW WILL WE GET THERE?	8
Strategies	8
Tasks	10
Resources	10
Step 4 Evaluation	
HAVE WE ARRIVED, OR, ARE WE MOVING IN THE RIGHT DIRECTION?	12
Performance Indicators	12
Review	14
Acknowledgements	15
Glossary	16

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Introduction

Small museums are directly responsible for the presentation and preservation of a large part of Australia's diverse historical and contemporary culture. Good planning is necessary to ensure the survival of any museum. Museums Australia has developed this manual to assist small non-profit museums with their planning needs. It sets out a simple planning process - how to decide your vision and review your operational activities to ensure they are achieving your aims.

The dedicated people who work in small museums, both voluntary and paid workers, are critical to the success of our cultural sector. Whether paid or not, Board members or operational workers, your expertise, time and resources are valuable and every one of you can contribute to the planning process. For this reason, throughout this manual, museum workers – paid staff, volunteers, management, friends and members - are referred to as staff or workers.

It is hoped that museum staff will use this manual to reinforce or fine-tune the planning activities already occurring in their museums, or as a step by step guide to assist with the implementation of a formal and comprehensive planning process.

The International Council of Museums (ICOM) definition of museums:

A museum is a non profit making, permanent institution in the service of society. It is open to the public and it acquires, conserves, researches, communicates and exhibits, for the purpose of study, education and enjoyment, the material evidence of people and their environment.

Every museum will have a different balance of program activities. This manual aims to help you link all operational aspects of your museum - exhibition, conservation, marketing, acquisition, fundraising and public relations - with your mission, and set priorities in relation to your resources. It does not include standards of practice or policy examples. There are a number of resources for these areas available from Museums Australia, including this manual's companion document, *Caring for Our Culture: National guidelines for museums, galleries and keeping places*.

Should you wish to develop your planning techniques further, some references and resources are listed at the end of the document.

Some jargon has been unavoidable, but a glossary is provided to assist with definitions. Don't get distracted by terminology. As long as you are clear that there are broad aims that must be coordinated and translated into practical action steps, there is no need to debate exactly what you should call them.

What is a Strategic Plan?

Put simply, a Strategic Plan is the bridge between where your museum is now and where you want it to be. The Plan expresses the direction of your organisation, identifies goals and actions that will enhance its operations, and matches the skills and resources of the organisation to achieve these.

A Strategic Plan usually includes:

- The vision (and/or)
- The mission
- Analysis of the environment
- Analysis of the organisation
- Strategic Goals
- Action Plan
- Review Mechanisms

The Plan encompasses the whole range of matters typically discussed at a usual Committee or staff meeting. *How can we attract more people to our museum? How can we afford to do a,b,c? Who should go to the conservation workshop next week? Should we be trying to get funding to build a new exhibition area, or new storage? What sort of message or image should our new brochure convey? How can we attract more volunteers?*

(and) *Should we try to attract people with special skills?* The Plan links and directs collection management, funding and resources, interpretative activities, marketing and community liaison activities.

The time span of a Strategic Plan is usually 3-5 years, and incorporates all the immediate and long term activities of your museum. Practicality dictates this average – it's a time consuming process, so you don't want to have to do it too often, but our environment is changing, and our planning must recognise and accommodate these developments. Choose a time frame that suits your organisation and accommodates your longer-term goals.

Your museum's Plan can be two pages or a detailed twenty. Size will depend on the degree of complexity of your museum and the amount of detail you wish. Size doesn't really matter. What does is that you've thought through the bridge building process – the now, the future and the nuts and bolts of how to get there.

Why do it?

“ If you don't know where you're going, you'll probably end up somewhere else ”

CONFUCIUS

Staff of non-profit museums need to think and act strategically if their institution is to survive and prosper. More than ever before, the museum sector faces challenges and opportunities, including:

- Uncertainty about the future
- Greater difficulty in acquiring the resources to fulfil our objectives
- Audiences' greater choices - other cultural institutions, events and leisure activities
- Higher expectations of audiences
- Increased demand for accountability from local, state and federal government, community groups and individual supporters.

A Strategic Plan will help your museum anticipate problems and recognize opportunities, unite the staff behind a clear direction, allocate scarce resources to agreed priorities and will be evidence

of your organization's commitment, vision and accountability.

Some of the benefits of developing a Strategic Plan and putting it into action are:

- A coherent basis for decision making
- Increased efficiency
- Increased effectiveness
- Improved communication with stakeholders
- Motivated and focussed workers

Strategic Planning is not a magic pill that will solve operational or financial problems. It is a tool that will clarify what is important, help you decide on reasonable goals and make it easier to secure support from funding bodies and your community.

Who should be involved?

To ensure your Strategic Plan is comprehensive and supported within the museum, decision makers and workers should participate in the planning process. For small non-profit institutions, this means committee members and staff, both paid and unpaid. Interested people from outside the organisation who would be useful in terms of the environmental analysis could be invited to assist - from the local Council or Chamber of Commerce, for example. The most important task to do as a group is developing the mission and the vision. Other steps in the process can be developed and drafted by a working group, then circulated for comment before moving onto the next step.

Involve as many people as possible, with divergent views and experiences. The aim is to create as rich an analysis as possible. Remember, people will usually support what they know about and have helped create. They tend to reject proposals imposed upon them.

It might be helpful to use someone from outside your organisation to facilitate the planning process - the person should be skilled in managing meetings and might have some knowledge of the museum and museum practices.

How?

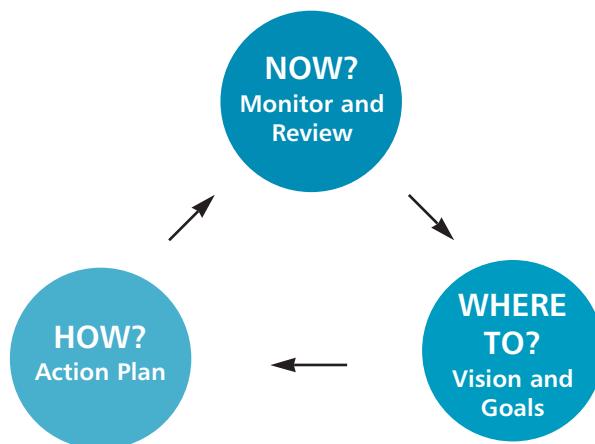
Allow adequate time. Your museum may choose to plan over two days intensively or over a series of half day sessions. It's worth having a break after Step 2 to digest the new directions, then before you start Step 3, recheck the vision, mission and goals. Don't spread the process over too much time; people get bored, or continuity is lost.

Butchers paper for brainstorming sessions helps keep a record of ideas. If you're using a whiteboard, make sure you make a record before it's cleaned!

At the beginning of each step, you'll need to think broadly and creatively, then narrow down your options using logic and practicality.

In working through the planning process, you will:

- Examine the environment in which your museum operates
- Identify and explore factors that affect your operations
- Develop or refine your vision for the future and the steps by which you'll attain it.
- Establish a framework to fulfil the mission and goals
- Clarify priorities and activities
- Allocate resources (people, materials, funds) to best achieve your goals
- Develop methods for evaluation



Step 1

Situation Analysis – WHERE ARE WE NOW?

The task of Situation Analysis is to produce a comprehensive review of current circumstances - first the environment in which your museum operates, and then of the museum itself. This step has no right or wrong answers, it is a data gathering stage and an opportunity to describe, discuss and reflect. By being aware of external trends and developments, internal strengths and weaknesses can then be evaluated for importance. For example, if the Internet is increasingly the channel used for museum communication, education and marketing (an external trend), you may identify as an important weakness the fact that none of the staff is computer literate.

There are various methods to assess the current situation and four are provided. SWOT and Stakeholder Analysis are the minimum. Facilities Audit and Trend Analysis will provide more detailed internal and external analysis. You may find it helpful to try several, but note the overlaps.

Stakeholder Analysis

A stakeholder is any person, group, or organisation that can place a claim on the museum's resources, attention or output, or is affected by its output. Stakeholder analysis is a means of identifying who the internal and external stakeholders are, how they evaluate the museum, how they influence the museum's operations, what your museum needs from them and how important they are. The key to success for any organisation is satisfying important stakeholders according to their own criteria for satisfaction. The results of this analysis will be used in developing the vision and mission statement,

but will also assist in determining who should be involved in the planning process.

Internal stakeholders may include groups of staff or influential individuals, members of the Committee of Management, students and service providers. External stakeholders could include local, federal and state governments, community organisations, funding bodies, educational institutions and professional associations such as Museums Australia. For example, a funding body such as the Australia Council may be an external stakeholder, evaluating you formally by the grant application and acquittal process and informally through visits and industry feedback. If you wish to receive ongoing financial and policy support from the Council, they would have a high degree of influence on your programs, and planning and reporting mechanisms.

SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats)

SWOT is a technique for assessing internal strengths and weaknesses and identifying external opportunities and threats. Note that opportunities and threats in the external environment are beyond your immediate control. They are things happening to you, which can be exploited or manoeuvred around. The internal aspects are under your control; things you are doing or have put in place.

Facilities Audit is a systematic method of describing your current operations (the S & W). *Think about aspects of your premises (location,*

Strengths	Weaknesses
Use Facilities Audit lists to fill in Strengths and Weaknesses	
Opportunities	Threats
Use Trend Analysis to help fill in Opportunities and Threats	

building, access and parking, signage, surroundings), staff (numbers, skills and expertise, rewards, recognition, connections and linkages), collection (strengths and weaknesses, uniqueness, policies, conservation, popularity), communication (advertising, publications, word of mouth, public relations activities, profile, different groups catered for), finances (major funding sources, admissions, commercial operations), programs (mix of programs, popularity, visitor services, numbers and demographics).

Trend Analysis is a technique to assist environmental analysis (the O & T). *Look at trends in funding, competition and audiences that may affect your operations. Reflect upon recent history and what has been 'in the news'; locally, nationally internationally and in the museum sector.* The more we understand external developments, the more we can align our actions with them rather than struggling against the tide.

Use the SWOT grid to list every important strength, weakness, opportunity and threat. Some items will be both strengths and weaknesses, opportunities and threats. Often strengths are what provides your advantage, and can be built upon further, whereas weaknesses are opportunities for growth and development.

The Situation Analysis will create a lot of information. Using the following criteria, sort through the data and consider which things matter:

- Urgent or important versus interesting
- Cause or symptom – the cause is more important than the effect, but both need to be managed
- Maximum effect – the 80/20 rule applies, that 20% of our operations achieve 80% of our successes, or 20 % of our errors generate most complaints. What are the issues that will have maximum effect?

Step 2

Goal Analysis – WHERE DO WE WANT TO BE?

This step helps you imagine how your museum could be in "the best of all worlds", and then decide the goals that will make that future. It involves dreaming up the perfect scenario, then tempering it with reality.

One of the distinguishing characteristics of a successful small museum is that the staff and office bearers are all pulling in the same direction - they understand the vision and mission of the organisation, and are working towards it.

Vision

The vision is a statement of what the organisation wants to be like. Create a vision that will guide your future actions and unite the efforts of everyone in your museum. It is generally accepted that those organisations that are driven by a clear, shared, well articulated vision tend to be more productive and more responsive to change.

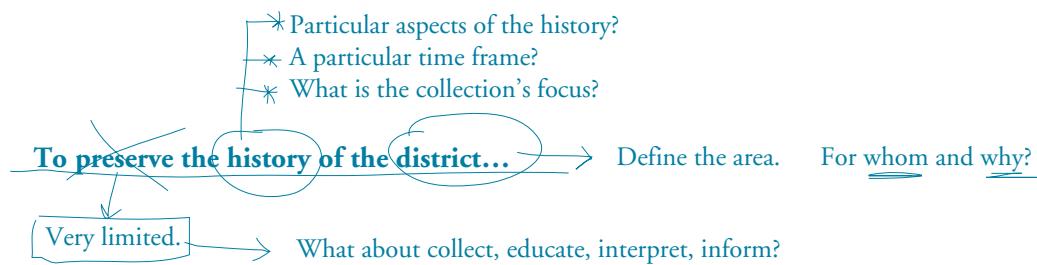
You will need to be intuitive, emotional and a little irrational at this stage. Imagine the way things

would be if all was perfect and money was no object. *What would be your perfect building? Perfect audience? Optimal resources? What other organisations do you envy and why?* List as many ideas important to your museum as you can, making sure you include issues of quality and scope.

Now draw out key words and concepts and try to create a statement. The statement must be practical, relevant and credible if it is to provide guidance. It should be short, focussed and inspirational. It should not be vague, unrealistic or impossible. It should be a rallying point that builds on the strategic advantages of your museum, and clearly says *yes! That's where we want to be!* It should be relatively easy to communicate and appeal to all your stakeholders.

A useful rule of thumb: if you can't communicate the vision to someone in five minutes or less and get a reaction that signifies both understanding and interest, your vision may need more work.

Reworking your existing mission...



could lead to something like...

“200 Gertrude Street is a non-profit, publicly funded complex of gallery and studio facilities. The organisation provides professional support to artists in the early stages of their careers, through exhibition, studio and associated activity programs that address the relationship between contemporary art practices and current critical debate.”

200 GERTRUDE STREET INCORPORATING
GERTRUDE STREET ARTISTS' SPACES

“Melbourne’s Living Museum of the West is a community museum which actively involves the people of Melbourne’s west and others in documenting, preserving and interpreting the richness and depth of the region’s social, industrial and environmental history.”

MELBOURNE’S LIVING MUSEUM OF THE WEST

Mission

The mission is more pragmatic; it identifies the area of operation and scope of activities.

Answer the following questions: *What is the purpose of your museum? What activities or services does it provide? For whom? Why? Is there an underlying philosophy that directs its activities? How is your institution or service different? How is it the same?* This statement should be about the unique character and purpose of your museum.

Some organisations combine their mission and vision into the one statement.

Together, the mission and vision:

- Encourage unanimity of purpose – a single focus
- Guide the search for and selection of new activities and projects
- Establishes the organisational climate (formal/casual, bureaucratic/democratic, practical/ideological etc)
- Attract or deter potential staff, both paid and unpaid

Goals

What are the major areas in which you need to be successful in order to realise your vision? The goals should flow from the situation analysis - based on the skill and resource strengths and weaknesses, the characteristics of the external environment and the needs and expectations of stakeholders - and be paths toward the vision.

Taking these one at a time...

- Strengths and weaknesses should be actively used to achieve the vision. *What do these suggest about how we should operate in the future?* These goals will be based on current capabilities and resources.
- Every element of the external environment in which your museum operates will offer a goal or influence goals. With respect to each point noted under opportunities and threats in your situation analysis, ask *What should our museum be trying to achieve here?*

The goals derived from your SWOT analysis will have a rational base. Now use your stakeholder analysis to consider more subjective aspects of analysis.

- Key groups - what are the interests of your sponsors and major supporters? What goals should you include to meet their needs? (Make sure these do not conflict with your mission and vision)
- Key staff - are there influential staff who have particular hobbyhorses that must be included? (Ensure these are also compatible with the vision and mission)
- Outsiders - what local political or community groups' needs should be addressed? Local industry, land care, indigenous, multicultural, historical, service, environmental, social, horticultural and political groups can exert influence and might be able to assist you.

Goals need to be challenging as well as widely accepted; therefore they need to be a bit difficult to force extra effort and creativity.

Once you have a list of goals, cluster them into related areas. This ensures that your Plan will be coherent and comprehensive, not a multitude of diverse activities out of which benefits might come. The clusters might be named programming, communication, funding and resources, collection management, etc. These clusters are your Key Result Areas - the areas of performance your museum will need to do well in to achieve your vision. Prune to those that are most crucial to your vision, so that there is at least one, but no more than a few, for each Key Result Area. Too many goals will spread your resources too thinly and make it difficult to achieve results.

This visionary part of your Plan looks like a tree diagram; for the vision and mission there are a number of Key Result Areas, each of which hold no less than one and no more than a few goals.

Step 3

Strategy Analysis – HOW WILL WE GET THERE?

This step translates your broad goals into short term operational strategies and tasks, then matches resources with the Plan.

Your planning involves thinking about both long term and short term goals. The long term planning tends to involve changes to your technologies, facilities and operations - things that typically require large investments of resources, committed over long time periods. In contrast, short term goals can be achieved sooner and are probably less complex. Both types of goals have to be broken down into strategies and tasks, and each task supported with people, information, facilities and/or money.

Strategies

Try to think of many possible ways to achieve a goal, in traditional and alternative ways. Brainstorm, copy what others are doing, build on strengths and challenge the usual. For example, the goal is to increase access to your collection. Strategies could include a suitcase tour to local schools, lending items out to the local hospital or

shopping centre, digitalising the collection and facilitating electronic access, arranging an exhibition with special events for community groups that may have a particular interest, or behind the scenes tours for collectors. Another strategy might be to review your collection policy, which should provide accurate guidance about the fragility and safety of your collection, and the type of access possible.

Now, which strategies will best achieve the goal? Which are necessary? Which will have the maximum impact, at the lowest resource cost? Get rid of the ones that will drain resources and/or have low effectiveness. You may end up with one strategy per goal or several. Several hints: think big but start small, go for urgent and important over nice and make sure as many people as possible are involved and committed. The nuts and bolts are being assembled, and everyone has a piece to contribute.

Key Result Areas	Strategies	Time frame
1 Collection Management	1.1 Monitor progress and implementation of objectives, ensuring they reflect Goals and Mission Statement. 1.2 Continue with cataloguing program 1.3 Seek additional funds in order to carry out Conservation report recommendations and implement heritage projects. 1.4 Implement recommendations of the VCCCM Conservation report. 1.5 Evaluate current Collection policy. 1.6 Ensure an effective documentation system is maintained. 1.7 Ensure effective storage and conservation. 1.8 Establish heritage report on historic Pioneers cottage and implement. 1.9 Improve signage and labelling of items in the Museum.	ongoing ongoing 1998/99 1998/99 1997/99 1997/99 1997/99 1999 ongoing
2 Education	2.1 Develop continuing education program for local primary government, Catholic and independent schools. 2.2 Consult with secondary schools to develop an ongoing relationship and services to assist students. 2.3 Develop an exhibition on the growth of Western Port for the Bass Bicentennial celebrations in 1998. 2.4 Provide physical facilities which enhance research. 2.5 Research and publish information brochures and books on local history. 2.6 Provide orientation and training for volunteers.	1999 1999 1997/8 1998 1999 ongoing
3 Public Relations	3.1 Develop a vibrant and all embracing public relations program liaising with tourism bodies and involving local newspapers and tourism papers. 3.2 Provide heritage items for sale in an attractive setting in the Museum shop 3.3 Work with neighbouring historical/heritage societies (listed) 3.4 Organise interesting, stimulating and wide-ranging interest subjects for general meetings of the Society 3.5 Increase membership by 10% annually 3.6 Develop interactive displays and hands-on exhibits in consultation with others 3.7 Publicise Society and Museum in local areas with specific brochures/newsletters, insertions in tourism publications, as well as personal contact and mailing 3.8 Attain registration in the Museum Accreditation Program 3.9 Accomplish and celebrate accreditation in the Museum Accreditation Program	1998, 1999 1998 ongoing ongoing ongoing 1999 ongoing 1997 1999+

Tasks

Each strategy will consist of a series of concrete tasks, allocated to particular people and requiring particular resources. This is the detailed blueprint of your Plan. Keep your options open at this stage; don't delete a strategy because you don't have adequate resources at the moment. *Who will do it? How will it be done? What resources are required? What are the milestones?*

Resources

Resources are human, financial, informational and physical. If you don't have the right mix and quantity of resources, *can you achieve them? How?* Start by looking at what you need to do all the tasks, then what you have or expect to have, then think about how to make up the gaps. Strengths, weaknesses, financial and facilities audit information will be useful here. If you identify large scale problems in resourcing, a whole new goal to plan for change may be necessary. If the resource problem is relatively minor, make it a task under the relevant strategy.

Human resources

What expertise do you need that you don't have? How can you get it? Through training, recruiting particular individuals, encouraging secondary or tertiary student placements or projects (and not just museum studies - think marketing, business, arts administration, graphic design, computers), establishing networks. *How to motivate and excite staff? How to make sure staff have a sense they're benefiting, not just giving and doing?* "Gain appropriate staff" may become a strategy under your marketing or collection management goals, and the task may be to approach the local TAFE to establish a final year marketing student placement, to talk to other organisations in your district to explore the possibility of sharing the employment costs of a person with conservation experience, or to attract new volunteers.

Staff networks and relationships with other organisations are an important part of your human resources. Consider whether strategic alliances with other community groups or institutions would help. A joint production is at one end of the spectrum, mutual backscratching in the middle and a new audience or volunteer pool the other end possibility.

Financial

This is a key aspect of what is often called the Business Plan of the museum. The Business Plan is typically reviewed and updated monthly, quarterly or as required

Make sure you involve the person who prepares your accounts in this step. Although the documents you will prepare are for internal use at this stage, it's worth ensuring they are prepared in accordance with the appropriate accounting standards so that they can be provided to external bodies if necessary in preparation for fundraising activities.

Budget

Your budget gives a snapshot of the planned income and expenditure for the next year (financial or calendar, whichever you use for management purposes). The simplest way is to use the last year's actual figures, adjusting for expected changes and then, adding the new costs of your planned strategies. Start with expenditure. Make the adjustment figures as accurate as you can (for example, increases in electricity and rates), but rough costings will do for the new endeavours that have come out of the planning process. Now, income, and try to be accurate about whether you'll get grants and the amounts, try to predict admissions, donations etc based on last year's actuals.

The gap between your "pretty sure" income and ambitious expenditure has to be thought about in terms of fundraising. Don't prune your Plan until after the next step.

Fundraising

Identify possible additional sources of income - either in-kind support or cash. *Can you get additional grants for specific items? Are there generous benefactors in your community who may be interested in your activities? Would local businesses be likely to help with materials or services? Is it possible to charge admission or raise your admission prices? Sell more items in your gift shop? Can you share resources (including people) with another organisation, either ongoing or on a project basis?* If you can find definite and realistic ways to increase income or reduce expenditure by gaining in-kind support, so that the two sets of figures match, go ahead with your Plan.

If income is still below expenditure, prune your Plan. You may have to delay some strategies or choose cheaper alternate strategies - to go ahead with a one span bridge rather than two. If strategy review will not balance your budget, go back to Step 2 and scale down your vision, reduce your ambitions.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Bank open												
I N C O M E												
Grant 1												
Grant 2												
Grant 3												
Admissions												
Donations												
Memberships												
Function hire												
Special admissions												
Other												
Total												
E X P E N D I T U R E												
Salaries												
Rent and overheads												
Insurance												
Marketing/PR												
Collection												
Project 1												
Project 2												
Project 3												
Other												
Total												
Net in/out cash flows												
Bank close												

Cash Flows

One of the biggest problems for small museums is ensuring you have enough cash to keep operating on a week to week or month to month basis. A Cash Flow projection tracks your anticipated income and expenditure over time so you can be sure there will be enough cash to pay anticipated bills, or at least plan the cheapest acceptable method of financing any shortfalls. Think carefully about when your cash comes in - grants, admissions, donations, fundraising, sales. Now look at when basic operational spending is necessary. Map these amounts onto a weekly or monthly planner over a full year. Now you can plan your additional expenditure on projects and extras to fit around your cash flows. There's not much point having the most fantastic exhibition about a local pioneer identity if you can't pay the rent next month!

Physical resources

Your bricks and mortar, computers, conservation and environmental monitoring equipment, display cabinets and storage facilities are long life or expensive resources that are not readily changed or

upgraded. They will constrain your strategy choice, and, might generate their own planning goals, strategies or tasks.

Information resources

These are the documents and data by which you define your organisation and keep it operating - policies, procedures, member and visitor data, mailing lists, disaster plans, financial paperwork and reports. Written procedures direct behaviour and are therefore helpful for new staff. Policies guide behaviour and give your museum a reference point for actions. As with physical resources, these may constrain strategies (the collection policy, for example, may restrict your access strategies) or you may identify the need to develop or improve what you have to assist the attainment of a goal or strategy.

Each goal generates at least one strategy, each strategy will require a number of tasks, each task will require a person to be responsible, some resources, a method and a measure. This operational part of your Plan can be drawn up as a table.

Step 4

Evaluation – HAVE WE ARRIVED, OR, ARE WE MOVING IN THE RIGHT DIRECTION?

Evaluation provides your museum with ways of measuring the successes and failures of your actions. It allows you to assess if you're on track, and provides you with powerful material to justify grant applications and sponsorship bids, and the means to acquit them satisfactorily.

This can be the most complex and frustrating area, as the link between strategic actions and results can be obscure. In some cases, although the museum's success or failure could be due to unrelated events - the unexpected demise of a competitor, higher income for your audiences, a sudden reduction in the public funds available to support your museum - it is critical to assess whether actions have been carried through, and their obvious results.

Performance Indicators

Performance Indicators are the measurable aspects of each strategy, and, taken together, are the way of measuring your progress towards your goals. During the planning phase everyone involved in a strategy should agree on how to assess its success or failure, but in numeric terms. (Descriptive terms may be useful, but can make it difficult to assess whether you've achieved what you set out to do.) Now choose a realistic pass/fail number and clarify the time frame. 6 exhibitions or 25 school visits over the year; 1 complaint per week, or as a better measure which tells you more about your service, 1 complaint per week which was not able to be solved by the front of house staff; 2 textiles professionally repaired over the year; a policy

Key Result Area 1 - Care of Objects

Scope

Acquisition, storage, conservation, research and exhibition of objects accepted in accordance with the Museum's Collection Management Policy.

Objective

The Museum will care for objects in the collection to the best possible standard thereby meeting its obligations to its community and the national collection by:

- Providing appropriate access to researchers and visitors to collection items held;
- Meeting the needs of the community with respect to interpretation, education, information and use of objects and research materials within our care and control;
- Application of the collections management policies as published;
- Regular renewals of displays both for the preservation of objects themselves and to sustain the interest of repeat visitors.

Action

1. Ensure accurate, detailed and current recording of collection items
Ongoing work as per collection management schedule, recurring.
2. Maintain standard of care of collection objects
Ongoing work as per collection management schedule, recurring.
3. Encourage visitors to come to the museum through initiatives in professional publications, production of leaflets and brochures etc.
March of each financial year
4. Survey conditions of store areas to ensure stability is maintained
Ongoing and with physical survey completed by December 20 each year.
5. Conservation of objects as required to maintain best condition
Ongoing with work times in February to April and October to December annually
6. Accessioning of objects and necessary research associated with that process.
Ongoing processing of objects and re-evaluation of collection recurring

Performance measure

Customer satisfaction with availability of collection objects, their standard of care/appearance and the depth to which they are researched.

Key Result Area 4 - Display

Scope

Research, plan, coordinate and produce high quality displays to educate, entertain, inform and communicate to our community tangible evidence of society and its development.

Objective

The museum will exhibit for the purposes of education, enjoyment and study material evidence of people and their environment, particularly focussed on the Western Suburbs of metropolitan Perth. This will be achieved by:

- Regular renewals of displays both for the preservation of the objects themselves and to sustain the interest of repeat visitors;
- Instituting a coordinated program of displays with relevance to our community;
- Meeting the needs of the community with respect to interpretation of material evidence of its past;
- Providing appropriate access to displays of objects which relate to the community's history;
- Regular monitoring and surveying of the community members to plan new or reworked displays;
- Application of the display policy of the Claremont Museum.

Action:

1. Encourage introduction of occasional externally curated exhibitions where their themes are appropriate to the Claremont community.
Annually
2. Ensure that a comprehensive program of display themes is worked out and applied.
Ongoing and as per display schedule
3. Research, prepare and seek additional external funding for display commemorating the Centenary of Women's Suffrage 1999.
March 1999
4. The millennium display - a forward thinking retrospective on Western Australian social history.
March 2000
5. Research and prepare in cooperation with government agencies at all levels a centenary display - tentatively intended to look at the function and powers of government and the responsibilities of citizens.
March 2001
6. Sequentially change the content of one display area on an annual basis.
Annually to 2001 and continually for the life of the museum.

Performance measure

Customer satisfaction with quality, content and relevance of displays. measured by survey of visitors on an ongoing basis, visitor research and front end evaluation prior to the installation of new displays. measured by survey of users of service and market research conducted on the museum's behalf.

manual prepared for staff; 2 private functions held in the gallery in the December party season; a 5% increase in annual attendance figures. What gets measured in an organisation is always what gets done.

At the end of the year, or when the strategy is completed, assess whether you achieved what you thought was possible. If not, why not? The why gives you useful insights into how to make things better. Either the performance indicator was too ambitious, or, the barrier that prevented you reaching the level of service was beyond your control, or...? If it was within your control, what happened? What could you have done? Why didn't you? It's easy to bite off more than you can chew, especially the first time. It's also easy to design Performance Indicators that are not true measures of the outcomes. The trick is to learn from your mistakes and be open in acknowledging them. Don't forget to let everyone know when your museum has exceeded its indicators, too!

Review the Plan periodically

Because of the short term focus of the operational part of the plan (strategies and tasks), you will need to review the Plan at least annually. Occasionally, it will be timely to review the Vision, Mission and Goals as well. Things change and ongoing stakeholder support relies on your museum knowing about their needs and satisfying or accommodating them. A new local Council, changes to state or federal funding programs, a

gradual shift in the local population, a proliferating collection that needs new guidelines and new partnership opportunities should all prompt a review of all or part of your Plan.

Now, congratulate yourselves! You now have an exciting vision, a list of inspiring goals that don't feel overwhelming, some practical but challenging strategies to implement, a detailed list of tasks allocated between staff and measurements... You're ready to begin the "real work".

If this has been your first attempt at formal planning, don't worry if it's not perfect. Keep an eye on your resources as tasks progress, and if things are getting out of control - staff confused or not coping, excessive expenditure or impossible requirements that weren't foreseen - shift some deadlines into the future to increase your financial and time flexibility. Then review the Plan and modify it to be more realistic.

Planning is time consuming and can interfere with the day to day operations of your museum. But, without it, you can't assess whether your museum has an appropriate program mix, whether you're maximising the potential of your collection, facilities and staff, and whether you're taking advantage of opportunities and changes in your environment - let alone understand the reasons for your less successful ventures and be able to clearly demonstrate your achievements.

Good luck!

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Material drawn upon for this document

- J. Brown-Parker, *Strategic Planning*, Monash University, 1997
S. Dickman, *The Marketing Mix: Promoting Museums, Galleries and Exhibitions*, Museums Australia, 1995
J. P. Kotter, Leading Change: Why Transformation Efforts Fail, *Harvard Business Review*, March-April 1995, pp. 59-67
J. Viljoen, *Strategic Management*, Longman, Melbourne, 1994

Other resources

Dr Sharron Dickman, *The Marketing Mix: Promoting Museums, Galleries and Exhibitions*, Museums Australia, 1995. Clear and practical planning manual that focuses on marketing. Very useful.

Museums Australia (local branch and national office) can provide you with up to date museum policy material, and information on training available in your region.

Dr Peter Steidel *The Art of Strategic Planning: Visions and Strategies for Cultural Organisations*, Department of Communications and the Arts and Business Victoria, Department of State Development, 1998. Sophisticated and detailed planning manual.

Caring for Our Culture: National guidelines for museums, galleries and keeping places. Museums Australia, 1998. An excellent toolbox for you to use in reviewing performance, and points you to additional resources on museum practice.

Previous Possessions, New Obligations: a Plain English Summary of Policies for Museums in Australia and Aboriginal and Torres Strait Islander Peoples, Museums Australia, 1996

Glossary

Business Plan	an aspect of an organisation's Strategic Plan that outlines its goals, resources (particularly financial) required to achieve them and how those resources will be sourced or developed.
Goal	a long term target or direction of development. It states what the museum wants to accomplish or become over the next few years, and provides the basis for decisions about the nature, scope, and relative priorities of all projects and activities. Everything the museum does should help it to move toward attaining one or more goals.
Key Result Areas	the areas of performance your museum will need to do well in to achieve your vision
Mission statement	a statement of the museum's purpose
Objective	a measurable target that must be met on the way to a goal
Performance indicators	the measurable attributes of each strategy
Strategic planning	a disciplined effort to produce fundamental decisions and actions that shape and guide what a museum is, what it does and why it does it.
Strategy	the means by which a museum intends to accomplish its goals or objectives. It summarises a pattern across policies, programs, projects, actions, decisions and resource allocations.
Stakeholder	any person, group or organisation that can place a claim on the museum's attention, resources or output, or is affected by that output.
Vision statement	a description of what the museum will look like if it succeeds in implementing its strategies and achieves its full potential.
Visitor demographics	Descriptive categories of information about visitors, such as age, gender, residential location, educational level, occupational status.