

Strategic planning

Establishing a new museum? Then developing a strategic or forward plan is a priority.

Strategic planning involves defining where you are today, and where you want to go in future. A strategic plan helps you to communicate your aims and objectives, identify priorities and define your short and long term goals.

Benefits of a strategic plan

- increases efficiency and effectiveness
- is a funding requirement –many funding bodies consider current a strategic plan as a prerequisite for funding.
- improves communication with stakeholders
- prepares the groundwork for building expansions and new initiatives
- motivates and focuses workers and board members
- provides a review mechanism and opportunity to update previous strategic plans
- addresses changing priorities and trends in the museum industry

Who is responsible for developing a plan?

As Te Papa wisely says, “People will support what they have helped to create”, which is a good reason to try and involve a range of people from your organisation.

For small not-for-profit institutions, committee members and staff, both paid and unpaid, can participate in the planning process. Interested people from outside the organisation could be invited to assist, bringing in alternative ideas and different experiences.

What’s in a strategic plan?

Executive summary

An executive summary acts as both introduction and conclusion and presents the essential information contained in the document. The executive summary is usually written at the end of the planning process and placed at the start of the document. The example below outlines the direction of the organisation and its key goals.

“The xyz Historical Society have been conserving, collecting and protecting artefacts and materials relating to historical development of the region for the past 50 years. The achievements over this time are a testament to the commitment and dedication of the volunteers who play a critical role in achieving the organisational objectives and ensuring the ongoing sustainability of the Society’s core work.

This document outlines a future vision for the organisation from 2014 to 2019, acknowledging the limited resources of the organisation and addressing sustainability issues with particular reference to volunteer succession planning and increasing community access to the collection and the facility. The plan addresses staged development for the organisation; however the emphasis of the plan is on ensuring that goals and strategies are achievable.”

Vision and mission

The vision statement defines the aspirations of an organisation. Strong vision statements are inspirational, clear, memorable and concise.

Example from National Museum of Australia:

“A recognised world-class museum exploring Australia’s past, illuminating the present, imagining the future”.

The mission statement is more pragmatic and defines what the museum does. It describes the reason an organisation exists and is used to guide decisions about priorities, actions, and responsibilities.

Example from National Museum of Australia:

“To promote an understanding of Australia’s history and an awareness of future possibilities by: developing, preserving and exhibiting a significant collection taking a leadership role in research and scholarship engaging and providing access for audiences nationally and internationally delivering innovative programs”.

Current organisational context

In this section include information about:

- a brief history of the organisation; when was formed and how it’s managed
- the scope of the collection
- the organisations’ resources; financial, physical and human
- audiences, partnerships, community support and engagement

Strategic direction

Defined by a fixed period of time, such as 3 or 5 years the direction identifies key priority areas and their associated goals.

Collections management: To ensure the preservation of significant objects and archival materials relating to the development of the xyz Historical Society

Exhibition development: Develop best practice exhibition displays that are easily accessible by visitors

Access and education: Ensure broad access to collections and increase community engagement, nurturing an appreciation of local cultural heritage

Administration & management: Undertake effective corporate governance and ensure the ongoing sustainability of the organisation

The key priority areas and the attached goals are then developed into an action plan. List specific actions to address each goal, identify timelines and allocate people to the task responsible and assign accountability to ensure the actions are met.

Review mechanisms

Defines the dates for reviewing the Strategic Plan. This is usually done every 3, 4 or 5 years. An Action Plan is usually reviewed annually.



You might also like ...

Forward planning template from Museums Australia (Victoria)

<http://mavic.asn.au/resources>

Developing a Strategic Plan, Te Papa National Services, 2001

<https://www.tepapa.govt.nz/sites/default/files/14-developing-a-strategic-plan.pdf>

The manual of strategic planning for museums, 2007. Gail Dexter Lord and Kate Markert, Altamira Press, Lanham MD. Available on Amazon.

<https://www.amazon.com/Manual-Strategic-Planning-Museums/dp/0759109699>