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## Introduction

Under the new Museum Accreditation Scheme all Accredited museums are required to produce, submit, and report against a forward plan. Many people will already be familiar with the need to produce a **statement of purpose** and **key aims**, but in addition to this to meet the new standard specific **objectives** must also be produced, and **reviewed** within an established planning cycle. This guidance is intended to help you through the process of developing a forward plan, not only to meet the needs of Accreditation but to provide your museum with an effective and active planning tool.

## What is a forward plan?

A **forward plan** is a document that results from the process of forward planning. In broad terms it sets out the aims and objectives of your organisation over a defined period, matched against resources and staff responsibilities. A forward plan can be as long or as short as necessary, depending on the scale of your organisation and what is appropriate to you, but it should always include an associated **action plan**. The important thing is that it is clear, achievable and realistic, and that the process of creating it helps you take steps towards achieving your overall mission.

## The planning process

In order to produce your forward plan it is necessary to go through the planning *process*. There are several steps to take.

### 1. Get people involved

It is important to involve as many people as possible in the development of your forward plan.

By considering the views of your staff, volunteers, Friends, visitors, local authority, trustees etc you will not only benefit from a range of perspectives and ideas, but will also encourage support for the final plan and its intended outcomes. Since user consultation is also a requirement of the Accreditation Scheme, involving visitors in your forward planning process will help demonstrate your commitment in this area of work too.

Group meetings can be a good way to solicit views, to focus thoughts on where your organisation is at present, and to look for emerging consensus on where people would like it to be in the future. One person should still take overall responsibility for the planning process, writing the plan and ensuring its implementation.

## 2. Explore and agree your vision for the future

(Mission Statement)

You may already have a vision, or **mission statement**, for your organisation but it is still worth taking some time to discuss it, to ensure everyone is still in agreement. If you don't have a mission statement now is the time to create one. In defining or reviewing your mission some essential questions should be answered.

- What is your purpose? (why does your organisation exist)
- What are your values? (what do you believe in)
- What are your goals? (what does your organisation aim to achieve)
- What is your function? (what does your organisation do)
- Who is your audience? (who do you do it for)

The answers to these questions, keeping consistency with your governing constitution, could be drawn together into a single short statement that sums up your organisation.

## 3. Take stock of where you are now

(Situation review)

Before you begin to plan for the future it is important to know where you are starting from, or in other words to take stock of your **current situation**. You will need to give consideration to what you do and how you approach all areas of museum activity, including governance, financial and museum management, user services, visitor facilities, and collections management.

In particular try to identify your core **strengths** and **weaknesses**, and match these against known **opportunities** and **threats**. For example you might consider how you measure up against known competitors, how you interact with other museums in your area, what you know about your visitors and what services you provide for them.

To understand both threats and opportunities requires some awareness of relevant external trends, for example changes in funding, types of visitor, school curriculum, choice of holiday destination etc. This may take a little research but a lot of information will already exist for you, you just need to talk to the right organisation. Understanding what is happening around you is a crucial part of targeting your activities for the future, and beginning to overcome any barriers to success.

#### 4. Decide where you would like to be in two, three or five years time

(Strategic aims)

Once you know where you are now you can begin to identify the things that really matter to your organisation in the long term, and to decide which areas of work to develop for the future. Again you should aim to think across the full range of activities undertaken by your organisation.

What you want to do can be expressed as simple statements, or in other words **strategic aims**. These will naturally be quite broad in scope. For example your aims might be to:

- increase visitor numbers
- ensure long term care of collections
- attract increased funding

or anything else that is crucial to your organisation and the successful development of your museum. Each aim will probably umbrella a range of actual activities, so you don't need too many.

#### 5. Set objectives that define how you will get there

(Objectives)

Knowing what you want to do is an important first step but you also need to work out how you are going to do it, or in other words to discuss some **strategies** for delivering your aims. You can translate these strategies into a range of **objectives** that will sit beneath your aims. Your aims and objectives should clearly relate to one another.

In theory objectives should be SMART – specific, measurable, achievable, relevant and time limited. In practise that means making them as specific as possible. The more specific your objective is, the clearer the direction of work, and the easier it is to measure whether your objective is being met.

For example:

- *Aim:* to ensure long term care of collections
  - *Objective 1:* using thermohygrographs monitor weekly for six months the environmental conditions in the museum store and produce short report analysing the results
  - *Objective 2:* two volunteers to attend training course on the safe handling of collections in September 2004, and to share what they have learned with all other volunteers

. . . . and so on.

Breaking your broad aims down into specific objectives in this way will create

manageable steps towards future goals and allow progress to be measured, as well as promoting a sense of achievement. As a rule of thumb objectives should be achievable within a twelve month period although the aim that they sit under may remain relevant for much longer.

## 6. Write up a forward plan and a plan of action

Once you have worked through the planning process you will be ready to draw together a record of your discussions and decisions in the form of a written **forward plan**. The content of your plan will help to define its structure, and should probably include all the sections worked through above:

- mission statement
- situation review
- strategic aims
- objectives

You should also aim to include a financial review and projected figures for future spending. The plan does not need to be too long but within each section you should aim to incorporate all key areas of museum activity.

To sit alongside your forward plan you should also produce an **action plan**. Your action plan should set out a clear relationship between each aim and its underlying objectives, and should also indicate the responsibility and financial or other resources allocated against each objective. You could also include a target date and an indication of how progress will be measured.

For example against an objective 'to catalogue 600 social history objects in six months' you could record the actual number of objects catalogued within that period.

This will be your active document so consult it regularly and use it in managing your museum work. It is useful to present your action plan in the form of a table so that all related information is clear to see. An example of an action plan is given at the end of this guidance sheet, and can be copied for your own purposes.

## What next?

Forward planning is a cyclical process of planning, implementation and review and is therefore on going. At the end of each year you should review your current action plan to identify which objectives have been completed, which need to roll on, and which new ones need to be created. At the end of your broader planning period you will then also need to review your written plan, to take stock, identify aims and objectives and begin the cycle again.

SMC members seeking further information about forward planning or to discuss the creation of your own plans please contact Emma Inglis, Planning and Partnership Development Manager. Tel 0131 550 4134, e-mail [emmai@scottishmuseums.org.uk](mailto:emmai@scottishmuseums.org.uk)

## Further written information

Mapping the Future - a guide to business planning for small arts and voluntary organisations Voluntary Arts Scotland, 2003 <a href="http://www.vascotland.org.uk">www.vascotland.org.uk</a>	Easy to understand information on why to plan, what should be in a plan, creating a plan and how to use it once created.
Producing a Forward Plan Stuart Davies Museums & Galleries Commission, 1996 <a href="http://www.mla.org.uk">www.mla.org.uk</a>	Step by step guide to producing a forward plan, including benefits of planning and making a plan work.
The Big Picture Scottish Council for Voluntary Organisations <a href="http://www.thebigpic.org.uk">www.thebigpic.org.uk</a>	An organisational development framework, designed to help you think about your organisation, what it does and how to improve.
The Future Starts Here - Strategic planning for smaller businesses CBI, 2004 <a href="http://www.bgateway.com">www.bgateway.com</a>	Useful and fun exercises to help small businesses analyse where they are now, where they want to go and how they will get there.

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## Action Plan

From: ..... To:.....

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