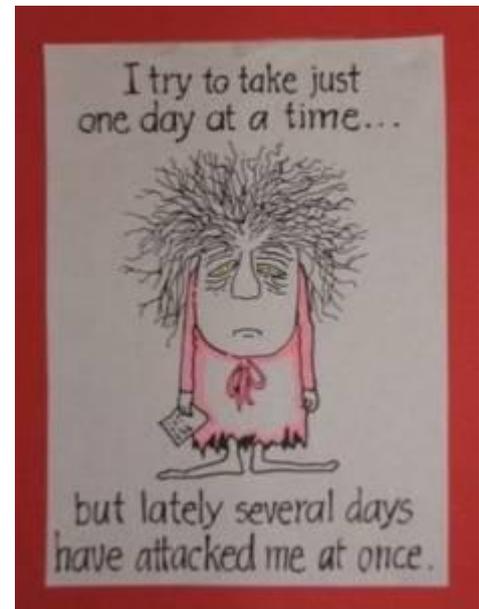


SW Museum Skills Training Programme 2014-2015

Planning for the future: easy steps to a forward plan

16th June 2014

SeaCity Museum, Southampton



Supported by
**ARTS COUNCIL
ENGLAND**

South West
Museum
Development
Partnership



The South Western Federation
of Museums and Art Galleries



South East Museum
DEVELOPMENT PROGRAMME

Introductions and ice-breaker

By the end of this session, you should have a better understanding of how: -

- forward planning can help you to manage your museum's resources
- the process can involve and energise everyone
- important a Forward Plan is within Accreditation 2011
- to recognise the steps in the Forward Planning process and the skills and techniques to use to complete each one
- to use the Forward Planning toolkit recommended by MLA to support museums through the process

This workshop introduces you to the web-based resource: -

The Forward Planning Toolkit developed by the South Western Federation of Museums & Art Galleries and Renaissance South West:

<http://swfed.org.uk/resources/organisation/management/forward-planning-toolkit-intro>

Statement of purpose

Defines the legal and/or charitable purposes of our organisation

- Why we exist
- What we believe
- What we will do / what we want to achieve
- Who we do it for

Example statement of purpose

"The Glastonbury Abbey Estate preserves Glastonbury Abbey - its fabric, collections and parkland - for the enjoyment and education of present and future visitors. Through improved presentation, innovation and the pursuit of high standards of visitor and collection care and education activities, it will develop Glastonbury Abbey as a heritage and Christian site of world renown."

Icebreaker

Examples of Museums' Statements of Purpose

Thanks to the museums which submitted these for use on the day.

Fordingbridge Museum

The Fordingbridge Museum Trust promotes and maintains the collection for the benefit of the community, schools, researchers, and visitors to Fordingbridge by collecting, conserving, recording and curating objects and archive material connected with the area in accordance with the appropriate published policy.

The Diving Museum

To advance the education and interest of the public and interested parties in the study of the History of Diving through the exhibition of a comprehensive collection of diving equipment and thus provide all people across society with an opportunity to understand and value the many contributions which man's endeavours to go underwater has made to the world in which we live.

Russell Cotes Art Gallery and Museum

MISSION

Our Mission is to inspire and enrich the lives of Bournemouth's residents and visitors by creating a cultural flagship around a unique historic house and international art collections.

STRAPLINE

At Home with a World of Art.

Portsmouth City Museums

'Our purpose is to contribute to the vision for Portsmouth as the great waterfront city. We aim to do this by using the collections as a resource or tool to deliver the wider corporate agenda to the benefit of individuals, communities and the city itself. We believe that the inspirational, yet relevant, nature of our collections means that Museums and Archives are particularly well placed to deliver outcomes relating to learning, skills and wellbeing and high quality attractions offering excellent customer care. We understand that to achieve this the city's collections must be well cared for, organised and documented and that we have to ensure that we retain for this and future generations the artefacts and records that matter most. We acknowledge that making such decisions is not easy.

We aim to ensure that the city's collections are available onsite, offsite and online.'

Accreditation 2011 – the central role of the forward plan

Accreditation 2011

The central role
of
the forward plan



Accreditation 2011

- A framework for development and improvement
- Emphasis on resilience/sustainability
- Consumer view embraced more fully
- Accreditation standard and process integrated into the day to day operation of the museum

1. Organisational Health

Accredited Museums are responsible, responsive and resilient

- Governance
- Management arrangements
- Secure occupation of premises
- Financial position
- Forward planning
- Workforce & Training
- Access to professional museum advice
- Emergency planning
- Organisational approach to environmental sustainability



2. Collections care

Accredited museums effectively manage and make available collections for everyone

Collections Management Framework – a set of policies and plans covering:

- Collections Development
- Collections Information
- Conservation & Care
- Security



3. Users and their experiences

Accredited museums are welcoming, and accessible and have a planned approach to identifying and providing a good quality service for a broad range of users, bringing people and collections together

- Access
- Publicity
- Visitor services
- Visitor care
- Interpretation
- Learning



Forward planning and Accreditation 2011

A **Commitment** to forward planning is an eligibility criteria

The statement of purpose, key aims, specific objectives and resource plan are **absolute requirements**

The Forward Plan is the focus of an **annual review** between the museum and its museum mentor

Every museum's **triennial review** will have to report development against the objectives it set in its Forward Plan

Requirement 1.4: effective Forward Planning

1.4.1 The museum's statement of purpose

1.4.2 A review of the previous forward plan

1.4.3 An analysis of the environment in which it exists

1.4.4 Consultation and an analysis of views

1.4.5 Its key aims

1.4.6 The specific objectives beneath each key aim

1.4.7 How it will achieve its objectives

1.4.8 A resource plan showing the people and money available to meet its objectives

1.4.9 The date the plan will be reviewed

Forward Plan or Business Plan?

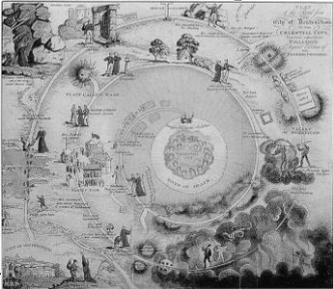
Why Plan?



Reasons not to plan



What's in the plan?



Who draws up the plan?



Other benefits of forward planning

Exercise 1

Selecting the team and how you will consult - Steps 1 and 2

In your museum pairs

- Think who should be involved in drawing up your forward plan
- What roles will they take?
- How will you involve them?

Research – step 4

Research – step 4

To understand your operating environment

- Past performance
- Internal factors
- External factors
- User expectations and needs
- Resources
- Risks



Risk

the combination of the probability of an event and its consequences

The chance of something happening that may have an impact upon the achievement of objectives

The analysis of your operating environment must include an analysis of the risks which threaten the museum's sustainability (requirement 1.4.3)



Risk Awareness Profiling Tool

www.raptonline.org.uk

- Assets – collections, displays & buildings
- Systems – policies, plans, protocols
- Finances – income and expenditure
- People – staff and audience

Risk assessment

Weighting formula: $XY+Y$

		10	15	20	25	30	
Y = Impact	Extreme / Catastrophic	5	10	15	20	25	30
	Major	4	8	12	16	20	24
	Moderate	3	6	9	12	15	18
	Minor	2	4	6	8	10	12
	Insignificant	1	2	3	4	5	6
		1	2	3	4	5	
		Remote	Unlikely	Possible	Probable	Highly probal	

X = Likelihood

Risk register

Risk	Likelihood / Impact	Response	Control	Accept?	Action required	Action by (date & person)	Next review date
<i>Theft of key exhibits</i>	<i>High/high</i>	<i>Treat</i>	<i>CCTV, alarm system</i>	<i>no</i>	<i>Renew contracts</i>	<i>End 2011/ Curator</i>	<i>April 2012</i>

Environmental sustainability policy statement, requirement 1.10

- Meet legal environmental requirements
- Reduce environmental impact of museum
- Be prepared for impact of climate change
- Take account when procuring goods and services



Exercise 2 Research – Step 4

In museum groups, carry out a SWOT or a PESTLE analysis of your museum.

Proforma for SWOT and PESTLE analysis are available in the download panel of Step 4 of the Toolkit

Vision, Key Aims, Specific Objectives and an Action Plan – Steps 5, 6, 7 & 8

Step 5 – Agree a Vision 

Step 6 – Establish Key Aims 

Step 7 – Set Specific Objectives 

Step 8 – Draw up an Action Plan 

Agree a Vision

Our vision is that the Russell-Cotes Art Gallery & Museum will be the internationally acclaimed cultural flagship for Bournemouth and beyond.



Establish Key Aims

requirement 1.4.5

- Refine the vision and help you achieve the changes and developments you are seeking
- Need to be attainable but not necessarily in the short term

'Improve the long term preservation of the collections'

'Maximise the income from the shop'

Set Specific Objectives

requirement 1.4.6

- Turn your Vision and Key Aims into successful action
- Must be SMART



Exercise 3

Key Aims, Specific Objectives and Action Plan - Steps 6, 7, 8

For each of the museums in your group:

- Develop a key aim and one specific objective to achieve it;
- Using the action plan template available to download in the Toolkit or the hard copy available here, plot out the stages towards achieving it.

Draw up a resource plan – Step 9

Draw up a resource plan Step 9

Accreditation requirement 1.4.8:

Demonstrate at an indicative level the people and money you have available to fulfil your objectives

- Financial plan
- Personnel resource plan



Financial plan

Outline revenue and capital requirements over the lifetime of the plan

- Current year's budget
- An indicative budget for the coming and subsequent financial years



Spending plan template

Available as a download at Step 9 of the toolkit

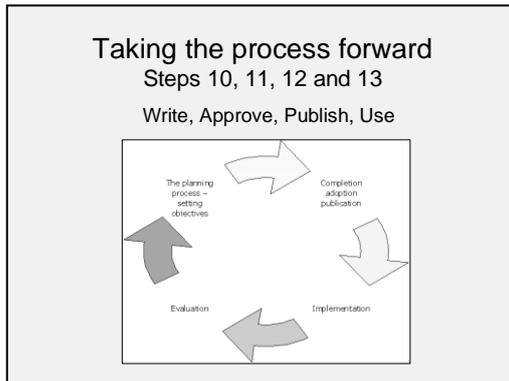
SPENDING PLAN 2011 - 2013						
	Last year actual	Year 1 budget	Year 1 actual	Year 2 estimate	Year 3 prediction	
INCOME						
1 Admissions						
2 Donations						
3 Excess sales						
4 Grants - core funding						
5 Subscriptions						
6 Bank interest						
7						
8						
TOTAL	0	0	0	0	0	0
EXPENDITURE						
1 Salaries						
2 Rent/Lease						
3 Utilities						
4 Maintenance						
5 Insurance						
6 Subscriptions cost						
7 Printing						
8 Marketing						
9						
10						
TOTAL	0	0	0	0	0	0
Net operating profit/loss	0	0	0	0	0	0
FORECAST CAPITAL REQUIREMENTS						
1						
2						
3						
TOTAL	0	0	0	0	0	0
ACHIEVED/FORECAST/GRANT INCOME						
1						
2						
3						
TOTAL	0	0	0	0	0	0
Net grant available	0	0	0	0	0	0
Net balance of budget	0	0	0	0	0	0

Personnel resource plan

Outline of the staff needed to deliver the plan



Taking the process forward - Steps 10, 11, 12, and 13



Exercise 4

Taking the process forward

Individually or in museum pairs think about: -

- What you will do to ensure your museum produces a robust Forward Plan
- How you will ensure the process doesn't just stop once the plan is written
- What further help you and your museum might need to make it all happen