

OMA Learning Lab Winter Series

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Presented by:

OMAAAMO
ONTARIO MUSEUM ASSOCIATION
ASSOCIATION DES MUSÉES DE L'ONTARIO



Webinar 3: Strategic Planning

Webinar Agenda

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- **Introduction**
 - Mary Collier, PD Program Manager, OMA
- **Presentation and Q&A (50 min)**
 - Jon Linton, Questions about the webinar content
- **Q&A with Ministry of Tourism, Culture and Sport (15 min)**
 - Museum & Heritage Advisor Cathy Blackbourn
 - Questions about the Ministry of Tourism Culture and Sport Governance standard

Strategic Planning

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March 14, 2013
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FAQs

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1. What are the **benefits** of having a well-articulated Strategic Plan? Does a museum really **need one**?
2. What are the **areas typically covered** in a Strategic Plan for a museum operation?
3. How **far ahead** should the Strategic Plan look? And **how often** should we **revise / update** it?
4. What is the **difference** between a **Strategic Plan** and a **Business Plan**?
5. What is the **difference** between **goals and objectives**? How important are they?

FAQs

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6. How important is **measurement and evaluation**?
7. What are the **characteristics** of a **good Strategic Plan**? And a **bad one**?
8. What is the **process** for developing a **Strategic Plan**? Do we need **consultants**?
9. What is the **role of the Board** in creating and endorsing a strategic plan?
10. How do we **implement** our strategic plan, once developed?

1. What are the benefits of having a well-articulated Strategic Plan? Does a museum really need one?

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- **answer: unequivocally YES!**
- not only the **result** is useful, but so is the **process**

The Result

- ***internally:***
 - agreement on mission, vision and how to achieve the vision
 - provides guidance on how resources are to be allocated
- ***externally:***
 - shows a plan or roadmap to the outside world: positive message for funders, donors, politicians, members, general public

1. What are the benefits of having a well-articulated Strategic Plan? Does a museum really need one?

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The Process

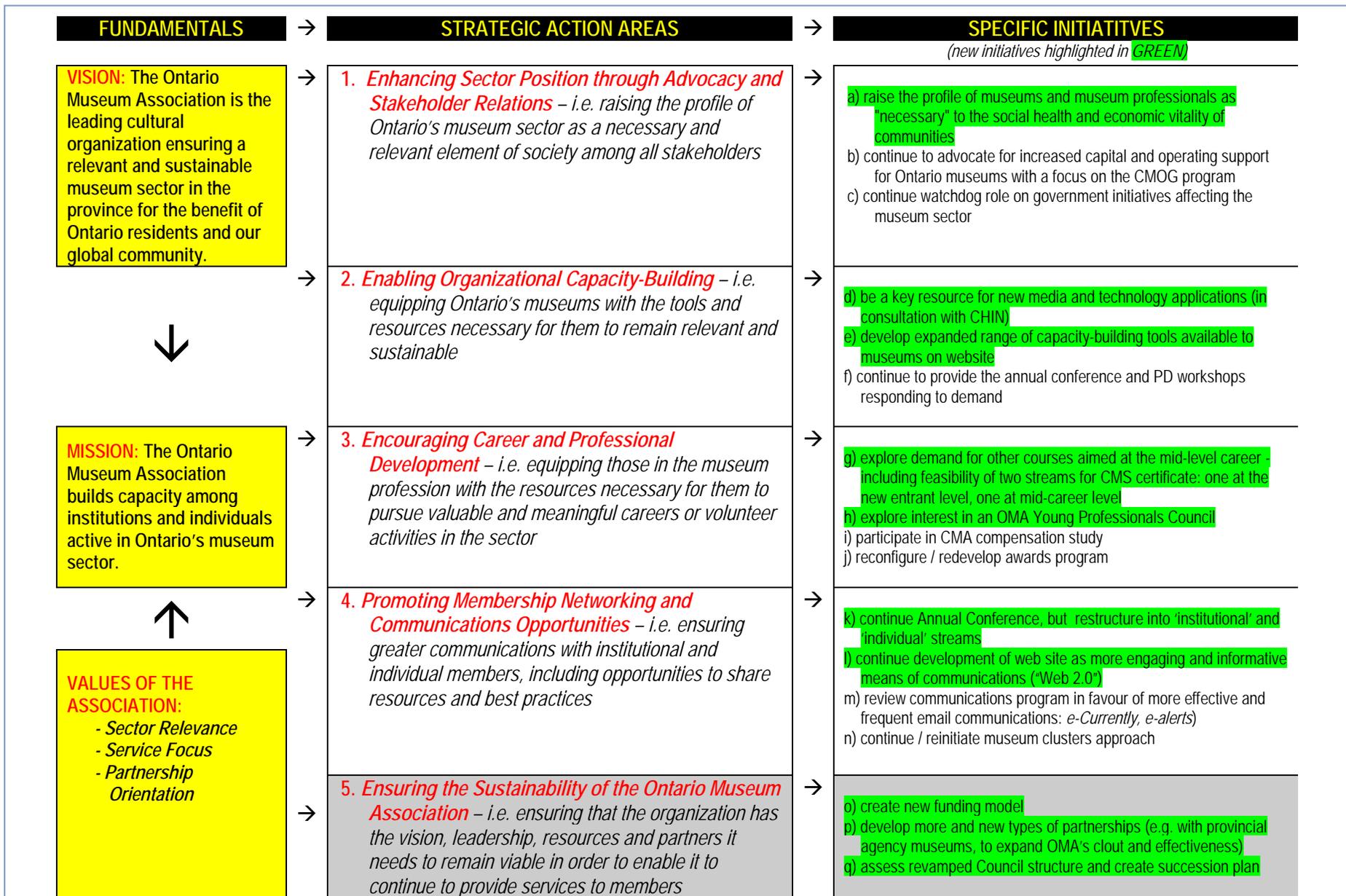
- involves **multiple groups** in a conversation about the future of the museum: Board, staff, volunteers, members, stakeholders, funders, partners, users (e.g. teachers), general public
- can be “**the ultimate teambuilding exercise**”

2. What are the areas typically covered in a Strategic Plan for a museum operation?

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(Part A – Structure)

- Vision / Mission / Statement of Values
- Strategic Action Areas (*functional and operational*)
- Goals & Objectives (*in Strategic Action Areas*)
- Actions
- Implementation
- Evaluation
- plan shows logical interrelationship of the parts –
tip: often useful to show this in one-page diagram form



2. What are the areas typically covered in a Strategic Plan?

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(Part B – Strategic Action Areas)

- fundamental aspects of ‘museum operations’:
 - collections / curatorial / research
 - exhibitions and programming
 - visitor experience
 - audience and membership development
 - marketing and promotion
 - outreach

2. What are the areas typically covered in a Strategic Plan?

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(Part C – Operational Strategic Action Areas)

- human resources and succession planning
- volunteer recruitment, training & reward
- financial (including fundraising)
- partnership development
- physical premises

3. How far ahead should the Strategic Plan look? And how often should we revise / update it?

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- **3-5 years** a good planning horizon (not too long, not too short)
- should revise / update / review annually
- remember: circumstances change, new opportunities present themselves, unforeseen contingencies arise

4. What is the difference between a Strategic Plan and a Business Plan?

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- sometimes these terms used interchangeably
- **strategic plan:** long-term, as discussed above (Board involvement and approval required)
- **business plan:** shorter term – typically next fiscal year or two (Board not necessarily involved)
- business plan exists to demonstrate the **return on investment** of a particular initiative
- distinct from annual budget process

5. What is the difference between goals and objectives? How important are they?

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- goals are **broad**; objectives are **narrow**.
- goals are **general intentions**; objectives are **precise**.
- goals are **intangible**; objectives are **tangible**.
- goals are **abstract**; objectives are **concrete**.

5. Goals and Objectives: Examples

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Goals	Objectives
To develop the audience and build membership	<ul style="list-style-type: none">a) To increase attendance by 10% (to xxx thousand) by Year 3 of the planb) To build the membership base to xxx
To ensure the collection is properly stored and catalogued	<ul style="list-style-type: none">a) To revise and approve the collections policy by Year 2b) To ensure that by Year 3, 100% of the collection is properly stored according to museum standardsc) To ensure that 100% of the collection is properly catalogued by Year 5 of the plan

6. How important is measurement and evaluation?

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- **why bother** with a strategic plan if you're not going to use it as a guide?
- **purpose** of evaluation:
 - *what works well and is on-track?*
 - *where have we gone off the rails? What should we do about it?*
 - *what have we successfully completed? What's next?*
- very important to evaluate success: measurement is a good way to do this – **but may not be the only evaluation technique** – good old-fashioned talk and consensus-building also valuable

7. What are the characteristics of a good Strategic Plan? And a bad one?

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Good	Bad
<ul style="list-style-type: none"> Developed by a group of stakeholders, internal and external 	<ul style="list-style-type: none"> Developed by just a few insiders
<ul style="list-style-type: none"> Starts with an exciting and inspiring Vision and Mission 	<ul style="list-style-type: none"> Starts with bureaucratic and flat statements that cause reactions of blah, meh, so what...
<ul style="list-style-type: none"> Is an integrated whole, with the strategic action areas logically linked and mutually supporting 	<ul style="list-style-type: none"> Comes across as a series of random activities
<ul style="list-style-type: none"> Is written simply and is easy to understand 	<ul style="list-style-type: none"> Is jargon-ridden, complex and difficult to follow
<ul style="list-style-type: none"> Is seen to be an on-going process 	<ul style="list-style-type: none"> Is seen to be a document
<ul style="list-style-type: none"> Is updated and refined annually: becomes an active, living initiative 	<ul style="list-style-type: none"> Is shelved
<ul style="list-style-type: none"> Includes an implementation plan with targets and dates 	<ul style="list-style-type: none"> No implementation plan – dates for accomplishment become pushed further and further away; no revision of plan

8. What is the process for developing a Strategic Plan? Do we need consultants?

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(Part A – Your Strategic Planning Team)

- need to **create a team** to undertake the necessary consultation and decision-making
- team should **represent the key constituencies** with Board, management & key staff represented
- reps from **other stakeholders** should be considered as well (volunteers, members, users)
- **5 – 8 people** ideal to guide the process
- good if one or more has **previous experience** with a strategic planning process

8. What is the process for developing a Strategic Plan?

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(Part B – The Process Itself)

- essentially **three phases** to the work:
 - 1) Data Collection and Situation Analysis
 - 2) Strategy Development
 - 3) Implementation Plan

Phase 1 - Data Collection and Situation Analysis

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- typically involves:
 - **talking to** Board, staff, volunteers, funders, users, for input
 - maybe a **survey** of visitors, general community
 - possibly **benchmarking / best practices** from other institutions
 - **situation analysis:**
 - Strengths, Weaknesses, Opportunities, Threats (SWOT) assessment useful
 - identification of strategic options

Phase 2. Strategy Development

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- based on SWOT, develop:
 - *Vision / Mission / Statement of Values*
 - *Strategic Action Areas (functional and operational)*
 - *Goals & Objectives (in Strategic Action Areas)*
 - *Actions*

Phase 3. Implementation Plan

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- determine timeframe, responsibilities for actions, and resource requirements
- **timeframe:** often:
 - immediate
 - short-term (a year)
 - medium-term (2-3 years)
 - long-term (4,5 years and beyond)

Phase 3. Implementation Plan, *continued*

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- **responsibilities** for actions (Board, staff, other)
- **resource requirements** (human as well as financial)
- **evaluation**

8. What is the process for developing a Strategic Plan? Do we need consultants?

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- best situation: **you do it yourself** (assuming you do it properly), **but**
- consultants sometimes useful when:
 - *you don't have time to do it yourself*
 - *you may need objectivity, distance when consulting the public*
 - *no one on your team has previous experience in putting a plan together*
 - *you want someone who can bring some experience from related situations to the table*
 - *you need some professional facilitation expertise*
- ideally your consultant / facilitator can bring some content to the table as well, in addition to facilitation skills

9. What is the role of the Board in creating and endorsing a strategic plan?

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- Board members should be **involved in process** of creation of the Strategic Plan
- Board **must endorse** the Strategic Plan
- Board should play a role in the **annual evaluation** of the plan, and approve / endorse any revisions to the plan
- often **Board committee** set up for this purpose (long-range planning, or strategic planning, committee)

10. How do we implement our strategic plan, once developed?

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- **Board committee** (Strategic planning, long-range planning)
- **implementation team from staff**
- possibly **advisory committee** to staff of reps from users, volunteers, etc.

→ ***follow your implementation plan!***

Resources: General

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- **The Mission Statement Book** (Abrahams, 2004)
- **Strategic Planning for Nonprofit Organizations**, Allison & Kaye, 2005
- **The Policy Governance Fieldbook**, Oliver [ed.], 1999

Resources: Specific

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- **Museum Mission Statements: Building a Distinct Identity** (Gail Anderson [ed.] 2000)
- **Building Responsive Museums**, The Learning Coalition, 2009
- **Museum Branding**, Margot Wallace, 2006
- **Museum Strategy and Marketing**, Kotler, 1998
- **Manual of Strategic Planning for Museums**, Lord, 2007
- **Museum Administration – An Introduction**, Genoways & Ireland, 2003

Questions?

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Questions for your Museum and Heritage Advisor?

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Read the Standards for Community Museums in Ontario at
http://www.mtc.gov.on.ca/en/museums/museums_standards.shtml

Download the Standards Questionnaires at
http://www.mtc.gov.on.ca/en/museums/museums_reporting.shtml

What's Next?

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- This slide deck will be emailed to all webinar participants
- The link to the recording of this webinar will be available on the OMA website shortly
- You will receive a link to a short webinar feedback form
- Thank you for your participation!

OMA Learning Lab Winter Series

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Upcoming Webinars

- **Museum and Fundraising Ethics – April 4, 2013**
 - Register online at museumsontario.com

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