

## MUSEUM NOTE

### **GOVERNANCE: Strategic planning and evaluating success for non-profit museums**

As a community museum, this tip sheet will help you comply with the governance standards of the Ontario government's *Standards for Community Museums in Ontario*.

Standards enable community museums to:

- provide the appropriate care and management of collections
- meet visitors' expectations
- be accountable and transparent to the community, funders and donors

### **Objective of the Governance Standard**

As a community museum, you must be governed according to standards and be open and accountable to the public for your decisions.

### **Importance of strategic plans**

While it is human nature to want to just jump into "doing", it is important to plan how you're going to do it.

The strategic plan for your museum and governing body will help you to:

- make more effective decisions
- allocate resources, both human and financial
- evaluate your organization
- reaffirm or reassess the **purpose** of your museum's activities as set out in your mission statement

### **Engaging your community**

The creation of a strategic plan should be a collaborative effort that involves your museum's staff and board, your stakeholders and all voices in your community.

The time and effort it takes to engage people in your community and listen to their input will result in a strategic plan that is more relevant and impactful.

Community input will help you to better:

- map out plans for your museum's future
- consider and respond to changing conditions in your community
- continue to operate in the public trust

## **Making decisions strategically**

As a **governing body**, your strategic plan and mission statement will help guide your decisions about:

- fundraising opportunities
- grant opportunities
- stakeholder engagement
- partnership opportunities

As **museum staff**, your strategic plan and mission statement will help guide your decisions about:

- exhibit and event subject matter
- approaches and target audience
- additions to your collection and what can be removed
- what donations should be accepted
- your priorities and goals
- your training or professional development needs
- community partnerships

## **Allocating resources**

As a governing body, your strategic plan and mission statement will help you determine:

- your budget
- the financial resources required
- the human resources needed

## **Evaluation: Monitoring your museum's performance**

Regular review is the key to an effective strategic plan.

We recommend the following protocols to ensure your plan is as relevant and effective as possible:

- include a 'progress review' of your strategic plan as a regular item on the meeting agenda of your museum's governing body; include items such as progress reports on goals met
- review your plan on a yearly basis – as part of your annual general meeting and annual report – to help measure your organization's success
- review and revise your plan, every five years

## **Stakeholder Communication**

Plans that are strategic in supporting a compelling mission statement may help you

convince funders, including local government, that your museum is credible and worthy of investment.

When a strategic plan accompanies a project grant application it strengthens the case that your funders' support will have positive impact on its community.

### **Creating a strategic plan**

Don't be afraid to plan and don't be rushed! An inspirational and useful plan is worth the time and effort.

Here are two easy-to-use resources to help you get started:

- *Producing a Forward Plan: MGC Guidelines for Good Practice* – by Stuart Davies
- *Human Resource Planning Tool* – The Learning Coalition

You may also want to hire a skilled facilitator, with no affiliation to your museum, to help you make planning meetings more productive and ensure your plan is a visionary one for your organization and your community.

### **RECOMMENDED RESOURCES**

Alberta Museums Association. *Standard Practices Handbook for Museums*, 3<sup>rd</sup> edition. 2014. *Planning 2.6* pp.79-84.

Balanced Scorecard Institute. *Balanced Scorecard Basics*.

The balanced scorecard is a strategic planning and management system that is used extensively in nonprofit organizations to align business activities to the vision and strategy of the organization, improve internal and external communications, and monitor organization performance against strategic goals.

<http://balancedscorecard.org/Resources/About-the-Balanced-Scorecard>

### **CMOG Standards Resources**

<https://members.museumsontario.ca/resources/tools-policies/CMOG-standard-resources>  
for:

Linton, Jon. Archived OMA webinar and notes on Strategic Planning. March 2013.

### **Governance**

Davies, Stuart. *Producing a Forward Plan: MGC Guidelines for Good Practice*  
Different terminology for Strategic Plan but this 24 page booklet will provide everything a board needs to inform their strategic planning process and ensure it is used.

Museum of Ontario Archaeology. *Strategic Process Example*

### **Human Resources**

The Learning Coalition. *Human Resource Planning Tool*. 2006.

Provides an easy-to-use step-by-step process for thinking about the people doing the work in the museum and integrating that information into the museum's annual and/or strategic plans.

Falk, John H. and Beverly K. Sheppard. *Thriving in the Knowledge Age New Business Models for Museums and Other Cultural Institutions*. Lanham, MD: AltaMira Press, 2006. While the whole book is inspirational and informative. Chapter 9 *Strategies for Success* is particularly helpful including a table 9.1 *What the public is really saying they want from a museum*.

Norris, Linda. <http://uncatalogedmuseum.blogspot.ca/search/label/planning>

This link takes you to her blog posts on museum planning of any kind, all are worth a read but, for strategic planning in particular, see posts from April 9, 2014, September 23, 2011 and January 2, 2010.

Vergeront, Jeanne. *Strategic Planning Notes*.

The Museum Notes blog also offers several insightful posts on vision and mission statements. This particular post provides links to many of these organized under useful headings. <http://museumnotes.blogspot.ca/2013/09/strategic-planning-notes.html>