

## Forward Planning Toolkit

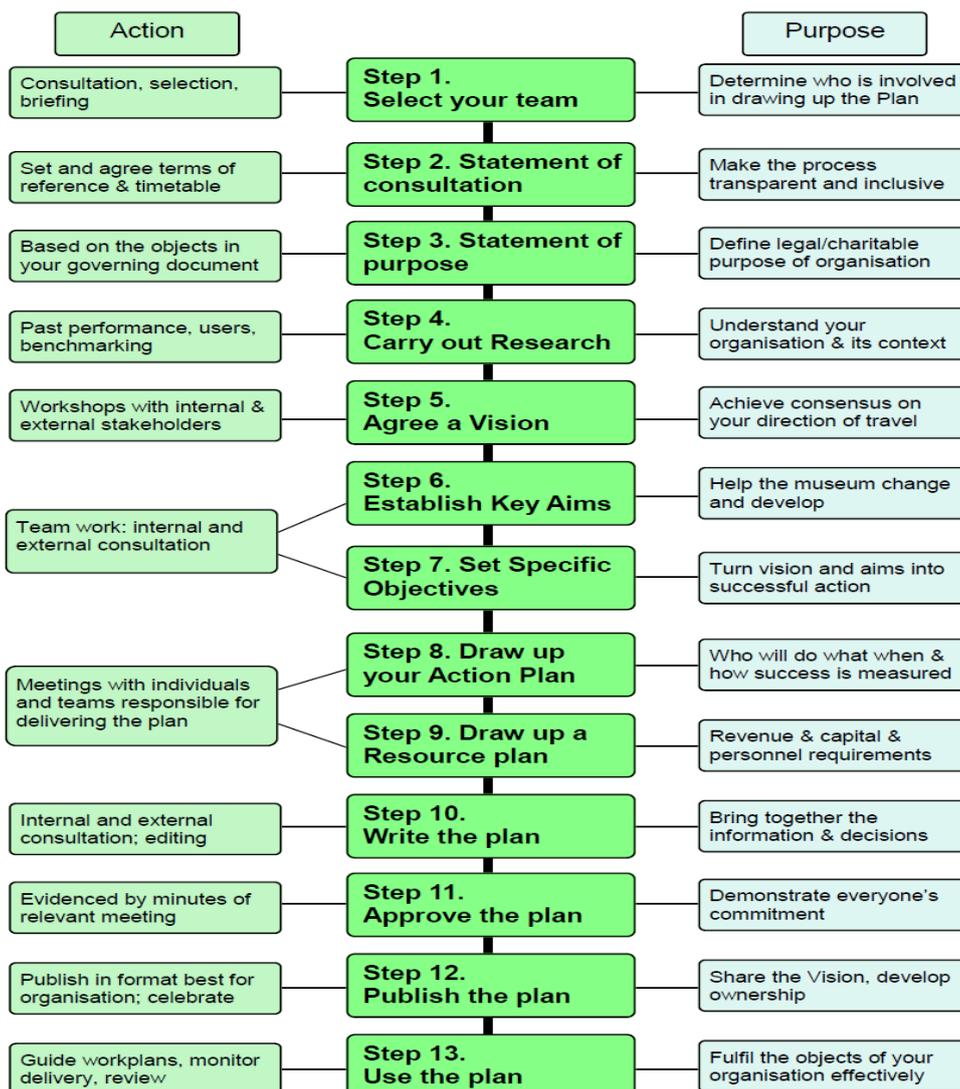
The Forward Planning process can seem daunting. This toolkit has been devised to break it down into manageable steps to enable you to create a meaningful and practical document that will ensure your museum achieves its vision and operates sustainably, using its resources (collections, workforce, budget, premises, supporters, etc) effectively.

By following the steps set out on the following pages you will create a document that meets Arts Council England's Accreditation Standard for Museums.

### TOP TIPS

- Take it a step at a time
- Share the task between several people
- Give yourself time to do it
- Integrate it into the daily life of the museum
- Do not be overwhelmed by the size of the task
- Aim to produce a plan that fits the scale of your museum

Ready to start using the toolkit?



## **Step 1. Select the Forward Planning Team**

### **Determine who is going to be involved in drawing up the Forward Plan**

Select the team by choosing one person in overall charge of the process and at least one person from each of the other groups.

#### **Lead person**

- Need not be the head of your organisation
- Must be knowledgeable about the museum's management
- Must have time to devote to the task
- Must be given authority and all trustees, staff and volunteers must be aware of this

#### **Governing Body**

- All trustees/members or one or two representatives?
- Can be an empowering task for someone new
- What skills do they bring to the team?

#### **Staff**

- All staff or one or two representatives?
- In larger institutions ensure representative of curatorial, front of house, education, outreach, conservation, finance, etc
- In smaller institutions be sure to include the person responsible for each of these functions too – one person may have more than 1 role

#### **Volunteers**

- One or two representatives?
- Ensure a good spread of roles and ages

#### **Stakeholders**

- Friends group, local education establishment, humanities & arts organisations, community groups, local authority, subject specialist groups, etc

#### **TIPS**

- Forward planning is a team effort. Anyone who is not a member of the Forward Planning Team (FPT) should be involved through consultation and briefings by their representative on the team.
- Be sure to include the person in charge of finance.
- Other people can also be asked to provide data to inform specific parts of the plan for example conduct a visitor survey, collate data from past surveys or provide financial information.
- Including everyone at some level ensures greater ownership of the plan and increases the chance of it being used.
- People feel empowered if they are asked to contribute and if their voice is heard.

## Step 2. Statement of Consultation

### Make the planning process transparent and inclusive

Agree and publish the mechanisms the Forward Planning Team (FPT) will use to involve and inform all the museum's stakeholders and the timetable for drawing up the Forward Plan.

How	Who	When?
Meetings	Staff, volunteers, Friends, Public	
Reports in newsletters	Friends Local groups	
Focus groups/workshops	Users/non-users, Governing body, staff, volunteers, Friends	
Away day	Team leaders, senior management	
Suggestion boxes	Users, staff	
Through the FPT rep	Staff, volunteers, Friends	
Presentations	Friends Local groups Local authority	
Questionnaires	Users	
Social media and website	Users/non-users	

### TIPS

- At the very least the FPT should consult the museum's stakeholders at:
  1. The start of the forward planning process to set out what they are doing and how;
  2. The draft plan stage to get feedback on the proposals;
  3. The publication stage to launch the plan.
- Emphasize that it is an open process and abides by the Museums Association's Code of Ethics .

### ACCREDITATION

- Accreditation 2011 requires museums to consult their users on a range of issues to understand who they are and what their needs are (Requirement 3.1).
- The assessor will want to see evidence that you have consulted and analysed the views gathered as part of the forward planning process (Requirement 1.4.4)
- Guidance on this requirement can be found in: Accreditation guidance – section 1, organisational health and Accreditation guidance – section 3, users and their experiences.

### Step 3. Statement of Purpose

#### Define the legal and/or charitable purposes of your organisation

Identify your museum's:

Purpose	
Values	
Activities /intended achievements	
Audience	

#### TIPS

If you haven't got a statement of purpose, then you will have to develop one. Look at your founding document, consider your collections and any other heritage assets you are responsible for (perhaps the museum building?), your audience, the activities you undertake. If you are a local authority museum you will be guided by the council's vision and policies as well.

It should be the same statement that is used in your Collections Development policy and any other policy statement. It underpins everything you do.

Your statement of purpose (or mission statement) is usually found in the museum's governing document or trust deed. It usually includes legally binding and /or charitable objects.

#### ACCREDITATION

A Statement of Purpose is an absolute requirement for Accreditation (Requirement 1.4.1). The statement must be formally approved by the museum's governing body or officer with delegated responsibility.

Further information on the requirements for a Statement of Purpose within the Accreditation Standard can be found in: Accreditation guidance – section one, organisational health.

#### WHO?

The Forward Planning Team can draw up the statement of purpose which is then put to stakeholders for consultation and comment. Alternatively, all staff and close stakeholders can contribute to the development at a staff meeting or Forward Planning workshop.

## Step 4 – Carry out Research

### Understand your organisation – its past performance, achievements, resources, standards, finances, etc – and the context in which it operates.

This is arguably one of the most important parts of the Forward Planning process as, done well, it gives you a clear picture and firm foundations on which to build your plans for the next 3 years., so make sure you allocate sufficient time to the process.

#### 4.1 Review information from the past 2 to 3 years on:

Current performance measurement	The targets or performance indicators set in your previous Forward Plan – did you achieve the objectives? If not, you should state why.
Stakeholders	Who are they, how do you know, what stake do they have in the museum and what are their expectations of it?
Market Research	What do your visitor surveys, visitor books, observation, local demographics tell you about your audience?
Resources	Building & land: condition, use, accessibility, Staff (paid & unpaid): expertise & training, numbers, succession planning Collections: scope, documentation, storage, condition, use Capital investments: restricted and unrestricted reserves
Statistical data	Income and expenditure, performance of reserves, grant income, cost per head; Visitor numbers and types, learning sessions, outreach, exhibitions

#### WHO?

Responsibility for collecting and scrutinising the research data can be delegated to members of the Forward Planning Team (FPT), most logically to the person in charge of the particular area targeted. In smaller museums one person will often cover several areas.

Alternatively, in large museums, tasks can be delegated to people who are not part of the FPT – their involvement gives them ownership of the forward planning process.

#### ACCREDITATION

- Accreditation 2011 requires museums to carry out a **review** of their performance and an **analysis** of their operating environment and to undertake an analysis of the risks faced by their organisation (Requirements 1.4.2 & 1.4.3). Assessors will want to see this evidenced in the forward plan. Details of the processes and of their outcomes can be included in appendices or supporting documents rather than the Forward Plan itself.
  - Accreditation 2011 requires museums to have a policy statement on its organisational approach to environmental sustainability and for this to inform their development (Requirement 1.10). Museums may wish to develop the statement as a result of the review process. The statement can be included as an appendix with a summary and reference to it in the section analysing the museum's operating environment.
  - Guidance on these requirements can be found in: Accreditation guidance – section one, organisational health.
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## 4.2 Carry out a SWOT analysis by filling in the quadrants below

What are your museum's

**Strengths?**

What are your museum's

**Weaknesses**

What **Opportunities**

does your museum face?

What **Threats**

face your museum?

### TIPS

- The strengths and weaknesses are often seen as current internal factors, the opportunities and threats are seen as future external influences. Sometimes a statement can fit into more than one box.
  - Examples of Strengths include: *'dedicated staff', 'strong community support'*
  - Examples of Weaknesses include: *'lack of staff training plan', 'large documentation backlog'*
  - Examples of Opportunities include: *'800 anniversary of town charter in 2013', 'creation of new post of learning officer'*
  - Examples of Threats include: *'closure for major repairs to fabric', 'low interest rate on reserves'*
- Remember there are standards to which museums are required to operate: the Museums Association Code of Ethics, Accreditation 2011, SPECTRUM and Benchmarks in Collections Care 2.0.
- The Risk Awareness Profiling Tool is an on-line checklist to help you identify and keep track of aspects of your museum's operation that are vulnerable to risk. It is accessed at [www.raptonline.org.uk](http://www.raptonline.org.uk).
- Don't go overboard on identifying risks at the expense of taking advantages of the opportunities. It is important not to inhibit creativity.

### WHO?

SWOT analysis is best done by a group of people together. It is an opportunity to hold a general meeting, open to as many constituents as possible to encourage a conversation between staff, volunteers, users, stakeholders, etc.

Divide your group into sub-groups of no more than 4 or 5, give each a large sheet of paper and a pen and give them 30 minutes to fill in the squares.

Alternatively have four 'stations' within your room, each with a flip chart and pen. Allow people to move between them, writing their thoughts on the chart.

At the end of the session, gather people back together and share each group's/station's findings and discuss which they feel are the top 6 strengths, weaknesses, etc. These can then be taken back to the Forward Planning Team.

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### 4.3 Carry out a PESTLE analysis – identify what factors impact on your service under the following headings

Political	Economic
Social	Technological
Legal	Environmental

#### TIPS

A PESTLE analysis is a useful tool for understanding the ‘big picture’ of the environment in which an organisation is operating. It is a useful tool for understanding factors associated with market growth or decline whether they are risks or benefits.

A PESTLE analysis is probably best done by the Forward Planning team as it requires more detailed knowledge and research than a SWOT. It looks at:

- **Political factors:** what is happening politically in the environment in which you operate: depending on your institution, this can extend from international events, through national agendas to town and parish council level and include areas such as political support and sector support networks and agencies.
- **Economic factors:** economic growth/ decline, interest rates, exchange rates and inflation rate, wage rates, minimum wage, working hours, unemployment (local and national), grant availability, changes in tax legislation.
- **Sociological factors:** what is occurring socially in audiences you attract or expect to attract, cultural norms and expectations, health consciousness, population growth rate, age distribution, career attitudes, leisure patterns.
- **Technological factors:** what is happening technology-wise which can impact what you do, for example mobile phone technology, Web 2.0, blogs and micro-blogs (Twitter), social networking websites, collections and resource management software and systems.
- **Legal factors:** what is happening with changes to legislation and treaty obligations. This may impact on employment, equalities, collections (restitution, human remains, etc). tax policy, environmental regulations,
- **Environmental factors:** what ecological and environmental issues impact on your organisation, for example the re-evaluation of flooding risk, energy conservation.

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### 4.4 Analyse the information you have collected to identify trends, risks and opportunities and to assess the impact on your museum

- Identify trends
- Think about the value of every stage of your operation
  - What does it add to the overall performance?
  - What would be the effect of developing or cutting it back?
- Identify key themes, pressures and opportunities

- How do you minimise risks?
- Do certain themes recur?
- Is everything of equal weight or can you prioritise?
- Draw conclusions
  - These will form the underlying rationale of your organisation to issues such as sustainability (environmental, financial and social), staff development, risk management, etc
- Summarise
  - This position statement for your museum will inform the next stage of the planning process.

## TIPS

- Use this stage to develop your organisation’s policy on Environmental Sustainability – museums applying for Accreditation must submit evidence of the Governing Body’s and the Management’s approach to this issue.
- The detail of the research gathering phase (sources consulted, documents used) should be bound as an appendix. Only a summary and the key points to come from the analysis should be included in the Forward Plan itself.
- At the end of this step you should now have a clear idea of the context in which your museum operates and a robust profile of your organisation, warts and all!

## WHO?

Analysis should be done by the FPT and the summary by the lead person.

Any policy documents and statements must be formally approved by the Governing Body or the officer with delegated authority and made available to staff and volunteers as necessary.

## TIP

The following enhanced SWOT Analysis tool is useful for the Team to take the findings of the original SWOT analysis further.

*[Translate into tasks for the Project Plan]*

	<b>Strengths</b>	<b>Weaknesses</b>
<b>Opportunities</b>	<i>[How do I use these strengths to take advantage of these opportunities?]</i>	<i>[How do I overcome the weaknesses that prevent me taking advantage of these opportunities?]</i>
<b>Threats</b>	<i>[How do I use these strengths to reduce the likelihood and impact of these threats?]</i>	<i>[How do I address the weaknesses that will make these threats a reality?]</i>

## **Step 5. Agree a Vision**

### **Achieve consensus on your direction of travel**

In the light of the summary produced by the research carried out at Step 4, think about where you would like to see the museum in five to ten years time.

- What do you want it to have achieved?
- What position do you want to hold in the local community, the region, nationally?
- What will your museum be doing?
- Who will its users be?
- What values will it have and project as an organisation?

### **TIPS**

The Vision Statement defines the purpose of your organisation in terms of its values rather than its legal or charitable obligations.

The Vision Statement is aspirational in tone. It is a good way to get commitment from a range of stakeholders. For employees it gives direction about how they are expected to behave and inspires them to give of their best. For external stakeholders it helps them understand what your museum can offer them.

Discuss and refine people's ideas until you have a short, succinct statement.

### **WHO?**

Include all those involved in the museum, from the governing body/senior managers down to the cleaner and all external stakeholders in developing the vision. As with the SWOT analysis, this can be done through workshops or focus groups.

## Step 6. Establish Key Aims

**To refine the vision and help you achieve the changes and developments you are seeking.**

Think about the following to identify and refine your strategic aims.

### Specific Areas

### Key Aims

Service development:

*collections care and development, access, interpretation, education*

Business and marketing development:

*income and financial viability*

Buildings and sites development:

*improvements to and uses of property*

Organisational development:

*internal management and systems*

External relationships:

*Key stakeholders and communities*

### TIPS

- Test each aim against the purpose and values of your museum that you identified earlier. Are they consistent with what stakeholders are expecting of you?
- Remember that your key strategic aim must be the day to day running of your museum and care of your heritage assets before any development can take place.
- Strategic aims need to be attainable but not necessarily in the short term. They may be timeless.
  - Examples: An aim might be to refurbish all the museum galleries. That might take ten years.
  - Another aim may be to make a 'valued contribution' to local cultural life.
- The next section of the FP will set out the objectives to be achieved within the 2 to 3 year lifetime of the plan you are drawing up which will move the museum towards the achievement of those aims.
- In local authority museums it is important to ensure the museum's strategic aims match similar statements in other documents such as service plans.

### ACCREDITATION

- Key Aims are an absolute requirement for Accreditation 2011. They must be formally approved by the museum's governing body or officer with delegated responsibility.
- Guidance on this requirement (1.4.5) can be found in: Accreditation guidance – section 1, organisational health.

**WHO?**

The Forward Planning Team should draft the aims and then consult on them briefly with the rest of the staff and key stakeholders. This can be done at this stage, or after the next one.

## Step 7. Set Specific Objectives

### Turn your vision and strategic aims into successful action.

For each of your key aims, identify objectives that will enable you to achieve the aims, as in the example below:

Strategic aim	Specific objectives
Ensure long term preservation of the collection	By July 2012 the environment in the galleries and stores will meet the standards set out in the collections care manual.  The emergency plan will be reviewed and disseminated to all staff by December 2011

The objectives and its accompanying action plan and resource plan must reflect the museum's plans with regard to all sections of the Accreditation standard.

#### TIP

- Steps 7 (setting objectives), 8 (action planning) and 9 (resource planning) can be combined into one document or separate ones – whatever suits your organisation best.
- Some museums prefer to have a 3 step process at this stage, identifying Strategy/Strategic objectives and output/outcomes to achieve each strategic aim. In this case, the example above would look as follows:

Strategic aim	Strategy / Objectives	Outputs / Outcomes
<i>Example: Ensure long term preservation of the collection</i>	<i>1. Improve environmental monitoring and control in the stores and galleries by February 2013</i>	<i>1. Gallery and stores are monitored weekly for 6 months 2. An action plan is produced by Feb 2012 and implemented by Feb 2013. The environment in the galleries and stores are within the parameters set out in the collections care manual by February 2013</i>
–	<i>2. Ensure institutional and individual preparedness for emergencies by December 2011</i>	<i>1. Staff have all undertaken an emergency simulation exercise by 12/2011 2. The emergency plan is reviewed and disseminated by 12/2011</i>

#### TIPS

- Specific objectives and outcomes/outputs should be **SMART**
  - **S**(pecific) – be closely defined
  - **M**(easurable) – have an outcome/output that can be measured
  - **A**(chievable) – be realistic to achieve with the resources (money, personnel, collections, buildings and time likely to be available to you)

- **R(levant)** – be consistent with your museum’s statement of purpose, vision and strategic aims
- **T(ime-limited)** – have a definite start and end date
- The terms ‘strategy’, ‘objective’, ‘specific objective’, ‘strategic objective’ are often used interchangeably, which can be confusing. The important thing to remember is that this is a plan for your institution to use, so whatever model and terminologies you use, be consistent and make sure everyone within your museum understands what is meant by them.
- As you identify and refine objectives you will need to keep in mind your statement of purpose and vision. You will also remember what resources you have to achieve them with and the results of the SWOT and PESTLE analysis.
- Are the objectives achievable in relation to each other? Be realistic, prioritise. It is best to do a little well than a lot badly. Think about the mundane that can be achieved with little or no extra expenditure as well as the ambitious projects.
- You will need one person in charge of each objective. Are they committed to too much? What other events/commitments might get in their way.

## **ACCREDITATION**

- Your Forward Plan must set specific objectives beneath each Key Aim (Requirement 1.4.6)
- The ACE Accreditation guidance states: The museum’s objectives and resource plan should reflect the museum’s plans with regard to all sections of the Accreditation Standard, and should include explicit reference to the museum’s policy regarding governance, management, secure occupancy of all premises, environmental sustainability, collections development, collections documentation, collections care and conservation and access to the collections and associated information.

This does not mean that you must have an objective related to each of these areas of operation, but that you should take account of and refer to the relevant policies so that objectives are not developed in a vacuum.

- They can be contained within a single document or within an action plan together with the resource plan (Step 9) and success criteria (Step 8).
- Further guidance on this requirement can be found in the download: Accreditation guidance – section 1, organisational health

## **WHO?**

The FPT in consultation with the people in charge of each area involved in achieving the objectives. Share drafts with key people at regular intervals.

## Step 8. Draw up an Action Plan

Set priorities and focus on who will do what by when and how you will measure success

Key Aim:					
Specific objective:					
Actions	Start & end date	Lead	Additional support needed	Estimated cost & source of funding	Success criteria

### TIPS

There are several variations on this plan – choose the headings and format that suit your organisation best. Show drafts to the people who will be using the plans – Trustees, volunteers, staff – to get their feedback on what they would find most useful.

Complex actions may themselves be broken down further into individual team or personal workplans. They may require specific decisions and authorisation.

As with setting objectives it is essential to remember when drafting your action plan to stay aware of the workload of individuals and the financial resources you have available. You may find it helpful to draw up a calendar and spreadsheet to visualise the commitments being made. If one person is down to do 20 tasks in one month or all expenditure comes in the first week of the year, then it is back to the drawing board. The calendar and spreadsheet will form the basis of your Resources Plan (Step 9)

It is encouraging to have a way of showing when an action has been completed. If there is no room for a tick box, highlight the action in a different colour once it is complete, as shown in the example available to download from the right hand column.

### ACCREDITATION

Museums must demonstrate how they will achieve their specific objectives (Requirement 1.4.7). This is best done by drawing up an action plan.

Steps 7 (setting objectives), 8 (action planning) and 9 (resource planning) can be combined into one document or separate ones – whatever suits your organisation best.

Guidance on this requirement can be found in the download: Accreditation guidance – section 1, organisational health.

### WHO?

The process is co-ordinated by the person leading the Forward Planning process, who may in fact draw up much of the plan itself, in consultation with the people who will be responsible for delivering it.

In larger organisations with sections heads or smaller organisations with a good system of delegation/allocation of roles, then the people responsible for delivery will draw up their particular section of the action plan in consultation with the lead person.

## Step 9. Draw up a Resource Plan

### Set indicative revenue and capital expenditure and personnel requirements over the lifetime of the plan.

A Resource Plan is an extension of the Spending Plan required for Accreditation 2004. You will have set out the headline figures and key responsibilities in your Action Plan (Step 8), the Resource Plan provides the supporting detail and shows that you are aware of the cash and personnel required to run the museum and achieve the objectives set out in the Forward Plan.

#### ACCREDITATION

- Steps 7 (setting objectives), 8 (action planning) and 9 (resource planning) can be combined into one document or separate ones – whatever suits your organisation best.
- The person assessing your application for Accreditation will ask: is the resource plan sufficiently detailed? Is the museum overly dependent on one source of funding? Is there a realistic income diversification strategy or plan? Has the museum considered the risk of the funding being reduced or withdrawn?
- The Resource Plan can be a separate document or bound with the specific objectives and success criteria into an action plan.
- Guidance on this requirement can be found in: Accreditation guidance – section 1, organisational health.

#### SPENDING PLAN TIPS

- Produce revenue and capital budgets for the period of the plan. Some objectives will have no cost implications, others will require additional funding.
- The figures for the current year – your budget – will be accurate, those for subsequent years less so. You will need to keep an eye on these throughout the year and consolidate them when you set the budget for the coming year.
- To draw up your revenue budget, use headings from your past couple of years' accounts. Income may come from a range of sources: unrestricted funds or restricted funds, core funding, sales, admissions, gift aid, etc. State the assumptions on which the figures are based, eg visitor numbers, sales, interest rates, changes to minimum wages, etc.
- If your museum is strongly reliant on income from visitors, conduct a sensitivity analysis by asking yourselves questions such as *'What would happen if our numbers fall by 20%?', 'How would we respond to this?'*
- To draw up your capital budget give an estimated cost for each project, the source of the funding and whether it is secured. If not, set steps to achieve it in your action plan.

#### WHO?

Your finance officer or treasurer should draw up the spending plan, working with the forward planning lead.

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#### PERSONNEL PLAN TIPS

- For this you will need to bring together the information in your Action Plan, where you identified the lead person and other people involved in specific actions. If you haven't already done so, plot this onto a calendar covering the period of the plan.

- It is a good idea to add in the meetings of the governing body/management team to the calendar. In addition, highlight whether it has an input into the objectives other than monitoring progress and evaluating results. For example, appointments might have to be made, a lease or funding agreement negotiated and signed.

**WHO?**

The FPT or lead person in consultation with the representatives and/or managers of the people concerned.

## Step 10. Write the Plan

### Bring together the information you have gathered and the decisions you have made

Section	Content
<b>Introduction</b>	Brief description of the museum, its history, collections, buildings, governance, its audience, its principle achievements over the past five years
<b>Statement of purpose</b>	The museum's statement of purpose
<b>Forward Planning</b>	<ul style="list-style-type: none"><li>• How the Forward Plan was drawn up – key people and consultations, period of the plan and system for use and review</li><li>• How risk was identified and how it is taken into account during the planning process.</li><li>• Statement on museum's approach to environmental sustainability</li><li>• Progress on meeting objectives in previous forward plan</li><li>• Visitor figures, staffing (paid and volunteer), budget, size and range of collections, museum buildings, key stakeholders</li></ul>
<b>Situation review</b>	<ul style="list-style-type: none"><li>• Key challenges facing the museum</li><li>• Key opportunities facing the museum</li></ul>
<b>Vision</b>	The vision statement for the museum for the next 5 to 10 years
<b>Strategic Aims</b>	The museum's key/strategic aims (Step 6)
<b>Current Objectives &amp; Resource Plans</b>	The action plan drawn up at Step 8, including success criteria and including resource plans
<b>Appendices</b>	Data collected at Step 4, full list of consultees, plans, etc as appropriate

### TIPS

- Make the plan short and succinct – it is a working document. Any additional research or contextual information should be put in an appendix and referenced from the main text.
- If you are consulting on your draft plan, you might want to revise it in the light of feedback received. You don't have to – it is your plan. However, remember to thank everyone who has been involved in consultations or contributed information to the plan.
- Number the sections and paragraphs to make reference to them easier when using the plan.

### ACCREDITATION

- Accreditation 2011 emphasises that there is no set format or length for a Forward Plan, only that it must contain specific information and be appropriate in size and scope to the scale of the museum it serves.
- Guidance on scalability can be found in: Accreditation guidance – introduction and in Accreditation guidance – section 1, organisational health.

**WHO?**

The Lead person should draft the plan and then pass it to the rest of the team for review. The lead person will then draft the final version.

## Step 11. Approve the Plan

### Demonstrate the Governing Body's commitment to the Plan

Action	Purpose
The plan is approved and adopted by a full meeting of the Governing Body or the person with delegated responsibility to approve departmental plans (local authority).	To formally acknowledge that the plan is the official policy of the museum

#### TIPS

- The approval will normally be a signed and dated minute of the governing body unless there are other arrangements (approved by the governing body) for another person or body to approve policy documents.
- In local authorities with a cabinet style executive and powers delegated to heads of section or other officers, museums must submit evidence of the delegation of the power to approve policy documents from the Cabinet. The plan submitted for Accreditation must be accompanied by evidence (signature or covering letter) that the plan has been approved.
- Where there is a management agreement in place between the collections owning body and the museum managing body, the management agreement must stipulate whether approval of the Forward Plan is delegated to the managing body or whether it should be referred back to the owning body.

#### ACCREDITATION

- The Statement of Purpose and the Key Aims must be formally approved by the museum's governing body or by the person with authority, formally delegated by the governing body, to approve documents of this nature.
- Guidance on the approval and the evidence that must be submitted with a return is available in Accreditation guidance – section 1, organisational health.

#### WHO?

The museum governing body or delegated officer

## Step 12. Communicate the Plan

### Share your vision, develop ownership

Action	Purpose
<p>Publish the plan as appropriate:</p> <ul style="list-style-type: none"><li>• On the museum website</li><li>• Hard copy</li><li>• As a pdf to email to stakeholders</li></ul>	<p>Ensure all staff have access to a copy, particularly of the action plan – they should at least have a working copy of every section that involves them.</p>
<p>Brief key stakeholders on the plan</p> <ul style="list-style-type: none"><li>• Individual staff appraisal / work planning</li><li>• Staff meetings</li><li>• Meetings with Friends/volunteers</li></ul>	<p>Ensure that everybody is aware of their responsibilities within the plan, is inspired by the plan and committed to realising the vision</p>
<p>Celebrate the publication</p> <ul style="list-style-type: none"><li>• Hold a launch party</li><li>• Issue a media release</li></ul>	<p>To thank people for their contribution to gain media attention, to secure commitment</p>

### TIPS

- Make sure key stakeholders – Friends group, principle fundraisers, local groups you have consulted – are sent a copy together with a note thanking them for their contribution.
- Make sure every new Trustee, member of staff or volunteer is made aware of the plan/given a copy as part of their induction.
- Give everyone involved in delivering the plan a working copy of the Action Plan to use to monitor their own work schedule.

### ACCREDITATION

- Consulting your users and non-users is a requirement of Accreditation detailed in section 3.1 of the Standard. Consider publishing your plan, or a summary of it, on your website.
- Guidance on consultation can be found in: Accreditation guidance – section 3, users and their experiences.

### WHO?

The head of the museum, heads of section, HR and/or volunteer manager, marketing/publicity officer as appropriate.

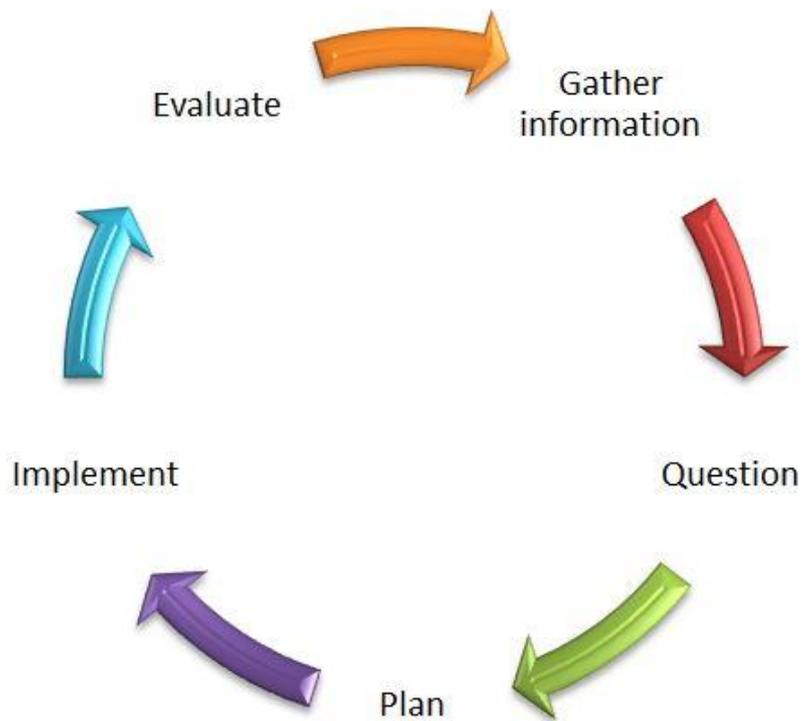
## Step 13. Use the Plan

### Manage developments and resources effectively to fulfil the objects of your museum

Action	Purpose
Put the Action plan on the agenda of every regular management meeting – of the Board, staff, department	<ul style="list-style-type: none"><li>• To monitor progress towards achieving the objectives set in it</li><li>• To be proactive</li><li>• To make timely decisions</li><li>• To address any slippage</li></ul>
Check individual performance against the plan at staff reviews.	<ul style="list-style-type: none"><li>• To establish training needs</li><li>• To set and monitor workplans</li></ul>
Every year conduct a more in depth review – how you did, which objectives were met, why others weren't. Approve, communicate and implement a new action and resource plan.	<ul style="list-style-type: none"><li>• To refine the plan for the coming year and develop the one for the year after.</li></ul>
Every five years (or sooner if there are major changes affecting the context within which the museum operates) take an in depth look at your museum, starting again at Step 4 – Research	<ul style="list-style-type: none"><li>• To review the context, check the vision, update the aims, consult, etc to ensure you maintain an up to date strategy to fulfil your museum's objects and statement of purpose.</li></ul>

#### TIPS

- A review of the Forward Plan will form the core of an annual meeting with your Museum Mentor (museums without professionally qualified staff only).
- If some of your targets have slipped, do not worry, you will not be downgraded. Your Mentor will look at the reasons for the slippage with you and help set a revised timetable. Planning is not a guarantee of achievement!
- Planning is a cyclical process, at the annual review, you will look again at the decisions taken at following
  - Are the strategic aims still relevant?
  - How have we performed against the objectives and the action plan?
  - What further objectives can we now work towards?
  - What resources do we have to do this with?



## ACCREDITATION

- Accreditation requires your Forward Plan to stipulate the date by when it will be reviewed (Requirement 1.4.9).
- For museums with a Museum Mentor, your Forward Plan and the Key Aims, Specific Objectives and Actions you set out in it will form the focus of your annual review with your mentor.
- All museums will be required to report progress in implementing their Forward Plan when they submit a return to Arts Council England every three years
- Further guidance on the return process will be available on the Arts Council England website – [www.artscouncil.org.uk](http://www.artscouncil.org.uk)