

CREATING & IMPLEMENTING FORWARD PLANS

Michael Day

Chief Executive, Historic Royal Palaces

Second edition, revised by Adrian Babbidge

“Would you tell me please which way I ought to go from here?”

“That depends a good deal on where you want to get to” said the Cat.

“I don’t much care where . . .” said Alice.

“Then it doesn’t matter which way you go” said the Cat.

“. . . so long as I get somewhere,” Alice added as an explanation.

“Oh you’re sure to do that” said the Cat. “if only you walk long enough.”

(from Lewis Carroll’s *Alice’s Adventures in Wonderland*)

It has been said that “If you don’t plan where you want to go, you’ll probably end up somewhere else”. It follows that ‘somewhere else’ is almost certainly somewhere you do not want to be. The same is true for all museums, large or small, whether run by paid employees or unpaid volunteer staff, with a workforce of hundreds or just a handful.

WHAT IS A FORWARD PLAN ?

The generic term ‘Forward Plan’ is used to describe any document that sets out how an organisation proposes to achieve its objectives. ‘Corporate’, ‘business’, ‘strategic’, ‘implementation’ and ‘operational’ plans are all forms of forward plan. Their different names tend to indicate their purpose (though even here local usage may differ):

- a short-term plan, perhaps with the life of a single year, or the length of a single project, or relating to a single unit within a

larger organisation, is often called a ‘business plan’, ‘business statement’, or ‘annual’, ‘operational’, ‘project’, ‘work’ or ‘implementation’ plan;

- a mid-term plan for a whole organisation, perhaps with a life of three to five years, is often known as an ‘operational’ or ‘corporate’ plan;
- a longer-term plan, perhaps with a lifespan of five years or more, tends to have ‘strategy’ somewhere in its title (eg ‘corporate strategy’, ‘development strategy’, ‘strategic plan’).

WHAT IS IT FOR?

The type and name of the forward plan will vary from museum to museum. However, whatever the plan’s type and name, its purpose will be to provide the museum with –

- a **sense of purpose** – *what are we here for?*
- a **sense of audience** – *who are we here for?*

- a **sense of direction** – *where are we going?*

- a **strategy** – *how are we going to get there?*

- a **financial framework** – *how are we going to pay for it?*

- a **sense of achievement** – *how well are we doing?*

and stakeholders, including funders or prospective funders, with –

- a **sense of your organisation’s strength**, and

- a **clear picture of your ambitions**.

WHY SOME MUSEUMS DON’T PLAN

Some people find reasons to explain why their museum does not have a forward plan:

- We’re too busy dealing with day to day problems.

- It's only a fad.
- We don't have time.
- We're too small.
- It's all in our heads.
- Everyone knows where we're going.
- We don't know how to.
- Things are changing too fast.
- Nothing's happening anyway.
- We haven't got any money, it's not worth it.
- We started but we got really bogged down and ran out of steam.
- No-one ever asked us to.

If you have ever found yourself thinking or saying one of these, think again. Forward plans, and the process of creating them, will help to make your museum more successful. Here are some reasons why.

REASONS TO PLAN

- **Purpose** – to ensure commitment to an agreed purpose. Forward planning demands a fundamental look at the nature of the organization, and a clear focus on what it is there for.
- **Vision** – it is important to be clear about future direction. Planning should not be seen as a necessary evil forced by lack of funding.
- **Leadership** – planning is part of leadership which all museums need. The plan expresses the vision for the museum in a way that people can support.
- **Control** – planning lets you take control of your own future rather than letting the outside world dictate it.
- **Confidence** – forward plans inspire confidence in funders and supporters, demonstrating that you are well-organised and use your resources effectively.
- **Monitoring** – plans set measures for progress and performance. Without clear targets it is hard to know how well you're doing. Measurable achievement and celebrating success improves morale.
- **Alignment** – plans match resources (people and money) to aspirations. Museums often have unrealistic aims or ideas that together are impossible to achieve. The planning process helps to identify realistic ambitions.
- **Appropriateness** – ensuring that external opportunities are in line with your purpose. It is all too easy to be diverted from your true path by the temptation of funding for a project that is not a current priority.
- **Involvement** – planning helps everyone to be a part of the future.
- **New conversations** – museum staff are usually hard-pressed, trying to deliver services and achieve developments with inadequate resources. The planning process makes you stop and think about what really matters, creating time for important discussions which would never arise during a typical working day.

WHO SHOULD BE INVOLVED?

Successful plans – the ones that are actually implemented – share the following characteristics:

- **Trustees** – as the people responsible for ensuring that the museum remains solvent, is well-run and achieves its purposes, and that trustees (the members of the museum's governing board or committee) are actively involved in developing the plan from the outset, not merely rubber-stamping the result.
- **Management team** – work on preparing the plan has to be driven with commitment by the people who manage the museum. In a volunteer-run museum this might be its honorary officers; in other small organisations, two or three staff and a similar number of trustees; in larger entities it will be the director (head of the museum) and management team reporting to a working group of the full board of trustees. If there is no management team, a planning team involving all the senior or key staff should be created. The director must always be fully involved and should not delegate the task to another manager.
- **The whole staff group** – all members of staff (including unpaid volunteers) at whatever level should have a chance to contribute at some point in the process.
- **Key stakeholders** – especially regular funders, should be consulted early in the process and again at draft stage.
- **Audience groups** – involving people who represent different types within your audience keeps you closer to their needs.
- **Consultants** – if a consultant is used, their role should be to facilitate the development of the plan, working with the in-house team to help it through the process of analysis and debate. Don't allocate the task of planning and writing to consultants: your plan will be easier to implement if

produced by your own efforts rather than being a formulaic, purchased product. Further, funding bodies are likely to have greater confidence in an organisation that can produce its own modest, realistic document rather than those with an ambitious plan generated by a here-today, gone-tomorrow adviser, however impressive their credentials.

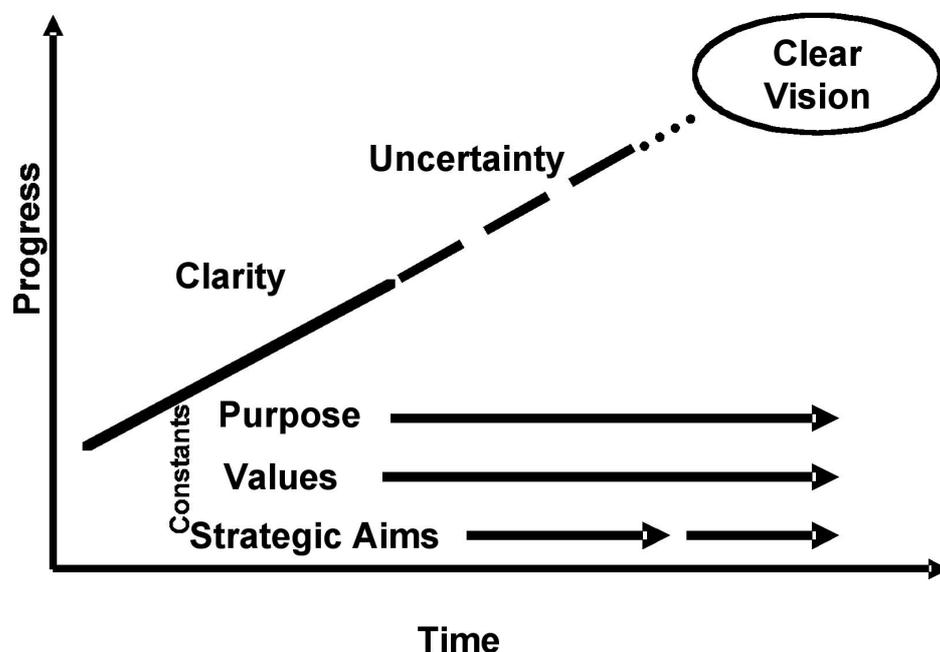
While it is important to maintain momentum, the involvement of different groups of people helps to build a wide measure of support. You should expect that consulting on the plan will lead to its being changed on a number of occasions as it develops.

PLANNING FOR AN UNCERTAIN FUTURE

It can be difficult to decide over what period to plan. The world is a confused and tumultuous place. It is rarely straightforward. The future is infinitely unpredictable and appears to change with ever-increasing rapidity. Yet bits of future co-exist with present and past. To see the future, look around you. Features that will be commonplace in the future are already identifiable in the present-day.

Unlike most organisations, museums operate on a long time continuum. We deal with the stuff of the past with a mission to guarantee its survival in perpetuity. Short-termism, taking a quick win today, is inappropriate for museums, which must plan long term. However, plans covering five years or more almost never work out the way we anticipate.

So, how do we find a balance between the need to plan and a shifting world? The answer is to attempt to control destiny by creating an ordered way forward that acknowledges expected change, and planning both for the short and long term, looking simultaneously at the detail of the immediate future and the eventual goal. This might be pictured like this:



This model requires a long term vision – an ambition to work towards that can provide a sense of direction. But while you can see the goal, the journey to achieve it, and its duration, may be hazy. Progress is more often incremental, and it is usually easier to see the immediate steps required. So plan long in general terms, and short in specifics. This might mean a longer-term, high-level strategic plan supported by more detailed short-term plans of who will do what and when and where. During each shorter-term plan, review, check the vision and set out the plan for the next short period.

In smaller museums, a single plan, focused on the short to middle term, is often sufficient provided that there are periodic reviews of high level issues such as the organisation's aims and operating environment.

FORMAT

There is no standard format for a forward plan, although all will include similar elements. The length of the plan will vary from museum to museum. For the smallest, all the necessary information might be included within a couple of pages of A4. Larger museums will require longer documents, but for the largest a good plan need rarely exceed 25 pages.

You are writing the plan to be sure that the organisation has a clear direction for the future. However, you may also be motivated by the need to produce a plan for negotiating core funding from a local authority, a lottery application or some other specific purpose. So be clear about for whom it is being written, and why. To motivate staff? Plan the future? Sustain or create revenue funding? To support a bid for capital or lottery funding? One document could do all these jobs, but it might not do them all very well.

If the forward plan is to accompany a funding application, you should be sure to follow any guidance issued by the funding body about any specific requirements. Otherwise, follow the framework which is set out here.

THE PLANNING CYCLE

All plans follow a typical cycle which has the following elements:

1. Creating a statement of purpose, values and audience.
2. Reviewing the current situation and external environment.
3. Developing a vision for the plan period.
4. Establishing strategic aims.
5. Setting objectives with performance measures to achieve aims.
6. Allocating responsibilities and time.
7. Allocating costs and producing budgets.
8. Writing the plan.
9. Approving the plan.

10. Communicating and implementing the plan.

11. Monitoring and reviewing.

Each stage should fit with what has previously been worked out and agreed. So, as you move through the cycle, keep asking '*does this fit with what we have already agreed?*'

1. Creating a statement of purpose, values and audience

This is sometimes called a 'mission statement'. Your museum may already have one. However, if you are put off by the jargon, try the following instead:

- a. Describe in a sentence why your museum or organisation exists. Ignore the temptation to merely add a local context to a standard definition of a museum, such as that of the Museums Association. If you come up with a statement that appears very bland, you might want to ask the question 'And why is that important?' to get at the underlying purpose. When you are happy with what you have written, ask yourself whether this sentence is consistent with the policies of any body that provides core funding for the museum. The museum's primary purpose will be constant over time, but it will need to be reviewed from time to time to ensure that its style and language represents current circumstances.
- b. Discuss and write down the values held by your organisation. How do you see the world? What do you believe is important? These are constants, and should be clear and explicit. Core values established at the outset can be used to test specific aims and objectives later in the planning process. For example, you might believe that 'wide accessibility' is an important value. If so, is this reflected in specific aims and goals in the plan?
- c. Discuss and write down who your audience is – who, indeed, you exist for. 'Everybody' may be your aspiration, but it will help if you can break this down into three or four identifiable groups. You might distinguish between local people and visitors to the area, special interest groups or a non-expert audience, specific age groups, and so on.

This first section becomes the first part of the plan. It may not take up more than half a page but will establish firm foundations for the rest.

2. Reviewing the current situation and external environment

Here you make an assessment of the current state of your organisation and the world in which it has to operate. The quality of discussion and analysis at this stage will determine the eventual success of your plan, so give it sufficient time and care. Although the task may appear large, do not be daunted by it, or attempt to cut corners, as this stage gives an opportunity to learn many things about your organisation and how others perceive it. Use these exercises:

- a. *Current performance measurement.* How well are you doing at the moment? List the

successes and failures of the past one or two years. What went well and what didn't? If you have had a plan with written goals before, how many of these did you achieve? What can you learn from this? Also, ask yourself how fit is your organisation? How quickly does it respond to change and recover from events – whether successes or setbacks?

- b. *SWOT analysis.* This is a simple process in which you identify Strengths, Weaknesses, Opportunities and Threats. Sometimes it is difficult to know into which category any particular factor falls. Some characteristics can be both strengths and weaknesses, opportunities or threats, depending on perceptions. So keep an open and questioning mind. If you find it difficult to differentiate between these ideas, think of strengths and weaknesses as internal and in the present, opportunities and threats as external and in the future. When you have written them down, decide which two or three of each category are the most important.
- c. *Stakeholder analysis.* A stakeholder, simply stated, is every body or individual who has a stake in your organisation. The nature of the stake will differ with each one, but each puts something in and has an expectation of you in return. The easiest way to do this exercise is to write the name of your museum in the middle of a piece of paper and then ask yourselves 'who has a stake in us' and write them down. Then ask 'what is the nature of their stake' and 'what is their expectation?' Typically, you might come up with 15-20 stakeholders. Then decide on which three or four really matter and what you have to do to make them happy.
- d. *Market research.* Whether your museum charges for admission or not, you need to know what your customers (and the people who never use you) think about you. There are lots of ways of doing this. You can commission specialist firms to undertake surveys and/or run focus groups. You can set up a way of collecting visitor feedback through questionnaires or visitor comment books. Perhaps most importantly, you can ask your front of house staff what visitors are saying. Encourage them to note all overheard comments and to observe visitor reactions; then discuss with them which are the most common.
- e. *Current statistical analysis.* What do the available statistics say? Look at areas such as visitor admissions, education use, collections management and staffing. What do the financial trends tell you? Look at measures such as overall surplus/deficit, ratios such as payroll as a proportion of total expenditure, site operation costs and admission income per visitor head, unrestricted reserves in relation to income. Over the last five years, are you becoming more successful and financially viable, or less so? Is there a regular pattern or are the figures erratic?
- f. *Value chain analysis.* This gives you an opportunity to think about everything that you do at the moment. Think about each stage of your current operation. What value does each operation add to or

subtract from the whole. What would happen if you removed it or reduced its scale? Would that free up resources for other more worthwhile activities?

- g. *Finally, draw conclusions from all this analysis.* What are the issues that really matter, what should be your priorities in the coming years? Are your existing plans consistent with what this analysis tells you? In the plan document itself, you will probably want to write no more than a brief summary of recent progress and the key issues arising from your analysis. However, the most important thing is the process of discussion that you have gone through to reach the conclusions.

3. Developing a vision for the plan period

The vision underpinning the plan answers the questions: 'Where do we want to be in one/three/five/10 years? What do we want to have achieved?' It may be quite simple to answer this – perhaps there is already a major new scheme which forms the core of the vision. If there are no existing plans for development, it may be harder. So, think about your museum and your organisation in the context of all the analysis that you have done in the process so far. Think about the buildings and how they might develop the quality of the services you provide and how they could look, the quality of the organisation itself and how it runs, and imagine where you could be five years on. If it is hard to formulate a vision, think about it simply as an organisational ambition. If you do this exercise as a group, different people will come up with alternative ideas and priorities. Discuss and refine these until you reach a short statement which encapsulates the key idea.

4. Establishing strategic aims

The next step is to draw up a series of primary strategic aims which together describe and will bring about the changes and developments you are seeking to achieve. If you think that forward planning is only about projects that need funding and how you are going to pay for their operation, you will miss many opportunities for improving your museum, the services you provide and the way that you manage. These will not necessarily require additional resources to achieve.

Strategic aims are relatively general and aspirational in quality but they begin to focus on specific areas. It may be helpful to think about the following:

- Service development – collections management, access, interpretation, education.
- Business and marketing development – income and financial viability.
- Buildings and sites development – improvements to property and new acquisitions.
- Organisation development – internal management and systems.
- External relationships – key stakeholder groups and work with the community.

Express each strategic aim in a sentence. For some of the above categories you may only

have one or two aims, for others you may have more.

It is important to think about the everyday, mundane areas of work as well as the more obvious and exciting new developments. You may be able to make a number of small incremental improvements that together will bring about significant change. The twin questions therefore are: 'What new developments do we want to aim for?' and 'How can we do all the everyday tasks better?'

Examples might be:

- *Improve the care and quality of our collections through increasing the resources put into conservation, storage and documentation, and continuing the planned approach to collecting.*
- *Implement an exciting interpretation programme which supports individual site brand identities and promotes attendance through popular events and exhibitions.*
- *Increase the income earned from admissions and other trading activities.*

Finally, test these strategic aims against two positions:

- Are they consistent with the organisation's purpose and values that you have agreed earlier?
- Are they consistent with what stakeholders are expecting of your organisation and how you wish to be placed in relation to these groups?

When you are happy, write down the strategic aims under the main headings for approval by trustees, who should already have been involved.

5. Setting objectives with performance measures to achieve aims

This stage is about breaking down each of the strategic aims into one or more measurable objectives. These are sometimes called targets or goals. Strategic aims can be general in nature. Objectives on the other hand must be SMART:

- Specific
- Measurable
- Achievable
- Realistic
- Time-limited

You should be able to answer the question 'How will we know when we have done this to each of the objectives.'

Examples of objectives relating to the strategic aims examples above are:

- *Secure funding for lifelong learning project and make appointment of externally-funded lifelong learning officer by 31 December.*
- *Complete a simple database entry for every item in art collection by 30 June.*
- *Stage an annual programme of at least six events which together attract 5,000 visitors.*
- *Research local companies' sponsorship policies and produce a plan to attract £2,500 in sponsorship by the end of next year.*

Objectives are likely to deal with a shorter time period and be achievable over a maximum of one to two years. The main point of this stage is to create specific objectives for each strategic aim – so that you make progress towards it and can measure that progress.

6. Allocating responsibilities and time

Now, you begin to ensure that all these objectives are achievable in relation to each other. You will already have discussed a target date for each individually, but can they all be achieved together?

Each objective should be the responsibility of one person, but has the same person taken on an unrealistic number of tasks at the same time? These objectives should become a key part of individual or departmental work plans, monitored and reviewed through team and individual appraisals.

Is there sufficient organisational energy to get everything done? Are there any major events which might get in the way? It may help to produce a programme or calendar for the year, showing the time expected for each of the objectives, together with any other significant event which might impede progress. Noting the names of the people needed to undertake the work against each objective will help you to see whether your plan is achievable.

Most importantly, everyone involved in delivering the plan should discuss its implications. You will need to bear in mind that some people will spend most of their time on routine maintenance tasks. In this discussion, keep asking 'Are we achieving a balance between stretching ourselves and staying realistic?'

7. Allocating costs and producing budgets

Some of the objectives for change will have no cost implications, while others will require new financial resources. You will have had the costs and affordability in mind during the planning process, but now is the time to put everything together with your existing budgets to produce revenue and capital budgets for the period of plan. The shorter the plan, the more reliable these numbers are likely to be. Longer term projections will be more uncertain, but the discipline of establishing indicative figures will help make the plan realistic and achievable. A forward plan without numbers is almost worthless.

The capital summary is relatively straightforward. Identify the projects, the estimated cost and the source of funding for each. Funding may already be secured – from existing resources, or the promise of a grant or donation. On the other hand, it may still just be an aspiration, dependant on a successful application or fundraising campaign. Summarise the steps and the key dates in the process.

For the revenue budget projection, if you have someone in your organisation with accountancy skills and a spreadsheet package, allocate this exercise to them. If not, can you enlist the help of a friendly volunteer? Otherwise, try it yourself either manually or

on a computer. The budget headings should strike a balance: put in sufficient detail for meaningful analysis but contain the final version on no more than two pages. Use whatever headings suit your institution's mix of income and expenditure items.

Sometimes projections are prepared in an 'objective' format, based on the organisation's activities and with all the costs relating to those activities, both direct and indirect (i.e. apportioned staff and premises costs, and organisational overheads). However, the sophisticated number-crunching required to do this means that usually projections are 'subjective', listing income and expenditure by type. Projections prepared on a subjective basis might look something like this:

	Last Year – Actual	Year 1 – Budget	Year 2 – Estimate	Year 3 – Projected	Year 4 – Projected	Year 5 – Projected
Income						
Admissions						
Shop Profit						
Catering Profit						
Donations						
Grants – Core Funding						
Grants – Projects						
Subscriptions						
Bank Interest, etc						
TOTAL INCOME						
Expenses						
Payroll costs						
Premises						
Collections care						
Exhibitions						
Education and access						
Marketing						
Administration						
Governance, etc						
TOTAL EXPENSES						
SURPLUS/(DEFICIT)						

In preparing the projections, you will have made a number of assumptions, which all need to be stated.

These may include:

- visitor numbers and income per visitor (both from admission charges and profits on trading activities).
- income from endowments and bank interest.
- grants, whether core funding or for one-off projects.
- national minimum wage thresholds, pay awards and changes to national insurance and pension contribution rates.
- inflation increases, whether in terms of Retail Price Index or key cost areas, such as energy and other utility costs.

- availability of capital from a fundraising campaign or lottery application.

Many independent museums are heavily reliant on admissions and trading income. In these circumstances it is therefore worth undertaking a 'sensitivity analysis' that looks at different scenarios, and asking yourselves questions such as 'What would happen if our admissions income fails to meet budget by 10 or 20 per cent? How would we respond to this?'

Financial projections should always be prudent, with caution being exercised in the case of income that is expected but which is based on future contractual agreements or the museum fulfilling certain conditions.

Provision should always be made for unforeseen circumstances, whether by maintaining an appropriate level of unrestricted reserves or, in the case of projects, including an element for contingencies.

You may also need to ensure that the museum's cash flow enables likely expenditure projections to be matched by sufficient income and/or reserves, so that you do not find yourself with the majority of the expenditure at the beginning of the year and the income at the end, and the necessity of short-term borrowing.

8. Writing the plan

After all the discussion and agreement at various stages, it needs one person to take on the task of writing it down. The main

messages here are:

- Make it clear
- Keep it brief
- Avoid repetition and anything unnecessary.

Finish the first draft as soon as you can and give everyone who has worked on it a chance to suggest revisions before the final version is produced. Aim for the shortest possible time between starting to write it and completing the final draft. Produce the final document in a form which will make it easy for everyone in the organisation to understand and unite in its delivery. Keep the main body of the plan for the key elements described here, and use appendices for summaries of assumptions, achievements since the last plan, property schedules, management structures, and so on. External confidence requires that the final document is clear and well-presented, but avoid the temptation to make the plan, through design and illustration, into a cultural artefact in its own right. Simplicity is best.

9. Approving the plan

At this point, everyone needs to receive the final version of the plan and accept it; the line in the sand is drawn. At this stage everyone (including trustees) become committed to delivering objectives against the allocation of resources made in the plan. Where the plan is linked to external funding, or other support, the plan will define the range of projects, services and/or programmes to be provided in return for funding or other support.

10. Communicating and implementing the plan

Plans are only tested when you begin to implement them. It is vital to:

- Communicate the plan, or a summary of its key objectives, to everyone in the organisation.
- Ensure that everyone knows what their specific responsibilities are.
- Check that people have created space for new demands by dropping less important tasks.
- Keep the plan's objectives visible.
- Check progress against the objectives regularly.
- Be prepared to adapt objectives if unforeseen events happen.

Summarising the process we have worked through, the contents will be:

1. Introduction, including the time frame covered by the plan.
2. Statement of purpose, values and audience.
3. Summary of current situation analysis and the issues arising.
4. Vision for the planning period.
5. Strategic aims.
6. Objectives incorporating performance measures over the planning period, linked to strategic aims and with responsibilities allocated to teams or individuals.
7. Financial plan including capital projects

summary and revenue budget projections.

8. Brief concluding summary of key changes and benefits of stakeholders.
9. Appendices.

11. Monitoring and review

The process of monitoring and reviewing works at two levels. Firstly, you should monitor continuously how things are going, what small changes need to be made and what you are learning from the process.

Secondly, you should review the plan at appropriate intervals. Allow time to unpick how you did, asking which objectives were achieved and why you failed to meet others. Draw conclusions from this and use these in drafting the following plan.

Most organisations find that it is helpful to undertake this review formally at a specific time each year. The review then becomes an important milestone in the life of the museum, allowing celebration of achievements and learning from what has happened. It also creates a link with the next year's planning and creates a cyclical approach to strategic management which gives greater control over the museum's affairs. An external consultant, working as a facilitator for the annual review, can be useful.

LESSONS PEOPLE HAVE LEARNED ABOUT THE FORWARD PLANNING PROCESS

It is easy to become preoccupied with the plan as an artefact. Much the most important part is the process of planning, of creating the plan. If you get it right, the implementation will follow more easily. If you get it wrong, the plan may be destined for failure.

The planning process model is not difficult to work through. It is important not to be overwhelmed by the apparent size of the task if you have never done it before.

- To get going, get going – have discussions but get something, however sketchy, down

on paper so that others can begin to comment and respond.

- It doesn't matter how sketchy or rough a plan is – just by putting down a few targets and dates, the thing becomes real and motivates people onwards. Strategic plans can animate people. Once people begin to act, they generate tangible outcomes which help them discover what is happening . . . and what should be done next.
- Short is better than long – the brevity of the document helps to clarify the dimensions of the task and the simpler the first step the better.
- Agree a timetable and get commitment from the rest of the team.
- Create time and keep energy in the process – don't let it drag. Otherwise people will lose faith in it.
- Corporate planning requires analysis – which can be revealing. Revelations in turn can be uncomfortable and cause disturbance. So, keep your antennae sharp and manage the tensions which result.

LESSONS PEOPLE HAVE LEARNED ABOUT IMPLEMENTATION

What goes wrong?

- Events do not turn out as expected.
- The plan sits on a shelf and does not get used.
- There is denial, the plan is ignored in favour of past practices and existing work commitments.
- People actively fight against it, particularly if it involves radical change.

How can you ensure that the plan has a good chance of getting implemented?

- Creating and implementation are part of the same process. If there is good consultation around carefully worked out aims and simple development steps, plus an awareness of customer needs leading to an inspiring but realistic plan, implementation will be easier. If it is not these things, you may as

well put it in the bottom drawer and forget about it.

- Make planning a visible part of your work, not a separate activity to be dreaded. Forward planning should bring together ideas and plans from different people and parts of the organisation.
- Communicate with as much energy as you can to stakeholders and staff. Hold a press conference, give them a copy. There is nothing like a lot of people watching from outside to keep you concentrating.
- Keep the plan visible, flexible and responsive. This means that the plan should be on everyone's desk and should be referred to regularly. If changes are needed mid-year, do not be afraid to make them.
- Develop specific targets and departmental/individual work plans which spring from them.
- Develop separate strategies for managing cultural change – if planning and organisational change are to be mixed, understand this at the outset.
- If you are not using the plan, then it is not right. Acknowledge this, throw the old plan out and start again, and next time try making it shorter.

FINAL THOUGHTS

The conclusion is simply an exhortation to have a go. With a forward plan your museum has a greater chance of future success. Once you have tried it, make the process of review and renewal of the plan a regular and normal part of your work.

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Michael Day is now Chief Executive, Historic Royal Palaces.

This version has been revised by Adrian Babbidge of the Egeria Heritage Consultancy.

ASSOCIATION OF INDEPENDENT MUSEUMS

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