

---

---

**ARTICLE REPRINT**

---

---



***A quarterly publication of the Association of Children's  
Museums***

## Challenging Transitions: Planning for Change

**Ann Bitter, Guest Editor, Walker Art Center, and Jeanne Vergeront, Museum Planning.** This article first appeared in the Winter 2002 Volume 16 Number 4 issue, "Strategic Planning" © Association of Children's Museums. All rights reserved. Mary Maher is the *Hand to Hand* editor: [MMaher2049@aol.com](mailto:MMaher2049@aol.com)

Whether your museum is small or large, located in a big city or a small town, in the United States or anywhere in the world, the ability to anticipate and adapt to changes in your environment—catching the right waves—is critical to your institution's survival. This and the following issue of *Hand to Hand* are devoted to the topic of strategic planning, thinking and action.

There is no one "right" way to plan. Moreover, a museum's approach to planning depends on the stage of the organization's systems (i.e., programs, exhibits, governance and finance). In planning this issue, we gathered a group of children's museum staff at InterActivity in Ottawa last June. One of their many suggestions was to make it easy for people to evaluate their museum's organizational capacity. Only then, they said, could a museum hope to plan from a solid foundation. So, in response, we adapted a model created by Susan Kenny Stevens in her book, *Nonprofit Lifecycles: Stage-Based Wisdom for Nonprofit Capacity* to reflect common stages in a children's museum's lifecycle. Diagnosing where your museum fits on this continuum is the essential first step in deciding where your strategic planning efforts need to be directed.

In addition, these issues will focus on different approaches to planning, as developed by a number of consultants and practitioners in the field. Consultant Jeanie Stahl, who has had extensive experience in business planning for museums of all kinds and all sizes, takes a look at financial planning and key financial ratios. In her usual thoughtful and unorthodox way, executive director Pat Turner, describes her unique planning process in bringing *Imagine It!* Children's Museum of Atlanta to life.

Together, these articles represent a multifaceted approach to planning that is varied, practical and mission-based. They have three basic assumptions in common:

- **Everything new is already growing old.** Change is a fact of life for everyone and everything, including children's museums. The minute a new exhibit is unveiled or a new facility is opened, staff should immediately start thinking about—and devoting resources to—figuring out how to keep it fresh and relevant. Stasis is death.
- **Organizations that plan their work do better than those that don't.** Being strategic is a continuous activity, not a document. Planning involves achieving the right balance of stability and maneuverability, strength and flexibility, discipline and innovation.
- **Where you want to go depends on where you are.** A museum's planning process must be aligned with its style and organizational capacity.

At first, the concept of planning for change may seem contradictory: the very act of planning could imply that things won't change anymore once you've developed a plan to deal with the immediate set of challenges. The kind of planning we are talking about is continuous, not static. It may begin with a consultant to guide the process, but it must become an organizational habit. The plan does not rest in a notebook on the shelf. It lives as part of your culture. Our approach to planning for change acknowledges this contradiction, and advocates what nonprofit management consultant Melanie Beene calls "dynamic adaptability—the ongoing readiness to respond to a dynamic environment."

---

# Riding the Wave: Aligning Organizational Capacity with Planning Needs

**Ann Bitter, Walker Art Center, and Jeanne Vergeront, Museum Planning**

Museums are like people in that museums have a similar lifecycle: they are born, they grow, they mature, they decline and they die. In management consultant Susan Kenny Stevens' lifecycle model, however, museums potentially have the chance to "turn around" and begin a growth cycle all over again. Good news for those museums who are feeling some pain in the joints and are forgetting why they came into a room...It's also good news for those museums moving through the stages of idea, start-up, growth and maturity because being forewarned about the symptoms of decline can prepare them for early diagnosis and correction before the slippery slope on the right side of the lifecycle accelerates their fall.

In her 1999 book *Nonprofit Lifecycles: Stage-Based Wisdom for Nonprofit Capacity*, Stevens outlines seven basic nonprofit lifecycle stages: idea, start-up, growth, maturity, decline, turn-around and terminal. Adapting Stevens' model specifically for children's museums, we have developed a matrix that maps the lifecycle by phase characteristics, planning focus, planning outcomes and case studies. This matrix can effectively guide the planning a museum must do and the decisions they must make to "ride the wave" and remain a vital resource to their audiences.

Managing success through the first four stages in the lifecycle and turning around decline require three things: 1) know your current reality on an ongoing basis; 2) align what you do with audiences and resources availabilities; and 3) rigorously plan and measure performance.

## HOW TO BEGIN

Don't even think about planning to grow or improve your museum until you've diagnosed what stage of development your museum is in. You can't solve the right problems or leverage the best opportunities until you know who you are and what kind of change is right for you. The yellow dots on the lifecycle chart show a museum whose capacities are at different stages. These stages must be brought into alignment if challenges are to be successfully mounted. You can't grow your programs if you don't have effective financial systems, for example. The black dots show a museum whose capacities are in alignment. This museum is prepared to move forward. If you are thinking about starting a planning process, use this chart to go through a self-assessment with your board and staff. Are your performance areas all in the same stage or are they all over the place? Moving a museum from one stage to the next requires strengthening its current position and increasing organizational capacity.

Once you've figured out which stage your museum occupies, the next step is to figure out your organization's capacity to move from one stage to the next. In her book, Stevens lists six key diagnostic questions tied to each capacity area: 1) At which overall lifecycle stage is your

museum? 2) At what stage are its programs? 3) Does the current executive director have the right characteristics to lead the organization through this stage of development? 4) Is the board assuming roles and responsibilities consistent with the requirements of the stage? 5) Are financial resources adequate for this stage of maturation? 6) Are current financial and administrative systems aligned with the museum's programs and life stage?

#### PLANNING TO PLAN

Since change is inevitable, board and staff leaders must make preparations for it. Planning means anticipating change, not simply reacting to it. The consequences of not being prepared for change grow, even if the museum doesn't. As a museum puts down roots in a community, its profile, promise and responsibility evolve. Just as a museum's strengths are heightened by increased visibility, its weaknesses are also revealed by higher public expectations brought about by its higher profile. Don't try to catch too big a wave until your museum is ready for it.

#### WHY PLAN FOR CHANGE?

According to management thinker Peter Drucker, all knowledge eventually becomes the wrong knowledge, even for successful organizations. The assumptions on which your museum was founded years ago have changes. Knowledge of the day, whether about children's development, educational methods, urban issues or portfolio management has changed. Visitors coming through your door are different. So are your staff and board. Not changing—or not changing fast enough—turns an organization stale and makes it vulnerable.

#### DATA, DATA, DATA

Being ready for change means having relevant information, up-to-date information to identify key performance indicators, assess current performance, set benchmarks for growth and monitor progress. Accurate figures reflecting key statistics such as attendance and earned and contributed income as well as key ratios such as population-to-attendance and cost-per-visitor form the foundation upon which growth decisions are made.

#### THE BOARD'S ROLE

The board's role is to mind the future. In that role it should advocate preparedness for change, and must be your ally in supporting and finding resources for the planning effort. The board establishes the reason for planning and monitors the process, but the staff does the actual planning. Establishing a board strategic planning task force will ensure that the staff's vision for the future is aligned with the board's. It is usually not recommended that a board member, whatever his or her experience, lead the planning process.

#### JUST THE FACTS, MA'AM

In his book *The Fifth Dimension*, Peter Senge stresses that it is imperative that leaders provide an accurate picture of current reality. Sounds simple, but as any museum director who has tried to conduct a meaningful analysis of her museum's strengths and weaknesses can attest, it's anything but. Every strategic plan must start with a rigorous assessment of your museum's strengths, weaknesses, opportunities and threats— a SWOT analysis. Your vision will never be realized unless it is based on an accurate, insightful view of current reality.

#### STRATEGIC ABANDONMENT

James Collins writes in his book *Good to Great* that every successful company has a “stop doing” list. Programs or activities that aren't absolutely essential to the mission are eliminated. Others call this “strategic abandonment.” Whatever you call it, having a “stop doing” list is as important as having a “to do” list. A disciplined planning process will help a museum's leaders make choices about where its limited resources are best allocated.