

READY? SET? PLAN!

VERGERONT MUSEUM PLANNING

Any major planning effort, like a strategic plan, master plan, or a facility plan can feel daunting. Maybe it's the first major plan for the museum since opening; perhaps board and staff have changed significantly since the last major planning effort. Or this could be a young museum's very first plan. Whatever the conditions, a critical first step for any major planning effort is preparation. Preparation for planning is a bit like the planning process itself: engaging people in considering what must be accomplished, how best to do it, with whom, and with what resources. Four steps will prepare a museum for a solid planning effort.

- Get people on board and build ownership. Since the planning process will involve others, start talking with them: staff, board, partners, and funders. Gathering ideas and drawing on other perspectives will build ownership from the start. Conversations can be informal or more formal as "job number one" of a planning task force. Ask others what they hope the plan will accomplish, issues they see facing the museum, planning challenges, who should be involved, and the kind of planning expertise needed. Talk with key supporters early on. It's an opportunity to show you're proactive on behalf of the organization's future. You can also explore possible support for the planning process itself or for some aspect of implementation. You can lay the groundwork for sharing the plan when completed.
- Learn from experience—yours and other's. How you approach the next round of planning is influenced by previous planning. Do a quick assessment of past planning efforts, of what worked and didn't work so well. Did you get the plan you wanted? Did staff and board feel they were included and informed? Did the plan seem too generic? Too much of a stretch? Did people feel the plan sat on a shelf? How could implementation have been better?

You can learn as much from other museums' planning efforts as from your own. Ask about the planning work museums comparable to yours have done recently. Identify museums of comparable size and type in other parts of the country as well as similar local organizations that have done recent planning. Consider asking about how long a planning process took, who participated, whether it was facilitated internally or externally, what information they gathered, how much it cost, what they wish they'd done differently, and how pleased they were with the plan. Ask for a copy of the plan or a table of contents to see what the plan covered. All of this will help in determining the plan's scope and can help in deciding whether to issue a request for proposals (RFP) for planners and what the RFP might include.

- Shape the scope. Figuring out the nature and the scope of the plan starts with placing your planning needs in a larger organizational and community context. Has it been five years since your last strategic plan? Is another museum expanding their services to reach your audience? Are funders asking tougher questions about the museum's impact? Is it time to rethink your exhibits? Every plan is not necessarily a standard strategic plan, master plan, or exhibit plan. Typically a plan must be focused to reflect a particular time frame (i.e. five-to-six years or annual); an organizational focus (capacity building, learning impact, community engagement, etc.); or a focused area of change on an existing strategic platform (relocation, sustainability, etc.).

Considering stakeholder involvement helps determine the scope. Is significant community input important? Should you be reaching across sectors of the community? Is internal alignment on core activities critical? Factors such as external deadlines and a compressed timeline can affect a plan's scope as can cost. Since a plan can cost anywhere from \$10,000 to \$100,000, get a realistic idea of what the kind of plan you want is likely to cost.

- Match the resources to the plan. Reviewing all the gathered information will give a clearer idea of the resources your plan requires. Resources generally include time, expertise, and funding which are inextricably intertwined. Based on what you hope the plan will accomplish, think about the skills and expertise required: planning expertise, facilitation skills, and museum knowledge.

Local non-profit strategic planners know strategic planning. They know your community and bring an objective perspective; less often do they know museums, their current issues, and standards. A board member who is a strategic planner will know the museum, but may lack objectivity.

While museum expertise can be valuable in strategic planning or financial planning, it is necessary in developing education plans and exhibit plans. Specific expertise may, or may not, be available locally so getting to know the local, regional and national landscape will help in deciding potential planners and likely travel costs. Sometimes a plan's authority is linked with a particular type of expert; sometimes its credibility comes from expert local knowledge. In every case, skilled facilitation is critical to engaging participants and moving the planning process forward and can be provided by someone from inside or outside the organization with the right skills and enough time.

A combination of internal and external players can be a good choice. In the end, the right team always brings together expertise and local knowledge; is compatible and interested in producing the best plan; and fits a museum's price range and schedule.

Preparation for planning does take time. It also makes a real difference. Preparatory work develops a shared understanding among key players about what's ahead and removes a few of the inevitable obstacles. It helps bring the right players together; manages expectations about the process and the resulting plan. Each part of preparation helps set a planning process on a smooth course.