



SHARE Museums East

Forward Planning

A practical guide
for museums



SHARE Museums East
a network of know how

na **NORFOLK** Museums
& Archaeology Service

Supporting excellence, resilience and
cooperative working in museums
in the East of England.



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- Beverley Donaldson, Partnership Officer at Cambridge Museums Advisory Partnership
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Welcome desk St Neots Museum



Introduction

This practical guide is written for curators and managers who will lead the planning process for their museum. It explores strategic planning through a series of steps that have been developed with a pilot group of museums in Cambridgeshire. The planning process is designed to win support for the organisation's vision, to articulate its strategic priorities, set objectives and allocate resources to support them. It can be used by any arts organisation with a collection and an audience.

Many excellent toolkits and guidance materials are freely available online and have been consulted in the preparation of this guide. Our document differs in style while matching the requirements of Arts Council England's Accreditation 2012. It is a simple mapping document that shows how to lead the planning process to gain maximum 'buy in' from stakeholders, staff and supporters. SHARE Museums East continues to engage cohorts of museums in Forward Planning work, using the process outlined here as a guide.

Why forward planning?

All organisations achieve their aims with less effort, in less time and to greater effect, if they plan. This is particularly true where an organisation has a limited number of staff and relies on enthusiasts and volunteers.

The process of planning, particularly the consultation undertaken during the development of the plan, is just as important as the final plan document. Consultation builds consensus and reinforces support for the achievement of the planned aims and objectives.

The forward planning process therefore has the potential to refresh or even redefine the purpose and direction of your museum and to energise everyone in the process.

Using this Guide

This Guide will help you to develop the Forward Plan in two closely linked parts

- **the Master Plan**
- **the Action Plan**

These are designed to serve two distinct audiences and purposes.

The Master Plan gives strategic guidance to the governing body and the staff and is a public document. As well as defining the direction of your organisation for all those involved a Master Plan, signed off by the Board, can be used in support of your Accreditation application (or return) and can be sent to the principal funder, to new funders, potential partners and funding bodies.

The Action Plan is the day-to-day practical guide that ensures the aims and objectives of the Master Plan are implemented within a framework of available time and resources. It is, in effect, a 'who does what' document.

The Master Plan and Action Plan will achieve better understanding of what must be done and what must wait and why.

The Guide is organised in four stages:

- Preparation – gathering information
- Consultation – involving others
- Master Plan – the strategic public document
- Action Plan – the operational delivery plan.

We also include checklists, resources, links, ideas and examples to support the process.



Forward planning step by step

Follow this process to bring your trustees, stakeholders, staff and volunteers with you as you write your plan.

- 1 **Understand the planning process.** Use it flexibly to determine the strategic direction of your museum.
- 2 **Gather and review** previous plans and information on current performance.
- 3 **Involve others:** Decide how you will involve your trustees or management board, staff and volunteers, stakeholders and supporters.
- 4 **Discuss the vision** for the future with the chair of your board and develop values with your staff.
- 5 **Begin drafting** your new Master Plan.
- 6 **Identify priorities** for the plan period.
- 7 **Prepare a financial statement** for the year preceding the plan period and income and expenditure for each year of the plan period
- 8 **Gain the approval of the board** for the Master Plan
- 9 **Draw up the Action Plan** for the delivery of the priorities, assigning staff and budget across SMART objectives. Discuss and agree this with the team who will deliver it.
- 10 **Use the Action Plan** to check off your achievements as you proceed, reporting to meetings of the Board. Use this to prepare your annual review.



Farmland Museum Denny Abbey



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Exploring Ely Museum's stores



1 Preparation

In this section:

- i. Accreditation
- ii. Gathering information
- iii. Making notes
- iv. Reviewing achievements

If you follow the steps in this section you will have completed the initial work required for writing a successful forward plan. These include a review of the health of your organisation, consideration of how you care for your collections and how you use them for the benefit of your museum users.

1.1 Accreditation

- ii. The Forward Plan is the backbone of the Accreditation submission. It is the Arts Council's standard by which your museum (if in England) will be judged by its principal funders.

Accreditation has been designed to assist museums to conduct their business in a professional manner. It enables museums and governing bodies to assess their current performance, and supports them in planning and developing their services under the headings:

- organisational health
- collections
- museum users' experiences

If you are unfamiliar with the scheme, it is a good idea to look at it at this stage. <http://www.artscouncil.org.uk/what-we-do/supporting-museums/accreditation-scheme/>

For the Accreditation standard download: http://www.artscouncil.org.uk/media/uploads/pdf/accreditation_standard_english_web.pdf

1.2 Gathering information

Begin by looking at your existing documents. These may include:

- plans
- funding applications
- reports
- surveys
- local planning documents
- any similar material you have in hard copy or on your computer.

You will also need the visitor data you have gathered and analysed, such as

- comments cards
- visitor books
- letters
- any staff ideas you have encouraged.

Set some time to review them. Reading them will remind you how much work you have already done and will stimulate your ideas about what to retain and what to discard.

The Accreditation standard includes the following defining statements about forward planning:

Effective forward planning is a requirement (1.4) *'the museum must plan effectively for long-term success and to make sure it can adapt in a changing environment in order to survive'*.

The Forward Plan is a forward-looking document that sets out the detailed aims and objectives of an organisation, to be achieved within a defined planning cycle. It is sometimes called a Business Plan.

Forward Planning is a considered way of setting direction and overarching ambition, of taking stock and prioritising work in line with the organisation's statement of purpose and in consultation with its stakeholders, aligning resources with objectives.

The statement of purpose and key aims must be approved in all cases by the governing body.



1.3 Making Notes

As you prepare to get others involved in the planning process, make sure you keep jotting down ideas that occur to you. Make sure you review your old plans.

ASK YOURSELF:

- How suitable are your current vision and overarching aims?
- If you are planning a major change do you need to alter them?
- Do you need to re-phrase the language used to reflect your vision for the future?
- How well has your plan served your organisation?
- To what extent were objectives achieved?
- Have you been over or under-ambitious?
- How could you improve the way you communicate your plan to others?



Above: Key Memories Reminiscence project

Right: Staff training: ceramics workshop at the Fitzwilliam Museum (© The Fitzwilliam Museum)

1.4 Reviewing past achievements

Review and note down what you count as **Key Achievements**. This is a rehearsal for the work with groups you will undertake shortly.

ASK YOURSELF:

- What contributed to success?
 - What lessons should be learned?
 - What impeded your plans?
 - How might these constraints or barriers still exist?
 - How might you avoid or overcome them in future?
 - Consider these questions against each of the following six areas of the museum's activity:
1. **museum as organisation** - staff, volunteers, administration, systems, finance...
 2. **collections** – permanent displays, exhibitions, conservation, stores, documentation...
 3. **users and their experiences** – access, learning and outreach services, tours, trails...
 4. **income generation and fund-raising** – admission, shop/cafe revenue, sale of images, development...
 5. **buildings and facilities** – condition, use of spaces, appearance on approach, development...
 6. **partnerships** – with other museums, with tourism, in response to other partners...





IDEA - TABLE

It is helpful to write down some initial ideas that look forward in these areas too. Use the table below as a guide and as a discussion tool with colleagues and supporters when consulting with them.



AREA	PAST ACHIEVEMENT	FUTURE AMBITION
ORGANISATION		
COLLECTIONS		
USERS and EXPERIENCES		
INCOME and FINANCE		
BUILDINGS and FACILITIES		
PARTNERSHIPS		

IDEA - CHECKLISTS

You may find the checklists appended to this guidance will help you complete your preparation

SWOT for achievements and the museum's state of health

PESTEL for analysis of its situation in its environment

Guidance on the Accreditation Standard



Near the end of this work -

ASK YOURSELF:

- What ideas and objectives are emerging?
- What are the resource implications?

Keep making notes to capture all the ideas.

Now that you have gathered and reviewed your current plan and examined your museum's achievements and its health in relation to the environment in which it operates, it is time to begin the consultation phase.



2 Consultation

The purpose of the plan is to align the efforts of all those involved in the work of the museum. To ensure that the plan is implemented, key groups working for or with the museum should be involved in its development and be able to refer back to the plan's key aims and priorities for action. The plan will succeed only if there is good communication with these groups. Consultation on the plan is central to establishing and maintaining that communication.

This section explores a variety of ways to engage different groups of people in the planning process.

Who should be involved?

- 1 **Chair of Trustees/Museum Lead - establish the vision**
- 2 **Trustees**
- 3 **Staff groups**
- 4 **Audience groups**
- 5 **Key stakeholders**
- 5 **Other supporters**

2.1 Chair of Trustees/Museum Lead

Assuming you are the Museum Lead (curator, director or manager) preparing the strategic document that sets the direction for the museum into the future, you need to capture the essence of this direction, the vision. The vision statement should be both **aspirational** and **achievable**: 'blue skies' tempered with practicality. It must capture the passion and determination that will impel the museum forward, but at the same time it must recognise the need to conserve the organisation's energy and consolidate successes. The process of developing the vision must be steered and shared.

Initial conversations about the vision and how to express it are most productive when the Chair of the Trustees and the Museum Lead make an opportunity to discuss ideas 'in private and off the record'. Once there is an understanding and a sharing of ambition at this level the rest of the planning process, especially identifying priorities and curbing wild or over ambitious ideas, is made much easier.

When you have captured an expression of the vision, you are ready for discussions with colleagues, trustees and supporters. By the end of your consultations all who work with you should share the vision.

PRACTICE EXAMPLE - Visions

Here are two different examples of visions to help you think about yours:

Cambridge Folk Museum 2012-15 <http://www.folkmuseum.org.uk>

"The Folk Museum is the only museum in Cambridge devoted to the history of the City and its people. Our vision is to become the Museum of Cambridge: a resource for the people of Cambridge, which explores and interprets the growth of the City and its surroundings alongside the development of the University. We will consult with new and existing communities and audiences to provide an experience that is thought-provoking and informative."

The proximity of the Museum to Kettle's Yard, the historic house and contemporary gallery of the University, offers an opportunity for collaboration. Together with Kettle's Yard, the Museum can offer a destination on the north side of the town, the oldest settlement. The distinct and different nature of the collections and of the spaces in which they are housed offer visitors complementary heritage experiences. By working in partnership with the City, the University, Magdalene College and other local arts organizations, all organizations in the area will benefit from increased visitors."

Or much shorter, but to the point, here is the Colchester and Ipswich Museum Service 2008-2011 Vision <http://www.cimuseums.org.uk>

"Our vision is that we will provide a museum service that not only acts as a source of pride, inspiration and fun, for all the diverse peoples of Colchester and Ipswich but is also recognised as one of the best in the country and a role model for others both inside and outside the museum sector".



2.2 Management team

The Museum Lead will lead the planning process with the staff to prepare for a planning meeting with trustees. You will need to be able to show what resources are available, or what may need to be added in order to implement ideas as they are proposed. By sharing the work in the first section, including the vision, with your senior colleagues, you will ensure that the forward impetus for the whole enterprise comes from the staff at least as strongly as from the trustees. Staff may also know about developments in the museum sector of which trustees may not be aware and which have a bearing on the museum e.g. funding streams, standards, training and development opportunities.

In the course of talking with colleagues about the vision you may also feel it is worthwhile capturing the essential values that underpin the way you all work. These may include things such as integrity, commitment to public benefit, collaboration, equal access for all.

Once again be sure to capture ideas and responses on paper.

PRACTICE EXAMPLE - Values

In support of their Strategic Plan the Fitzwilliam Museum staff produced a small booklet in which they explored their values and what each meant for the conduct of the museum as a whole and for an individual member of staff:

Fitzwilliam Museum (2010) Values
<http://www.fitzmuseum.cam.ac.uk>

"Excellence, quality, creativity, inclusiveness, imagination, integrity, collaboration, leadership – these are words that we associate with The Fitzwilliam Museum and they express the values we aspire to. They are drawn from the ideas of people through the Museum"

2.3 'Trustees'

Members of the museum's governing board or committee, the trustees, have responsibility for the museum's governance and its solvency¹. The trustees will contribute ideas and respond to those put to them by the Museum Lead on behalf of the staff. They need to be involved in the development of the plan from the outset to assure themselves that the museum is well-run and achieves its purposes.



IDEA: HOLD A PLANNING MEETING WITH TRUSTEES

Ask the trustees to attend a dedicated half or whole day meeting to plan the museum's future.

Prepare for the day well. It is a good idea to send some information about the purpose and structure of the day in advance. Begin with a cup of tea or coffee while they gather, then ask them to take a careful look around the buildings – outside, inside, stores and displays.

Many museums have found it useful to bring in an outsider to facilitate these discussions.

It is often useful to request that no comments are given during the walk around, but instead, invite Trustees to record all their observations on paper and then pool ideas afterwards in small groups.

Listing thoughts and suggestions under the SWOT headings might help.

1. The exact level of responsibility of this body will depend on the model of governance and legal structure within which the museum operates. For the purposes of this practical guide to forward planning this is not critical but it is extremely important that the 'trustees' and museum director know their status. A useful guide to alternative structures is to be found in Collections and Governance: a practical guide, Alex Dawson, a Collections Trust publication.



2.4 Staff groups

All members of staff, including key volunteers, should be given an opportunity to contribute to the plan. This is best done when the shape of the proposals is emerging. If this involvement is left until later they may feel that their contributions will not be considered seriously. Try to make sure such meetings are enjoyable – offer some refreshments and use an ‘ice-breaker’ to encourage positive contributions and avoid ‘group think’.

IDEA - UNLOCK DISCUSSION



Ask each person to bring along a small object that represents what attracted them to working in museums or expresses why they enjoy working in the museum. Give each person just a couple of minutes to present their object and explain what it represents and why. By the end of these presentations you will already have quite a range of different ideas and an understanding of what motivates each individual, and they will understand one another better and be ready to make useful comments on the draft plan.

2.5 Audience groups

Do not forget the visitor or potential visitor.

ASK YOURSELF:

- Who are your visitors and users?
- Why do individuals come? What brings families in?
- What new audiences do you wish to attract?
- How can your collections be presented to appeal to them?

Remember to consider minority groups or new arrivals to the community and any housing developments. If you are able to do so, reach out to them, and think also about ‘shut in’ people, including those in care and retirement homes. Try to involve people who represent them in consultations when your plan is in draft. Their responses will be valuable and they will be advocates for any new programmes designed to serve them.

IDEA - IN THE MIND OF THE VISITOR



If you want your trustees or staff to think about users and their experiences invite them in pairs or threes to take on the ‘persona’ of an audience group and ‘visit’ the museum in character e.g. older person interested in local history; school student with a project to research; English language student with time to kill; tourist visitor from the UK; foreign tourist visitor etc. Send them out to visit the museum for 15 - 20 minutes and when they return ask them to jot down any ideas for changes or improvements in signage, information, displays, facilities or services.



2.6 Key stakeholders

Stakeholders are individuals or organisations for whom the success of your museum is important. They are likely to include:

- local preservation groups and those interested in the heritage of the region or community
- benefactors and donors of funds, objects or works of art
- the city, district, borough or county council
- the parent body [e.g local authority or university]
- one or more charitable trusts that may be involved in supporting the museum.

All of these may be regarded as stakeholders and will expect at the least to be kept informed, or to be consulted on proposed developments. If additional funding is required for the implementation of the plan from any of the stakeholders, or even continued funding at the current level, the stage at which to involve them should be carefully considered.

If you are planning to apply for a major grant, check whether you need to share your Forward Plan as it is developed with the funder.

2.7 Other supporters

Try to build in time for others to contribute to your draft plan. Your local Museum Development Officer should be pleased to be consulted at an early stage in the planning process and will be able to steer you towards funding and expertise in a range of areas.

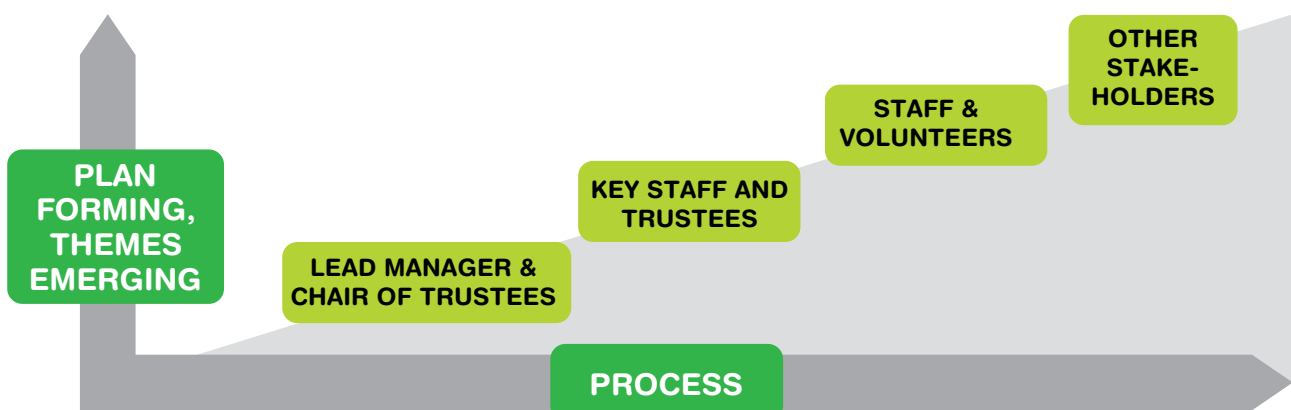
If your museum belongs to a network by virtue of its type, collections or special projects, then colleagues in your network can be very helpful when you are planning. Time permitting, they will be willing to advise and may have experience in an area where you lack it. In keeping them informed about your ideas you may discover opportunities for working together and forming partnerships to develop certain activities and projects.

FINALLY - Gather all the information generated by your consultations and review it. Examine and re-draft any existing plan in the light of new ideas. **ALWAYS WRITE IT DOWN!**

IDEA: USE OTHERS

Remember the value of SHARE: resources, networks, training and consultations that are designed to assist museums across the whole range of their activities

At all times when you feel the need for a second opinion, as you develop your plan, help is available within the museums community. The museums represented in our group valued meeting and discussing areas of concern with sympathetic colleagues. They said it was “almost like mentoring”, “someone to hear what has gone on” that left them “feeling more positive”.





3 Drafting your Master Plan

THE MASTER PLAN SHOULD INCLUDE THE FOLLOWING ELEMENTS

- 1 Introduction to the Museum and its setting
- 2 Museum Mission
- 3 Vision and values
- 4 Key aims
- 5 Review of previous plan and key achievements
- 6 Priorities for 3 or 5 years relating to the key aims
- 7 Income and Expenditure for the period
- 8 Appendices
- 9 Risk Assessment

This section will consider each element in turn, citing some examples along the way.

3.1 Introduction

The Master Plan will be a public document. It needs to introduce your museum to readers who are not familiar with it.

The introduction should briefly set your institution in its political, environmental and social context.

PRACTICE EXAMPLE: MASTER PLAN INTRODUCTION

Here is the introduction to the master plan for The Farmland Museum and Denny Abbey
<http://www.dennyfarmlandmuseum.org.uk>

"The Farmland Museum is an Independent Trust which was formed in 1992 following the establishment of a museum in the village of Haddenham in 1969. The museum is a registered charity and under a Local Management Agreement also manages the historic monuments of Denny Abbey on behalf of English Heritage.

The Museum together with English Heritage actively works with other partners and businesses within the cultural life of its surrounding villages in South Cambridgeshire, the cities of Cambridge and Ely and beyond."



PRACTICE EXAMPLE: MASTER PLAN INTRODUCTION

This example is from the Cambridge and County Folk Museum <http://www.folkmuseum.org.uk>

"The Cambridge & County Folk Museum is an Independent Trust and a company limited by guarantee (no. 412205). The museum is registered with the Charity Commission (no. 311309) and it holds full Museums Accreditation ..."

[updated additional information for the 2012-2015 plan]

"The museum is located within the oldest part of the City where the Romans settled and established the original river crossing on Magdalene Street. This area is now being developed as the creative independent traders' sector of the City in order to encourage visitors away from the city centre. This is to be enhanced by the re-development of Kettle's Yard Gallery next door to the museum, which will enable the Museum to explore and harness new audiences, whilst also offering partnership opportunities.

Recent news that the University Museums of Cambridge (UCM) have been recognized by the Arts Council England as a Major Partner Museum provides potential opportunities for further collaborative work with the Folk Museum. The UCM is one of 16 museums and partnerships which are to receive a share of £20m Renaissance major grants funding.

Cambridge City Council's Arts Strategy highlights the vision of the Council to enhance the quality of people's lives through cultural activities. The Museum is able to contribute to and deliver a number of the key priorities laid out in the strategy such as access to art for all, engaging and enabling local communities in cultural activity and enhancing the city's reputation and identity through innovation and excellence of cultural provision.

It is expected that the number of new city residents will rise by 27% over the next 20 years due to increased City development. More homes and residents provide the potential for the museum to increase its current visitors as well as opportunities for outreach. It also provides the Folk Museum with the opportunity to reaffirm its goal in delivering a museum which is a centre of excellence for the history of Cambridge and its surroundings."



Cambridge and County Folk Museum



3.2 Museum Mission

Can you express the purpose of your museum in a sentence or two? This is your mission statement and although it should be short and succinct, arriving at the mission statement may be a lengthy process. Each word will be weighed and examined for interpretations and nuances. It is a good idea to discuss and refine the mission statement with the Board.

Try to express your mission positively: for example, “will provide” is stronger and more positive than “aims to provide”. It sounds more resolute and determined.

PRACTICE EXAMPLES: MUSEUM MISSION STATEMENTS

Cambridge Folk Museum Mission <http://www.folkmuseum.org.uk>

“The museum will illustrate and interpret the social history of Cambridge and the County through its collections and other resources for the education and enjoyment of all.”

The Farmland Museum and Denny Abbey <http://www.dennyfarmlandmuseum.org.uk>

“Our mission is to enable a wider audience to participate in and enjoy the Museum’s work, enabling every individual to gain an understanding of rural life in Cambridgeshire, and, to provide visitors to Denny Abbey and those participating in the Museum’s outreach work with a sense of change, while evoking an equally strong sense of stability and continuity with the past, which helps in the development of an individual’s sense of self worth, place and community.”

CMAF Mission <http://www.cambridgeshire.gov.uk/CMSWebsite/Apps/Committees>

“Cambridgeshire Museums Advisory Partnership (CMAF) supports the strategic development of the sector to ensure that Cambridgeshire’s museums continue to care for and make accessible the heritage of Cambridgeshire, its people and environment, for everyone’s learning and enjoyment.”



Feast of Fenland at Farmland Museum Denny Abbey



3.3 Vision and values

Following your mission statement, you should insert your vision statement. Have a look at the example below from the Horniman Museum and Garden's plan, which combines introduction, vision, values and objectives in a statement on their website <http://www.horniman.ac.uk>

PRACTICE EXAMPLE: VISION AND VALUES

"The Horniman Museum is a charitable company limited by guarantee. ...Our vision is central to everything we do, whilst our values help shape our work and give the Horniman its unique character.

Our vision: to use our worldwide collections and the Gardens to encourage a wider appreciation of the World, its peoples and their cultures, and its environments.

Our values:

- respect for the World's diverse cultures, environments and resources
- enrichment through learning and understanding
- enjoyment for our visitors
- communication of our message and awareness of what we do
- excellence in research, interpretation and care of our collections
- stewardship of our historic listed buildings and Gardens
- efficiency and effectiveness in the way we conduct our business
- partnership with the community and institutions nationally and internationally
- relevance to our urban, multi-cultural setting
- valuing difference by working towards a diverse workforce and audience"

3.4 Key aims

The key aims will spell out your mission in more detail.

Your aims should be broad in scope. They express how you plan to carry out the museum's mission. There may be as many as 10 key aims at this stage.

Later these will be prioritised and limited to no more than six. You may find that the aims can reflect the headings that you have used earlier to examine your existing plan:

- museum as organisation
- collections
- users and their experiences
- income generation and fund-raising
- buildings/facilities
- partnerships

Aims may begin "to continue..." and relate to an essential on-going activity, or they may begin "to develop...", "to explore..." or "to instigate..." and relate to new initiatives or projects. Both are good so long as you can clearly define the activities related to them when you come to write the more operational Action Plan later ([see part 4](#)).

PRACTICE EXAMPLE: KEY AIMS

The previously cited Horniman Museum outlines just three long term aims, which cover all of its work:

Access – we will use the collections and Gardens to stimulate curiosity and wonder, promoting opportunities for people of all ages, abilities and backgrounds to participate in and enjoy exhibitions, educational programmes, activities and events – both face to face and online.

Collections – we will safeguard and develop the collections so that they can be made as accessible as possible now and into the future.

Enabling – we will secure and effectively manage our resources so that we are able to protect, develop and share our collections for the benefit and enjoyment of our visitors, both real and virtual, now and into the future.



3.5 Review of previous plan and key achievements

One of the most encouraging activities for you and your colleagues in preparing your Master Plan will be to reflect on what has been achieved in the past year, how and why. Some projects will be complete but there will be others, in addition to routine maintenance tasks, that may constitute a major part of your Master Plan. Remember also that new aims and activities may need additional resources.

PRACTICE EXAMPLE: REVIEWING ACHIEVEMENTS

The Farmland Museum and Denny Abbey
<http://www.dennyfarmlandmuseum.org.uk>

Achievements over the last five years (2006-2010)

- *Attracting project funding and grants of £500,000 exclusive of SCDC and EH core funding*
- *Working with English Heritage, SCDC and HLF on a joint five year development plan of Abbey interpretation (new text panels, timeline and dressing), production of a new guidebook, storage and display of excavated material, school sessions and children's interactives*
- *Achieving and maintaining Accreditation*
- *Location, photographing and adding more information to the digital catalogue of 10,000 objects in the collection*
- *Six years of HLF funded education and outreach post and ability to support an education officer from core funding from 2007*
- *Creation of a new temporary exhibition space and ticket office.*

3.6 Priorities for three to five years - relating to the key aims

If, like many museums, you find that you have a long list of aims, you should choose no more than six priorities from among them. Once again use the headings suggested for the review of your achievements in part 1:

In each of these areas try to express your aim succinctly. This will help you later when you develop your Action Plan and its related objectives in measurable terms.

Look at these possible examples:

Aim 1: Museum as organisation – e.g. “to position ourselves as the centre for ...” (your priority for the museum’s profile and marketing it effectively)

Aim 2: Collections – e.g. “to maximise the potential of our collections...” (your priority for management, conservation, storage, displays, interpretation or exhibitions)

Aim 3: Users and their experiences – e.g. “to encourage volunteering and play a full part in ...” (choose where you can work with greatest impact and long-term benefit in education and outreach)

Aim 4: Income generation – e.g. “to identify opportunities to generate income through commercial activities and/or fund-raising / working with partners in culture and business ..”

Aim 5: Building/facilities – e.g. “to maximise the potential of our site for...” (your priorities for improvements or maintenance. What about your café for example, or your storage?)

Aim 6: Partnerships – e.g. “to strive for sustainability and greater resilience ...” (identify funding opportunities to match your projects; explore joint working with a neighbouring or complementary organisation and consider sharing projects and posts).

For more ideas on prioritising your aims see the appendix on [page 29](#).



3.7 Income and expenditure

The Accreditation standard requires financial information for two consecutive years: reporting on the current year and proposing a budget for the subsequent year.

Use your version of the table overleaf to prepare a financial statement for the year preceding the plan period, then to develop an overview of the sources of income expected for each year of the forward plan and the corresponding expected levels of expenditure.

The level of detail of income and expenditure given will depend upon the size and complexity of the museum and on the number of different funding streams it receives.

IDEA: DIFFERENTIATE BETWEEN CORE AND PROJECT MONEY

It is useful to differentiate 'core' income/funding and its source from income generated by activities, subscriptions and donations, from funds raised for 'projects'. Use corresponding distinctions between 'core' and 'project' for expenditure also, as in the example shown.

This makes it easy to demonstrate to trustees and funders what can be achieved with each and the effect of losing all or part of one or the other.



IMPORTANT NOTE: We recommend that you prepare the financial information as suggested overleaf but **do not incorporate it into the published version of your Master Plan**. This flexibility allows you to attach it or update it, or to append a different presentation of the information according to the use of your Plan.

The headings in the table overleaf are only examples. You should choose headings that are most useful for the purposes of your museum.



Museums as Learning Spaces training session, Ely Museum



	Year 1	Year 1	Year 2	Year 2
	CORE	PROJECT	CORE	PROJECT
INCOME				
County/City Council/University grant				
Funds raised by development activity				
Friends subscriptions				
Admission charges				
Shop and café sales				
Donations				
Grants: AIM				
HLF				
Other				
Other				
TOTAL				
EXPENDITURE				
Rent, rates, utilities etc				
Salaries: Administration				
Collections				
Education/outreach				
Collections care/Conservation				
IT, website, photography				
Buildings maintenance				
Grounds				
Administration costs (printing, stationery, telephone etc)				
Travel and training				
Other				
TOTAL				



3.8 Master Plan Appendices:

We suggest that the following information is appended to your Master Plan to complete it.

- **Acknowledgement of funders**
It is especially recommended that the principal contributors to the achievements mentioned in the plan should be listed, including sponsors and donors as well as trusts, foundations and local or central government grant giving programmes.
- **List of Board Members**
- **List of key staff**, including key volunteers, and support groups such as the friends or development groups.

You may also want to include analysis of the lessons learned in the process of your consultations, quoting those consulted where appropriate.



3.9 Risk assessment

Once you have completed your Master Plan you should check its feasibility and sustainability by carrying out a risk assessment. The purpose here is to identify risks arising from the plan itself or from the environment in which your museum is operating and then to record what actions will be taken to reduce or mitigate the risks. We do not suggest that your risks are shared outside the organisation and are therefore not suggesting that they are published with your plan. However, identification and consideration of risks are useful to the board and senior management and should be regularly reviewed and revised.

Risks for your planned activities may arise from known or unknown circumstances. It is useful and prudent to analyse the priorities you have planned in order to identify potential risks.

For each one you will want to identify the likelihood of the risk occurring and the impact if it were to do so. The 'residual risk' is the level of risk remaining after the mitigating actions have been applied.

In the example given below 'likelihood' and 'impact' of risk are recorded on a scale of 1 – 3 and are then multiplied to produce the score of the risk.

A traffic light system is used so that the highest risks are coloured red and can be seen at once. These are the risks that the Trustees need to consider particularly keenly as they will bear the risks should they be realised.

NOTE: Larger organisations preparing their risk assessment may like to consider using the RAPT – Risk Awareness Profiling Tool. It is an online checker using the headings Assets, Systems, Finance and Audience that is very flexible and easy to use. At the end you will have a 'to do' list of areas of risk in order of urgency and impact. <http://www.raptonline.org.uk/welcome.asp> and see **Appendix**.



PRACTICE EXAMPLE: ASSESSING RISK [see section 3.9 for notes]

Plan Ref	Risk	Likeli-hood	Impact	Score <i>Likeli-hood x impact</i>	Control action to mitigate	Current Status of risk	Previous Status of risk	Residual Risk after control action is applied	Owner <i>i.e. who is responsible for managing each risk</i>
M Museum as organisation									
M1	Vacancies on Board remain unfilled	2	2	4	Appeal for trustees in local press in addition to action by Chairman	AMBER	N/A	GREEN	Board
M2	IT equipment - age of server and likelihood of failure	3	3	9	Consultation with staff on requirements. External expertise will be sought	RED	RED	RED	Board
M3	Accreditation not achieved	1	3	3	Careful preparation and support from MDO/Curatorial adviser	GREEN	GREEN	GREEN	Director/curator
C Collections									
C1	Additional external storage cannot be found	3	3	9	No large new acquisitions. Further housekeeping. Further searches for shared facility.	RED	AMBER	RED	Director/curator & Board
C2	Unable to control moth infestation in textile collection	2	3	6	Urgent appeal for assistance through SHARE scheme	RED	N/A	RED	Curator
A Audience									
A1	Planned work in adjacent buildings deters visitors	2	2	4	Curator is monitoring and in negotiation	AMBER	N/A	AMBER	Curator
A2	Failure to attract active volunteers	1	3	3	HLE funded Volunteer Coordinator working to recruit new volunteers	AMBER	RED	GREEN	Curator
R Resources									
R1	LA cuts to core grant	3	3	9	Representations underway	RED	AMBER	RED	Chair & Director
R2	Rent is increased	2	3	6	Representations underway	RED	AMBER	RED	Chair & Director
R3	Failure to achieve income targets	2	2	4	Reserve plans in place	AMBER	N/A	GREEN	
B Buildings/facilities									
B1	Rent – see R2								
B2	Maintenance by owner is delayed and collections are put at risk	2	3	6	Representations underway	AMBER	N/A	AMBER	Chair & Director
B3	Storage – see C1								



4 The Action Plan

Your Action Plan is the operational document that puts your Master Plan to work. It is where you spell out your objectives and how you will achieve them within the timeframe of your plan and the limitations of your staff and finances.

The Action Plan must be used. It needs to be crisp and clear. It will express the key aims of the Master Plan in terms of a set of objectives that should be regularly reviewed and updated by the Museum Lead.

The Action Plan will become the instrument for keeping the efforts of all the staff aligned.

In this section we look at:

- Writing SMART objectives
- Putting the Action Plan to use
- Managing staff and volunteers using the Action Plan
- Training and Development
- Drawing it all together – 10 steps

4.1 Writing SMART objectives

Objectives that are SMART are - Specific, Measurable, Achievable, Realistic and Time-limited.

To develop SMART objectives, take the Key Aims you have prioritised in your Master Plan, one by one. Analyse each one and how you will achieve it.

ASK YOURSELF:

- what will actually happen to deliver each aim?

Capture the answers: these are your **Objectives**. As in the example below, try to use an active verb to describe them. For reference use a numbering system that will link the objectives to the key aims they deliver.

Identifying the lead person responsible for an objective, and checking that one person is not responsible for too many of them, is a useful exercise which engages staff in responsibility for delivering the objectives. If you can identify support for the lead person as well this makes their position less lonely and again engages more people in ensuring that the plan is delivered.

Breaking down the Master Plan into the Action Plan requires detailed consideration of the resources needed to deliver each objective and will quickly show whether more than 100% of any person's time has been committed, as well as whether funds are sufficient to deliver any action.

PRACTICE EXAMPLE: ACTION PLANNING AGAINST AIMS [SMART OBJECTIVES]

Aim 4 To increase revenue from 'commercial activities' and fundraising.

In order to become more self-sufficient, the museum needs to maximize its own income generation and fundraising abilities. The areas that will be focused upon include the museum shop, café, room hire, paying visitors, friends groups and a new fundraising strategy.

Each one will be expressed as a **SMART** objective.

See table [overleaf](#).



Aim 4 To increase revenue from Income generation and fundraising

Objectives	Actions	Lead Person	Additional Support	Estimated Cost	Source of Funding	End Date	Performance Measurement
4.1 Improve Shop	* Increase shop space making use of the large windows	Visitor Services Officer	Trustees x 1 Museum Lead and Education Officer	None		Jan 2012	Increased space
	* Create a 'Made in XXXXXX' product range	With Education Officer	Visitor Services Officer and Trustees	In-kind advice		Jan 2012	££ Increase in shop revenue\$
	* Trial an interactive Pop-Up shop for families. If successful make it a permanent feature of the shop.	Education Officer	Visitor Services Officer	None	Cambridge Museums Grant £300	Aug 2011 for pop-up. Apr 2012	££Increase in shop revenue\$
4.2 Increase café activity	Increase frequency of Saturday café; explore viability of Sunday tearoom	Volunteer Coordinator	Friends & Volunteers	?		Easter 2012	££ turnover
4.3 Hire out education room	Discuss bookings with U3A and WEA, local history society and others	Education Officer	Care-taker	?			£720 minimum pa (24 X £30)
4.4 Increase number of paying visitors	Identify and target groups who do not currently visit Develop trails to increase repeat visits	Visitor Services Manager with Education Officer and Collections Manager	External marketing advice		£500 grant for marketing from City Council	Feb 2012	Increased visitor numbers when compared with 2011
4.1.5 Energisise the Friends	Recruit new Friends and appoint a Chair	Museum Lead/ Chair of Board	Out-going Chair of Friends			Sept 2012	Appointment
4.1.6 Review current fund-raising with new Chair of Trustees	Clarify structure of Friends and identify local untapped sources of funds	Museum Lead	Volunteer Coordinator			Sept 2012	Access to funds for priorities clarified

\$ The amount of income should be discussed and set as a target.



4.2 Putting the Action Plan to use

Putting the Action Plan to use

Once completed, this action plan will quickly show how everything falls into place:

- what needs to be done
- who will do it
- with what additional support
- by what date.

Share it with your key staff and volunteers. Check that they agree it can be delivered. Give them their own copy and invite them to highlight the objectives that require their contribution.

4.3 Managing staff and volunteers using the Action Plan

The SMART Objectives must be practical to be useful. When they are, they offer a framework for staff management, training and development. Because each objective identifies the lead person who will deliver it and where they may find support. For the Museum Lead the objectives present targets for staff. Their performance can be discussed in relation to the targets. Where annual appraisal interviews, whether formal or informal, are conducted, the objectives of the Action Plan can be used and reviewed.

The connection of objectives with individuals will further reinforce the feeling that each person makes a recognised contribution to the achievement of the museum's aims and the delivery of the vision.

4.4 Training and Development

Because the Action Plan shows what must be done, it can be used to check whether there are any skills gaps or development needs among those involved in delivering the plan. A list of any such needs creates your Annual Training Plan. It's easier to apply successfully for funds for training when you can show evidence of need related to your plan in this way.

IDEA: DISPLAY THE OBJECTIVES



Get a white-board and put it up in a non-public area where all staff and volunteers can see it. Write up the current month or quarter's objectives and activities and who is taking each forward. Cross them off as they are achieved. It can be an incentive and prove very rewarding.

The Master Plan and Action Plan will help you to achieve a better understanding of what your priorities for action are, and what must wait, and why.

Follow the step by step process on [page 14](#) to bring your trustees and stakeholders, staff and volunteers with you.

PRACTICE EXAMPLE: MANAGING USING THE ACTION PLAN

Your museum aims to increase its income by hiring out a room and the Education Officer has agreed to take this on as she has ideas about potential client groups. At your meeting with her you discuss these ideas and agree that she will contact potential users. She is prepared to commit to getting a regular client within three months and to raising a minimum of £720 in the first year (24 weeks @ £30 for a one hour session). You can discuss a higher rate 'after hours', charges for use of equipment etc. You caution her not to spend too much time on this but leave it to her. As a result you have a SMART objective that is realistic, and you can expect the Education Officer to report to you on this activity.



APPENDICES

1. Checklist for SWOT

This useful self examination can be undertaken with the Board and with groups of staff and applied to the organisation/museum and to the way the groups function.

Use this approach in your consultations to gather information for your plan, but use it carefully and constructively inviting others to make suggestions and keeping a positive tone to the discussion. You might put contributions onto a flip chart divided into four quarters.

Strengths	Weaknesses
Opportunities	Threats

You might ask yourself questions such as those listed below. You will be able to think of others:

Strengths – what do we do well?

- What advantages does our position in town/out of town give us?
- Which are our best assets (collections, buildings, people)?
- What support may we rely on? How are our partners a strength? Who have we done great projects with?
- How can we build on these areas? How ambitious are we as an organisation?
- How clear are we about what we do well?
- How are we thought of in the local press and by the tourist information centre?

Weaknesses – (the opposite of strengths) - where do we not do so well?

- Where do we lack profile in our marketing?
- Are people sure what they will find or experience if they visit?
- How suitable is our staff structure for our organisation now?
- How active or united is our Board?
- What skills and experience do we need for our plans?
- How clear are we, from trustees to volunteers, about where we are going and when we are going to get there?



Opportunities – what opportunities for growth or development present themselves?

- How can we take advantage of changed circumstances in our immediate environment or in local or national trends?
- How can we work more effectively with partners if we allow others to lead?
- How could we explore digital elements to our advantage – for example putting some collections online or having a more attractive website?
- Can we turn a threat - such as loss of staff - into an advantage? e.g. by taking the opportunity to refine our activities and re-structure roles

Threats – (these are the opposite of opportunities but can also apply even to our strengths).

- Is our funding threatened by cuts elsewhere?
- Is our lease about to run out?
- Who is responsible for the upkeep of our old buildings?
- Rival organisations - is another new museum or gallery with more funding about to overshadow ours? Or is a new leisure park or shopping centre planned nearby? Has our setting changed, with new shops or housing around us
- Are key members of staff/volunteers soon to retire?

2. Checklist for PESTEL

PESTEL is a very useful approach to recognising and defining the situation in which your museum operates. It invites an analysis under six headings and encompasses governance issues. It is useful to apply the same headings to the organisation itself, as suggested here:

Political – this should include both national and local politics in relation to culture and the arts and any effect they may have on your museum's operation. Consideration of political issues with a small 'p', such as the 'standing' of the museum in local public opinion, is also encouraged.

Ask yourselves such questions as

- What do we want to be known for? e.g. Do you want to be at the cutting edge, offering encounters with innovative practice or do you want to have a reputation of solid, educational work?
- How are we seen by others? e.g. Is your organisation seen as 'elitist' or as 'populist'? Is it considered a 'backwater' and 'hobby place' for older citizens or a lively place for families?

Economic – this is usually closely related to the political issues that have been identified but should also look more immediately at the financial health of the organisation and how this may be addressed both immediately and in the longer term.

- Are there expenses that you are unsure about? Rent, rates and buildings refurbishment?
- Do you know enough about cuts to funding in the local authority or your parent body? Have you explored new sources of funding or criteria for applicants e.g. HLF?



Social – this should invite an examination of the diversity of visitors and users as compared with the local population and with regional and national statistics.

- How well do our staff demographic match the local population?
- In what ways might we encourage volunteers from minority groups to come to the museum and become engaged in an activity on site?
- How can we demonstrate that we provide learning experiences that can change lives and attitudes to heritage?

Technological – this considers all digital activities and the equipment used to safeguard collections.

- Does our website serve our aims and objectives and reflect the ‘personality’ or profile we wish for our museum?
- Are we using or might we use social media to reach a new audiences and engage them with our museum, its collections and activities?
- Have we thought about digitally sharing our collections with others – working with Collections Link or BBC Your Paintings?
- How do we look after our photographic images/digital files? Have we thought about a digital strategy for the management and preservation of your digital assets?
- Does our monitoring equipment deliver accurate information, or if we have controls are they set to ensure the appropriate environment for your collections?
- What about alarms and security routines? Do we rely too much on technology?

Environmental – this overlaps with Technological.

- Can we improve our carbon footprint and save our utility bills? Who do we go to for advice?
- Should we change our lighting to reduce UV or lux levels or to save energy?

Legal – if a charity, do we comply with legal requirements of the Charity Commissioners?

- Are we well versed in employment legislation?
- What about Health and Safety at work, especially in the café? Who is responsible?
- Entertainment licensing? Do we need a licence?
- Ethical issues – are staff and volunteers clear and do they behave with integrity?
- Copyright and intellectual property rights?
- Volunteer management? Dignity at work?
- Freedom of information and data protection? Disability Discrimination?
- Are we protected – security? Insurances?
- Is our Board clear about our liabilities?
- More generally, have we put policies in place to guide our work and those who carry it out?



Appendix 3

Further ideas for prioritising key aims

It is essential to focus on a limited number of priorities for the plan period. This gives impetus to new work or a fresh emphasis to continuing work.

The priorities will almost certainly emerge from the discussion about aims and objectives. However it may be necessary to force the discussion to arrive at agreement on the priorities. It is all too easy in this process to end up with a longer list of things to do in the new plan than were in the earlier one.

It is difficult to drop activities to make room for new ones – but this is essential.

Here are two approaches

A] List your priorities under theme headings

Themes may emerge from your discussions and help to group the aims.

For example, The Farmland Museum and Denny Abbey chose four themes to guide their objectives and to be monitored and reviewed quarterly for reporting to the Trustees. The chosen themes related closely to those of the South Cambridgeshire District Council

- Education and life-long learning
- Stronger resilient communities and volunteering opportunities
- Tourism, enterprise, innovation and regional economic growth
- Health, happiness and well-being

B] Consider priorities under the six areas of the museum's activity outlined in Chapter One, the first 3 of which relate directly to the headings of the Accreditation standard

The questions under each suggest useful prompts.

1. The museum as organisation

- How is our museum perceived by others?
- Should we be working on raising our profile?
- What does this mean for how we promote and position our museum and what it has to offer to the local and tourism markets?
- Do we need additional funds for marketing?
- Is this a long term or a short-term objective?

2. The collections –

- What priorities do we want to set for collections management?
- Is the documentation complete?
- Do we need to transfer the catalogue to a database and put the collections online? What does this mean for staffing?
- What about the permanent displays? Do they need refreshing? Are they attractive and accessible to all our audiences or only to some?
- Is this the period in which we prioritise and tackle our storage problems?
- Can we get in some loan exhibitions to attract visitors while we concentrate on these essential housekeeping tasks?
- Do we know of any remedial conservation that is required?



3. Users and their experiences – services, education and outreach activities.

There may be real opportunities in this area where funding is easier to find. There may also be new partners in the health or older peoples' services, as well as with schools.

Could we encourage visitors to explore the museum by theme as a way of winning repeat visits, increasing the educational value of the visit and appealing to a greater variety of interests of different groups?

Might we offer the museum as a meeting place for a booked group or the café as the final destination for a walking group?

What about putting the collections online and increasing footfall by linking to city walks? Or sending them out in loan boxes?

4. Income generation and fund-raising –

Once your priorities are clear you may be able to identify immediately where to turn for funding. Consider also:

- Have you got the right connections to help you with this? For example one museum in the cohort group had in-kind assistance from a department store that improved the appearance for their small shop and boosted sales.
- Are the Trustees able to help or should you consider forming a development committee?
- Are you using the Museum Development support in our area?

Buildings/facilities

- Is the museum responsible for the upkeep of the buildings?
- Has there been a thorough inspection within five years? Should we finally investigate that damp patch in the store?
- Did your walk around reveal obstacles for people with mobility difficulty to get to our front door? Is the alternative door sufficiently attractive or does it serve as the goods entrance?
- Should this be tackled now or as part of a larger scheme in the next plan?
- How good is the signage? For motorists? For pedestrians?

Partnerships and funders

- What are the key partnerships that you need to nurture and how?
- Are you communicating well with them?

For many small museums it is simply too difficult to do all that they would like to on their own. Have you considered the joint funding of projects with one or more other museums and perhaps sharing staff?



PRACTICE EXAMPLE: Wide Skies project, Cambridgeshire

'Wide Skies' is supported by the Heritage Lottery Fund (HLF) and aims to provide museums in Huntingdonshire and Fenland with increased links into the community. Two Learning Coordinators were appointed to work with a cluster of museums in each district, drawing in new volunteers and equipping them to develop family activities, and reminiscence work as well as the more usual museums volunteer work of collections documentation, storage and front of house services.

The project has completed the first year and new volunteers have been recruited across the nine participating museums. The museums have clearly benefited from fresh eyes and new approaches:

"The new volunteers have brought with them an enthusiasm which has helped to stimulate and invigorate all aspects of service delivery and work in the Museum."

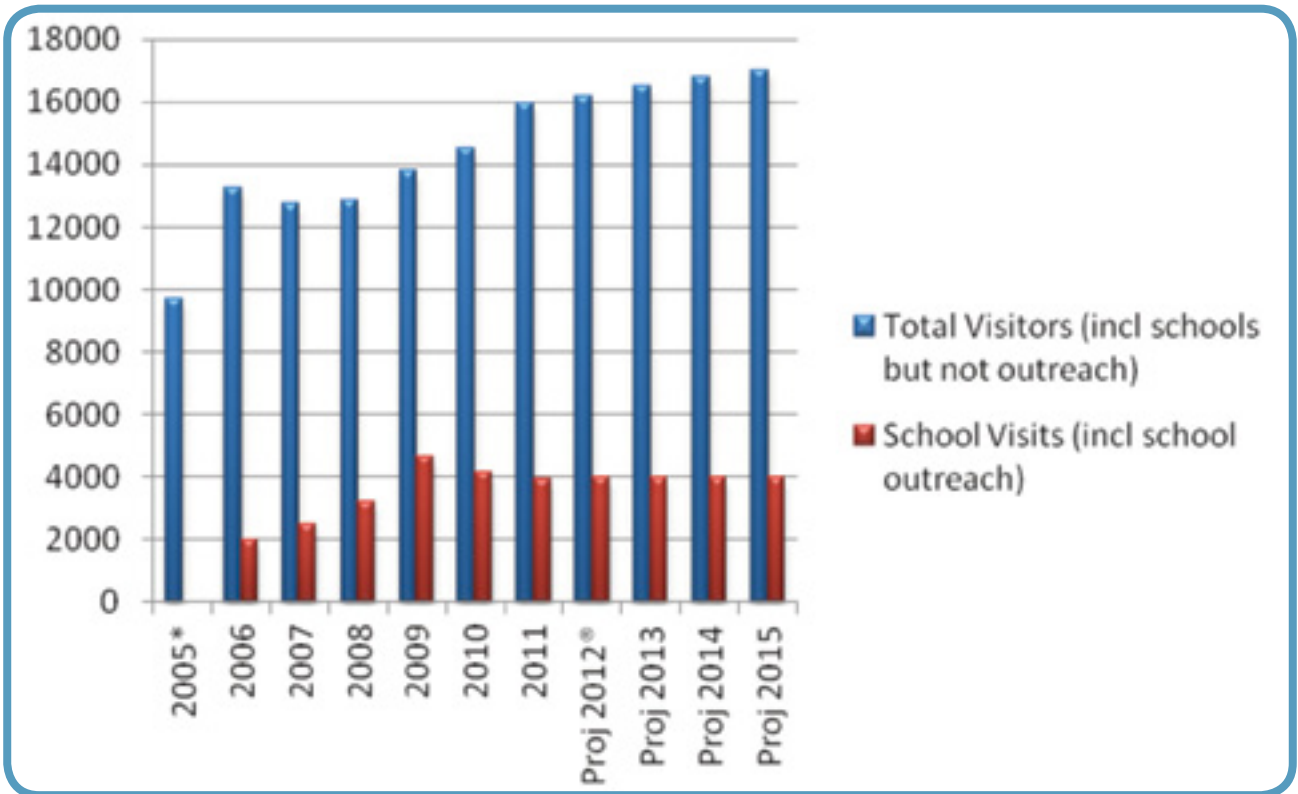
Curator from one of the participating museums



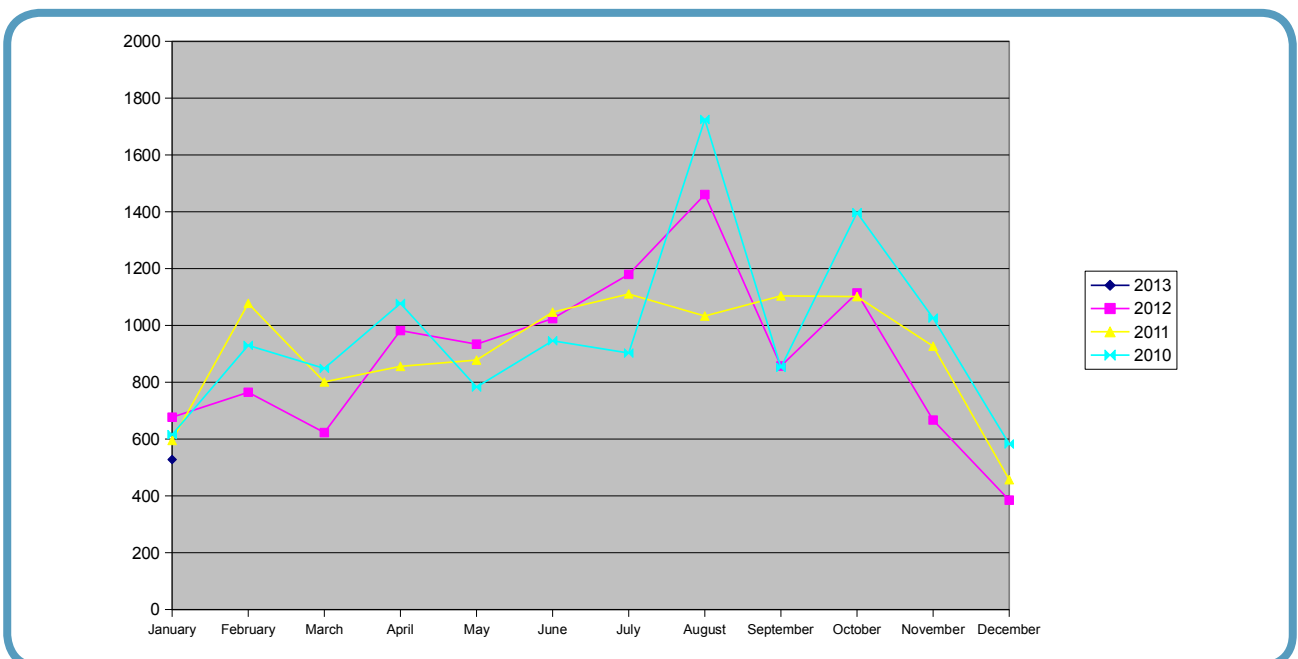


Appendix 4 Plan presentation

Without going to the expense of hiring a designer there are some simple ways to smarten the look of your plan and to make the message stronger. Instead of tables of figures e.g. for trends in visitor numbers or schools groups using your museum, convert these into bar charts and pie charts from your Excel sheet. It makes the figures easier to 'read' and conveys the message at a glance, as in these examples:



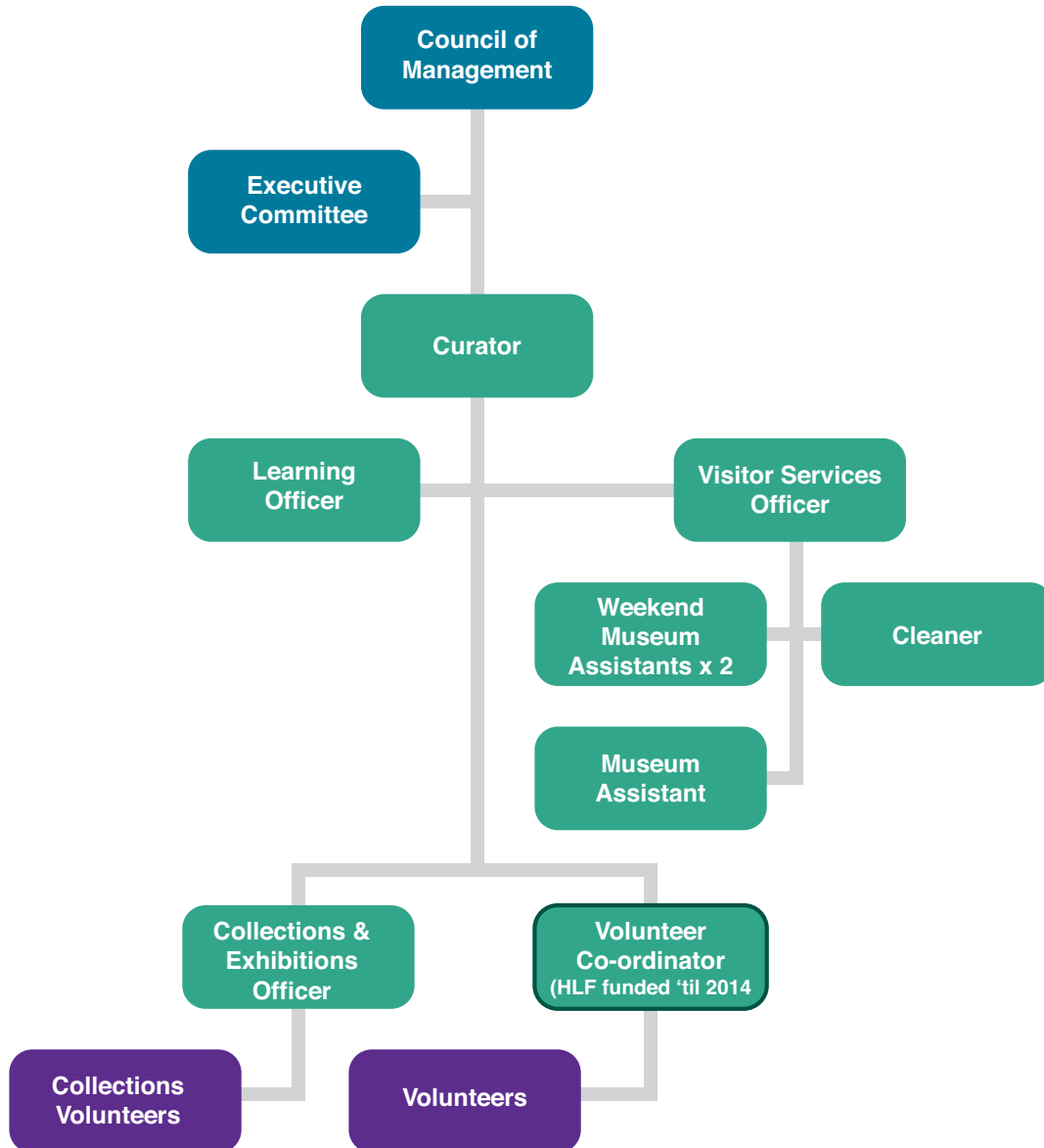
Presentation of visitor figures – this distinguishes schools visits within the total number of visitors



Example of how to present visitor figures.



Explaining your staff structure, particularly if you want to show how heavily your museum relies on volunteers or that several staff externally funded and on fixed term contracts, is also best done using a diagram.



Using images is very important, too. An image of a variety of people enjoying an event at your museum or a new display, information board or exhibition, will save many words and conjure up the atmosphere in the museum. This message reinforces the words you used to express the vision.

Offer your Master Plan as a .pdf to be downloaded from your website and print a limited number of hard copies to give to trustees and others, but don't spend a lot of money on an expensive publication.



Appendix 5. Resources and useful live links

Arts Council England (ACE)

<http://www.artscouncil.org.uk> for guidance documents such as

Accreditation <http://www.artscouncil.org.uk/what-we-do/supporting-museums/accreditation-scheme/>

Self-evaluation <http://www.artscouncil.org.uk/selfevaluation/>

Roll-out of Accreditation in the East of England <http://www.artscouncil.org.uk/what-we-do/supporting-museums/accreditation-scheme/>

The resource list to support Accreditation is now available as a downloadable document on the ACE website at <http://www.artscouncil.org.uk/what-we-do/supporting-museums/accreditation-scheme/how-do-i-apply>

Good governance: A Code for the Voluntary and Community Sector – Version for smaller organisations. FAQs and downloads <http://www.ncvo-vol.org.uk/codeofgovernance>

Directory of Social Change (DSC) provides training and information to the voluntary sector to enable charities to achieve their mission and runs courses and publishes charity and voluntary sector books on fundraising, management, organisational and person developments, communication, finance and law. <http://www.dsc.org.uk>

The Charity Commission is established by law as the regulator and registrar of charities for England and Wales.

<http://www.charitycommission.gsi.gov.uk>

Risk Awareness Profiling Tool (RAPT) <http://raptonline.org.uk>

Association of Independent Museums (AIM) Focus papers

Creating and Implementing Forward Plans, Michael Day, second ed. Revised by Adrian Babbidge

<http://www.aim-museums.co.uk>

Collections Link

<http://collectionslink.org.uk> for Accreditation Guidance to Section Two, Benchmarks in Collections Care and Caring for Collections. You can join interest groups on this site and access a rich bank of free resources.

Collections Trust

<http://www.collectionstrust.org.uk> for a range of useful publications on Collections Care and Management, SPECTRUM 4.0 and BSI PAS 197: 2009 Code of Practice for cultural collections management.

Collections Trust Collections Management: a Practical Guide especially for a framework and policies. Others in this series: Documentation, Pest Management, Governance.

IDEA: CHECKING AGAINST AGREED DEFINITIONS

Check to see if your statement of purpose reflects the accepted definitions of a museum of the [Museums Association](#) (MA)

The MA agreed a definition in 1998. It says:

'Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society.' This definition includes art galleries with collections of works of art, as well as museums with historical collections of objects.'

See also the [International Committee for Museums \(ICOM\)'s definition](#).





