Introduction to strategic planning for natural history museums

These notes have been prepared to help anyone who is trying to improve their organisation's effectiveness, resilience and chances of success. They explain how to identify and to begin to overcome key challenges. They are part of a toolkit of similar materials directed at helping people in natural history museums to get the best for themselves, for their museums, for their audiences and for nature.

What is strategy?

Strategy can be thought of as **a set of carefully chosen actions directed at achieving particular results**. Strategic thinking is the process that helps to develop a strategy: identifying what the situation is, where you need to get to, how best to get there, and how to know when you've arrived there. Strategy combines **careful thought with focussed action**. You need both elements: without thought, you can't identify and develop key actions, and without action you are only talking. It should go without saying that the point of strategy is to help make improvements, to increase the likelihood of success and reduce the likelihood of failure. Strategy allows you to change how you 'play the game', and you can decide to enter into different 'games': it's all up to you. Strategic thinking is hard thinking: use it selectively. Invest energy in it when you are in need of changes of direction, to gain clarity on what needs to be done or to solve particularly important challenges.

Mission and Vision

Many organisations have a **mission**; probably rather fewer have a vision. The mission can be thought of as '**the reason why you exist**'. Your organisation probably has a mission; it is probably a set of words on a piece of paper, it probably doesn't explicitly state why you exist, and not all of the staff can probably remember it. Were the staff involved in writing it? Do they understand it? Does it reflect what it is that you are all about? Do people interpret it in their own ways?

Most natural history museums' missions probably include some kind of words like 'educate', 'inform', engage', 'inspire'. Be cautious about making claims that you can't meet, or at least qualify your words. Can you genuinely inspire everyone? Fairly common, and useful, phrases include:

> *We provide opportunities for people to explore our collection, for their enjoyment, education and inspiration.*

> *We aim to provide opportunities for everyone to experience and be inspired by our collections and exhibitions.*

> *We aim to help visitors explore the natural world.*

Make sure your mission incorporates the difference you are trying to make. What do you intend people to take away? What, if any, wider difference are you trying to make?

> *Through our work, we intend to…*

> *Through our work we aim to...*

Mission—'why we exist'—shouldn't become reduced to a historical description of where your organisation came from. Make sure your mission distils your relevance today. If your organisation serves a particular group of people or has a distinctive position, make sure that they are incorporated in the mission.

The mission should be a short paragraph at most, preferably less. However, a set of pithy, worthy words on a piece of paper isn't going to get anything done. Talk about it at work, make use of it, include it in people's appraisals, bat it about, test its relevance. If its not hitting the mark, change it for a better one. If you can't change your organisation's mission, develop one for your own team that reflects your own contribution to the organisation.

Vision is an imaginary picture, either fully or partly formed, that communicates where you want to get to, whether as a sector, organisation, individual or team. The vision helps to fulfil the mission. It helps staff to imagine what success will look like: where they are headed, why it is worth getting there, and what it feels like when you're there.

Work culture

So, you've got a mission clarified, and a vision of where you are heading towards, so what are you going to do next? Well, a big step is to understand where you are now, and what needs to happen to get where you are going. Your staff are going to be crucial in this, and will need to be on the journey with you. You can help construct an effective work culture by establishing a set of **values** to accompany your mission and vision. Values are the principles that you will work to in working towards achieving the mission and vision. They set a tone for colleagues to work to, and to have a framework for agreement and disagreement. It is important that people develop a shared understanding of what those values mean, whether in a team or in an organisation, so that the values are actually what people experience of one another, how they behave on a day-to-day basis. Values can be made evident to your audiences, and will be evident from the things you produce. They are a great way of people finding out what you are all about and what you value about them. They help people understand whether your organisation is something for them, or not.

Work structure

Although it may be less fashionable to think of, the structures at work have a very important bearing on how initiatives pan out. Work structures are responsible for work culture more than work culture is responsible for work structures. Work structures include team structures, decision-making structures (both formal structures and 'on the ground' what gets done). What teams collaborate, and which ones don't, and what are the reasons for that? What tensions are there between individuals and teams; what levels of risk-taking are encouraged (you'll know this when things go wrong); what relationships exist between people, and which don't; what issues are going unaddressed; what potential is not being tapped into? The list goes on and on. These will impact on any initiative, for good or bad. People need the time, resources and skills to do things, and to be motivated to do them. They need to be clear on why they're doing them, and how they contribute to the greater endeavour.

Working out what needs to be done

A common tool to work out your current situation is to use a **SWOT analysis** (strengths, weaknesses, opportunities and threats), but strategic planning often ends there. This is a mistake, as SWOT analysis has great potential to help you identify and plan actions to effect change. In a SWOT analysis, strengths and weaknesses are internal to your organisation, opportunities and threats are external.

	positive	negative
internal	**Strengths**	**Weaknesses**
external	**Opportunities**	**Threats**

Imagine a smallish museum in a medium-sized town, where finances are tight and where the local authority is facing budget cuts (it shouldn't be too hard to imagine that). A SWOT analysis might look something like the following:

STRENGTHS	WEAKNESSES
-dedicated existing audience -few alternative cultural venues in vicinity -good partnerships with local park -some very good quality collections -dedicated staff	-not well-connected with other museums -small staff, no curatorial specialist -collections not used much -not well advertised -not connected with tourism -displays have not been updated for 30+ years -staff demoralised by funding crisis
OPPORTUNITIES	THREATS
-audience would be likely to take part in further activities -audience could be interested in helping run museum -number of local organisations that could be useful partners -partnerships could open funding opportunities	**-threat of closure of building due to local authority cuts** -lease of building expensive -increased competition for finances from other local authority services -services not understood/appreciated by council member -building in poor condition

You can prioritise issues by considering how likely they are to happen, and their impact. In the table above the most critical issue, the threat of closure, is highlighted. Okay, so now you have some more information. The next step is to use a **TOWS analysis**. This looks at how these features could be combined to shape a better future for the organisation. How could the strengths be used to capture the opportunities (SO challenges); how could the opportunities overcome the weaknesses (OW challenges); how could the strengths

overcome the threats (ST challenges) and how could the threats and weaknesses be minimised (WT challenges)?

	STRENGTHS	WEAKNESSES
OPPORTUNITIES	**SO challenges** -diversify activities in park and museum to increase audience -increase capacity through volunteers -develop partnerships for mutual advantage -promote existing offer more widely	**OW challenges** -develop partnerships -put good quality collections on display to broaden audience -find people who can provide collections expertise -advertise offer better -raise staff morale to capture opportunities -raise commerciality
THREATS	**ST challenges** -garner support from existing audiences -articulate value of museum and culture to council member -concentrate on unique offer -use high quality of collections to appeal to council member -capitalise on staffs' dedication as advocates	**WT challenges** -work to ensure building remains fit-for-purpose -raise commercial offer to mitigate risk of cuts -secure additional funds for building -get collections out and about to raise visibility and promote museum -find curatorial support from networks

Looking across the table, there are a number of key themes that can be seen, around:

- Organisational profile, through partnerships and marketing
- Increasing capacity
- Maintaining and diversifying audiences
- Advocacy, notably to the council member

Causes and effects

Now we are a bit further on again, but these are still just hunches. We have used our judgment to assess the situation, but we have biases in our own minds that can get in the way of identifying the core challenges. A way round this is to use the Effect-–Cause–Effect approach. This seeks to identify the real limiting factors: the root causes. This is really important as, without doing this, you may only ever be dealing with a symptom, not with the cause, and consequently doomed to waste time and energy dealing with all-too-familiar situations over and over again, while the root cause goes unaddressed or, worse still, un-noticed.

Effect–Cause–Effect thinking works by singling out a particular effect, hypothesising a cause, and then predicting what other effects that cause would have if it did indeed exist. You then assess whether these effects also crop up in your organisation. If they do, then there is a good chance that you have indeed identified a potential core challenge, a root cause. If they don't, then you're probably not on the right track.

In the example above, you could hypothesise that low profile, the untapped audience and low level of understanding by the council member are all due to poor marketing capabilities. If there were poor marketing capabilities, you would also expect that your museum would have a low profile in local media, undefined marketing strategy, and lack of advertising in different venues. If you found that these were also true, they would give you a candidate for a core challenge.

So, again, we're a bit further on, but we're not there yet. You should only choose a few core challenges to work on at one time, so that you can invest energy and resources in them.

Can it be done—and is it the thing most worth doing?

Before committing to a particular challenge, you should also consider: out of a set of candidates, will a particular

challenge be the one to get you where you need to get to; do you have the resources to achieve it, and will the work culture help achieve it, or will it be a major brake on moving forward.

It is also worth remembering that you have an imminent high-risk situation, namely that there is a real threat of closure due to funding cuts. You could prioritise activities that will help reduce the risk of that becoming reality, but it is worth being really clear on what the underlying problem is, so you can use your energy and resources effectively.

Just do it

Once you've done all this you should have some really good intelligence on what you need to do to more your organisation forward. The proof is in the pudding: once you've established your goals and some pathways to get there, all you have to do is to get on with it, 'Just do it', as Nike would say. It's important not to get stuck to a particular direction, so review your progress periodically and see whether the landscape of challenges and solutions is still going to help you get to where you need to.

Summary

These notes have attempted to show that strategic thinking takes a bit of effort, but is immensely valuable as it helps deal with the subjectivity of our own thinking. The example above has involved several waves of thinking, to come up with some really chunky areas of work to address particular challenges. These challenges have been worked through so that we can be confident that they will indeed make a significant difference to the imaginary organisations. You can do the same with yours. So, if you're a bit stuck with which of 50 challenges are worth addressing, these notes should hopefully be some help. Good luck!

These notes have been produced as part of a programme of support for North West museums with natural history collections, led by Manchester Museum in association with World Museum Liverpool, Tullie House Museum and Museum Development North West. If you have any comments, please email henry.mcghie@manchester.ac.uk