

**Oklahoma Museums Association  
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New resources on this topic will be added to the lending library soon!



Whatever you write about business planning seems so cliché. Like, “A business plan is a roadmap for how you plan to operate the business over the planning horizon”, or “A business plan guides your organization and helps measure key mile stones of success.” Well, it does that, but more problematic for museums is there are few guides for a museum board/staff to write a business plan. A business plan is more tactical and short term than a strategic plan which focuses on long term vision and goals. Museum boards need to have thought through all aspects of what makes their museum successful and sustainable. That is particularly difficult.

Think about what you do when you write a business plan for your museum. [1] You are charting a course to build the future for your museum to reach your museum’s long term goals. [2] You have to identify and examine the key factors of success for the museum and plan how to manage each one of them so the museum is both successful and its future is sustainable. [3] You must dedicate the small amount of time it requires to develop a plan, instead of just letting things happen.

**Current Realities**

One of the things all plans have in common is an assessment of what is called “current realities.” This usually takes the form of strengths, weaknesses, opportunities and treats. Strengths and weaknesses basically are more internal to the museum. Opportunities and treats are more associated with external matters. For example, one strength may be your collection; one weakness may be outreach programs. Opportunities might be the expansion of your museum; threats may be from something like funding. To set the groundwork for the plan, each major area of your museum’s operation needs to be examined. You probably already know the answers. There may be more than one issue in each category. Using the previous examples, you can construct a table summarizing the SWOT analysis as seen at the bottom of the page.

**Stakeholders**

Another important consideration, which needs to be reviewed often, is to examine your stakeholder groups. First, list all mu-

seum stakeholders. These are people that have a stake in your museum’s success. There are other community and statewide shareholders. It is more than the staff, the board, and docents. Next, think about how to best communicate with each stakeholder group to insure a feeling of inclusion in the museum’s success.

**The Plan**

At a minimum, your plan should cover topics such as:

- Theme: Thoroughly explore the story your museum needs to tell and how the collection, captions, displays, etc. help tell that story.
- Collections: Examine your collection carefully. How will you enhance your collection items, and what new assets do you need to tell a better story? What are your accessions records like? Are they current? Do you plan to deaccession items from the collection?
- Promotion: What are the tools/methods you use to promote your museum to your stakeholder publics? Whose fault is it if your museum is the best kept secret in the state? People must have reasons to visit your museum.
- Human Resources: This means assessing stakeholder groups from the board, to staff, to docents and to the various publics. How does each group work together to make the museum more successful?
- Facility: What needs to be done to your facility to improve the image of your museum and to tell your story more effectively? What is the image the museum projects?
- Finance: The harsh reality is that museums have to pay salaries, bills, utilities, etc with CASH. An integral part of any plan is a sound financial plan. Your plan should use a time horizon several years into the future. Where will your funding come from three years from now?

**Plan Development**

The best way to develop a plan is to get the board to agree to a planning retreat (off premises), engage an “outside” facilitator, and dedicate the time to planning. A facilitator keeps the session moving. Staff can participate too. You must plan for the future you want for your museums. Remember, the future will get here, whether you plan it or not.

	Issues	Trial Solutions
Strengths	Professional Collection	Maintain present program
Weaknesses	Outreach Programs	Try OMA traveling programs
Opportunities	Expansion of the Museum	Examine Planned Expansion
Threats	Funding	Examine sources of threats