



AMERICAN ALLIANCE OF MUSEUMS ANNUAL MEETING 2014

# Is Planning Giving You the Creeps?

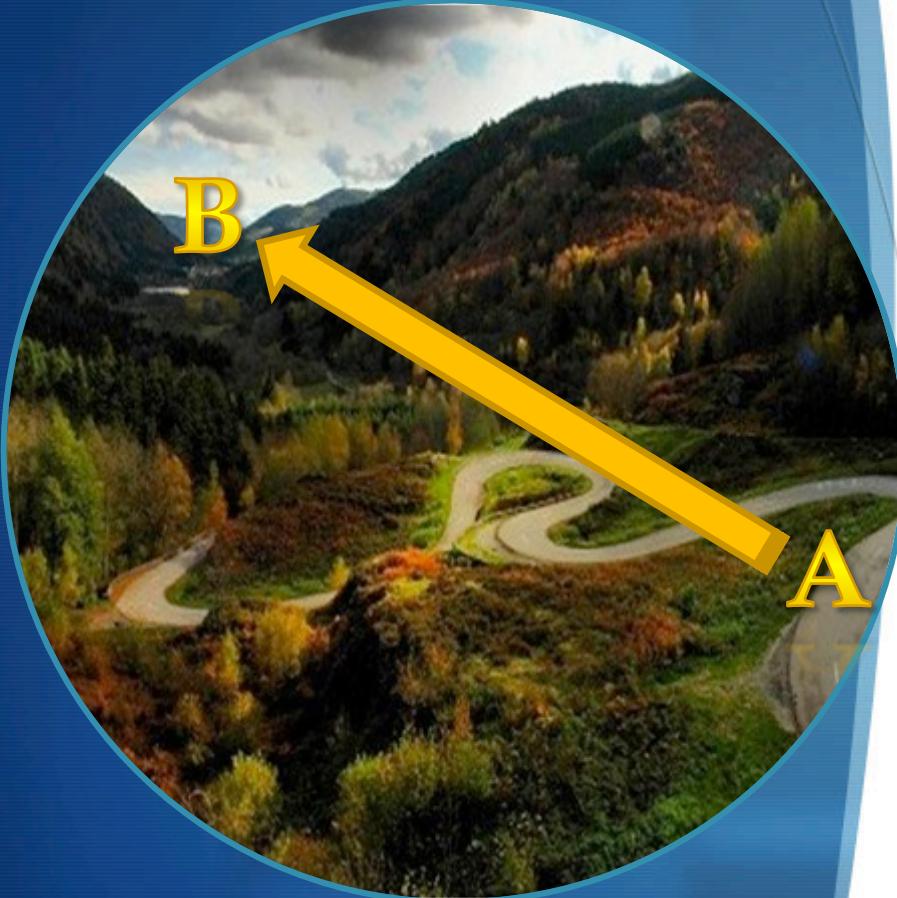
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May 20, 2014



# AAM Core Document: Strategic Institutional Plan

1. Current (up to date)
2. Approved by the governing authority
3. Aligned with current mission
4. Articulates a big-picture vision as well as operational tactics to achieve the vision
5. Covers all relevant areas of museum operations
6. Includes:
  - Goals (what the museum wants to achieve)
  - Action steps
  - Assignment of responsibility
  - Assessment of resources (human and financial)
  - How the institution will obtain these resources
  - Timeline for implementation
  - Priorities
  - Evaluation mechanisms and measures of success



## Get from A to B

- Achieve goals
- Accomplish projects
- Make a difference



# Organizational Sustainability

- Longterm success and impact
- Builds capacity
- Engages supporters



# Funders and Donors

- Government
  - General operating support
- Foundations
  - 55% program support
  - 29% general support
  - Broadening assessment tools
- Individuals
  - 75% of all giving



So why do  
they fail?



# 1. Adopt a Meaningful Purpose & Vision

1. One future
2. Description of what success looks like
3. Hopeful and inspirational
4. The “ends”



# Too Much Wandering

1. Wishful thinking
2. All destinations are equal
3. Just about survival
4. The “means” or “ends”?

# Mission Statements

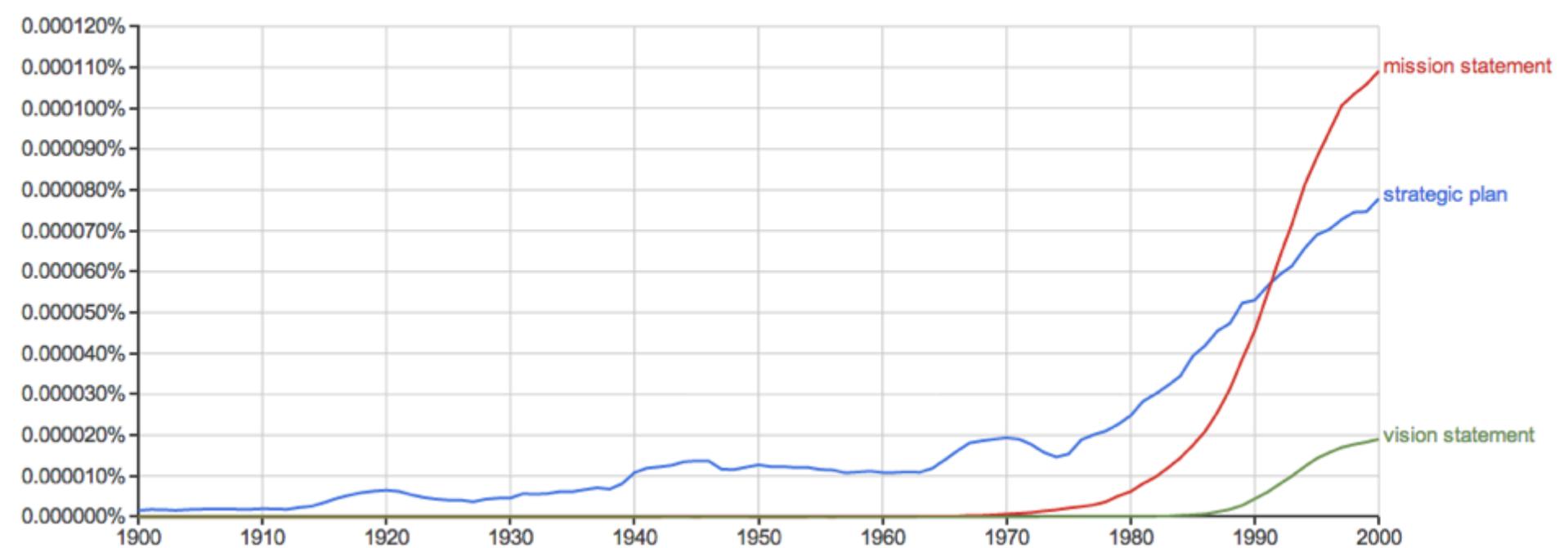
## Needed but Needful

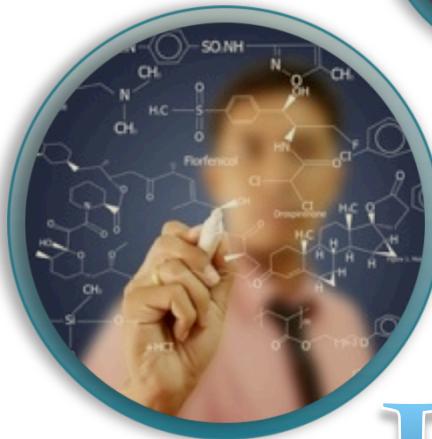
- Unclear or ignored by most board and staff members
- Little to no influence on day-to-day activities
- Empty public relations gesture that provokes cynicism
- Gaining consensus on a meaningful mission statement is very difficult; typically results in statement that is least offensive

# Mission Statement Quality Affects Performance

“Looking at the Value of Mission Statements: A Meta-Analysis of 20 Years of Research”  
by Sebastian Desmidt, Anita Prinzie, and Adelien Decramer in *Management Decision* 49 (2011)

- Defines purpose
- Identifies values and beliefs
- Recognizes unique identity, strength, or distinctive competence
- Focuses on audiences served and the means to satisfy them
- Short
- Crafted by diverse stakeholders (e.g., board, staff, volunteers, members)

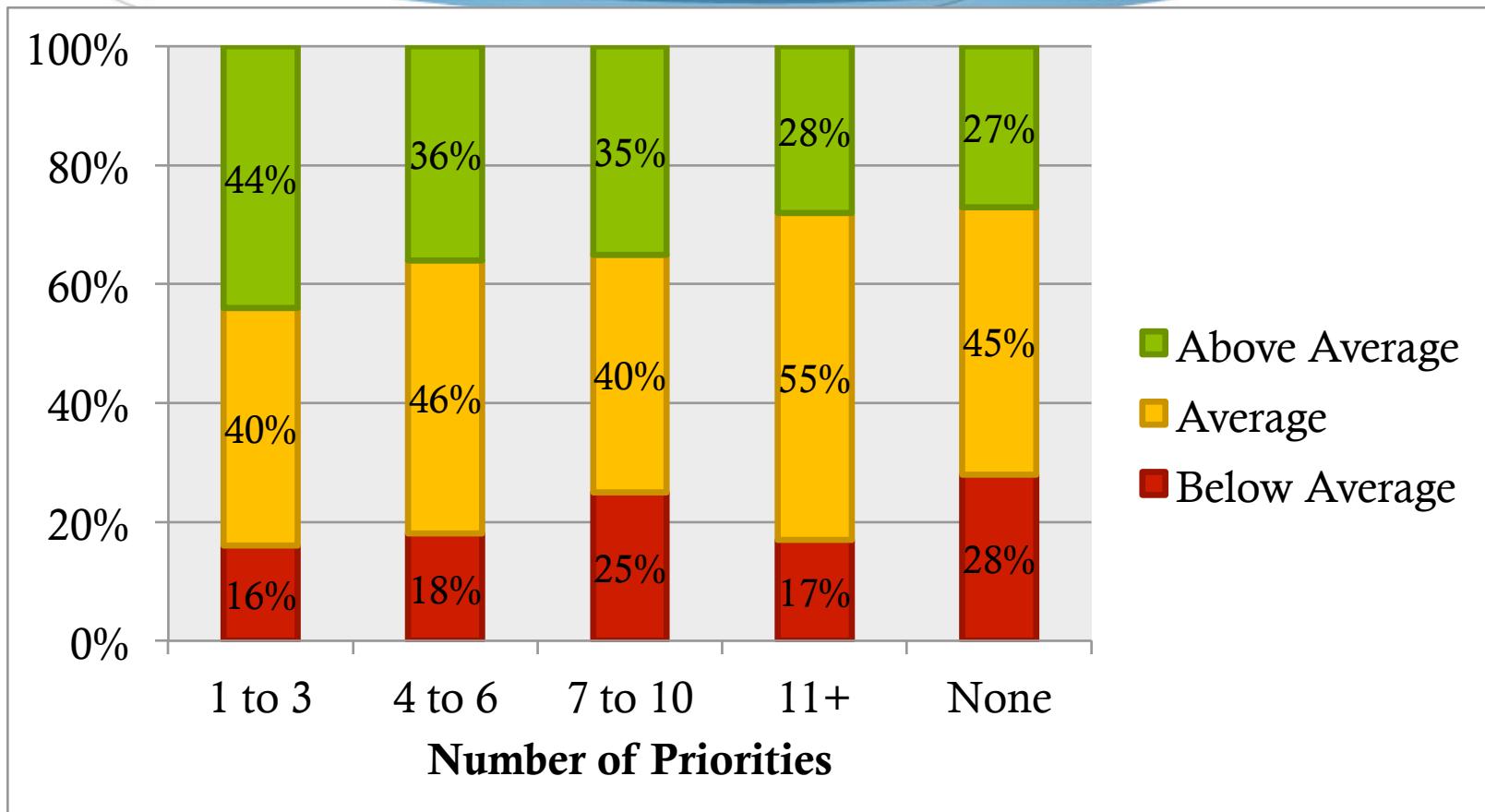




## 2. Choose a Few Priorities

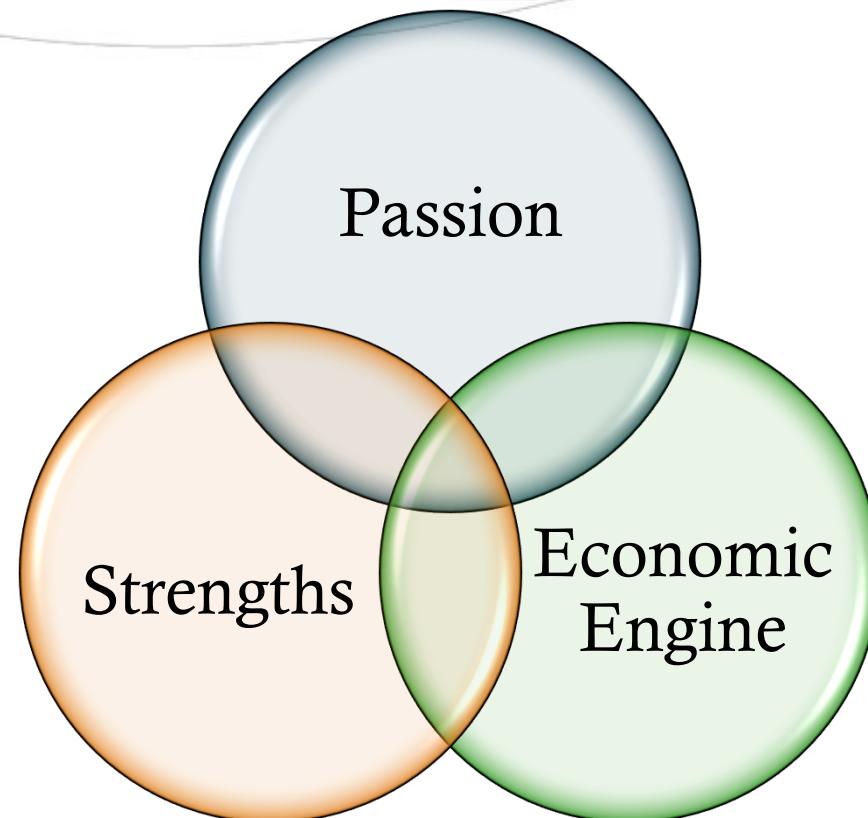


# Revenue Growth vs. Company-wide Priorities

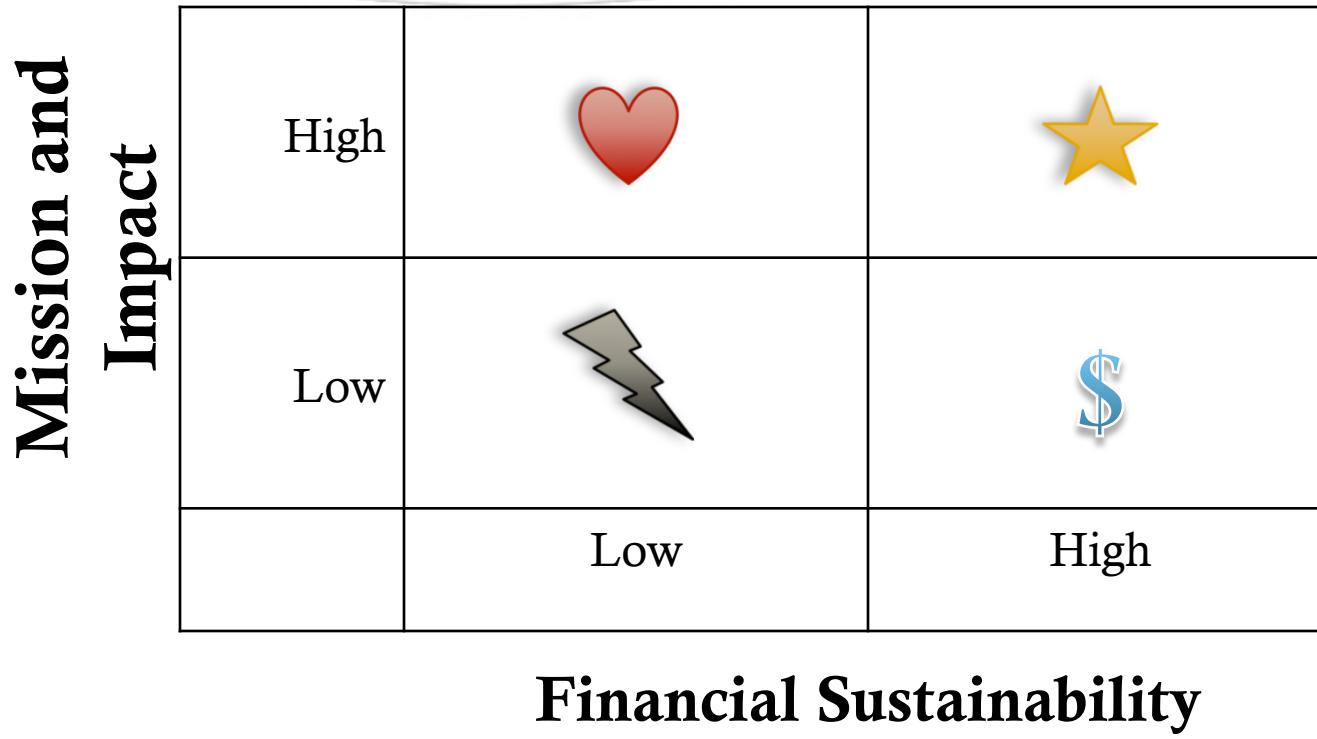


Jim Collins' “Culture of Discipline”

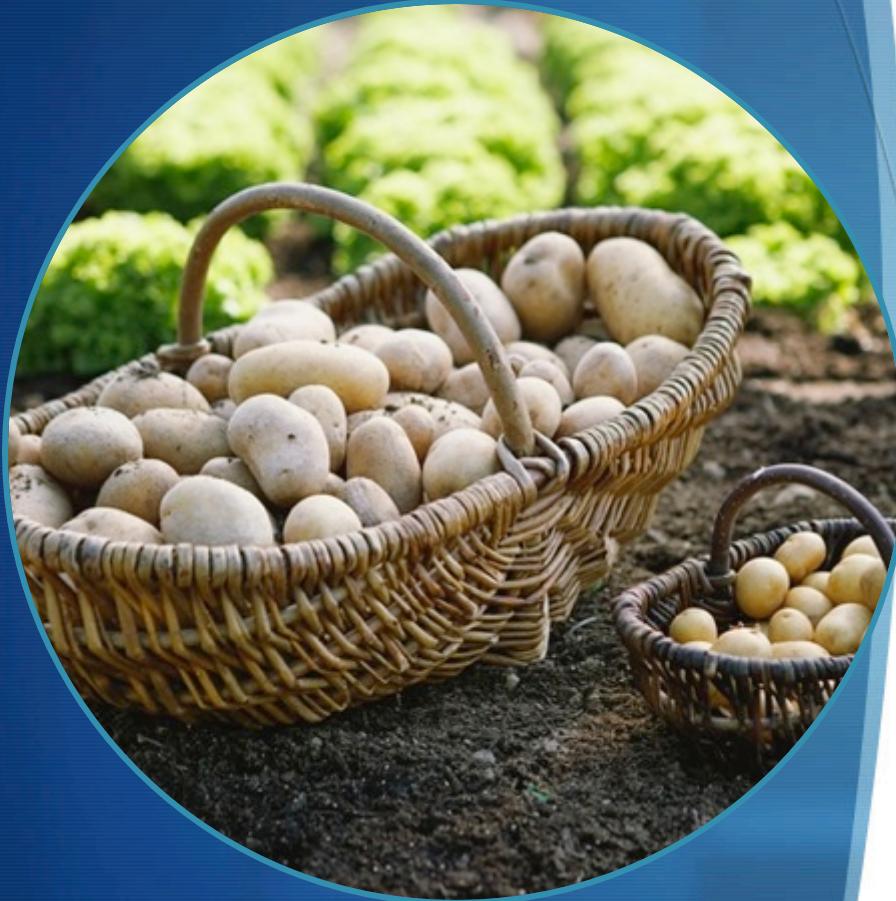
# Hedgehog Concept



# Double Bottom-Line



### 3. Scale Plans to Capacity





# Adizes' Organizational Lifecycles

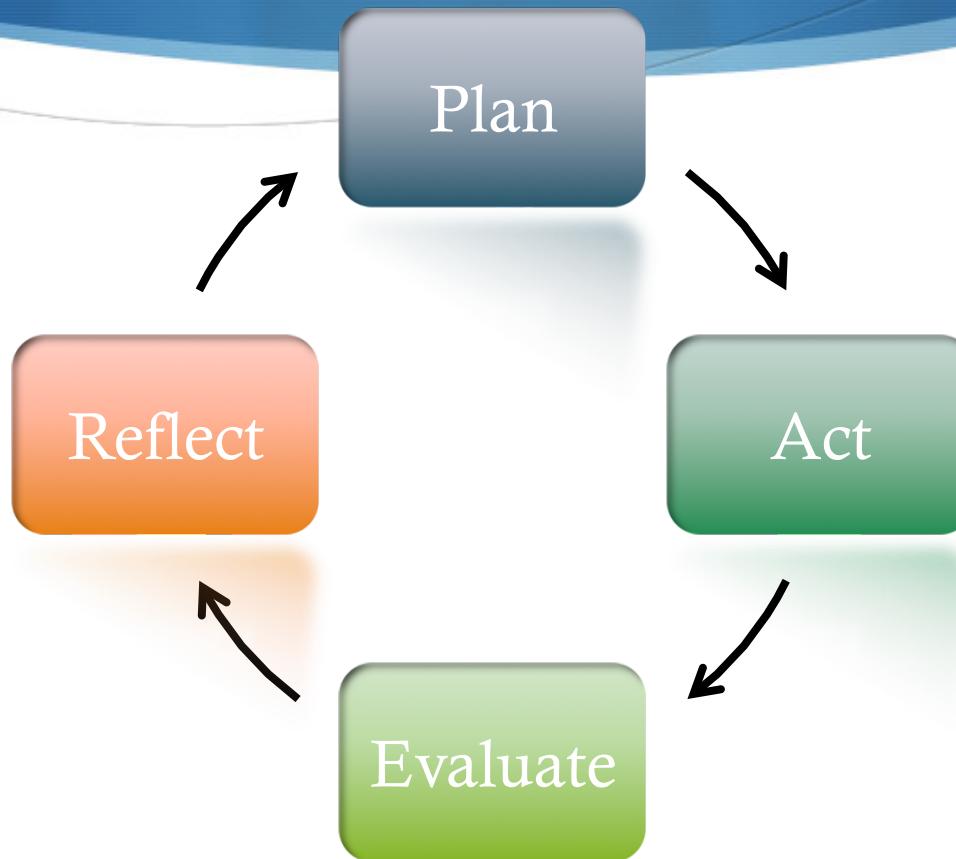


## 4. Treat Planning as a Process, not as a Product



# Holistic Intentionality

Available free at [RandiKorn.com](http://RandiKorn.com) under *Resources*



# Building Momentum



# Developing the Right Plan for your Museum

1. *Corporate Lifecycles: How and Why Corporations Grow and Die and What to Do About it* by Ichak Adizes (1988).
2. *Good to Great and the Social Sectors* by Jim Collins (2005).
3. *Museum Strategy and Marketing: Designing Missions, Building Audiences, Generating Revenue and Resources* by Neil Kotler and Philip Kotler (1998).
4. *Running Lean: Iterate from Plan A to a Plan that Works* by Ash Maurya (2012).
5. *Starting Right: A Basic Guide to Museum Planning, Third Edition* by Gerald George (2012).
6. *Strategic Planning for Nonprofit Organizations, Second Edition* by Michael Allison and Jude Kaye (2005).
7. *Strategy Safari, Second Edition* by Henry Mintzberg et al (2009).
8. *The Five Most Important Questions You Will Ever Ask About Your Organization* by Peter Drucker (2008).
9. *The One Page Business Plan for Non-Profit Organizations* by Jim Horan (2007).

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A design and strategy firm that connects people to historic places



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*Thanks!*

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