

## FORWARD PLANNING: some top tips for Accreditation success!

Your forward plan isn't just for Accreditation- it should be a user-friendly, working document that enables you to identify and share your goals, and the measures to achieve them. The Accreditation Standard states that effective, resilient organisations plan both for long-term success and to make sure they can adapt and survive in a changing environment.

There are a range of templates available to help you with your forward planning. There is no standard approach or single template for Accreditation and you are encouraged to develop your own local plan so long as the key Accreditation requirements are met.

All Accredited museums must have a current forward plan that covers:

- The museum's statement of purpose
- A review of the previous forward plan
- An analysis of the wider environment and context, such as a SWOT analysis
- Consultation with key stakeholders
- Key aims which reflect the 3 areas of Accreditation
- Specific objectives beneath each key aim
- Steps to achieve these objectives
- A resource plan
- A date for next review

### Quick checklist

#### *Does your plan have:*

The museum's statement of purpose, identifying and sharing its vision?	<input type="checkbox"/>
A review of the previous forward plan?	<input type="checkbox"/>
Evidence of consultation with key stakeholders	<input type="checkbox"/>
Key aims	<input type="checkbox"/>
Specific objectives	<input type="checkbox"/>
Spending plan for current and following year?	<input type="checkbox"/>
Do you review the plan annually?	<input type="checkbox"/>
Do you know when it was last reviewed?	<input type="checkbox"/>
Has the plan been formally approved?	<input type="checkbox"/>
Who needs to approve the plan?	<input type="checkbox"/>
When can the plan be approved?	<input type="checkbox"/>

- **Read the ACE Accreditation guidance**

Read the guidance for 1.4 forward planning in section one (organisational health) of the Accreditation guidance documents. This is able as a free download from [www.artscouncil.org.uk/supporting-museums/accreditation-scheme](http://www.artscouncil.org.uk/supporting-museums/accreditation-scheme)

- **Background research**

A little bit of background research might help give you some pointers on what areas to focus on. Check your last Accreditation award outcome letter from Arts Council England as you may have a relevant 'required action' or 'area of improvement' for 1.4. The wording of this can be helpful as the assessors can sometimes tailor this so you know what's needed. You might even find some background explanation in the letter itself. If not, don't worry!

- **Statement of purpose**

The assessing organisation will be looking to see how this relates back to the museum's governing document. For example you might simply reference your museum's charitable objectives or mission statement here. Don't forget to include this element as it's easily overlooked but needs to be part of the approved forward plan.

- **Review of previous plan**

Summarise any key achievements from your previous forward plan. Were there any areas which you weren't able to progress as originally planned? These might be carried across into your new forward plan. Alternatively it's a good idea to provide a brief note explaining the reasons for any un-met aims and objectives of the previous plan. There's no need to provide lots of detail here and you could consider including this as a supporting appendix.

- **Analysis of the wider environment and context**

This is broader than the museum's environmental conditions! Think about any risks to your museum's operating environment and consider your strengths and weaknesses as an organisation. A simple SWOT tool (strengths, weaknesses, opportunities and threats) can be a really easy and effective way to cover this section.

- **Consultation**

It's a good idea to describe how you've developed your forward plan within the plan itself. A brief overview of the process and description of who's been involved such as your staff and volunteers, stakeholders and users and non-users is useful to include. You don't necessarily need to buy-in consultation support or market research here and there's lots that can be done in-house.

Supporting appendices can be useful here for example you might wish to include notes from a focus group meeting as background evidence for your plan.

### Key aims and objectives

Do these reflect all areas of the Accreditation Standard (organisational health, collections and user services?) A table format can be an easy way to structure this information so the links between aims and the objectives underneath each aim can be seen clearly.

- **Action planning**

How are you going to achieve the aims and objectives you've identified? Who is responsible? What are the timescales? What is the cost? How will you know this has been achieved? Again you don't need to include a lengthy narrative here- an action plan as a table.

- **Resource planning**

Your plan will also need to include financial information as part of the resource planning. You can show how this links directly to the aims and objectives as part of a single action plan or provide separate budget information. The plan will need to cover a minimum of two financial planning periods (reflecting the current and subsequent planning year). Even if this is at an early stage for the next financial planning period you can include estimates. This section doesn't need to be formally approved so that's fine if it's indicative at this stage.

- **Check your dates**

Is your forward plan in date? It needs to cover at least the current planning year and the subsequent planning year (so two year's minimum).

- **Start approvals early!**

Has it been approved? If you are starting a new plan think ahead to when your governing body will be able to meet and approve in time for your return deadline. Often the approvals process can take longer than you think so do remember to start this early. Evidence of signed approval will be needed and the ACE guidance document describes the type of approval document which can be accepted (see pages 12 &13).

The key elements that your forward plan will need approval for are the museum's statement of purpose and key aims. The museum's objectives and resource plans don't need to be specifically approved for Accreditation.

- **Has your plan been reviewed?**

If your plan is reviewed annually have you recorded this anywhere? Do you have meeting minutes which demonstrate when the plan was last reviewed? How will review and when? Include the date of your next planned review in your forward plan.

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### Where can I get help?

Your local Museum Development Officer (MDO). Visit our website at [www.sharemuseumseast.org.uk/local-links/](http://www.sharemuseumseast.org.uk/local-links/) for contact details of your local MDO.

Accreditation advice through SHARE Museums East. Email [accreditationeast@norfolk.gov.uk](mailto:accreditationeast@norfolk.gov.uk)

Your museum mentor (if applicable)

Your Accreditation assessor

*Once your return has been submitted and is assigned to an assessor they might get in touch with you directly with some assessment queries about your forward plan. This is very common so don't panic! They may ask for additional information but if you're not sure what's needed don't be afraid to ask. Just remember they are always looking to achieve the best possible outcome for your museum. They will be able to highlight which areas to focus on and can help you prioritise what's needed so you're ready in time for the Accreditation Panel (the awarding body).*

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