

GUIDE TO MANAGING HISTORICAL SOCIETIES

Managing the Organisation

Part 3 – Planning – Strategic Plan/Forward Plan – Business Plan

Planning

Community heritage organisations are renowned for being rich in enthusiasm and commitment and poor in resources—in monetary terms, equipment and often skills and volunteers.

It is important for an organisation to have a plan, but for a plan to succeed it must contain a balance between realistic goals and available resources.

At its simplest, the plan should be developed and agreed by the committee of management and identify:

- What is to be done?
- When it will be done?
- How it will be done—that is, who will do it and what, if any, will be the cost?
- Evaluation - Was the planned activity worthwhile and what can be learned from it?

The range of plans and the detail of planning depend on the complexity of the heritage organisation and the resources available to develop them. Some plans useful for a heritage organisation might include:

Strategic Plan/Forward Plan

A long-term plan developed with the stakeholders (people involved in the heritage organisation). A strategic plan analyses what the organisation wants to achieve, its vision and purpose.

Resources for creating a forward plan:

- *MAP forward planning template* can be found on the *Museums Australia (Victoria)* website at <http://www.mavic.asn.au/resources>
- *Museums Australia 1998 strategic planning manual: Strategic planning manual for small museums* – http://www.collectionsaustralia.net/sector_info_item/67

The forward plan should be reviewed regularly and revised when necessary.

Business Plan

A business plan is often required for grants.

A business plan reflects the business activities of the organisation. It is not about strategic or forward direction but more about testing the “business case” for a project or organisation:

- What has been the need?
- What are the resources?
- How will the organisation or project be marketed?

Excellent guidelines for a business plan for an arts organisation – *Creative Volunteering - No Limits, Carry out Business Planning* – can be found at the *Volunteering Australia* website – <http://volunteeringaustralia.org>. Locate the resource by typing ‘Creative Volunteering’ in the Search box.