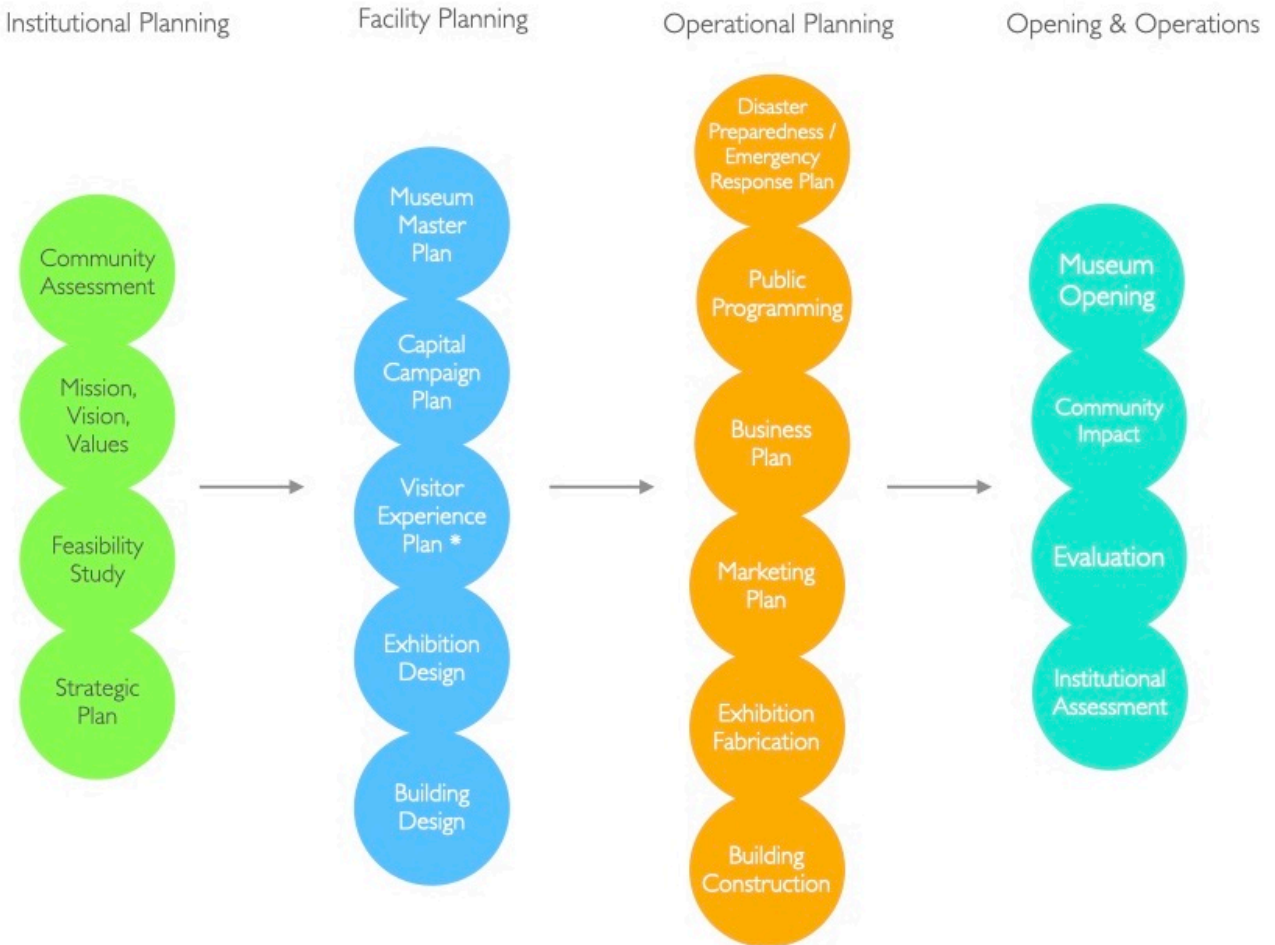


## Museum Planning Process Overview



**Museum Planning:** A process and resulting documents to define a museum's vision, visitor experience, and organizational plan.

**Museum:** A museum is a nonprofit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates, and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of education, study, and enjoyment.<sup>i</sup>

### Institutional Planning

1. Community Assessment
2. Museum Feasibility Study
3. Museum Strategic Plan

### Facility Planning

4. Museum Master Plan

### Operational Planning

5. Institutional Assessment

## Introduction

Museums are complex mission-driven organizations that are integral to civil society and democracy. For museums to be successful, they must understand visitors' needs and their communities, both in-person and online.

## Process

Before a museum can provide for a visitor, stakeholders must first understand area demographics, local communities, and audience needs. A **Community Assessment** is a quantitative and subjective view of the area's visitor requirements and demographics, describing audience segments and requirements.

Museums are nonprofit organizations; they are continuously raising funds to support museum programs. Museums must be "right sized" to be both financially and programmatically successful in serving visitors. The first step in "right sizing" a museum is generally a **Museum Feasibility Study**. This involves researching area demographics, existing nonprofit organizations, and local community needs. The result of the feasibility study will include benchmarks for the museum stakeholders to follow in their decision-making.

Once success is established, a **Museum Strategic Plan** will define how to best serve visitors and stakeholders. The process of strategic planning is as necessary as the final document. A successful Museum Strategic Plan is a living process used daily to guide the decision-making of museum stakeholders.

A **Museum Master Plan** is a process and document that defines the museum program, adjacencies, and visitor flow. It is detailed, including such information as how many restrooms and parking spaces are required. The Museum Master Plan is a cumulative process that emerges from the Community Assessment, Museum Strategic Plan, and Museum Feasibility Study.

Once a museum is operating, steps of the process are repeated to ensure that the organizational mission is being fulfilled. The repeated actions of the process include a Community Assessment, the Museum Strategic Plan, and an Institutional Assessment.

## Conclusion

Every community is different, and every museum is other, but all museums have five core documents:<sup>ii</sup>

1. Mission Statement
2. Institutional Code of Ethics
3. Strategic Institutional Plan
4. Disaster Preparedness/Emergency Response Plan
5. Collections Management Policy

All of these documents aim to create an experience that supports the visitors' needs and the community.

## Institutional Planning<sup>iii</sup>

1. **Museum Mission:** A statement approved by the museum's governing authority that defines the purpose of the museum—its reason for existence. The mission statement establishes the museum's identity and purpose, provides a distinct focus for the institution, and identifies its role and its responsibilities to the public and to its collections.
2. **Museum Vision:** An aspirational declaration of a museum's intentions, including describing the ideal scenario or successful future.

3. **Museum Values:** The core belief system, which provides a moral compass and framework for the museum's goals, priorities, and decisions.
4. **Museum Programming:** A description of how the museum will accomplish its mission, often through exhibitions, demonstrations, lectures, and publications.
5. **Museum Strategic Plan:** A comprehensive plan that broadly delineates where the institution is going and provides sufficient detail to guide implementation. It sets priorities and guides essential decisions that are oriented toward the future.
6. **Community Assessment:** Research and analysis related to the needs and characteristics of museum audiences. A community assessment is used to identify program and community resources and specify where there are gaps.
7. **Institutional Assessment:** The systematic collection, review, and use of information about educational quality. The assessment is undertaken to improve programs, services, student learning, and development.
8. **Evaluation:** Obtaining valid and reliable information from visitors helps museums plan exhibitions, activities, and programs, and determine the extent to which the activities meet their intended objectives. This can include observation (tracking) studies, questionnaires, interviews, community meetings, and focus groups. Visitor evaluation can be carried out before (front end), during (formative), and after (summative) exhibition or program development.
9. **Institutional Code of Ethics:** An institution's policies, consistent with the public service it affirms in its mission statement. A code puts the interests of the public ahead of the interests of the institution or any individual, and encourages conduct that merits public confidence.

### Facility Planning

10. **Museum Feasibility Study:** A market analysis that considers all of a museum project's relevant factors—including mission; audience requirements; and economic, technical, legal, and scheduling considerations—to ascertain the likelihood of completing the project successfully as well as the long-term sustainability.
11. **Capital Campaign Plan:** A document that describes the strategy and tactics to reach the required financial resources to accomplish the museum programming. It often includes funding building construction; costs of opening; exhibition costs; and furniture, fixtures, and equipment (FFE).
12. **Museum Master Plan:** A dynamic long-term planning document that provides a conceptual layout to guide future growth and development. A master plan includes analysis, recommendations, and proposals for a site's population, economy, housing, transportation, community facilities, and land use.
13. **Visitor Experience Plan (also called an Interpretive Plan):** A document that outlines the narratives, content, and messages the museum wants to convey through various media, such as exhibits, programming, and publications. It may include the institution's interpretive philosophy, educational goals, and target audiences. A museum may develop an overall institutional interpretive plan or an interpretative plan for an individual component of its operation—for example, its permanent exhibits or one of its historical sites.

14. **Exhibition Design:** A process of conveying information through visual storytelling and environment. This integrative, multidisciplinary process combines architecture, interior design, graphic design, media, interaction design, lighting, audio, and other disciplines to create multilayered narratives around a theme or topic.
15. **Museum Public Programming:** Any participatory educational activities offered to the visiting public, either free or for an additional charge, often as an enhancement to an exhibition or an object on display.

### Operational Planning

16. **Business Plan:** A written document describing a museum's business activity, objectives, and how it plans to achieve its goals. Plans include an executive summary, programming, revenue streams, marketing strategy and analysis, financial planning, and a budget.
17. **Marketing Plan:** A detailed plan of the communication strategies a museum will use to make audiences aware of museum programs. The plan identifies target markets, the value proposition of the museum brand, the campaigns to be initiated, and the metrics to be used to assess the effectiveness of initiatives.
18. **Disaster Preparedness/Emergency Response Plan:** Written policies and procedures that prevent or minimize damage resulting from disasters (either human-made or natural) and help a museum recover. The plan outlines the responsibilities of each involved party.
19. **Collections Management Policy:** A policy that defines the scope of a museum's collection and how the museum cares for and makes its collections available to the public.

**Civil Society:** A community of citizens linked by common interests and collective activity. These are generally nongovernmental and nonprofit organizations that have a presence in public life, expressing the interests and values of their members or others, based on ethical, cultural, political, scientific, religious, or philanthropic considerations.

**Diversity, Equity, Accessibility, and Inclusion (DEAI):** Four values at the core of every museum for welcoming and engaging museum audiences in meaningful ways. DEAI seeks to create equity across ability, class, gender, race, ethnicity, and queer identities.

### Museum Planning, LLC

Since 1999 the Museum Planning, LLC team has opened more than forty turnkey museums projects worldwide, including projects in Mexico City, Hong Kong, Indonesia, and the United States. The Museum Planning team believes strongly in the power of museums to change people and communities and has developed an interactive visitor-centered approach to museums. Museums are mission-based nonprofit organizations that serve local communities. Museums must serve all community members, and for this reason, we have developed an approach based on understanding community needs and plans.

### Services provided by Museum Planning, LLC

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<sup>i</sup> International Council of Museums (ICOM), <https://icom.museum/en/resources/standards-guidelines/museum-definition/>

<sup>ii</sup> American Alliance of Museums Core Documents, <https://www.aam-us.org/programs/accreditation-excellence-programs/core-documents-verification/>

<sup>iii</sup> Definitions copyright American Alliance of Museums, <https://www.aam-us.org/programs/accreditation-excellence-programs/education-assessment/>