

## What do we mean by future planning?

Future Planning is the process by which you decide what your museum is going to deliver in the short term (12 months) medium term (two - five years) and long term (five or more years).

Future planning may include the following:

- Financial - identifying changes in income and expenditure
- Staff and/or volunteers - training needs, recruitment, appraisal process
- Governance - how your organisation is governed, trustee training and recruitment, forum, or steering groups
- Collections, agreeing needs for conservation, cataloguing and display
- Building, ongoing maintenance and repairs, any large items of expenditure, survey results
- Visitor experience, accessibility, visitor facilities and improvements needed
- Exhibition, activities and events, programming for visitor needs and diversification of visitor base

It is unlikely that you will have all the resources to deliver everything you would like to or need to. A process of prioritisation will determine which items are on your priority list for the short, medium, and long term. Planning is an ongoing process and priorities may need to change if the evidence base for your planning changes or circumstances change.

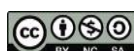
South West Museum Development provides the Organisational Health Check that can support with this prioritisation. Find out more about it [on our website:](http://www.southwestmuseums.org.uk/organisational-health-check)  
[www.southwestmuseums.org.uk/organisational-health-check](http://www.southwestmuseums.org.uk/organisational-health-check)

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## Evaluation in future planning

Evaluation can provide important evidence to inform your future planning and prioritisation process. Understanding your current and potential audiences, their experience of your museum, their needs and barriers will form part of the evidence base for your planning. When planning for audience engagement and development, relevant data will be important to ensure planning is grounded in the needs of the audience.

- 1. Quantitative evaluation** - Visitor numbers and demographic information collected over several years will help you to create a picture of your audience now and how your audience has changed over time. Collecting the same data over several years will allow you to analyse it and identify trends. For example, has the age or gender of your visitors changed, have they travelled further and where are they from? Are you seeing more or fewer families or young people, tourists or locals? Are your visitor numbers going up or down and is this reflected in shop or cafe spend and donations? Which events, exhibitions and displays are popular and which audiences do they bring? If your data is consistent with wider studies, you can also use it for comparison with other museums in your area or of similar size and type. This will allow you to identify how your visitor trends are similar or different to those of other museums.
- 2. Qualitative evaluation** - The visitor experience can be best understood through qualitative data. This will tell you what people think, feel and how they react to your museum. It can be used to understand both visitors and non-visitors' views on future plans for the museum. It can help you understand the needs and barriers of a particular audience that you want to target and the potential popularity or otherwise of proposed programming. Best practice today is to consult audiences and co-design activities with them. Instead of testing the popularity of topics you have chosen for an exhibition, you could invite a focus group to come and visit your collections and listen to the connections or areas of interest they find.

## Testing plans

Testing your plans is critical if you have any large changes in your future plans so that you can understand how your audience may react to the proposed changes. Change has many causes, but the need to match your income and resources to your expenditure, meeting audience and collection needs will be key considerations. You will need to understand the impact that proposed changes may have on your audiences and your volunteers/staff, supporters, and stakeholders. A period of consultation and the analysis of the data it generates, will provide useful data on both existing and potential audiences. This evidence will be key to making the case for any support you need to deliver your plans, including fundraising. It will also help plan your media and communications around the change and manage potential negative comments on social media or local press.

## Planning Cycle

Many museums use a planning document which can be called a business plan, forward plan, or strategic plan. Reviewing this document will be part of the planning cycle and is an Accreditation requirement. To find out more about this type of planning document please see our [resource on forward planning](#) which is available on our website:

<https://southwestmuseums.org.uk/resources/forward-planning/>

Whenever documents are reviewed, evaluation will provide useful evidence and help the museum to build future plans from an evidence base. It can be tempting to save time by relying on your own knowledge of visitors, anecdotal evidence, and previous experience to represent visitors' views. However, this won't give you a complete picture and may overrepresent the views of visitors who have time to chat and complete visitor books.

## Where to start

The first step to using evaluation to inform your plans is to put a plan in place. We have developed a suite of resources on effective evaluation from planning through to carrying out your evaluation, see our other resources here:

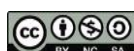
1. Effective Evaluation: Getting Started: [Effective Evaluation – Getting Started - South West Museum Development \(southwestmuseums.org.uk\)](#)
2. Effective Evaluation: Planning - [Effective Evaluation Planning - South West Museum Development \(southwestmuseums.org.uk\)](#)
3. Effective Evaluation: Evaluating Audience Impact [Evaluating Audience Impact - South West Museum Development \(southwestmuseums.org.uk\)](#)
4. Effective Evaluation: Example Plan - [Example Evaluation Plan - South West Museum Development \(southwestmuseums.org.uk\)](#)

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