



Strategic Planning for Railway Museums

(Building Your Museum's Future)

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Outline

- Why do Strategic Planning?
- Creating a Strategic Plan
 - Typical Plan Components
 - Steps to create a plan
- Using a Strategic Plan
- Example
- Q & A / Discussion

Why Strategic Planning?

- Railway preservation is a long term endeavour
 - Looking beyond ourselves, planning for succession
- Planning makes us more effective
 - Increases our focus and helps us keep on track, better use of our hard to find resources
 - Uses hard sought after funds more effectively
- Planning sets common direction – a guide to achieving our future
 - Helps align members to work towards common goals
- A strong plan with evidence that it is being followed is a very effective tool for fundraising and support from needed constituencies

Creating a Strategic Plan

A fundamental planning process.....

1. Where are we today?
2. Where are we going?
3. How do we get there?
4. Results / Review / Renew

The Strategic Plan is Owned by the Museum

Creating a Strategic Plan

1. Where Are We Today?

- **Strengths / Weaknesses / Opportunities / Threats (SWOT)**
 - A solid assessment of the starting point for the plan – from both internal and external perspectives.
- **Distinctive Excellence**
 - Assure that you don't leave behind your best strength(s).

Creating a Strategic Plan

2. Where Do We Want To Be?

- **Vision**
 - Choose your destination – essential to the development of a plan
- **Mission**
 - The purpose of the organization – the foundation
- **Values**
 - What's important to us in how we do things

Creating a Strategic Plan

3. How Do We Get There?

- Core strategy selections and statements of strategy
- Setting of specific objectives
- Assignment of action
- Measurement of results to plan

Creating a Strategic Plan

Making It Happen....

- Making the decision to proceed – typically Board of Directors or Management Committee needs to determine that a plan for the future is needed
 - The organization needs to want to set the course for its future and see value in doing this
- Consider engaging an expert – someone from outside your organization typically can assist in very significant ways
 - An outside view is often hard for insiders to take
 - Facilitation with this process builds an aligned team

Creating a Strategic Plan

Typical steps to starting a plan:

1. Interviews with Board members and key museum leaders
2. Workshop to create the initial plan
 - Typically 2 to 3 days
3. Regular Progress reviews
 - Two or three the first year
4. Annual renewals and setting of objectives

Positioning the Strategic Plan

The Strategic Plan becomes the highest level document for the organization, and drives other aspects of the operational cycle:

- Identifies any operational plans needed
 - Marketing, Collection, Museum Site Development, Operations, Staffing, etc.
 - Strategic Plan should precede and drive the budget process (as it sets the key priorities)
- Identifies fundraising needs and plans
 - Provides the data for the Fundraising “case”

Implementing and Using the Strategic Plan

- Communicate the plan to your members
 - They are most interested in where the organization (and their collections typically) are headed
- Review progress at every board or management committee meeting
 - Keeping the plan and its objectives front and center helps keep focus on priorities and aids achievement
- Keep at the annual reviews for progress
 - Achievement of objectives is the reason for planning and setting goals in the first place, resetting each year keeps things progressing
- Changes will happen!

Strategic Plan Example

WCRA's VISION

The West Coast Railway Association is a world acclaimed leader in the preservation, exhibition and operation of heritage railway equipment and artifacts.

- *WCRA will host 100,000 guests by 2010 at our various venues including the Heritage Park, 374 Pavilion, Western Rails, Off-site mini rail events and Tours. (Results, 2006 = 57,615, 2007 = 64,587)*

Strategic Plan Example

WEST COAST RAILWAY HERITAGE PARK (MUSEUM) VISION:

The West Coast Railway Heritage Park is a leading North American attraction that presents British Columbia's railway heritage in a beautiful natural setting. We will be:

- One of British Columbia's top ten tourist attractions
- Canada's #1 railway heritage attraction
- One of North America's top ten railway heritage attractions
- A business model that sets the standard for others in the railway preservation sector

Strategic Plan Example

WCRA's CORE STRATEGIES

- To succeed as a self funded and self-sustaining non-profit model organization
- To add something new every year
- To have well trained, customer focused staff
- To maintain high standards of preservation and presentation
- To be a major contributor to the Squamish community
- To create a world centre for education and research
- To create a true living heritage experience

Example and Results

Areas of Strategy & Objectives in WCRA's Plan:

- Marketing (including 2010 Winter Olympics)
- Administration / Vancouver Office operation
- Financial Operations / Fundraising
- WCR Heritage Park Development
- WCR Heritage Park Operation
- Railway Operations / Shops
- Collection - Heritage exhibit fleet / Operational fleet
- Rail Tours
- Board of Directors / Staffing

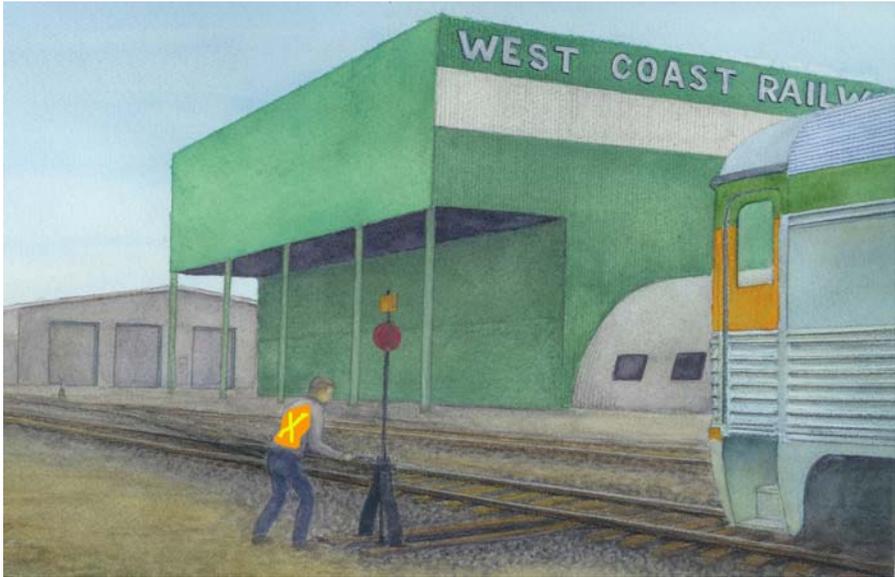
A Strategic Plan also helps you cope with the unexpected...



Royal Hudson - Return to Steam, September 28, 2006



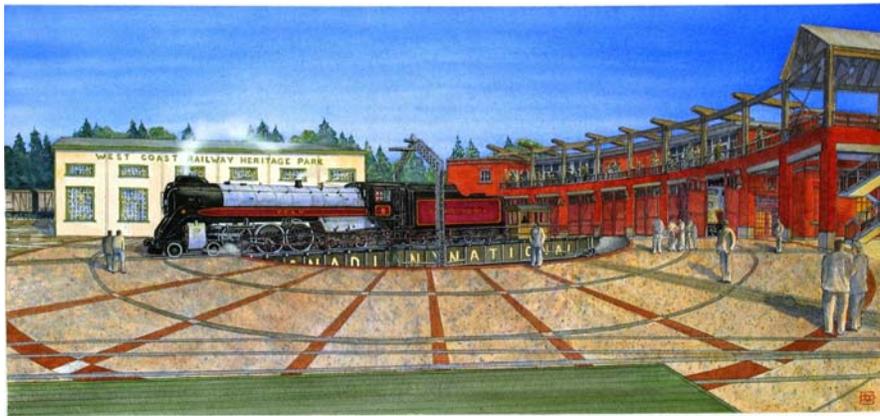
First Annual Steam Day at the Heritage Park, Sept. 29, 2007



BC Rail Motive Power Shops – concept to acquire 2005



Acquired through lease 2006, contract maintenance work established. Now home to WCRA Operating fleet, positive financial contributor 2007, working to purchase in future.



**Roundhouse & Conference Centre at the Heritage Park
Conceived 2005, Funded 2006, Under Construction 2007
Site of ARM 2009 Annual Conference**

Example and Results

Operating with WCRA's plan:

- Objectives are reviewed at every Management Committee Meeting (6 per year)
- Annual review of plan held each November, led by Management Committee with some Board members present as well (1 day)
- Plan reviewed annually with the Board at the December Board of Directors meeting
- Budget for coming year produced aligned to the objectives set in Strategic Plan
- Major reviews of strategy approx. every 3 years

Keeping Your Museum On Track

A strong Strategic Plan can help OERM develop and operate:

- Better – both operationally and financially
- Faster – because you know what your priorities are and stick to them
- More professionally – what fundraisers (and your guests) are after

A strong Strategic Plan increases the chances of long term survival for your museum.