Geographic Forum
Forward Planning Guide

Museums Galleries Scotland
Supporting Scotland's Museums
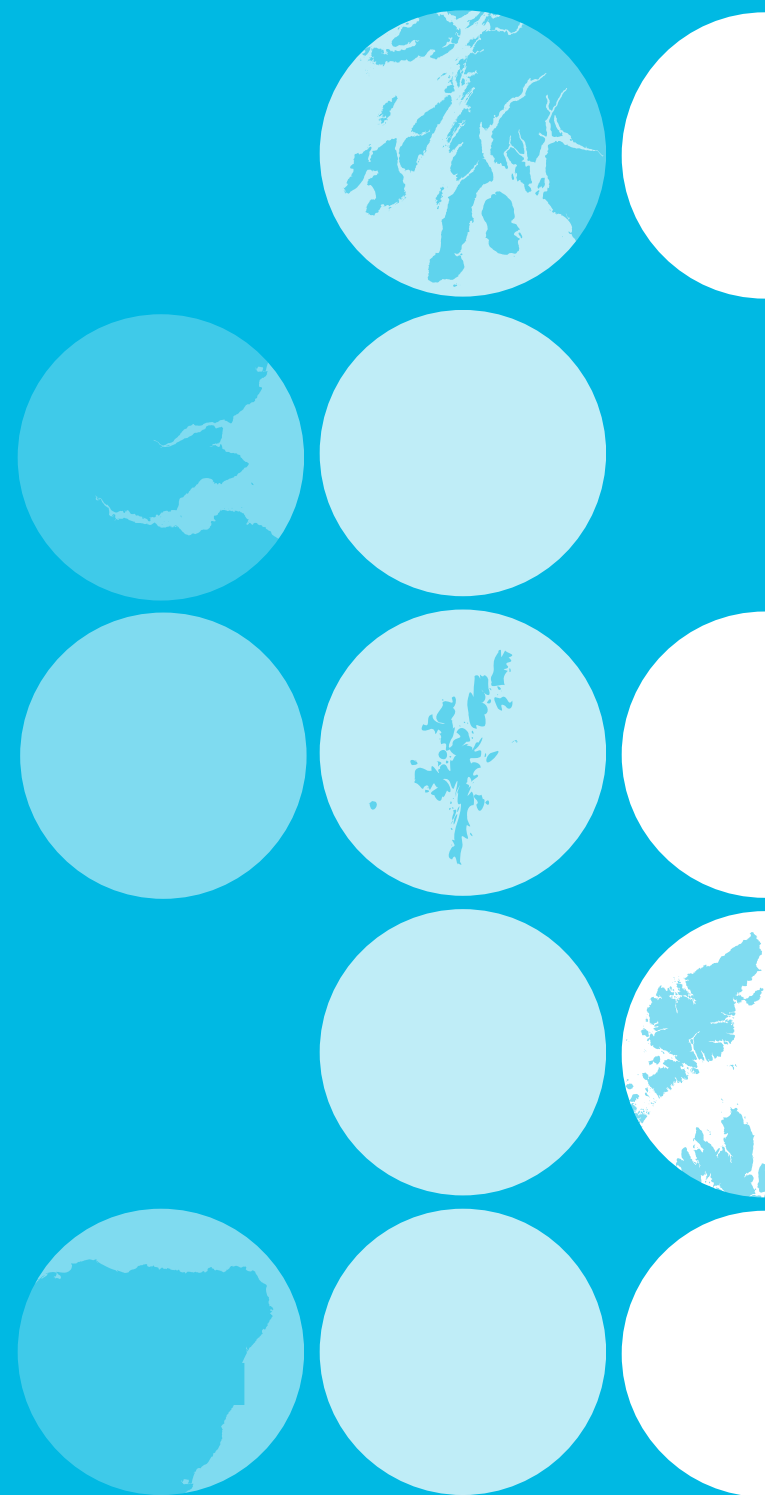
Taing dhan
A' Mhaoin-Dualchais

Made possible with
Heritage Fund

Outline

1.

Introduction

A **forward plan** is a useful document for geographic forums. It helps to outline the direction of the forum and build consensus within the group.

This guide covers the basic steps in developing a forward plan and ensure that forum members can input into the process. The guide can be used in conjunction with the **Forum Connections Forward Plan template** which can be completed as you go along.

Collaboration is an important aspect of forward planning. It ensures everyone understands and agrees on the direction the forum will take. The process outlined in this guide is designed as a collaborative activity. The forums committee should be involved in these activities, as well as any other stakeholders who will add value to the discussions. This ensures everyone's views are represented.

Introduction

This process can take time to complete.

It's important to allow for breaks or even split the work between two sessions. Participant feedback has shown that two sessions of around 1.5 hours has been most effective. The focus of the first session is to gather as many ideas as possible and the focus of the second session is on prioritising the various elements explored in the first.

Timing is a critical part of this process.

Sessions should take place no later than a week apart. This gives participants enough time to reflect on discussions in the first session, without forgetting what was said.

Review

The first step of a forward plan is to review the recent activity of the forum and what has been achieved against the most recent planning document. If the plan isn't recent or this will be the group's first one, it is useful to review the last year.

Fundamentals

It's important when forward planning to understand the purpose of your forum and the shared values amongst your group. These elements must be agreed upon before deciding what activities to do. You can clarify these elements by answering three fundamental questions:

- Why does your forum exist? (**Purpose**)
- How will you achieve what you have set out to do? (**Values**)
- What activities will you undertake to make this happen? (**Actions**)

The collaborative process of creating, or reviewing, these fundamentals is as important as the output itself. It allows the group to come together, reach a consensus, and talk through any differences of opinion. This should be done at the start of each forward plan review to ensure that it remains relevant and the group can adapt to any changing circumstances or membership.

If you are starting a new forum, it is important to have this clearly in place before you start organising activities.

If you are reviewing your forum's work to develop a new forward plan, it is important to check and make sure that these elements are still relevant to your group.

Review

Why?

If your forum is well established, your statement of purpose or mission statement may already exist. Your current forum group may not have looked at this statement since it was written.

Essentially, this statement is the answer to "Why does your forum exist?". It should be no more than a couple of sentences and state the contribution the Forum will make, and the impact that this will have as a result.

> **Example: The [insert forum name] exists to strengthen ties between like-minded organisations in order to better promote the region and its heritage.**

The statement of purpose should reflect the needs of your membership. It should also be a statement that everyone has agreed upon. Reviewing the statement of purpose regularly will ensure that it remains relevant. Everything included in the forward plan should work towards fulfilling this purpose.

Exercise: Asking Why

Goal	To get participants to talk about their reasons for being part of the forum. Either as individuals or organisations.
Set-up	In pairs or small groups, each person will have the opportunity to answer the questions: *"Why are you a part of this forum?"* and *"Why is that important?"* Make a note of each answer, either on a flipchart or online whiteboard (see the **Digital Tools** section on p.14). By the end of the exercise, you will have a list of reasons for being part of the forum. As a group, discuss commonalities and differences in the answers.
Time	10 minutes.
Benefits	Allows all participants to express their main motivations for the forum Provides a list of reasons for the forum's existence Allows for any differences to be aired A good base to produce a purpose statement for the forum
Possible issues	When discussing priorities, emphasise everyone's reasons for participating in the Forum as equally important. This helps participants feel validated even if their motivations or "why" are a lower priority than others.

By reviewing the reasons 'Why' forum members participate, you can ensure that their motivation broadly fits with the mission of the Forum. If it does, you can move on, knowing that everyone is still on the same page. If not, the statement needs to be reworked.

Review

Prioritising

If your purpose statement needs to be reworked, examine everyone's reason for being part of the forum for similar themes. Make a note of these and ask everyone to vote on what the most important aspects for the group should be. Use the top ones to form your new purpose statement.

For example, if a few responses to the **Why?** exercise were:

- To share information
- To find out what other museums are up to
- To extend my network of colleagues

then a part of your purpose statement should include something about collaboration or networking.

Once your purpose statement is agreed, you can add it to the **Forum Connections Forward Plan template**.

Review

How?

The next step looks at **how** you will achieve your purpose statement, not through specific activities, but the *values* that the forum incorporates to achieve its aims – "how will our forum realise our purpose?"

A few examples of value words could be collaborative, supportive, innovative, outward-looking, agile, inclusive.

An excellent way to decide your values is by exploring the **Strengths**, **Opportunities**, **Aspirations** and **Results** within your forum. This is known as a **SOAR Analysis** exercise. Doing this will highlight the common values that are present in your work or goals.

Exercise: SOAR Analysis

Goal	To analyse the current state of the forum and identify future opportunities. A variation of the SWOT analysis but focuses on positives and the future.
Set-up	Divide into two breakout groups, each looking at one aspect of SOAR (Strengths, Opportunities, Aspirations, Results). Give each group 10 minutes to discuss and write down their main points on flipchart paper. After the 10 minutes each group will move on to the next topic. They will then add to the previous group's work.
Time	45 minutes.
Equipment	Flipchart or online whiteboard (see the **Digital Tools** section on p.14)
Benefits	Allows the group to work together to share ideas.
Possible issues	Group discussions can be dominated by individuals. Try to ensure that everyone gets a say.
Digital equivalent	Use breakout rooms and online whiteboard. Have the groups discuss each aspect for 10 minutes each. Return to full group and ask the groups to talk through their main points for SOAR.

10.

Exercise: SOAR Analysis

At the end of this exercise, you will have explored:

- the key strengths in your forum,
- the opportunities external to your forum that you can take advantage of,
- the aspirations of the group over the period of the forward plan,
- the tangible outcomes and activities that you want to undertake.

From these responses you can determine the values of the forum, particularly from the strengths and aspirations aspects.

Once you have a list of the common values, like the ones below, you can vote on the ones that are most important. We recommend limiting it to a maximum of five key values for the forum.

An example of values written in EasyRetro, an online whiteboard tool

Exercise: SOAR Analysis

Once you have narrowed down the top five values you can be more specific on what each value means to the forum.

Think about how the value fits into the forums purpose and how it will help you to achieve your aims. For example:

- Supportive – as a forum we will endeavour to ensure that all our activities provide support for our membership.

You can now add these values in the Key Aims section of the **Forward Plan template**.

How are you going to achieve your forums goals? What are your forum's values?

desc

+

Collaborative - activities conducted by the forum are delivered together with input and benefit to the majority of members

👍 3 💬 0

Supportive - as a forum we will endeavour to ensure that all our activities provide support for our membership

👍 2 💬 0

Dynamic - able to react to opportunities that present themselves

👍 2 💬 0

Innovative - working to develop new activity and goals for the future

👍 2 💬 0

Resilient structure - the forum has a structure with clear roles and succession planning in place

👍 1 💬 0

Sharing expertise - willing to share expertise across the forum for the benefit of all

👍 1 💬 0

An example of values written in EasyRetro, an online whiteboard tool

12.

Review

What?

The final question to answer is on activities. **What** activities will the forum undertake that fulfil the purpose statement and are in line with your values?

The discussions held on **Why** and **How** will inform the next exercise. Look at the SOAR analysis activity and focus on the Opportunities and Results. What activities were found that take advantage of opportunities and fulfil your objectives?

Some examples might include (but are not limited to):

- An annual event
- Knowledge sharing between members
- Upskilling
- Growing the forum membership
- Joint promotion

When you have identified these activities, you can prioritise them using a similar tool to the values exercise. Using the **SMART** acronym, your activities should be:

Specific – you should be able to succinctly say what the activity will do and what it will achieve.
Measurable – how will you measure the success of the activity? Set benchmarks so that you know whether the activity has met them.
Achievable – make sure activity has ambition but be realistic in what the group can achieve.
Relevant – ensure it fits into the overall purpose and values of the forum.
Time-bound – set an agreed timetable to undertake the activity.

It's also good practice to assign someone, or a group of people, to be responsible for that activity.

You can now fill out the final table in the **Forward Plan template**. It is up to you to decide how far into the future you want the forward plan to go. Usually, this is between 1-3 years.
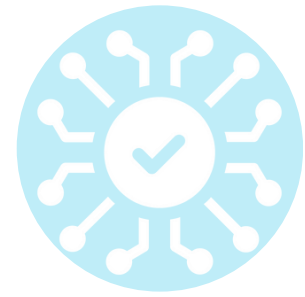
Digital tools

The forward planning process can take place either in person or online.

An online whiteboard is needed if you are holding this online. The whiteboard will help keep track of the notes from the various activities and allow participants to collaborate remotely.

Online video conferencing platforms are becoming more sophisticated. Both Zoom and Teams have an integrated whiteboard that can be used to brainstorm as a group during meetings. This can be saved and exported for future reference.

There are other whiteboard tools to choose from. Below are some examples of useful digital tools that can help you to facilitate your session.

Digital tools

Google Jamboard
An online whiteboard that allows participants to add sticky notes and create multiple slides for input. Please note that Jamboard will be discontinued from December 2024.

Cost: Free
Link: https://jamboard.google.com/

EasyRetro
An online whiteboard that allows easy creation of lists. Includes a voting tool. This is useful for prioritising activities.

Cost: Free version allows 3 board creations.
Link: https://easyretro.io/

Mentimeter
An online presentation tool that allows for participants to contribute to discussions in writing and can be done anonymously.

Cost: Free version allows for up to 50 participants per month
Link: https://www.mentimeter.com/

1. Strengths

What the forum does well, along with its key assets, resources, capabilities, and accomplishments.

Diversity of membership organisations	Wide range of expertise	Range of job roles involved; curators, managers, volunteers etc.	Expanded awareness of what is going on in the area	Communication: open and supportive group dynamic
Have money in the bank account		Cross promotion of activities	Promotion beyond the region	Local area/history knowledge
				Shared learning resources
Regular, well attended meetings	Hybrid working model	Pivoting to online meetings and events	Willingness to adapt to new situations	

An example of a Google Jamboard

Maintaining your plan

At the end of this process, you should have a basic forward plan for your forum that focuses on its purpose and provides a guide for the upcoming years. More details can be added to this basic template. There is also space in the template to add financial information. This is optional as not all forums have bank accounts or need for funding.

It is important to refer to forward plan regularly and update it so that it remains relevant and useful.

You'll need to review progress and plan ahead before your chosen timescale for the forward plan ends. For example, if your forward plan is for three years you should begin exploring your next steps about six months before the plan comes to an end. This will help you to assess what has, and what hasn't, been successful, and to decide on how you will build on your successes in the coming years.