

Assignment #4: From Policy to Practice – A Tactical Plan to implement the Strategic  
Plan

Organization & Management of Museums

submitted by

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April 4, 2015

## Introduction

We reviewed the 2016-2019 Strategic Plan to see how it may affect the roles of the Programming Coordinator and Education Officer for the Brant Historical Society. One of the priorities for the organization from the strategic plan focuses on Educational Programming that we provide to schools in the community. Through this report we will explore the goals and objectives in the strategic plan and produce a tactical plan to help guide priorities for this position. The report concludes with 5 recommendations to ensure that the Strategic Plan's goals are met and evaluated at the end of the year 2019.

## Background Information

The Program Coordinator initiated the creation of a new strategic plan for the Brant Historical Society, as they could not locate a printed or digital copy of an existing strategic plan. Afterwards, a copy of the 2014-2018 strategic plan generated by an earlier Executive Director was found. This plan had an ambitious 6 strategies that needed to be addressed, too many for a 4 year period. As there were multiple priorities, many of these priorities were forgotten about and the organization has evolved so that portion of this plan were out of date.

In the 2014-2018 strategic plan, the following strategy was identified:

- “4. Ensure all programming is consistent with the Mission.
  - A. Determine the education needs of the school boards and what they are willing to pay for and develop programming to meet their needs ensuring a source of revenue.
  - B. Leverage the lab resources offered by Nipissing University to develop programmes taking advantage of using contemporary technology to deliver engaging content.” (Brant Historical Society, 2013, pp. 2)

It is important to note here that no tactical plan for implementing this strategy and these objectives was ever developed. In terms of evaluation of these original ideas, all existing programming was consistent with the Mission of “using education to engage the community” (Brant Historical Society, 2013, pp. 1). It appears that the school board was not consulted about educational programming at all. Nipissing University has only been able to contribute alternative placement students who assist with the implementation of children's programming. The lack of a tactical plan and constant staff turnover likely led to these priorities not being achieved.

As the 2014-2018 strategic plan was not acted on, the Program Coordinator started in December 2015 to create a new and revised strategic plan for the organization. This was submitted to the President of the Board of Directors for feedback and improvements to the strategic plan. This resulted in a consultation with the Board of Directors at their January meeting and passage of the proposed strategic plan at their March Board Meeting.

The second strategy again highlights educational programming as priority for the organization going forward. Education Programming has been recognized as

a very effective revenue tool that can devote monetary resources to cover administrative expenses. These programs also play a vital role in fulfilling our mandate. The strategy was better laid out with clearly defined goals and objectives, which are:

<b>Goals</b>	<b>Objectives</b>
Maintain a portfolio of educational programming consistent with curriculum development for primary schools	<p>Continue to update programs reflecting First Nation content delivered at primary school level.</p> <p>Develop content reflecting impact of immigrant history in Brant-Brantford region.</p> <p>The organization will continue to develop programming to be offered to elementary school groups at Myrtleville House Museum including school bookings, PD Camps, and Summer Camps.</p>
Develop an education program offering for secondary schools	<p>Develop a GPS related program targeting geography, urban development and history students.</p> <p>Develop local history content for secondary students studying history, political science and urban development.</p>
Develop a program offering for post-secondary students	<p>Provide access to Laurier students studying Community History to the BHS collection.</p> <p>Provide training opportunities for students carrying out research in local history and collection management.</p>

(Brant Historical Society, 2016, pp. 2-3)

These two background documents form the basis of creating a tactical plan to address these 7 objectives approved by the Board of Directors of the Brant Historical Society.

### Methods

Developing a tactical plan to execute the above goals and objectives is the main focus of this report. Research was conducted on tactical plans in order to find an appropriate approach for developing this tactical plan. A tactical plan is

“short range planning that emphasizes the current operations of various parts of the organization. Short range is defined as a period of time extending about one year or less in the future” (Management Innovations, 2008).

We employed this philosophy in our approach to developing a tactical plan.

After searching images on the Internet of examples of tactical plans, it was decided that a chart format would be the easiest way to convey the broad approach to the tactical plan on one page. We listed the Specific Objectives that we wanted to achieve and described a broad tactical plan. The most prudent implementation the tactical plan was based on the current situation of staff so that they can see how the tactical plan does not appear to be overwhelming. Finally, as mentioned by Management Innovations (2008), we broke down this tactical plan into tasks that can be accomplished within an annual period.

When formulating the tasks, we designed them using the backwards-design approach. This approach asks us what we want to accomplish and design backwards from our task to meet our goals outlined by the strategic plan. This chart can also be used as our rubric for how we assess our execution of the tactical and strategic plans throughout the year, at the end of each year as a formative assessment, and at the end of our three-year cycle as a summative assessment.

We further implemented the SMART concept, first introduced by Dorin (1981). This idea suggests that goals produce should be Specific, Measureable, Assignable, Realistic, and Time-related. All the goals in our chart follow this philosophy. All the goals are specific in a quantifiable, and therefore measurable, number of products they aim to produce within the time period of a year. Each task assigns the responsibility to an existing member of staff so that it is assignable. When we look at any one line, the goals appear to look realistic and roughly distributed between the two existing staff. For these reasons we believe that we have created a valuable tool that is useful in planning, implementation, formative assessment, and summative assessment of the tactical and strategic plans.

## Results and Analysis

### Details of the Tactical Plan

The tactical plan is consists of five tasks that should be done on an annual basis (See Appendix A). The first of these tasks involves a review of existing programs to find connections to First Nation Communities. Brantford is a community located beside the largest First Nation community in Canada and groups are highly represented in local school populations. Twelve existing programs will be review for connections with First Nations content that may be included as part of the education program to reflect these populations. Additionally, this directly relate Recommendation 12 of the Truth and Reconciliation Commission’s Final Report (2015) where it states “We call upon the federal, provincial, territorial, and

Aboriginal governments to culturally appropriate early childhood education programs for Aboriginal families.”

The second tactical plan is to connect with one immigrant community each year and develop a program or special event in collaboration with that immigrant community. We have left this broad enough that it provides a loose and adaptable framework, as we may not always wish to engage with different communities in the same manner. The goal is to engage with these immigrant communities in a way that celebrates our similarities and highlights differences in a respectful manner to the immigrant and local communities.

The next point in the tactical plan is continue the creation of new PD Camp and Summer Camp content and create a new educational program for the first two years and two programs in year three. Most of our existing programs focus on the primary years with few programs above a Grade 4 level. This plan attempts to address that programming gap by creating four new programs at the Junior and Intermediate levels (Grades 4-8). It is suggested that this could be worked on during slower periods at Myrtleville House Museum, such as the beginning of the school year and the calendar year.

Creating high school education programs and integrating technology into those programs is the fourth point in the tactical plan. This is the task that is most adaptable as the Education Officer or the Programming Coordinator could execute this portion of the tactical plan. Depending on workloads throughout the year, this priority may be shifted to either staff member. The organization has no high school programs, which directly affects the future membership of the organizations and this point in the tactical plan aims to bridge that gap.

The final point of the tactical plan involves the collaborative relationship that we are fostering with Laurier Brantford. The long-term goal would be for History majors and minors at Laurier would be required to purchase a membership for the Brant Historical Society. In return, there would be an educational opportunity each year that students we need to use the resources at the museum for a class assignment, project, or any other educational opportunity. This will engage with the next generation of heritage workers with hands-on practical experience in the field and provide some additional revenue to the organization.

The tactical plan discussed above provide a framework for the implementation of the Brant Historical Society’s strategic plan between 2016-2019. The plan is comprehensive showcasing its benefit in the planning, implementation, formative assessment, and summative assessment of the tactical and strategic plans. Overall, the tactical plan uses 5 tasks to implement 7 objectives and 3 goals of the strategic plan.

### Recommendations

Recommendation 1: The Board pass a motion to allow staff to start the implementation of tactical plan and work towards the goals and objectives established in the Strategic Plan 2016-2019 for the Brant Historical Society.

The board should discuss the above proposal and make necessary changes to the recommendations and framework of the program so the staff can start working toward the implementation of the tactical plan.

Recommendation 2: The Board should receive reports on a quarterly basis from staff on the progress of tasks for that year.

This recommendation allow for staff and board collaboration and feedback in the process in addition to other stakeholders (community members, volunteers, and members).

Recommendation 3: All related staff members should collaborate and be involved in the process of implementation of the tactical plan.

Members of staff should organize meetings from time to time to discuss their contributions to completing the tactical plan. Implementing the tactical plan will have ripple effects. For example, in adding new programs to the museum will require our staff website administrator to add these programs to our website. This example showcases why all related staff should meet regarding the implementation of the tactical plan.

Recommendation 4: The Board should allocate annual budgets to help guide the staff in the financial implementation of the plan.

In the absence of an Executive Director, the Board has consistently provided budgetary frameworks to staff that ensure that they do not negatively impact the financial stability of the organization. Providing a budget for each action on an annual basis will ensure costs of implementing the tactical plan do not balloon out of control.

Recommendation 5: The Board should complete an analysis in 2020 on the impacts of this tactical plan and its success in completing the objectives and goals of the strategic plan.

Investing significant resources in implementing a tactical plan suggests that there should be some evaluative tool where we can highlight success and identify opportunities for future projects. The analysis of this strategic plan will be very important in revising or improving the next strategic plan.

### Conclusions

This report aims to create a tactical plan that acts on the Education Program priority established in the strategic plan for the Brant Historical Society for 2016-2019. In researching our method, we established that a simple tactical plan designed using the backward-design method, making SMART goals, and implementing recommendations of the Truth and Reconciliation Commission. We

propose 5 tactics that will accomplish the 3 goals and 7 objectives of the strategic plan. The tactical plan created is a valuable tool that can be used from the initial planning stage to the final summative assessment stage. We suggest 5 recommendations that should be acted on to assist with furthering of the proposed tactical plan. The Board should discuss this report and liaise with staff for guidance so that we can accomplish our long-term goals for the Brant Historical Society.

### References

Brant Historical Society (2013). 2014-2018 Strategic Plan.

Brant Historical Society (2016). 2016-2019 Strategic Plan.

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Management Innovations. (2008, Dec. 10). Tactical Planning vs. Strategic Planning. [Web log Post]. Retrieved March 22, 2016, from <https://managementinnovations.wordpress.com/2008/12/10/tactical-planning-vs-strategic-planning/>

Truth and Reconciliation Commission of Canada. (2015). Truth and Reconciliation Commission of Canada: Calls to Action. Retrieved from <https://www.documentcloud.org/documents/2091412-trc-calls-to-action.html>

### Appendix A: Tactical Plan for Education Programming

<b>Objective</b>	<b>Tactical Plan</b>	<b>Year 1 Target</b>	<b>Year 2 Target</b>	<b>Year 3 Target</b>
Continue to update programs reflecting First Nation content delivered at primary school level.	Conduct review of programs to Ontario Curriculum Documents that enhance First Nation Content.	The Education Officer will review four of the Primary Level Education Programs	The Education Officer will review the other four Primary Education Programs	The Education Officer will review the Junior and Intermediate Programs.
Develop content reflecting impact of immigrant history in Brant-Brantford region.	Connect with an immigrant community to share the history of communities together, embracing commonalities and respecting differences.	The Programming Coordinator will connect with a community in Year 1.	The Programming Coordinator will connect with a community in Year 2.	The Programming Coordinator will connect with a community in Year 3.
The organization will continue to develop programming to be offered to elementary school groups at Myrtleville House Museum including school bookings, PD Camps, and Summer Camps.	Create new programs to enhance existing programs. Continue to develop new unique themes for PD and Summer Camps.	The Education Officer will create a new education program in Year 1 aimed at the Junior Level.	The Education Officer will create a new education program in Year 2 aimed at the Intermediate Level.	The Education Officer will create two education programs in Year 3 with one each at the Junior and Intermediate Levels.
Develop a GPS related program targeting geography, urban development and history students.	Create a new education program using technology to engage students in learning history and related disciplines	The Programming Coordinator will create an education program aimed at the High School Level Classes in Year 1.	The Programming Coordinator will create an education program aimed at the High School Level Classes in Year 2.	The Programming Coordinator will create an education program aimed at the Elementary Level in Year 3. Develop an education program aimed for an "in class" experience.
Develop local history content for secondary students studying history, political science and urban development.				
Provide access to Laurier students studying Community History to the BHS collection.	Connect with Laurier History Department to develop connections with courses offered at Laurier where they can engage with the collection.	The Program Coordinator will connect with one Laurier class and provide an educational opportunity.	The Program Coordinator will connect with two Laurier classes and provide educational opportunities.	The Program Coordinator will connect with at least one Laurier class and provide an educational opportunity.
Provide training opportunities for students carrying out research in local history and collection management.				