

Digital Strategy Template for Welsh Museums



Llywodraeth Cymru
Welsh Government

Introduction

Headland Design was appointed by Welsh Government to support staff, volunteers and trustees working in Welsh museums to look strategically at their digital activities and to consider how they could better use digital technology across all aspects of their work for the benefit of the museum, its collections and visitors. Helping museums to think strategically about how they employ digital elements will equip staff, volunteers and trustees to improve a range of operations, including collections management and documentation, digital preservation, interpretation, marketing, digital events and providing for online users.

This work has involved several training sessions, which were open to all Accredited and working towards Accreditation museums in Wales, and a series of workshops for nine participant museums who took part in a digital activities assessment and were supported in developing a Digital Strategy. This Digital Strategy Template has been produced as guidance for museums wishing to write a digital strategy. Although designed with Welsh museums in mind, the Digital Strategy Template could be used by museums across the UK, together with other organisations within the cultural sector, such as archives and libraries, as many of the themes are cross-cutting.

As part of the brief for the work, Welsh Government asked that the Digital Culture Compass be used as the tool for assessing current digital activities and making initial decisions about areas of priority for the near future. The Digital Culture Compass (DCC) was commissioned by the Arts Council and National Lottery Heritage Fund to support people working in arts, cultural and heritage organisations to assess their digital activities. No previous digital experience is needed to use the DCC and the toolkit has been designed to be simple to use and jargon-free.

There are two **Digital Wayfinder** tools to help organisations prepare for their digital assessment: the Approach Wayfinder and the Capabilities Wayfinder. The Approach Wayfinder provides a snapshot of the organisation's digital approach and draws on best practice. It consists of ten quick questions, which should take

about 15 minutes to answer, to help organisations think about their overall digital approach, including areas for improvement. The Capabilities Wayfinder provides an overview of the organisation's capabilities across 14 areas of digital activity and encourages them to think about their maturity levels in relation to these categories. The questions asked are more detailed than the Approach Wayfinder and should take about 45 minutes to answer.

The **Digital Culture Compass Tracker** is the tool used to conduct the organisation's digital assessment. There may be a range of reasons for a museum to undertake a digital assessment, such as, creating or revising a business plan, conducting an annual review of digital activities, reviewing specific aspects of digital output, e.g. the effectiveness of social media or marketing and considering a range of digital activities across the organisation.

The Tracker divides a museum's activities into 12 areas:

1. Strategy and Governance
2. Programme
3. Places and Spaces
4. Collections
5. Marketing and Communications
6. Research and Innovation
7. Talent and Sector Development
8. Fundraising and Development
9. Enterprise
10. Human Resources
11. Information Technology
12. Finance and Operations

These 12 categories are explained under 'Structuring your Digital Strategy - Where are we now?'

Why develop a Digital Strategy?

Digital is now an inescapable element of our personal and working lives, and most museums have incorporated digital activities into their front and back of house operations to help improve visitor experiences and enhance our capacity to manage and care for collections and sites. Consequently, digital provision, and keeping up with technological advances and opportunities, has become increasingly important in recent years. A strategic approach to the use of digital in museums is essential and a key challenge facing the modern museum sector. Increasingly, digital activities are being incorporated into museum policies and plans, including those required for Accreditation.

Digital provision is growing as a key element of the museum experience and can sometimes constitute the whole experience if audiences are accessing content remotely, such as virtual tours and online catalogues to conduct research into collections. Digital platforms are also an important aspect of people's pre-visit experience; potential visitors may explore museum websites and social media platforms to ascertain whether a site appeals to their interests and can cater for their needs. As technology develops and becomes an ever-more present and intrinsic part of everyday life, visitor expectations are changing and their visiting behaviours are shifting. Furthermore, the explosion of digital use as a result of the Covid-19 pandemic introduced the digital world to a wider range of users and through necessity, showed museums what can be possible with digital - what they could achieve outside of the physical - and opened up new potential. The use of digital in museum contexts is reshaping how our audiences are experiencing heritage, art and culture, and digital media is likely to remain a vital means of connecting people to our collections and sites. However, it must be remembered that museums are all about objects, and there is no substitute for engaging with collections and venues in person. Digital options may present important alternatives and provide access for those who cannot visit in person, and can be used to enhance the visitor experience, but digital can also be used to encourage physical visits to our museums.

The current and future importance of digital to the development of the modern museum sector, and our ability to best serve our audiences, means it is vital that we approach how we employ digital tools and methods strategically. This will ensure that digital activities align with the overall vision and purpose of our organisations and can contribute to achieving our aims and objectives.

Getting started

The first task is deciding the lifetime of your Digital Strategy. Three or five years is a good place to start. Digital technology advances at such speed, that you may find the goals of a longer strategy are outdated by the time you reach them. However, it is whatever will work best for your organisation. You may find it helpful to refer to your Forward Plan or Strategic Plan when making this decision, as you will need to align your digital goals with your overall strategic goals.

When writing your Digital Strategy, consider the audience of the document. Who is most likely to read it? Will the readers be trustees, your governing body, particular members of staff, potential funders? Will your audience require any further support to access the document, for example, if they have limited digital knowledge and experience?

Before embarking on writing a separate Digital Strategy, think about whether you could incorporate digital elements into existing policies and plans instead. Do you need a separate strategy or could the digital elements you want to introduce be factored into documents already in use (as part of a regular policy or plan review process) or those in development?

Structuring your Digital Strategy

The following offers a suggested structure for your Digital Strategy. Under each heading, advice is given about the type of information to include.

Suggested contents for your Digital Strategy

1. Where are we now?
2. Strategic principles
3. What are we going to do?
4. Resources
5. Action Plan
6. Risks
7. Review and data collection
8. Glossary of terms

1 Where are we now?

Your Digital Strategy will open with an introduction to the museum and any current digital activities. Here, you will give an overview of your site (or multiple sites if the strategy is to cover several) and any digital provision already in place as part of the current visitor experience. You may also like to explain how you use digital to manage and give access to your collections, and the nature of your online presence (e.g. website, social media platforms, online catalogue).

In this introductory section, it is important to reference other associated policies and plans to which the Digital Strategy will relate; for example, your Forward Plan, Collections Development Policy and Plan, Interpretation Strategy, Access Policy and Plan and Learning Policy and Plan. You may also like to state how your Digital Strategy will align with local and national priorities, such as relevant policies and plans produced by your local authority or partners, and those relating to the whole country, such as the Welsh Government's Digital Strategy for Wales.

It is also important here to explain why you have chosen to write a Digital Strategy and the areas of digital provision that will be explored in the document. Your strategy should have a clear focus – you can't do everything at once – so you need to choose a few key areas of digital activity to concentrate on for the lifetime of the document.

There are several areas of digital activity that you might want to consider for your Digital Strategy. The following are the categories used in the Digital Culture Compass. These 12 categories set out areas of a museum's operations, all of which may involve the use of digital. It should be noted that not all of these categories will be relevant for all museums. For example, you may not have direct control of your HR systems or the management and procurement of IT, and if that is the case, you can discount those categories from your assessment.

Digital category	Explanation
Strategy and Governance	How your organisation develops its strategic focus and oversees its delivery, including decision-making and prioritisation of resources. Unincorporated organisations may have less formal strategy and governance but all Accredited or working towards Accreditation museums will have something in place.
Programme	The artistic, cultural or heritage programme(s) of your organisation, for example, exhibitions and displays, performances, festivals, workshops, events or other experiences. How they are commissioned, curated, developed, produced, co-created and interpreted. How audiences, visitors or participants view, engage, experience, learn or participate in them.
Places and Spaces	Managing, occupying, owning and leasing: building(s); exhibition and event venues; monuments; heritage assets (including industrial, maritime and transport); natural and designed outdoor spaces; landscapes and other public amenities.
Collections	Developing, caring for, documenting and using collections in museums, libraries and archives. Collections include: physical items; digital copies; collections information; 'born-digital' material and intangible cultural heritage recorded as audio or video and other media that can be managed as digital assets. For interpretation of collections and public access, see Programme.
Marketing and Communications	Reaching, communicating, engaging, and building relationships with target groups, including audiences, visitors and other important stakeholders, to achieve your objectives, including income generation.
Research and Innovation	Audience research, market research, evaluation of activities and other forms of applied research. Experimental development of new products, services, experiences or ways of working. Activities may be internal or include external academic or commercial research partners.
Talent and Sector Development	Providing training, capacity building and supporting development for people outside of your organisation. For similar activities for your staff and volunteers see Human Resources.
Fundraising and Development	Raising money (e.g. grants, donations and sponsorship) and in-kind contributions to support your objectives. Managing relationships to enable fundraising and development, including liaising with funders about the delivery of funded activities.
Enterprise	Income generating activities that are not central to your artistic, cultural or heritage programme, for example, retail, hospitality, space hire, merchandising, licensing or the sale of consultancy services.
Human Resources	Recruitment, management, training and development of your staff, contractors, freelancers, volunteers and other members of your wider team.
Information Technology	Management of information technology and systems across your organisation, including hardware and software used for back of house and front of house operations and Cyber Security to offer protection.
Finance and Operations	Management of finances, offices and worksites, operational processes and legal affairs.

Structuring your Digital Strategy

In preparation for writing your Digital Strategy, you may find it useful to note your strengths and weaknesses alongside these categories or even to conduct a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis. This will help you to identify areas of potential development and also highlight what you're currently doing well and can build upon. The process will also help you to identify your key digital priorities for the lifetime of the document and set out challenges and opportunities to be addressed through your Digital Strategy.

When setting out your current digital situation, it will also be helpful to state how you currently collect data about, for example, your digital activities, digital

users, the effectiveness of digital outputs, interaction with digital interpretive elements, website visits and social media engagement, together with how you use that data. Do you analyse the data you collect? If so, how, and how do you use what you've learned to make improvements. If you're collecting data or more qualitative feedback from digital users, but not currently using what that data/information is telling you to best effect, that might be a priority to include in your Digital Strategy. If you are currently analysing and making use of data/information, are there improvements that could be made, which might form part of your Digital Strategy?

Considering our digital wellbeing

Wellbeing is not something that is raised in the Digital Culture Compass toolkit, but it's important to consider the impact of digital work and technology on the wellbeing of our staff and volunteers. It's easy to be overwhelmed by a packed email inbox and feel we must reply to all messages straight away, making us fall behind with other tasks that need to be completed. It's also tempting to check emails outside of working hours and feel you must reply. We must also be aware that not all colleagues will feel equally confident and capable of engaging with digital, and there may be some with limited digital experience, which could lead to anxiety and feelings of inadequacy or being left behind. Consequently, it's important that museums consider including something in their Digital Strategy about

how they will ensure that those using digital (whether front of house or back of house) feel well supported and able to switch off whenever they need a break. That might be setting boundaries for when they will be available via email and to answer emails, or scheduling screentime breaks where they can engage in other activities or simply take a walk in the fresh air to recharge. You might find it helpful to ask colleagues and volunteers what would help to support the promotion of their wellbeing when it comes to digital to ensure your organisation's Digital Strategy is taking the right approach and factoring in effective measures that will directly benefit those working with digital technology and on digital projects.

2 Strategic principles

This is where you will state the strategic goals of the Digital Strategy for the lifetime of the document. It is important that this aligns with your organisation's overall vision and purpose to ensure they are working together to achieve your aims and objectives. Look at your organisation's Forward Plan or Strategic Plan to identify key strategic goals, which will match well with what you're hoping to achieve through delivering your Digital Strategy. For example, your Forward Plan may state that you plan to put visitors at the heart of everything you do and you intend to invest in training and skills for staff and volunteers. Both of these overarching strategic goals would translate well to a Digital Strategy, where you may set out plans to develop digital elements to improve the visitor experience, and set up programmes of training and skills development to better equip staff and volunteers for working in an increasingly digital workplace.

Listing principles for your digital activities will guide and focus your decision-making while delivering the Digital Strategy. It will be useful to explain why you've chosen these principles and how they will help you to deliver the strategy and align with your organisation's overall strategic focus.

You may find it helpful to refer to some example digital strategies produced by other museums to see how they have set out their strategic principles in relation to their digital activities. Try looking at Amgueddfa Cymru's [Digital, Data and Technology Strategy](#).

3 What are we going to do?

Here is where you will set out the digital tasks you'd like to undertake within your organisation and how you are planning to make them happen. What will this strategy help you to achieve? Will these digital developments feed into any other aspects of the museum's operations or be a catalyst for change elsewhere? For example, will the strategy introduce digital elements to areas of the museum's operations where it hasn't been used before to create an overall 'digitisation' of your museum, or will you focus on projects in particular areas or departments?

You may find it helpful to choose several key areas of action from your organisation's overarching strategic document, which hold potential digital opportunities. For example, if your Forward Plan states that you want to develop other potential income

streams, your digital opportunity may be to develop ticketed digital events based on the museum's collections and associated heritage, or if you want to enhance the visitor experience beyond graphic panels and displays, your digital opportunity might be to introduce sound through digital soundscapes and oral histories.

Here, you will set out a long list of digital tasks that you would like to achieve. In section 5, you will choose several of those tasks to prioritise for the lifetime of the strategy. You might find it helpful to organise the tasks in a table using the Digital Culture Compass activity categories (those you have chosen to focus on in your strategy) like in the example below.

Activity category	What we are going to do
Collections	Introduce a new Collections Management System. Aim to digitise 50% of our collections by 2029. Provide training and skills development for staff and volunteers to facilitate digitisation and optimise our use of our new CMS.
Programme	Create online exhibitions to provide greater access to our collections and stories. Develop a programme of online talks linked to our collections and heritage.
Marketing and communications	Expand our online presence by exploring the use of Instagram Reels, Facebook Shorts and YouTube to extend our reach and grow our digital audiences. Develop staff to camera videos to give people a behind the scenes peek into life at the museum.
Research and innovation	Improve data collection and analysis to inform operational development. Explore digital means of evaluating exhibitions, events and other outputs.
Fundraising and development	Launch an online donations portal hosted on the museum website. Make use of digital newsletters to keep in touch with former and potential donors.
Enterprise	Develop and launch an online shop. Explore licensing of collections for use by artists, designers and other users to generate a new income stream.

If your strategy is going to cover several different venues, you will need to say how those sites will work together to achieve the digital aims and objectives identified. Will you have a digital committee or members of staff at each site responsible for delivering the strategy who will liaise with one another? If your strategy covers a singular site, who will be responsible for delivering the digital activities and coordinating other people's efforts?

4 Resources

Here, you can consider which resources will be needed to deliver your Digital Strategy. You might find it helpful to combine this with the priorities section and to include a resources column in your action plan, matching resources to each task, or you may choose to write a separate resources section.

Resources might include:

- Staff and volunteers
- Training
- Funding
- Software and equipment
- External providers
- Technical assistance

It's important to determine whether you have the necessary resources available to achieve the digital goals you're setting for your museum or ensure you have plans in place to secure those resources. Try to be realistic about what you can achieve during the lifetime of the strategy; it might be better to do fewer things well with the resources you have available rather than spreading your means thinly by trying to do too much too soon.

Insufficient funding and resources are common issues preventing the implementation of digital activities. However, it's important to still develop potential digital projects and keep in mind what you'd like to achieve, so that your museum is ready to make the most of future funding opportunities when they arise.

5 Action Plan

Based on the long list of digital tasks set out in section 3, here you will decide which of these tasks you will prioritise, together with when and how you will address them. You might find organising the tasks into one large action plan or a separate action plan for each year of the strategy will help you to plan for the delivery of each activity.

You may choose to divide tasks into several phases, with each stage building upon the last, explaining what you will aim to achieve in each phase.

Alternatively, you might find it helpful to separate tasks into those that can be achieved quickly and with relative ease (quick wins), those that are medium-term goals and those that are long-term goals, and will require a greater investment of time and resources to achieve, like in the example below. The resources you may need are also included below and you may find it helpful to add an extra column with specific timescales.

Quick wins – activities that can be put into action in Year 1		
Activity category	Activity	Resources
Marketing and communications	Expand our online presence by exploring the use of Instagram Reels, Facebook Shorts and YouTube to extend our reach and grow our digital audiences.	Social media platforms Staff and volunteers Collections Venues
Marchnata a chyfathrebu	Datblygu fideos ‘staff i gamera’ er mwyn i bobl gael cipolwg y tu ôl i’r llenni ar fywyd yn yr amgueddfa.	Y wefan Platfformau’r cyfryngau cymdeithasol Staff a gwirfoddolwyr Casgliadau Lleoliadau
Ymchwil ac arloesi	Gwella dulliau casglu a dadansoddi data er mwyn cyfrannu at ddatblygiad y gwaith.	Staff Grantiau addas Codi arian

Structuring your Digital Strategy

Medium-term goals – activities that will be achieved in Year 2		
Activity category	Activity	Resources
Collections	Begin digitisation of collections.	Staff and volunteers Training Camera equipment Scanner IT hardware and software Storage
Programme	Create online exhibitions to provide greater access to our collections and stories.	Digitised collections Narrative and content Website Staff and volunteers
Programme	Develop a programme of online talks linked to our collections and heritage.	Staff Historic research Online ticketing platform Website and social media Zoom
Collections	Apply for funding for Collections Management System.	Staff Grant application
Long-term goals – activities that will be achieved in Year 3		
Activity category	Activity	Resources
Collections	Introduce and implement a new Collections Management System, including data migration and cleaning of existing records.	Funding Staff External support (from CMS provider) Training
Fundraising and development	Launch an online donations portal hosted on the museum website.	Website Staff Software Online payment system External support
Enterprise	Develop and launch an online shop.	Website Staff Software Online payment system External support

6 Risks

It's important to consider the risks involved in what you're trying to achieve – what might prevent you from reaching your digital goals – but also the risk of doing nothing at all, and the negative impact that could have on your organisation's ability to progress and improve.

You could simply compile a list of potential risks and explain what might happen and how you would mitigate those threats, or you could create a risk register, stating the risk, its likelihood, its level of impact and who is responsible for its mitigation. The example below lists some potential risks related to digital projects.

Risk	Likelihood	Impact	Mitigation	Responsible
Skills and knowledge shortage among staff	Medium	High	Training and skills development	Insert appropriate staff member(s)
Lack of available resources and funding to deliver digital elements	High	High	Source funding, apply for grants, attract donors	Insert appropriate staff member(s)
Unable to secure funding to support the introduction of digital	Medium	High	Explore other funding options (grants, fundraising events)	Insert appropriate staff member(s)
Costs of digital activities too high	Medium	Medium	Find alternative and more affordable digital options	Insert appropriate staff member(s)
Cultural shift in organisation needed to achieve digital goals	Medium	High	Involve staff and volunteers in changes and decisions	Insert appropriate staff member(s)
Lifespan and usability of equipment and software	Medium	Low	Longevity and usability of hardware and software considered carefully during procurement	Insert appropriate staff member(s)

7 Review and data collection

Decide how you will collect data to assess the effectiveness of your digital activities and how you will review that data. Identify which activities will require data collection, and the methods you will employ to do so. How will you then

analyse the data collected to help you better understand the impact of your digital activities, the number of people who have engaged with them, user feedback, what worked well and what could be improved?

8 Glossary of terms

It's always helpful to use straightforward and easy to follow language in strategy documents, and to avoid the use of jargon. However, there will be unavoidable digital terminology that will need explaining. You may find it helpful to include a glossary at the end of your Digital Strategy to explain what you mean by each term used. This will also help to ensure standardisation throughout the document

as the terms will be decided before writing. Including a glossary of terms is sensible as it will make the strategy more accessible, especially for those reading who may have more limited digital experience, and to help you to articulate your plans effectively.

Top tips and resources

Here are some top tips and resources that you may find helpful when developing your Digital Strategy and thinking about potential digital projects.

Tips

- Take a look at the new [Museum Data Service](#), which “aims to connect and share all the object records across all UK museums”.
- ArtUK is a great way for museums and galleries to share their art collections (acrylic, oil and sculptural works) online and offers a range of benefits, such as help with licensing.
- The Bloomberg Connects application is free and allows museums and galleries to share their collections online with wider audiences.
- Google Ads allows free advertising for charitable accounts.
- Google and Microsoft offer discounted prices for charities and non-profit organisations (e.g. Google Workspace, Microsoft 365).
- DonorFy is an online donations portal, which offers a free subscription up to a certain number of donors with a modest annual subscription fee once that limit has been reached.

Resources

- For more guidance on writing a digital strategy provided by the Association of Independent Museums [click here](#).
- Museum Next, [Building a Robust Museum Digital Content Strategy](#)
- Digital Preservation Coalition offer guidance and resources on digital preservation: <https://www.dpconline.org/>.
- Cyber Security Guide for Small Charities will help you to navigate gaining Cyber Security certification: <https://www.ncsc.gov.uk/collection/charity>.