



Te Papa **National Services**

The Rauemi

Resource Guides

Developing a **training plan**

Museum Training Plan Templates Supplement

Governance, Management & Planning

Developing a training plan

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Museum _____

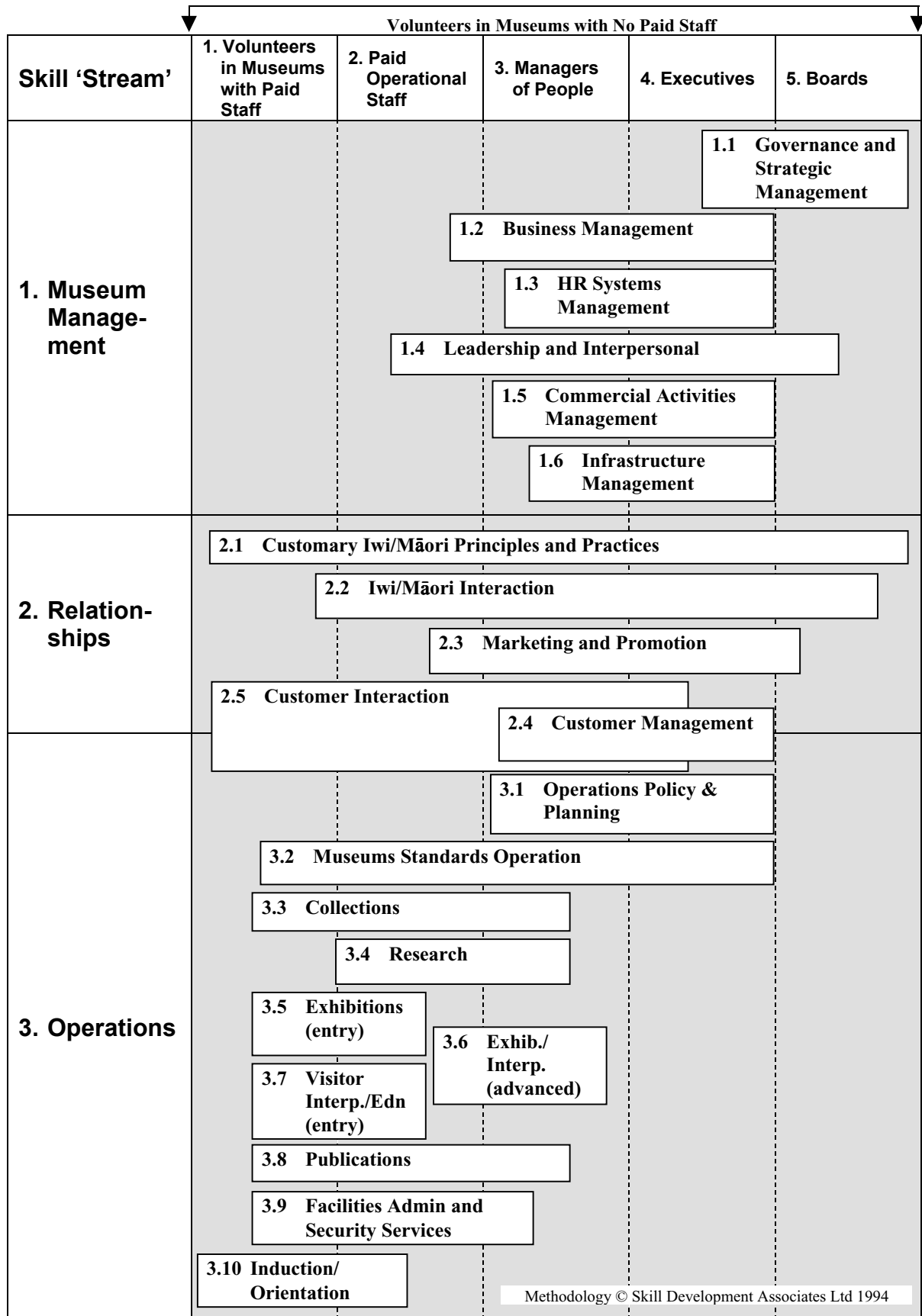
1 Role Definition

Role	Tasks	Number of People Involved	Hours per Week
Enter the positions or groups in this column, e.g., Curator.	For each position or group, broadly list the tasks they perform, e.g., Run the finances; Manage the collection; Develop policy.	Enter numbers for position or group.	Enter the average weekly hours.

2 Needs Assessment – summary of what museums do

What's it for?

Use this to keep an overview of all the programmes and how they relate. You don't fill anything in on this page.



2 Needs Assessment Checklist

What's it for? There are 10 pages showing breakdowns of the skills in each programme, those skills that are needed in your museum. Then enter and assess the group or individuals who need those skills.

1. Museum Management

1.1 Governance and Strategic Management		Who does this? Enter group or individuals								
		When required? ✓ appropriate column			Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'		
1.1.1	Set Up and Maintain Governance Structures									
1.1.2	Develop Strategic Plan and Vision									
1.1.3	Incorporate a Treaty Partnership Approach into Governance, Management Structures, Policies and Procedures									
1.1.4	Incorporate Tikanga and Te Reo into Museum Policies and Practice									
1.1.5	Read/Advise on Political Climate									
1.1.6	Develop Funding Strategies									
1.1.7	Obtain Resources									
1.1.8	Develop Strategic Alliances									
1.1.9	Communicate a Strategic Plan and Vision (externally)									
1.1.10	Conduct Strategic and Annual Reviews									
1.1.11	Negotiate and Resolve Complex Issues									
1.1.12	Review and Approve Policies									
Overall Assessment:		Training required?								
		Priority (A this year; B next year; C none)						If 'A', carry forward to Programme		

1.2 Business Management		Who does this? Enter group or individuals								
		When required? ✓ appropriate column			Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'		
1.2.1	Design an Organisation									
1.2.2	Develop Annual Business Plan and Budgets									
1.2.3	Manage Programmes/Projects									
1.2.4	Set Up and Maintain a Management Information System									
1.2.5	Set Up and Maintain a Financial System									
1.2.6	Develop an Asset Management System									
1.2.7	Develop Innovative Solutions									
1.2.8	Negotiate and Resolve Issues									
1.2.9	Manage Change									
1.2.10	Develop Organisational Culture									
1.2.11	Report on and Review Operations									
1.2.12	Identify and Manage Risks									
1.2.13	Develop Museum Policies, Practices and Processes									
1.2.14	Communicate a Strategic Plan and Vision (internally)									
1.2.15	Develop Relationships with Other Facilities									
1.2.16	Comply with Legal Obligations									
1.2.17	Make a Presentation to a Large Audience									
1.2.18	Prepare and Present a Complex Case									
Overall Assessment:		Training required?								
		Priority (A this year; B next year; C none)						If 'A', carry forward to Programme		

1. Museum Management (continued)						
1.3 Human Resources Systems Management		Who does this? Enter group or individuals				
		Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'	
When required? ✓ appropriate column						
1.3.1	Develop HR Policies and Procedures					
1.3.2	Develop a Staff Development Plan					
1.3.3	Manage Compliance with HR Policies and Procedures					
1.3.4	Manage Industrial Relations					
1.3.5	Remunerate Staff and Operate a Payroll					
1.3.6	Develop and Implement Health and Safety in Employment Plan					
1.3.7	Write Job Descriptions/ Contracts					
1.3.8	Recruit Staff/Volunteers					
1.3.9	Maintain a Communications System					
Overall Assessment:		Training required?				
Priority (A this year; B next year; C none)					If 'A', carry forward to Programme	

1.4 Leadership and Interpersonal						
		Who does this? Enter group or individuals				
		Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'	
When required? ✓ appropriate column						
1.4.1	Induct/Orient Staff and Colleagues					
1.4.2	Develop Performance Plans					
1.4.3	Train/Develop Staff and Volunteers					
1.4.4	Coach Staff/Volunteers					
1.4.5	Motivate People					
1.4.6	Conduct Performance Reviews					
1.4.7	Manage Terminations					
1.4.8	Facilitate a Small Group					
1.4.9	Interact with Staff and Colleagues					
1.4.10	Build a Team					
1.4.11	Negotiate and Resolve Issues					
Overall Assessment:		Training required?				
Priority (A this year; B next year; C none)					If 'A', carry forward to Programme	

1. Museum Management (continued)

1.5 Commercial Activities Management		Who does this? Enter group or individuals			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never			
		When required? ✓ appropriate column					
1.5.1	Develop Business/Franchise/Contract/Hire of Facilities Policy and Procedures						
1.5.2	Tender and Negotiate Franchises/Contracts						
1.5.3	Manage Franchises/Contracts						
1.5.4	Terminate Franchises/Contracts						
1.5.5	Develop Merchandising						
1.5.6	Develop Revenue Streams						
1.5.7	Develop Pricing Policies						
1.5.8	Hire Facilities						
1.5.9	Develop Joint Ventures						

Overall Assessment: Training required? →
 Priority (A this year; B next year; C none) →
 If 'A', carry forward to Programme →

1.6 Infrastructure Management		Who does this? Enter group or individuals			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never			
		When required? ✓ appropriate column					
1.6.1	Develop Infrastructure Policy and Procedures						
1.6.2	Negotiate Purchases/Leases						
1.6.3	Maintain Physical Assets (buildings, car parks, grounds, roads, etc.)						
1.6.4	Develop a Capital Programme						
1.6.5	Set Up and Maintain Services (e.g., IT, cleaning, communications, security)						

Overall Assessment: Training required? →
 Priority (A this year; B next year; C none) →
 If 'A', carry forward to Programme →

2. Relationships

2.1 Customary Iwi/Māori Principles and Practices		Who does this? Enter group or individuals			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never			
		When required? ✓ appropriate column					
2.1.1	Recognise Tangata Whenua and their Needs						
2.1.2	Describe the Principles of and Legislation Relating to Partnership Obligations and the Treaty of Waitangi						
2.1.3	Describe Māori Belief, Values, Tikanga and Taonga						
2.1.4	Recognise and Speak Basic Te Reo (words and phrases)						
2.1.5	Describe Customary and Contemporary Māori Social Systems and Structures						
Overall Assessment:		Training required?					
		Priority (A this year; B next year; C none)					
					If 'A', carry forward to Programme		

2.2 Iwi/Māori Interaction		Who does this? Enter group or individuals			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never			
		When required? ✓ appropriate column					
2.2.1	Interact in a Māori/Bicultural Setting						
2.2.2	Exchange Information with Tangata Whenua in Relation to a Museum Project or Event						
2.2.3	Identify Tangata Whenua Interest in a Museum Project or Event						
2.2.4	Organise a Hui						
2.2.5	Negotiate Agreements with Tangata Whenua						
2.2.6	Develop Ongoing Relationships with Tangata Whenua and other Māori Communities						
Overall Assessment:		Training required?					
		Priority (A this year; B next year; C none)					
					If 'A', carry forward to Programme		

2. Relationships (continued)

2.3 Marketing and Promotion		Who does this? Enter group or individuals			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never			
		When required? ✓ appropriate column					
2.3.1	Develop a Marketing Plan						
2.3.2	Develop Marketing/PR Policy and Procedures						
2.3.3	Conduct a Market Analysis						
2.3.4	Identify Marketing Opportunities						
2.3.5	Represent and Advocate for the Organisation						
2.3.6	Brand and Position the Museum						
2.3.7	Manage Media						
2.3.8	Promote Museum Image, Programmes and Events						
2.3.9	Obtain and Retain Sponsors/Donors						
2.3.10	Manage 'Adverse Public Events' and Interest Groups						
2.3.11	Raise Funds						
2.3.12	Establish and Maintain Key Working Relationships						
2.3.13	Establish and Maintain a Network						
2.3.14	Establish and Maintain Member Organisations						
2.3.15	Evaluate Marketing Effectiveness						
Overall Assessment:		Training required?					
		Priority (A this year; B next year; C none)					
					If 'A', carry forward to Programme		

2.4 Customer Management		Who does this? Enter group or individuals			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never			
		When required? ✓ appropriate column					
2.4.1	Identify Customers and their Needs						
2.4.2	Manage Reception/ 'Front of House'						
2.4.3	Coordinate Activities and Events						
2.4.4	Meet Customer Needs						
2.4.5	Develop Customer Feedback Systems						
2.4.6	Encourage Repeat Visitation						
Overall Assessment:		Training required?					
		Priority (A this year; B next year; C none)					
					If 'A', carry forward to Programme		

2. Relationships (continued)

2.5 Customer Interaction		Who does this? Enter group or individuals					
When required? ✓ appropriate column		Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'		
2.5.1	Make a Presentation to a Customer Group						
2.5.2	Host/Guide a Group						
2.5.3	Sell Products						
2.5.4	Interact with Different Cultures						
2.5.5	Give Information						
2.5.6	Find Out Facts						
2.5.7	Listen						
2.5.8	Relate to People						
2.5.9	Deal with Extreme Feelings						
2.5.10	Resolve Customer Problems						

Overall Assessment:

Training required? →

Priority (A this year; B next year; C none) →

If 'A', carry forward to Programme →

3. Operations					
3.1 Operations Policy and Planning		Who does this? Enter group or individuals			
When required? ✓ appropriate column		Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'
3.1.1	Manage Operations Contracts				
3.1.2	Develop Collections Plans, Policy and Procedures				
3.1.3	Integrate Tikanga Māori into Collection Management				
3.1.4	Acquire Collection Items				
3.1.5	Develop Exhibitions Policy and Procedures				
3.1.6	Assess Audiences and their Needs				
3.1.7	Plan an Exhibitions/Events Programme				
3.1.8	Develop Visitor Interpretation/ Education Policy and Procedures				
3.1.9	Engage Iwi Māori in a Programme or Event				
3.1.10	Plan a Visitor Interpretation/ Education Programme				
3.1.11	Develop Research Policy and Procedures				
3.1.12	Plan a Research Programme				
3.1.13	Identify Commercial Research/ Publication Opportunities				
3.1.14	Secure Research Funding				
3.1.15	Develop Publications Policy and Procedures				
3.1.16	Plan a Publications Programme				
3.1.17	Develop Joint Ventures				
Overall Assessment:		Training required?			
Priority (A this year; B next year; C none)					
					If 'A', carry forward to Programme

3.2 Museum Standards Operation					
When required? ✓ appropriate column		Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'
3.2.1	Describe Quality Management Principles and Methods				
3.2.2	Identify and Set Standards Appropriate to Museums				
3.2.3	Assess Performance and Practice against Standards				
3.2.4	Act to Meet or Maintain Standards				
3.2.5	Improve Processes				
3.2.6	Benchmark for Best Practice				
Overall Assessment:		Training required?			
Priority (A this year; B next year; C none)					
					If 'A', carry forward to Programme

3. Operations (continued)

3.3 Collections		Who does this? Enter group or individuals			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never			
		When required? ✓ appropriate column					
3.3.1	Maintain a Catalogue of Collection Items						
3.3.2	Prepare and Maintain Condition of a Collection						
3.3.3	Undertake Remedial Conservation						
3.3.4	Negotiate Transactions of Items						
3.3.5	Research History of Collection Items						
3.3.6	Handle a Collection Item						
3.3.7	Store a Collection						
3.3.8	Maintain Security of a Collection						
3.3.9	Lend/Borrow Items						
3.3.10	Maintain Collections Records						
3.3.11	Value a Collection						
3.3.12	Audit a Collection						
3.3.13	Access Information from a Collection						
Overall Assessment:		Training required?					
Priority (A this year; B next year; C none)					If 'A', carry forward to Programme		

3.4 Research		Who does this? Enter group or individuals			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never			
		When required? ✓ appropriate column					
3.4.1	Identify Research Subjects						
3.4.2	Develop a Research Project Plan/ Budget						
3.4.3	Conduct a Research Project						
3.4.4	Publish/Communicate Research Results						
3.4.5	Evaluate a Research Project						
Overall Assessment:		Training required?					
Priority (A this year; B next year; C none)					If 'A', carry forward to Programme		

3. Operations (continued)					
3.5 Exhibitions (Entry)		Who does this? Enter group or individuals			
		Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'
When required? ✓ appropriate column					
3.5.1	Plan an Exhibit/Event				
3.5.2	Create an Exhibit/Event				
3.5.3	Interpret an Exhibit/Event				
3.5.4	Install an Exhibit				
3.5.5	Maintain an Exhibit				
3.5.6	Run an Event				
3.5.7	Close Down/Debrief an Exhibit/ Event				
3.5.8	Maintain Security				
3.5.9	Evaluate an Exhibit/Event				
Overall Assessment:		Training required?			
Priority (A this year; B next year; C none)					
If 'A', carry forward to Programme					

3.6 Exhibition/Interpretation (Advanced)					
		Who does this? Enter group or individuals			
		Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'
When required? ✓ appropriate column					
3.6.1	Develop Multimedia Applications				
3.6.2	Develop Electronic Technology Applications				
3.6.3	Tour an Exhibit				
Overall Assessment:		Training required?			
Priority (A this year; B next year; C none)					
If 'A', carry forward to Programme					

3. Operations (continued)


3.7 Visitor Interpretation/ Education (Entry)		Who does this? Enter group or individuals						
		When required? ✓ appropriate column			Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'
3.7.1	Prepare Interpretation/Education Material							
3.7.2	Assess an Audience and their Needs							
3.7.3	Make a Presentation							
3.7.4	Create and Set Up a Display							
3.7.5	Manage a Programme Schedule							
3.7.6	Evaluate an Interpretation/Education Programme							
plus	Interact with Customers (per 2.5)							
Overall Assessment:		Training required?						
		Priority (A this year; B next year; C none)						
					If 'A', carry forward to Programme			

3.8 Publications		Who does this? Enter group or individuals						
		When required? ✓ appropriate column			Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'
3.8.1	Develop a Publications Project Plan							
3.8.2	Research Audience and their Needs							
3.8.3	Write a Publication							
3.8.4	Produce a Publication							
3.8.5	Manage Publication Contracts							
3.8.6	Distribute a Publication							
3.8.7	Evaluate a Publication							
Overall Assessment:		Training required?						
		Priority (A this year; B next year; C none)						
					If 'A', carry forward to Programme			

3. Operations (continued)						
3.9 Facilities Administration and Security Services		Who does this? Enter group or individuals				
When required? ✓ appropriate column		Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'	
3.9.1	Develop Facilities Administration and Security Services Standards					
3.9.2	Set Up and Operate Facilities Administration and Security Services Programme					
3.9.3	Identify and Manage Security Risks					
3.9.4	Operate a Security System					
3.9.5	Operate Plant and Equipment					
3.9.6	Maintain Grounds					
3.9.7	Maintain Buildings					
3.9.8	Operate Fire and Safety System					
3.9.9	Liaise with Contractors					
Overall Assessment:		Training required?				
Priority (A this year; B next year; C none)					If 'A', carry forward to Programme	

3.10 Induction/Orientation		Who needs this? Enter group or individuals				
When required? ✓ appropriate column		Now	Future	Never	Do they know it? Enter 'yes', 'no' or 'partly'	
3.10.1	Mission, Values, Objectives					
3.10.2	Museum Structure					
3.10.3	Museum Policy and Practices					
3.10.4	e-mail network					
3.10.5	Records					
3.10.6	Communications					
3.10.7	Other					
Overall Assessment:		Training required?				
Priority (A this year; B next year; C none)					If 'A', carry forward to Programme	

3. Annual Training Programme

What training? Programme/Skills	Who is to be trained?		How is it to be done?				Who Resp.	When is it to be done by?												How much?
	Total No.	Participants	Ext.	Int.	OTJ	Other		J	A	S	O	N	D	J	F	M	A	M	J	\$
Put this in your budget  Total																				