

Developing a **training plan**

What skills do the people who work at your place need to develop? How do you find out? How do you plan to meet their needs? This guide looks at how you put together a training plan for your museum.

Planning your training

A TRAINING PLAN SETS OUT YOUR ORGANISATION'S
TRAINING NEEDS AND YOUR PRIORITIES FOR MEETING THEM

INSIDE

- X Why plan?
- X Developing the plan
- X Maungaroa Community Museums training plan
- X Training plan sample forms

You develop a **training plan** in order to organise your **training programme**. When you make a training plan, you:

- identify who needs training and what training they need
- set priorities for meeting those needs.

A training programme is the next step. It sets out what training planned is planned for a given period, how, when and where this training will take place and how much it will cost.

What is in this guide

This guide explains how to prepare a simple training plan for a typical museum.

- It describes a process to follow for identifying training needs, setting priorities and translating these into an annual training programme.
- It includes a sample set of forms for you to photocopy and use in this process.
- It also includes a completed plan and annual programme for a fictional museum using these forms, to help you complete your own.

This guide is just a guide. Adapt the suggestions offered here to suit your own situation.

Follow-up workshops

Te Papa National Services is keen to assist museums further in planning for training. You are encouraged to approach us with proposals for workshops either for your individual organisation or for groups of museums and/or iwi within your region.



Why plan?

Benefits of the well thought out plan

A training plan helps you to develop a well thought out training programme. This has many benefits. If your programme results in having people who are confident and know what they are doing, they will substantially assist the smooth running of your museum.

A training plan is the basis for a one- to three-year programme to develop the skills of people working in or with your museum. The plan should:

- result in a programme which increases levels of skill
- help you make a case to get funds needed to cover the costs of your training programme
- give you better value for your training dollar
- be part of your long-term development plan for your organisation
- give your sponsors confidence that your museum and its collection are in good hands.

Your planning and the National Training Framework

The planning outlined here is designed to fit in with the Te Papa National Services' National Training Framework. The framework is a long-term plan for the development of all people who work in the museum sector.

For details, see the document National Training Framework for Museums | Te Anga Kaiako ā Iwi mō Ngā Whare Taonga o Te Motu, Te Papa National Services, 1999. Copies are available from Te Papa National Services.

When should you plan?

You can plan for a training programme at any time (especially if you don't have one now). Ideally, training needs should be reviewed and updated annually in tandem with the cycle of planning for your financial year.

A good training plan

A good training plan:

- covers the essential skills of your museum
- links to the National Training Framework
- is supported by the people involved
- results in a well thought out training programme

A well thought out training programme:

- covers a specific time period
- is cost effective
- is achievable.

Remember, in training no effort equals no results.

Developing the plan

Overview of the process

We suggest that you use a three-step process for developing your training plan. See pages XX-XX in this guide for a set of forms to assist you at each step. The set includes:

- a form for defining roles - looking at who does what in the organisation
- a form for assessing needs - looking at who needs what training (both individuals and groups) and giving priorities to meeting the needs
- a form for writing your annual training programme - saying who will be trained, what training there will be, how, when and where training will take place and how much it will cost.

Refer to pages XX-XX for the (fictional) Maungaroa Community Museum's completed example using these forms to see what the finished product looks like.

The process in detail

In this section we look at the planning process in detail and give you some hints on how to fill in the forms.

First step - prepare yourself

This step is important to get yourself orientated and be sure of what you are doing. Take the time to work through this resource guide and discuss training fully with other people involved in running your museum.

First sequence of tasks

Here is a suggested sequence of tasks to undertake within this step.

- Review the National Training Framework.
- Discuss the process with your board, director or committee.
- Discuss the process with other museums within your network.
- Review this guide - especially look at the Maungaroa Community Museum's completed plan and annual programme.
- Decide the term of the training programme, for example, annual, for two years, for the financial year.
- Think about the people you have at your museum and their roles.
- Record the details in the role definition form.

The role definition form

Use the role definition form to review what people in your museum do now. You may be able to make lists of tasks from current job descriptions.

You may find that various tasks will be shared or overlap. In these cases, repeat the task for each group or individual.

Role Definition Form

Note the number of people involved

The programme

Note group or individual's position.

List the tasks they do.

Enter their average weekly hours.

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.
Board Trustees	<ul style="list-style-type: none"> Set the direction/vision Assist fundraising Approve policies Approve annual plan Liaise with council 	5	5
Curator	<ul style="list-style-type: none"> Runs the museum Raises funds Looks after the facilities/buildings Deals with trustees Runs the finances Negotiates acquisitions for the collection Manages the collection 	1	40
Assistant Curator	<ul style="list-style-type: none"> Works with the collection Manages the guides, hosts and front of house Looks after the shop Looks after the displays Handles money/daily accounting 	1	40
Collection Assistants	<ul style="list-style-type: none"> Help set up the displays Help catalogue and maintain the collection 	2	20
Collection Help/Volunteers	<ul style="list-style-type: none"> Maintain cuttings service Assist with the collection 	5	10
Volunteer hosts/guides	<ul style="list-style-type: none"> Run the shop/counter Take guided tours Answer queries Explain the displays/collection to visitors 	10	40

YOUR NEEDS ASSESSMENT IS A BIG TASK. DON'T BE PUT OFF BY THAT. IT IS WORTH THE TIME YOU INVEST IN IT

Second step - identify the needs

The needs assessment checklist

For this step you need to refer to the needs assessment checklist. It lists in heading form a large number of skills. These are essentially the skills required to run a museum. You can find a detailed list of these skills in the Programme Inventory in Part 5 of the National Training Framework. The skills (grouped into three main programmes) were identified by a working party of museum leaders, including the directors of several small museums.

The needs assessment checklist used here is based on the inventory. Accordingly, it gives you a good basis to compare your museum with others.

A note for smaller museums

Small museums tend to be museums in microcosm and most of the skills in the inventory could apply to your museum. Of course, the scale and complexity will be different from a large museum. The inventory also reinforces the fact that people in small museums need to be generalists who are multi-skilled.

What museums do - the needs assessment summary

On page XX is a one-page summary of the skills. Use this to see how the checklist is organised and to get an overview of the division of skills within the three main skill streams:

- museum management
- relationships
- operations.

Second sequence of tasks

Here is a suggested sequence of tasks to undertake within this step:

- Read through the needs assessment summary and checklist.
- Identify what tasks your museum does or will need to do and tick when the skill to do them is required.
- Start with the Museum Management programme. Work through each block of skills in turn.
- Add any tasks that you do or will need to do that are not on the list. Make up your own block or add to the existing blocks.
- Ignore anything you are not clear about (if you don't recognise it, it is probably not applicable to you).
- Go through each block of skills carefully and identify which groups or individuals need these skills.
- Assess whether or not they have the skill to do the task.
- Complete an overall assessment of training needs for each block.
- Give a priority ranking for when training is required.

Try doing your needs assessment as a team - involve people in their own development.

Needs assessment checklist example

Use the list of individuals and groups you identified in the Role Definition Form.
 For each block, enter the individuals or groups who do this at the top.
 Don't include groups who don't do these tasks.

- The programme
- A group of tasks within the programme (forms one block in the checklist)
- Identify whether your museum does this now or will need to in the future (as appropriate)
- Individual task
- Give an overall assessment for each individual or group for the whole block.
- Enter each A into the training programme form.

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: **Board** **Curator**

When required? * appropriate column: **Now** **Future** **Never**

Can they do it? Enter 'yes', 'no' or 'partly'

Task	Now	Future	Never	Board	Curator
1.1.1 Set Up and Maintain Governance Structures	*			Yes	Yes
1.1.2 Develop Strategic Plan and Vision				Partly	Yes
1.1.3 Incorporate a Treaty Partnership Approach into Governance, Management Structures, Policies and Procedures	*			Partly	Partly
1.1.4 Incorporate Tikanga and Te Reo into Museum Policies and Practice	*			Partly	Partly
1.1.5 Read/Advise on Political Climate	*			Partly	Partly
1.1.6 Develop Funding Strategies	*			Yes	Yes
1.1.7 Obtain Resources	*			Yes	No
1.1.8 Develop Strategic Alliances	*			Yes	No
1.1.9 Communicate a Strategic Plan and Vision (externally)	*			Yes	No
1.1.10 Conduel Strategic and Annual Reviews	*			Yes	Yes
1.1.11 Negotiate and Resolve Complex Issues	*			-	Yes
1.1.12 Review and Approve Policies	*			-	Yes
Overall Assessment:	Training required? → No Yes		Priority (A this year; B next year; C none) → - B		

If 'A', carry forward to Programme

- Assess skills of each individual or group.
 Enter **yes** if they can do it.
 Enter **no** if they can't do it.
 Enter **partly** if they can do it but need to improve, or if only some in the group can do it.
- If **yes** is entered for training required, allocate a priority.
 Put **A** for needed this year or urgent
 Put **B** for needed next year or not so urgent
 Put **C** for not needed in the foreseeable future.

Refer to the example on page XX to see what the completed form looks like overall.

Third step - make up the training programme

The final step in the planning process is to transfer the individual or group needs to a programme for the whole museum. At this stage you work out when and how the training will happen, who will provide it and how much it will cost.

This then becomes your programme for action. A document like this is useful to take to your board and funders. It is a statement of credibility for your funding bid.

Cost effective learning

Your training does not need to cost a lot of money (over and above people's time). It is a well-established fact that the vast majority of learning happens best on the job, learning from managers, peers and colleagues. A good training programme will always aim at making this on the job learning happen.

Methods of training include:

- attendance at formal courses (for example, at polytechnics) or seminars
- visits or attachments to a larger museum
- structured learning sessions with your own people running them, or experts coming in to assist you
- doing the task with a competent person on the job
- learning by reading, research or discussion with other expert people.

Ongoing review

Keep your programme up to date. Review and revise it once a year and keep a lookout for opportunities as they occur. However, be careful to check that they are part of your priorities, that is, 'must haves' rather than 'nice to haves'.

Third sequence of tasks

Here is a suggested sequence of tasks to undertake this step. Use the training programme form provided to assist you.

- Transfer the A priorities from your needs assessment checklist to your training programme form.
- Decide who will receive training. Use priorities to select the individuals who need the training the most, for example, the ones with the lowest levels of skill.
- Decide how it is to be done. Select the method of training.
- Decide who will provide the training. Select the best provider according to your local knowledge and research.
- Determine when it is to be done.
- Calculate the cost.
- Add all the costs and transfer the total to your museum budget.

Training programme form example

Who: List individuals who will attend.

What: List the A priorities from your needs assessment. Can be parts of or whole programmes.

3 Annual Training Programme

What training?		Who is to be trained?		How is it to be done?			
Programme/Skills	Total No.	Participants	Ext.	Int.	OTJ	Other	
1.3 Human Resource Management	2	<ul style="list-style-type: none"> • Curator • Assistant Curator 	✿	-	-	-	
1.4 Leadership	1	<ul style="list-style-type: none"> • Assistant Curator 	✿	-	-	-	
2.1 Customary Iwi Principles and Practices	7	<ul style="list-style-type: none"> • 2 x Board • Curator • Assistant Curator • 3 x Volunteer Guides 	✿	-	-	-	
2.5 Customer Interaction	10	<ul style="list-style-type: none"> • All new hosts/ guides 	-	✿	-	-	
3.3 Collections: Handling Storage Access Security	2	<ul style="list-style-type: none"> • Collection Assistants 	-	-	✿	-	
3.10 Induction/ Orientation	10	<ul style="list-style-type: none"> • All new hosts/ guides 	-	✿	-	-	

How:

External (e.g. educational institution, other museum, National Services)

Internal (e.g. formal training sessions run by museum staff or visiting expert)

On the job (e.g. run by the team leader or manager(s) or competent volunteer)

Other (e.g. individual study, visits, discussions)

Who is responsible: Allocate responsibility for ensuring the training is done.

When: Enter when the training will occur.

How much: Enter the direct costs of the programmes. Include fees and travel.

Who Resp.	When is it to be done by?												How much?
	J	A	S	O	N	D	J	F	M	A	M	J	\$
JW			■										100
JW				■									300
JW						■	■						-
DF			■							■			-
DF					■	■							-
DF		■	■					■	■				-
Put this in your budget 🌸												Total	\$400





Acknowledgments

This guide was developed with the assistance of Skills Development Associates Ltd.

Te Papa National Services Resource Guides | He Rauemi are published by Te Papa National Services in support of its work with museums, galleries, iwi, and related organisations throughout New Zealand to enhance the museum services offered within communities.

For further information or to discuss training opportunities related to this topic, please contact:

National Services	Museum of New Zealand Te Papa Tongarewa	
	Cable Street, PO Box 467, Wellington	
	Phone (04) 381 7000	
	Fax (04) 381 7080	
	email natserv@tepapa.govt.nz	
	Website www.tepapa.govt.nz/National_Services/	
Copyright © Museum of New Zealand Te Papa Tongarewa 2001		