

Planning for staff & volunteer training in museums

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“All of these issues have come to the fore as human resources – the knowledge, skills, and creativity of people – increasingly are recognized as being the most important input that organizations in all sectors of the economy require.”ⁱ

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Definitions

Training = Acquisition of knowledge, skills, and abilities that results in improved performance

Human resources = The knowledge, skills, and creativity of people, including paid staff and volunteers

Human resources development = Acquisition of knowledge and attitudes to facilitate the achievement of individual career or personal goals and institutional objectivesⁱⁱ

Introduction

Planning for training and development of staff and volunteers in the current museum climate can be a challenge.

Many Ontario museums are small, one or two person operations, with little time, money, space, or opportunity for training. Most museums are maintained by partnerships of paid staff and volunteers. Museum workers are expected to maintain high standards of professionalism and in some cases to have or obtain credentials in non-profit management, artifact conservation, exhibition, education, public relations and other related fields.

Traditionally the supply of those interested in becoming museum workers both paid and volunteer exceeded the demand. Institutions were able to recruit new “already-trained” staff and volunteers to replace people who had either outmoded knowledge and skills or who were no longer challenged by the work provided. But that climate has changed.

Today fewer young people are interested in careers in culture. More mid-career museum professionals are choosing to cross over into related fields with new opportunities. Veteran museum workers are retiring. Volunteers are scarce. Museums must act now to attract and retain the best new workers, paid and volunteer.

Universities and colleges, professional associations, related organizations, municipalities, special interest groups, and museums themselves all provide training and development programs for staff and volunteers. The Ontario Museum Association website provides many useful links to these resources.

In this Tip Sheet I look at how museums can begin to plan for staff and volunteer training and development that is meaningful for both individuals and institutions.

Some training facts

The accepted benchmark for expenditures on staff training and development in Canada is 1.6% of total payroll ⁱⁱⁱ. Highly productive companies dedicate the equivalent of as much as 6% of their payroll to training and development ^{iv}.

In the non-profit sector of which museums are a part:

- 26 percent of employers rate increasing employee skills as a very important or crucial organizational strategy
- Two-thirds of employers provide training
- 30 percent of employees receive classroom training
- 24 percent of employees receive on-the-job training

Those most likely to receive training are:

- Women,
- Employees aged 35-44, and especially those aged 45 years and older
- Employees with a university degree

- Professional training is most common, followed by computer training

Employees believe training helps them prepare for their jobs. Despite this and the demonstrated success of companies that dedicate more to training and development, most employees in our sector today believe training has decreased since they began working for their present employer.^v

Why do training and development?

Training and development requires time and money yet it reaps organizational, individual and societal benefits for the museum that go well beyond the initial investment.

Organizational benefits

- Prepares staff and volunteers to achieve institution-wide strategic goals and objectives.
- Increases success in meeting institutional goals. Private sector companies that invest more heavily in training have greater productivity and profits.
- *Failure* to provide training for staff and volunteers carries a potential liability risk for museums. It has a direct and adverse impact on the institution's ability to adequately care for collections while providing high-quality programming.^{vi}
- Attracts and retains staff and volunteers. Training is the #1 attraction and retention tool.
- Builds ethical practices. Training in ethics and control systems can have a major impact on the incidence of fraud.
- Promotes "learning to learn." Individuals who work for institutions with a strong commitment to staff and volunteer education, development and learning are motivated to use these abilities on the job and to model them for museum audiences.

Tip – Integrate human resource training and development into all institutional planning, including:

- *Strategic planning*
- *Business planning*
- *Grant applications for special projects*

Individual benefits

- Achieves personal development. Training and development can promote greater confidence and a heightened sense of usefulness if staff and volunteers are given opportunities to use new skills.
- Achieves professional development. The museum community includes many different professions and occupations, all of which require continuous learning to stay abreast of new knowledge and skills.
- Boosts wages.

Tip – Staff and volunteers may benefit from training more than the institution does but most employers see this as a necessary investment in order to retain good people.

Societal benefits

- Develops literacy and numeracy skills. Many staff and volunteers come to the museum with higher levels of education but training and development may

provide other skills like museum literacy and “looking skills,” of use to them not only on the job but also in family and community life.

Tip - Communicate your strategies to staff and volunteers. Willing support and participation by those involved is paramount to the success of any plan.

Training styles

There is no one right way to do training and development. However, the greatest success is generally achieved when the policy and practices of training and development are consistent with those of your museum as a whole. Which of the following types best describes your policy and practice?

Performance style

The focus in this traditional style of training and development is on increasing the knowledge, skills, and abilities of individuals. A problem in performance is identified as a training need to which a training solution is applied. Training is generally delivered in a classroom context. The trainer is seen as a subject matter expert who shares his or her information and skills with staff and volunteers. Individuals are encouraged to determine their own training needs. Managers reward staff and volunteers by arranging training courses for them.

Tip – Link training to broader institutional objectives. Will training enhance both individual and institutional performance?

Strategic style

Here training and development are aligned with the organization’s mission, objectives, and action plan. Staff and volunteers usually participate in the overall strategic planning process as internal stakeholders. The goal of training and development is to facilitate the achievement of institutional strategy. Trainers are viewed as performance facilitators or business consultants. Training and development may take place on or off the job.

Tip – In an environment of continual change you may not want to lock your museum into certain strategies. Leave room for flexibility, innovation and creativity to allow your museum to respond to the unexpected.

“Learning to learn” style

The learning model recognizes the constant change taking place in museums and galleries. Learning and “learning to learn” are seen as the key components. These skills enable staff and volunteers to meet opportunities as they arise, build on collective wisdom, and go beyond standard ways of responding to challenges. In this model the goal of training and development is to generate innovation and to create new ways of doing things. Staff and volunteers are coached and mentored to form learning partnerships that assist one another in solving problems as they arise. Learning on the job, or “action learning,” is encouraged.

Tip – Develop strategies for training and development of staff and volunteers that are consistent with education and interpretation plans for your museum visitors. Do you want to encourage community involvement and participation in the museum? Start with your

staff and volunteers. How might they as a group be more involved in the development, implementation and evaluation of their own training?

Establishing a supportive climate

Tip – Advocates of employees may view training and development differently than do board members. It is important to discuss and agree upon the elements of a supportive climate with representatives of employees, management and volunteer staff.

The success of training and development depends on the establishment of a supportive climate that demonstrates:

- Performance objectives exist for each job in the museum
- Job performance is important
- Job performance will be assessed
- Managers and employees or volunteers have a responsibility to meet performance objectives
- Managers and employees or volunteers will be accountable for meeting performance objectives
- Acquisition of new knowledge, skills, and abilities is important – and will be rewarded
- If a problem arises it will be analyzed and addressed in the most appropriate manner

Tip – A reward does not have to be monetary. Volunteer appreciation programs provide good models for alternate methods of recognition.

What's the problem?

Lack of time and energy often prompts a manager to search for simple solutions to why a job is not getting done. But it is important to analyze the problem in order to find the right solution. Training may not be the answer.

A needs analysis is one tool with which to assess a problem. A needs analysis is concerned with the gap between actual performance and desired performance by the employee, volunteer, or organization. It helps to ask the following questions:

- What is the employee or volunteer or department or institution *supposed* to be doing?
- What do staff or volunteers need to achieve success?
- How is success measured?
- What is the gap between the current performance and this measure of success?

Why training needs analysis?

An analysis of training needs helps a museum in several ways:

- Establishes base-line performance. To perform their jobs, what do staff and volunteers know now? What does the present performance cost the museum? What more do staff and volunteers need to know?

- Fulfils legal responsibilities. Museums as employers are often required to assess worker knowledge and skill in areas regulated by the government; for example, occupational health and safety.
- Carries out moral obligation on part of the museum to assist staff and volunteers to perform their jobs well and to develop knowledge, skills, and abilities to further own careers or other personal goals.

Tip – Genuine involvement in a training needs analysis helps staff and volunteers to determine if the knowledge and skills they are being taught are really necessary to do the job.

Doing a training needs analysis

Step #1 – The concern. Identify the problem. This might be that the site coordinator has received calls from parents complaining that interpreters are treating summer campers in an abrupt manner. Sometimes the concern comes from external sources; for example, the government has enacted new legislation requiring you to follow new collection management practices.

Step #2 – Its importance. Assess if the concern is central to the organization. Consider the strategic direction of the museum – the mission, goals, objectives, outcomes and impact you desire. The training strategy you choose should boost your ability to meet these objectives. Do summer camps play an important role in meeting desired outcomes? Does current performance cost the museum in terms of community support or earned revenues? A concern is important if it has an impact on outcomes that are important to the museum.

Step #3 – The stakeholders. The next step is to involve the key players who have a vested interest in the process and outcome e.g. including, as relevant, municipal management, board members, employees or volunteers, and union representatives. Cooperation, communication and trust at all levels are important. The managers, board and overall organizational culture must support the needs analysis and subsequent response to the problem if it is to succeed.

Step #4 – Data collection.

Looking first at the institution

There are at least three sources of information from which you can begin to analyze a performance deficiency or gap: the organization, the job, and the employees or volunteers. Because an analysis of employees or volunteers is typically the first to be undertaken, in this Tip Sheet I want to focus on organizational analysis.

Information on the museum's strategy, environment, benchmarks and internal culture is critical to an understanding of gaps or deficiencies in performance. Employee or volunteer performance may be lacking because of the culture of the institution rather than the ability of the individual.

Strategy

Is there a strategic or business plan for the museum? What are the goals and objectives overall? For each functional area? Strategic planning is an ongoing process and training needs should consider the changing plan. For example, let's say a museum plans to begin bringing in large-scale touring exhibitions. Building requirements, collections management and conservation issues are addressed but what about the training requirements for staff or volunteers? What knowledge, skills, or abilities will they need in order to manage this new function?

Tip – Integrate human resource training and development into the strategic planning process from day one. Assume your current staff and volunteers will be those who will carry out your plan.

Environment

Museums exist in a complex society. Government regulations play an important role in determining training needs. Health and safety, for example, is probably the most common type of training undertaken in museums today. In Ontario, the Community Museum Operating Grant requirements provide direction for museum-specific training and development. Changing public attitudes are also an important consideration. Issues surrounding gender and diversity need to be addressed through training.

Benchmarking

Benchmarking is the ongoing process of measuring quantitative and qualitative organizational factors and comparing them to past performance or competitors' performance. It is most often used in museums with relation to public programs and services. But benchmarking is also useful to monitor the flow of internal human resource functions like turnovers, transfers, and promotions, how many are there? How frequently do they occur? What sort of training can help reduce turnover and prepare staff and volunteers for new assignments or promotions?

Tip – In museums with fewer staff or volunteers it may be useful to develop and monitor benchmarks for human resource development through a regional network of museums.

Culture

The culture of an organization is the collective attitudes of employees toward work, supervision, and [museum] goals, policies, and procedures. Museums are more than buildings and collections. The museum as a workplace is a social entity. Employees and volunteers have opinions about intangibles like communication and decision-making. Attitudes are learned and are affected by the experiences of employees and volunteers within the institution. Socialization of a new employee or volunteer takes place very quickly.

Asking employees and volunteers what the museum might do to help them make a bigger contribution or how they are being prevented from working to capacity are questions whose answers produce extremely valuable data.

Tip - Perceptions of employees and volunteers about institutional culture can be studied using many of the same quantitative and qualitative research methods employed in visitor studies. For example, see the OMA Tip Sheet "Obtaining and using visitor

feedback” by Barbara Soren. It is available online at http://www.museumsontario.com/resources/rsc_tip_visitor.shtml

Conclusion

In this Tip Sheet I have explored the first steps toward developing a plan for training and development of staff and volunteers. Next steps are comparable to those taken in the preparation of any museum program, including goal setting, program design, research and selection of teaching methods and providers, costing, and evaluation. Planning for training and development takes time, effort and money but it is an investment that will reap returns not only for the museum and the individuals involved but also for the many communities you serve.

ⁱ Kathryn McMullen & Grant Schellenberg. (2003) Skills and training in the non-profit sector. CPRN Research Series on Human Resources in the Non-Profit Sector No.3. Ottawa: Canadian Policy Research Networks. < <http://www.cprn.org/en/doc.cfm?doc=78> > Accessed July 14, 2003.

ⁱⁱ Monica Belcourt, Philip Wright, and Alan M. Saks. (2000). Managing performance through training and development. Scarborough, Ontario: Nelson. *Tip sheet is adapted for museums based upon this text.*

ⁱⁱⁱ Jocelyn Harvey. (2002) Creative Management in the Arts and Heritage: Sustaining and Renewing Professional Management for the 21st Century: Final Report on Phase 1. Ottawa: Canadian Conference of the Arts. <http://www.ccarts.ca/eng/04res/english.pdf> Accessed July 17, 2003.

^{iv} Belcourt, Wright, & Saks: 9

^v Kathryn McMullen & Grant Schellenberg. (2003) Skills and training in the non-profit sector. CPRN Research Series on Human Resources in the Non-Profit Sector No.3. Ottawa: Canadian Policy Research Networks. < <http://www.cprn.org/en/doc.cfm?doc=78> > Accessed July 14, 2003.

^{vi} Canadian Museums Association. (2001) More than willing hands: A report on voluntarism in museums. Ottawa: CMA. < <http://www.museums.ca/volunteers/volunteers.pdf>> Accessed August 12, 2003.