

Museum Development Yorkshire

Training Needs Analysis 2018

1.0 Executive Summary:

MDY conducted its first Training Needs Analysis for the Yorkshire & Humber region in November 2018. The main findings were as follows:

1.1 Statistical validity: Organisational responses represented 59 out of 141 Accredited Museum sites (including Provisional) in Yorkshire & Humberside. This is a response rate of 42%, which gives a statistical validity of 95% and margin of error of +/-10% on all results.

1.2 Representation of museums by type: Survey participation is broadly representative of museums in the region in terms of type and size.

1.3 Representation of individuals: Individual responses represent a significant body of experience and knowledge, although the number of responses in relation to workforce size is significantly less statistically valid than for organisational responses.

1.4 Identification of training needs: Results indicate a strength of practice in structured organisational assessment of training needs. Promoting training and development opportunities prior to or at the start of the financial year would give the most effective alignment with internal organisation practices, and would potentially assist with restrictions on participation caused by early allocation of budgets for training.

1.5 MDY training/development accessed in the last 3 years: Organisational respondents evidence a broad engagement across the MDY training and development offer, averaging approximately 4 different forms of engagement. This suggests that the layered museum development offer is providing multiple opportunities to suit different organisations.

1.6 Training and development needs:

1.6.1 Museum specialist skills – audiences and collections: The priority for development needs is based on museums understanding and responding to audience needs. There is an on-going need for development of collections practices, with Accreditation being the main driver. Collections-based development could also be promoted by demonstrating how it enables museums to meet audience needs.

1.6.2 Arts Council England initiatives: Priorities are identified as Audience Finder, Creative Case and Equality Action Planning, which again correlates with a focus on audience needs.

1.6.3 Management/business skills: Fundraising emerges as the top priority. Volunteer development & management is also a leading priority. There is potential to combine compatible development areas, and to signpost priority needs such as management development which can be delivered by other organisations.

1.6.4 Digital skills: Digital skills priorities relate primarily to building audiences (audience data analysis, collections digitisation, digital content creation, social media strategy). It is likely to be beneficial to combine digital skill development with other development areas, such as audiences or collections, to increase exposure to digital skill development and tap into other motivations.

1.6.5 Personal skills: The priority needs are listening & communication and networking, and could be built in as training themes for 2019-20 across other training and development activity.

1.7 Barriers to training and development: Lack of staff cover, lack of time and lack of training/travel budget ranked strongly and consistently above all other barriers. Opportunities to overcome these barriers through advance notice of training opportunities, creative tactics and direct support should be considered. There is a risk that individuals may be deterred from seeking training due to time pressures on their capacity, as well as awareness of lack of cover and travel/training budget within organisations. Creating a regional context in which training and development is strongly valued may help at both an organisational and individual level.

1.8 Preferred forms of learning delivery: Museums prefer bespoke group activities where possible, and other group activities where not possible. There is strong interest from organisations in mentoring, but less so from individuals. Individuals expressed different preferences overall, but with an interest in knowledge exchange/site visits and external learning, which correlates with organisational preferences. The variance in organisation/individual response may arise from both different experiences of learning delivery and different perspectives on the benefits of bespoke/group training.

1.9 Recommended actions: A series of actions have been compiled and recommended based on these key findings.

February 2019

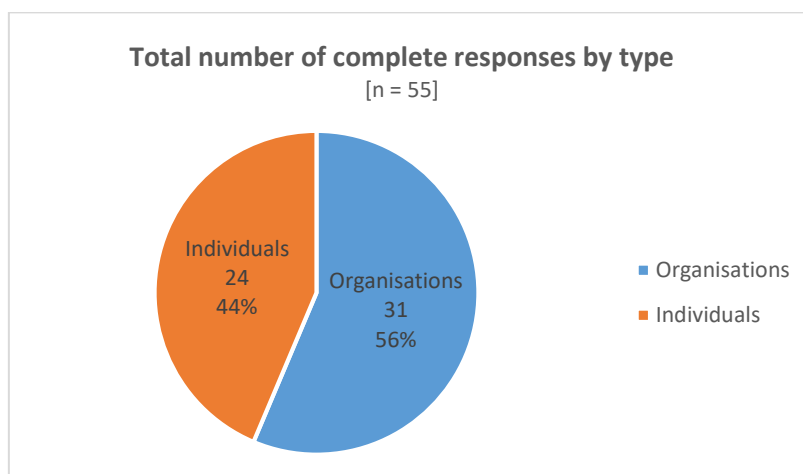
2.0 Recommended Actions for Museum Development Yorkshire:

- 2.1 Strengthen the regional context for organisations to prioritise training and development, through clear and consistent messaging about the organisational benefits of best practice.**
- 2.2 Provide refresher training on internal organisational training needs analysis, including sharing existing good practice, through the regional forums.**
- 2.3 Continue using the layered museum development offer to signpost organisations towards deeper levels of engagement and opportunities, according to their development priorities.**
- 2.4 Undertake review of regional forum delivery to determine how engagement and content can be developed to reach a broad audience with first level information, and bite-size training in response to development priorities.**
- 2.5 Provide advance notice of training events and forums by publishing two six-monthly training calendars in 2019-20, to facilitate organisational planning. Ensure that specific training information is provided at least one month prior to an event.**
- 2.6 Assess as a priority how to support the broad and substantial demand for audience development activity, including audience engagement and participation, Audience Finder, Creative Case for Diversity, Equality Action Planning, marketing & PR, and digital content development and delivery.**
- 2.7 Demonstrate how training and development opportunities support organisational priorities, e.g. audience engagement and Accreditation requirements.**
- 2.8 Programme personal skills development in listening & communication, and networking, across training delivery, such as forums and cohorts in 2019-20.**
- 2.9 Develop the learning cohorts in 2019-20 with a view to identified development priorities, e.g. fundraising, including through follow-up with survey respondents.**
- 2.10 Investigate demand for volunteer development and management through follow-up with survey respondents. Options could include support via forums, regional networking, and identification of other provision.**
- 2.11 Ensure that other identified priorities are addressed through forum content and/or signposting of more generic opportunities, e.g. management development.**
- 2.12 Pilot exploratory development activities with external expertise where opportunities arise, e.g. innovation in 2019-20.**
- 2.13 Link digital skills into other priority areas, e.g. cohorts working on audiences or collections.**
- 2.14 Trial additional opportunities to offer in-house training and development, and informal knowledge exchange, e.g. brokering site visits within cohorts, and mentoring.**

3.0 SURVEY RESULTS ANALYSIS

3.1 Response rate and statistical validity

55 complete survey responses were received during the survey period in November 2018.

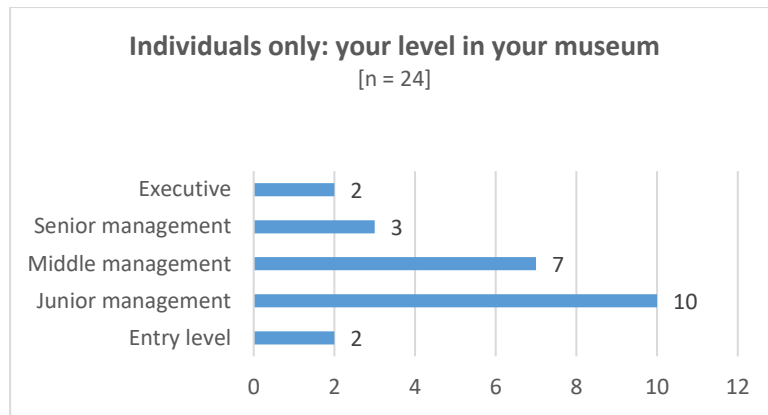


Organisations: 31 responses (56%) were on behalf of organisations and represented a total of 59 Accredited museum sites out of a regional total of 141 (including Provisional). Of these, 5 organisational responses represented NPO organisations, which represent 18 sites.

This gives a survey completion rate of 42%, in terms of museum sites represented in the results. In a survey population size of 141, a response rate of 59 gives a confidence level of 95% and up to 10% confidence interval (margin of error). (<https://surveysystem.com/sscalc.htm>)

Individuals: 24 complete responses were received from individuals. The exact population of potential respondents from the Y&H museum workforce (including both staff and volunteers) is not known, but it is clear that this response rate represents a much lower proportion of potential respondents than the number of organisational responses. The relative statistical significance of the two datasets must therefore be kept in mind when drawing inferences from the data.

Of the 24 complete responses received from individuals, 70% (17) were from people situated at junior and middle management level within their museum. Whereas the organisational responses are therefore likely to provide a senior and executive level view of organisational museum training and development needs, individual responses are more likely to offer a complimentary view from the perspective of people in middle and junior management.



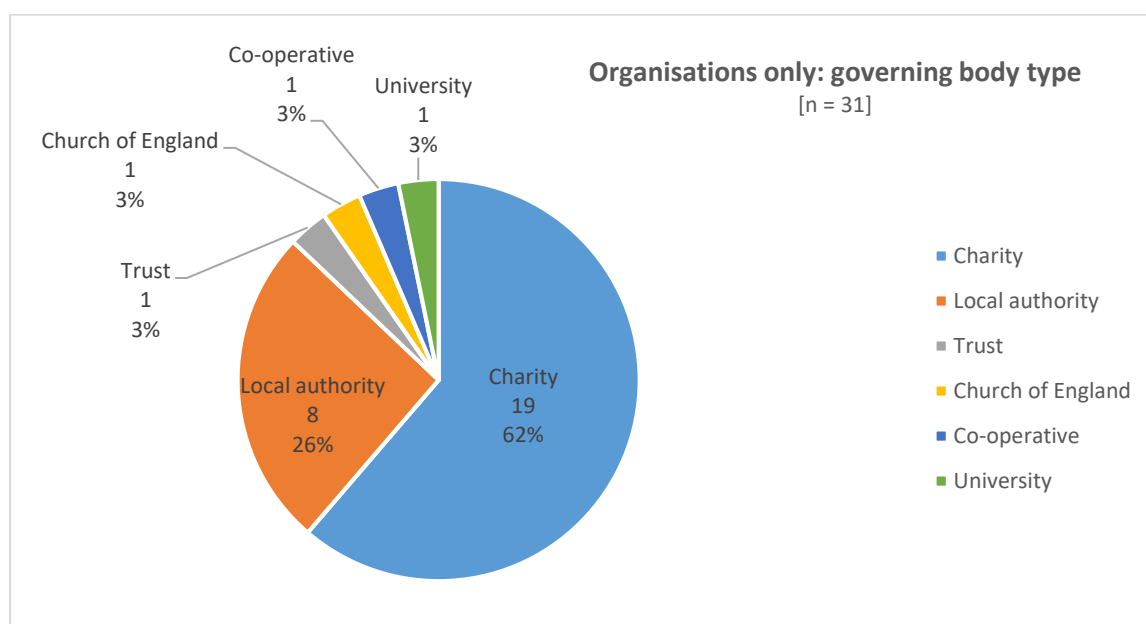
- **Survey findings focus on organisational responses which offer a statistically higher level of confidence.**
- **Results below are based on 31 organisational respondents representing 59 Accredited museum sites, including NPOs.**

3.2 Representation of types of museum

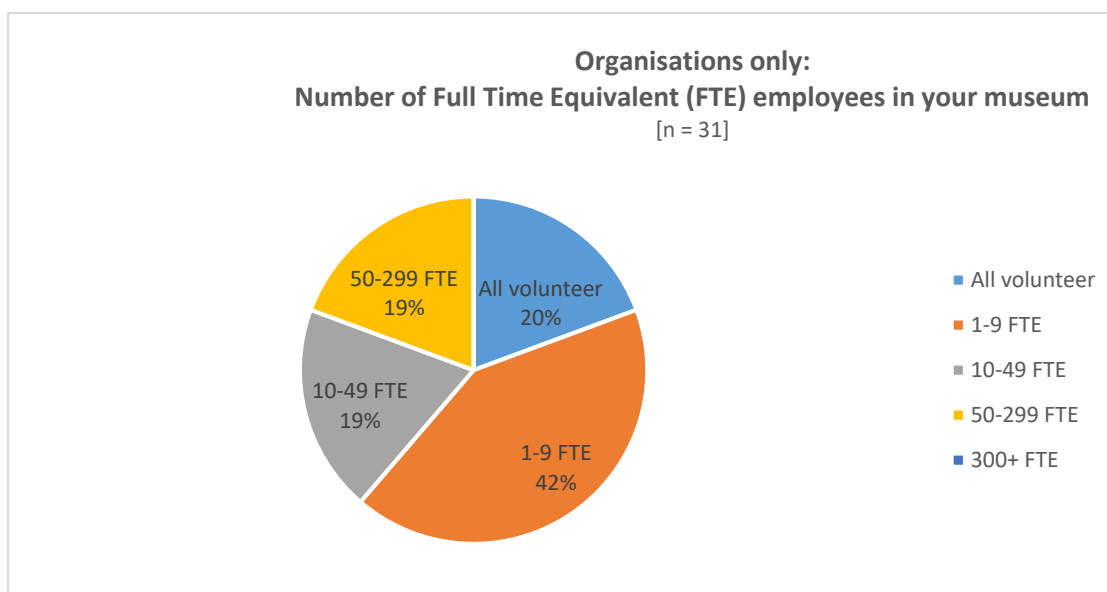
3.2.1 Governing body type

The survey's organisation type categories were not fully correlated with the Accreditation categories; this data should be fully aligned in future to enable statistical comparison. Of the 141 Accredited museums in the region, 47% are independent museums and 38% local authority.

Survey categories used are approximately comparable to Accreditation categories and appear reasonably in proportion, allowing for potential overlap in definition, for example of local authority trusts and other charitable organisations. A response rate of 62% from charitable organisations suggests strong representation of independent museums, and potentially a slightly low representation of local authority organisations.



3.2.2 Size of organisation



62% of respondents represented small museums (0-9 FTE employees), of which 20% (6 organisations) were fully volunteer-run. A further 19% of respondents had 10-49 FTE employees.

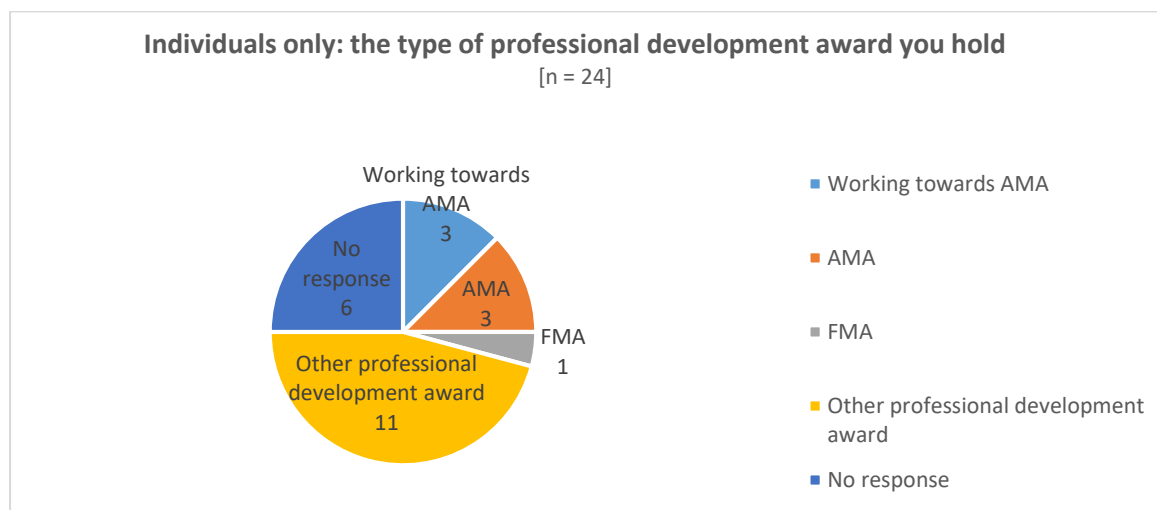
Current Museums in Yorkshire data suggests a mean average paid workforce of 23 of survey participants, therefore being in accordance fitting with this majority sample being in the 1-49 FTE range.

- **Survey results appear to be broadly representative of the make-up of different types and sizes of museums in the region.**
- **Further work is required to compile existing data for Yorkshire & Humber museums into an accurate, full dataset for benchmarking results.**

3.3 Representation of individuals

3.3.1 Type of museum professional development award

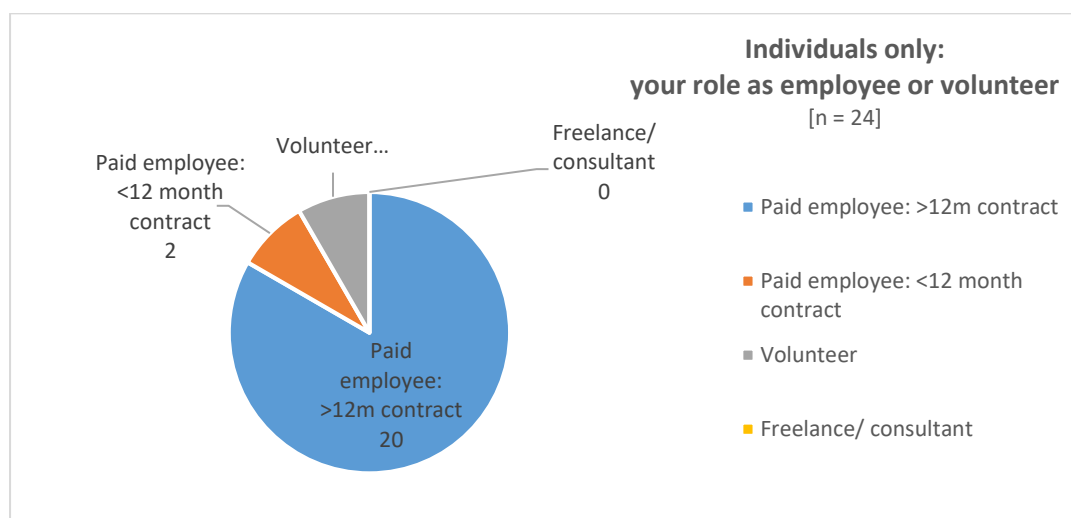
Of the 24 individual respondents, 75% identified as having a professional development award, including 29% who were working towards or held a Museums Association award. This seems to be a relatively low percentage and may be a result of the high proportion of junior and middle management respondents. This question was not asked to people completing the survey on behalf of an organisation, which may have produced a different result.



3.3.2 Employment contract/role

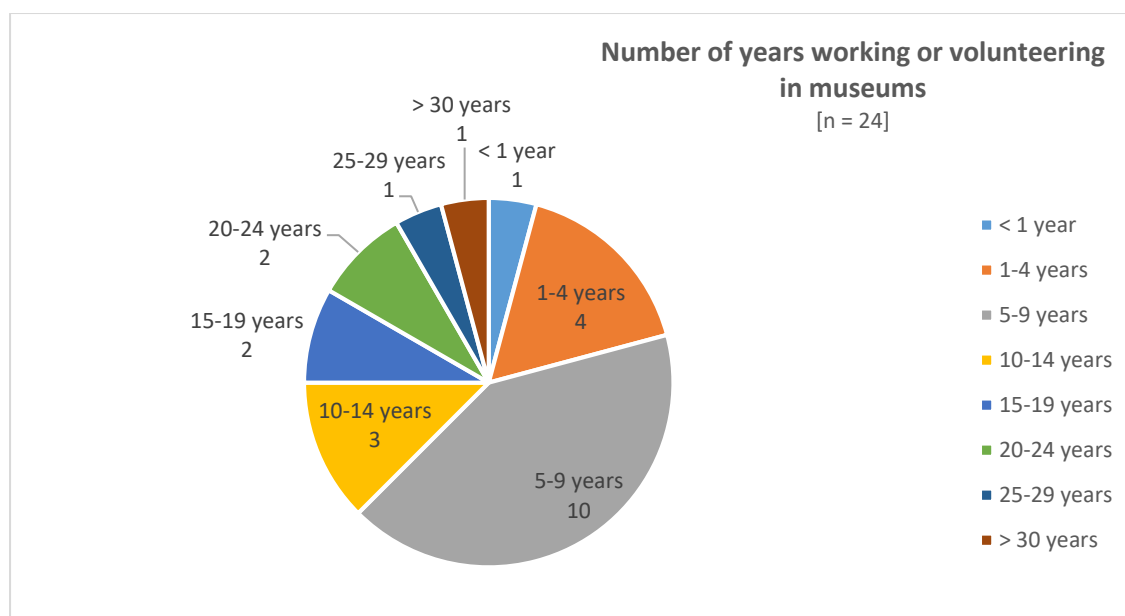
83% (20) respondents were in a paid role with a contract of 12 months or more (including permanent). This appears to correlate with the data below relating to length of experience in the sector.

Only 8% (2) of the individual respondents were volunteers, which is low in relation to the total number of volunteers participating in the museums workforce in Yorkshire and Humberside. However, 20% (6) fully volunteer-run organisations provided an organisational response.



3.3.3 Years of experience in the museum sector

20% (5) respondents had up to 5 years' experience in museums, with a further 42% (10) having 5-9 years' experience, and the remaining 38% (9) having over 10 years' experience. This suggests that a significant body of museum experience informs the individual responses, although the majority represent people in junior and middle management posts.



- Individual responses represent a substantial body of experience and knowledge in the sector, although the proportionately lower number of responses for the potential population size make the results less statistically significant.

3.4 How do you identify the training/development needs of your museum workforce both employed and voluntary?

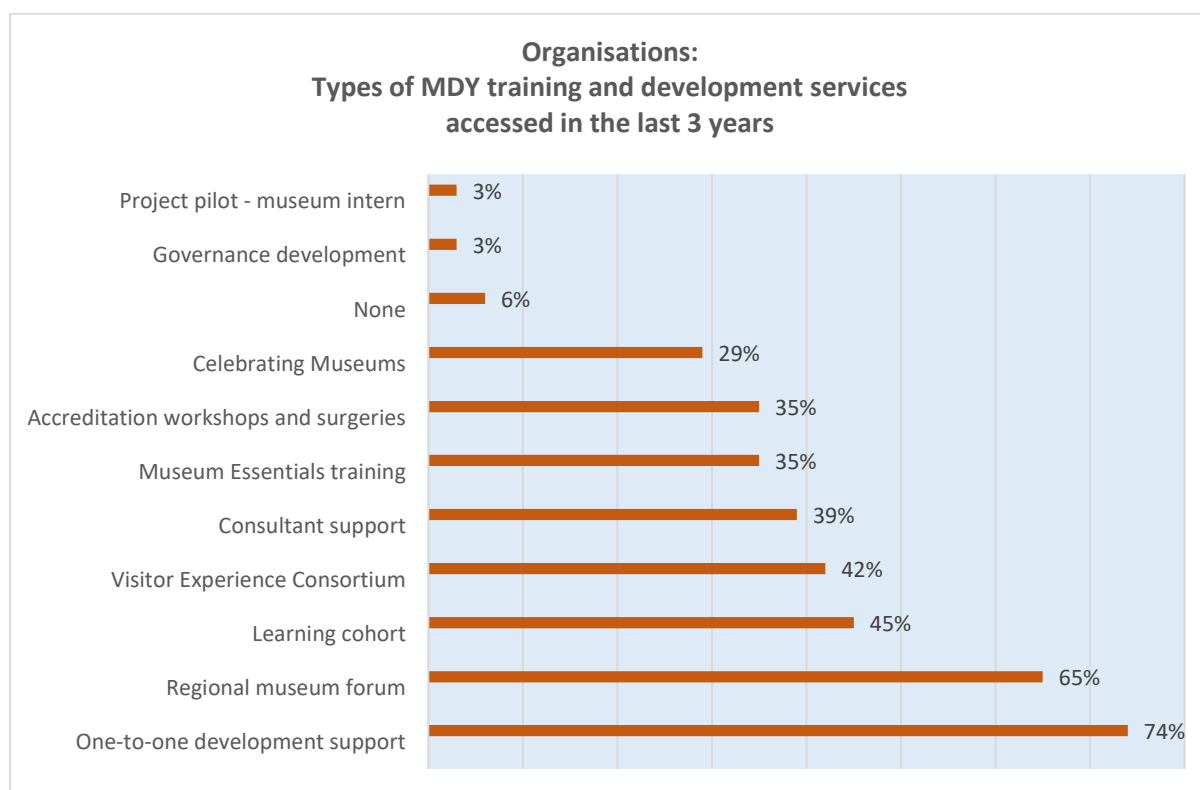
This was a free text response question. The majority of responses (c.70%) identified a formal appraisal and development process which informed planning for training and development needs. Use of team meetings, staff/volunteer surveys, and gap analysis between service plans and recognised capability were also identified by c.20% of respondents. Visitor feedback and mystery shopper processes were identified by c.13% of respondents. 8% referenced legislative or policy requirements as a driver for training needs.

The majority of responses focused on a planned approach to training, with a smaller number referring to ad hoc and on-going responses to training needs. A wide variety of approaches and inputs to training identification were cited.

A majority of respondents seem to have a structured approach to training and development as part of their planning cycle. In some cases, this structured cycle could be potentially restrictive if additional training opportunities become available later in the year.

- **Confirming MDY training and development opportunities at the start of the financial year seems likely to offer a good fit with organisational practices, particularly around the annual planning cycle. Aim to publish 2 x 6 month calendars covering each half of the year.**
- **There is potential for MDY to offer support and share good practice to strengthen internal organisational training needs analysis, e.g. through the regional forums. This would in turn support future regional training analysis activity by improving data coming from organisations.**

3.5 Which of MDY's training/development services have you or your organisation accessed within the last 3 years?



From the 31 respondents, 117 participation options were identified. Only 6% (2) respondents had participated in no training or development activities. This gives a mean average of 3.9 different types of engagement by the 29 remaining respondents, showing that respondents include those who are actively participating in MDY's programme, and supporting a picture of broad engagement across the MDY offer.

The highest level of organisational participation was in the areas of MDY focus, with 74% accessing one-to-one support, and 65% accessing the regional forums. This suggests that one-to-one contact and the regional forums are amongst the best ways of disseminating information and opportunities.

Other group activities were the next most popular, with over 40% participating in a cohort or consortium. 35% accessed single topic training on Accreditation and other Museums Essentials topics. 39% had accessed consultant support. 29% had participated in a Celebrating Museums event.

Individual museums also cited other pilot or bespoke activities that they had participated in.

- **A layered museum development offer provides multiple opportunities to suit different organisations, and can be used to signpost organisations towards deeper levels of engagement according to their need.**
- **Regional forums remain a strong form of engagement, and content is likely to reach a broad audience with first level information, and bite-size training, especially if backed up by early confirmation of agenda content.**

3.6 Which of the training and development needs listed do you identify as important for your museum in the next 3 years?

The following categories were used:

- Museum specialist skills
- Arts Council England initiatives
- Management/business skills
- Digital skills
- Personal skills

In each case, the chart shows weighted results (Very Important x2, Important x1, Slightly Important x0.5) to give a total weighted score for importance per category.

Both organisational and individual respondents are shown, however, the emphasis for inference of results is on organisational responses.

The number of responses per category without weighting is shown in Appendix 1.

3.6.1 Museum specialist skills



Visitor experience and customer care and **audience engagement and participation** are the top priorities for both organisations and individuals, closely followed by **audience development planning**.

The next most important priorities are **access** and **Accreditation/SPECTRUM**. Note that access is also aligned with the audience-focused priorities. **Accreditation/SPECTRUM** is the leading category associated with collections-based needs.

Health and wellbeing and **formal and informal learning** form the next tranche of priorities, again evidencing an audience-led focus. These categories have a marginal lead on the collections needs, and indicate an on-going strength of interest in these areas as development needs.

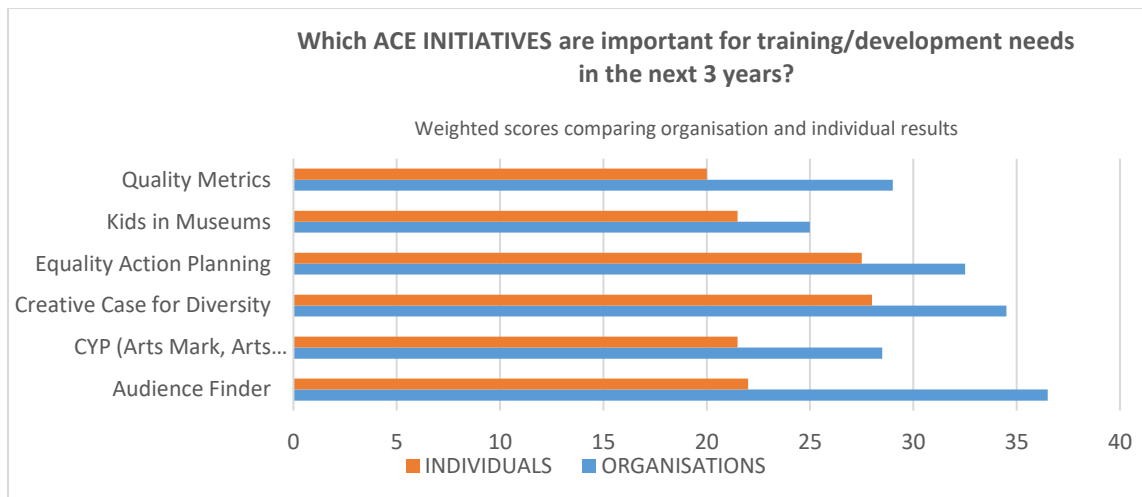
Interpretation planning and development falls in the middle ground between audience-based activity and collections. This could suggest that there is a recognised priority of understanding and engaging audiences, before implementing interpretation development.

Accreditation/SPECTRUM is the main priority and driver for collections-led needs. Collections categories form a slightly lower tier of needs, with some emphasis on **collections storage/environmental management** and **collections management**. Within this, collections needs are rated as more important by organisations than by individuals. This lower placing of collections needs may suggest a higher level of confidence in this area, but there remains a broad need across collections-based training needs. Note also that collections needs are spread across a larger number of sub-categories, which may have affected the result.

- **Top priorities indicate a strong focus on meeting audience needs, and enabling audience engagement and participation.**
- **MDY to assess how its offer could be developed to support audience-based development priorities, through in-depth conversation with a sample of respondents, and potential partners in delivery.**

- **Training and development opportunities should demonstrate how they support audience engagement and development, and Accreditation requirements, to tap into motivations for participating in training and development.**

3.6.2 Arts Council England initiatives



Audience Finder, Creative Case for Diversity, and Equality Action Planning are the top three priorities, with different emphasis in the ordering, across both organisations and individuals.

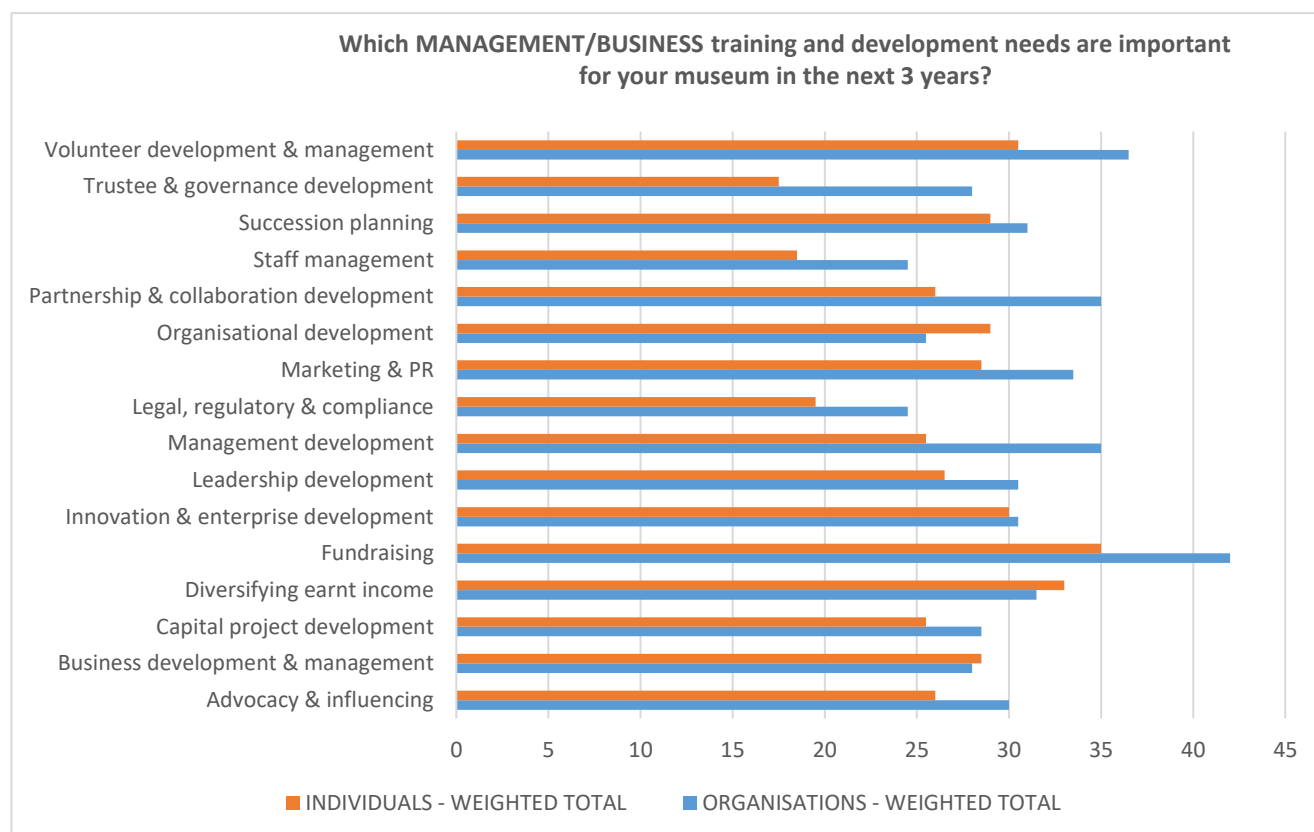
These categories also correlate with the museums specialist skills priorities around audiences. This extends to planning for organisational diversity through **Equality Action Planning** as a foundation for broader audience engagement.

CYP, Kids in Museums, and Quality Metrics are identified as the bottom three priorities by both organisations and individuals. It is possible that needs in relation to **CYP** and **Kids in Museums** are less of a priority due to being more established areas of museum activity. Direct activity on CYP and Kids in Museums is therefore less of a priority, and is also likely to be provided by other organisations.

Quality Metrics appears to be the least well understood category, being of direct relevance principally to NPOs at this stage, and not currently a priority for the majority of museums.

- **Demand for ACE initiatives, including Audience Finder, aligns with the demand for audience-based training and development activities.**
- **Audience-based development work should incorporate use of Creative Case for Diversity linking collections and content to audiences, and Equality Action Planning to implement workforce and governance diversity actions as a basis for effective audience outcomes.**

3.6.3 Management/business skills



When results are averaged out based on number of respondents, a proportionately stronger response rate is indicated by individuals in this category. This suggests that individuals felt a stronger need for these types of training opportunities than respondents on behalf of organisations.

Fundraising emerges as a clear priority for both organisations and individuals. **Volunteer development & management** is the second priority for organisations, and third priority for individuals, giving this an overall very strong place.

Partnership & collaboration development and **management development** are third equal priority for organisations, potentially working in support of the fundraising, diversifying earned income and partnerships priorities.

The middle ranking priorities are **innovation and enterprise development** and **leadership development**, as well as **diversifying earned income** which is the second priority for individuals, but fifth priority for organisations.

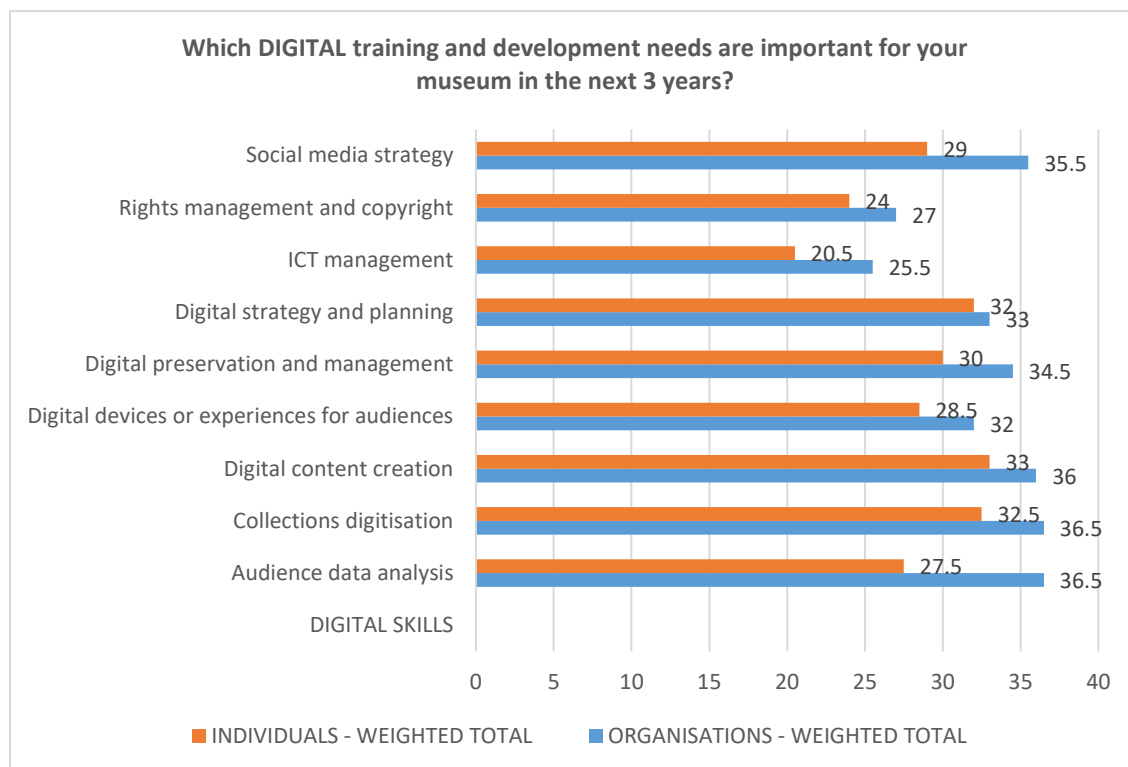
Marketing & PR is a strong mid-placed priority, and could be incorporated in activity around the audience development and Audience Finder priorities identified above, or alongside the earned income and innovation development needs.

Governance, **staff management**, and **legal, regulatory & compliance** all score the least highly and do not emerge as priorities for either organisations or individuals. In terms of staff management and governance development, this is potentially in conflict with findings in the *Character Matters* report, and best practice advice from sector leaders on governance. Potential inferences could be that these

areas are, or are felt to be, working well, or that there are low expectations of the impact of development in these areas.

- The leading priorities suggest a potential coalescence around fundraising, partnerships, earned income, innovation, and a secondary coalescence around volunteer development, management and leadership development.
- The identified need for volunteer development & management merits discussion as to how this could be met, potentially through a dedicated cohort or forum or external provision.
- The business, leadership, innovation and partnerships priorities align strongly with work being proposed for learning cohorts in 2019-20.
- The need for marketing & PR could tie in with the need for audience-based training and development, and could be combined with work on Audience Finder to propose an interesting body of development with wide appeal.

3.6.4 Digital skills



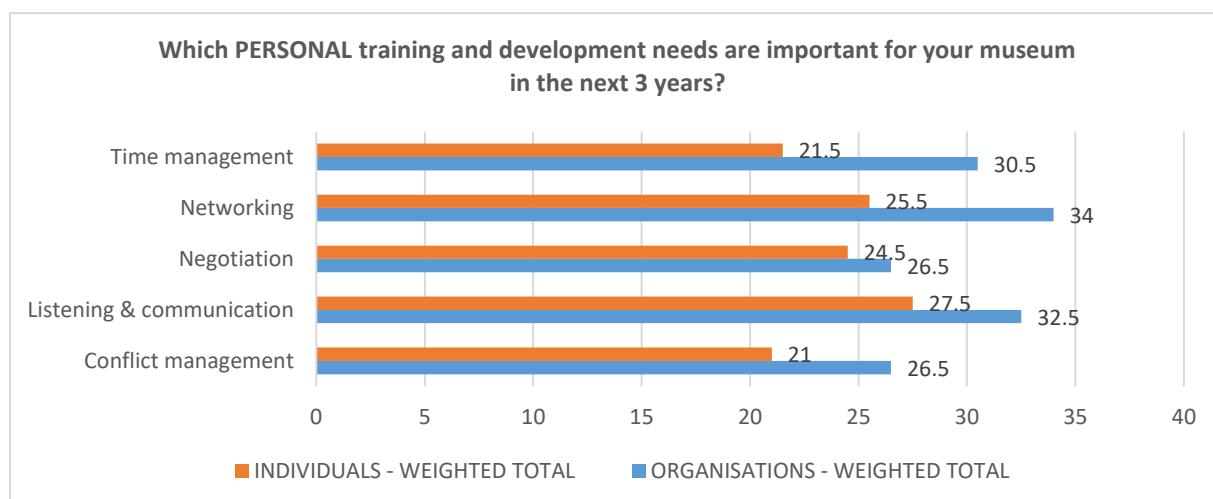
For organisations, **audience data analysis** and **collections digitisation** are the highest priorities followed closely by **digital content creation**, then **social media strategy**.

The results for individuals are fairly well aligned: **digital content creation** is the highest priority, followed by **collections digitisation** and **digital strategy and planning**, then **social media strategy**. Individuals place Audience Finder lower, but identify more strongly the need for digital strategy and planning.

In all cases, the most popular responses tie in with the overall identified importance of reaching audiences: significantly for organisations, understanding audience data first, followed by putting collections online, creating online content, and using social media.

- **The results show a consistent prioritisation of audience-based needs across all categories, suggesting that work with an audience development focus would respond effectively to demand.**
- **Given the integrated need for digital skills across museum development, there is a case for considering how digital skills can be tied into other priority areas of development, e.g. cohorts working on audiences or collections. This could open up digital skills development to people who might not seek it out if identified primarily as digital development.**

3.6.5 Personal skills



For organisations, **networking** emerges as first priority, followed by **listening & communication**.

For individuals, **listening & communication** is first priority, followed by **networking**.

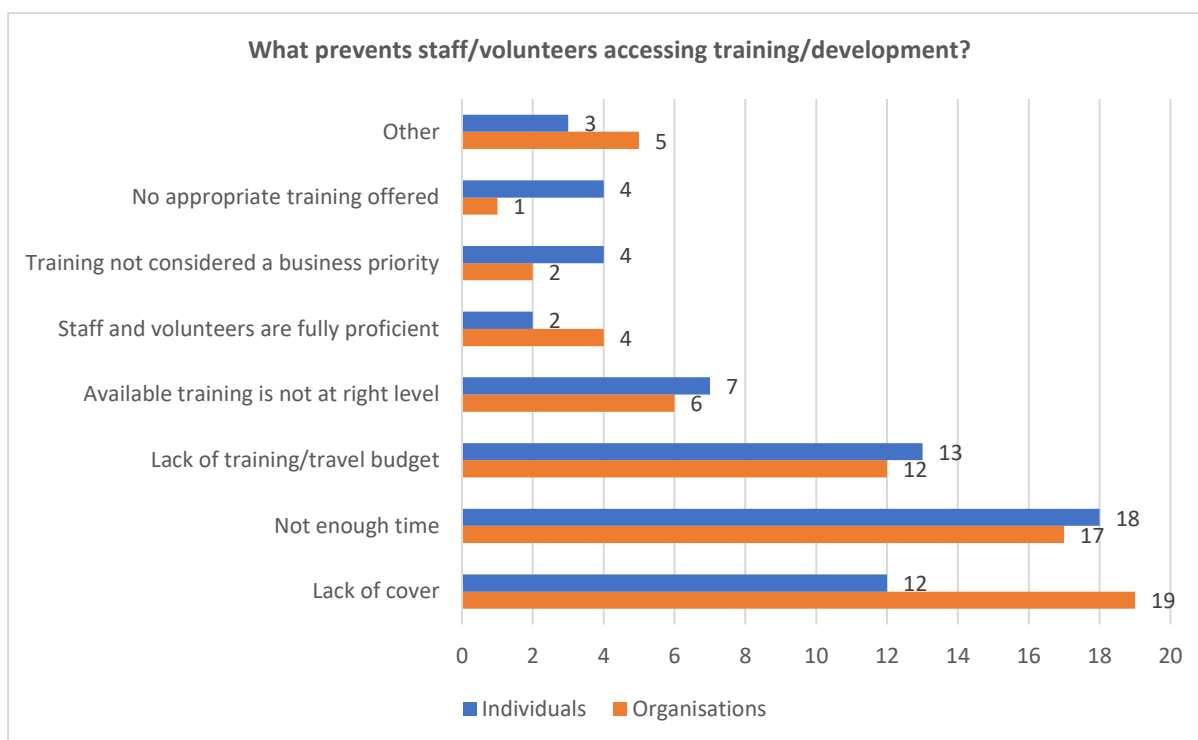
Third priority for organisations is **time management**, but for individuals it is **negotiation**.

There is an opportunity to consider how we provide opportunities to develop these personal skills which are clear priorities by making other training and development activities multi-layered, adding in activities which either explicitly or implicitly develop prioritised personal skills.

MDY could, for example, prioritise the highest scoring personal skills as training themes for the year. This could include: building into training days activities which focus on listening skills and reflecting on how these supported thinking and learning; having dedicated time to practice networking skills within the safe environment of forum meetings; or making agreed personal skills an explicit part of a cohort's development.

- **MDY will incorporate opportunities to develop key personal skills on listening & communication and networking throughout the programme in 2019-20.**

3.7 Barriers to training and development



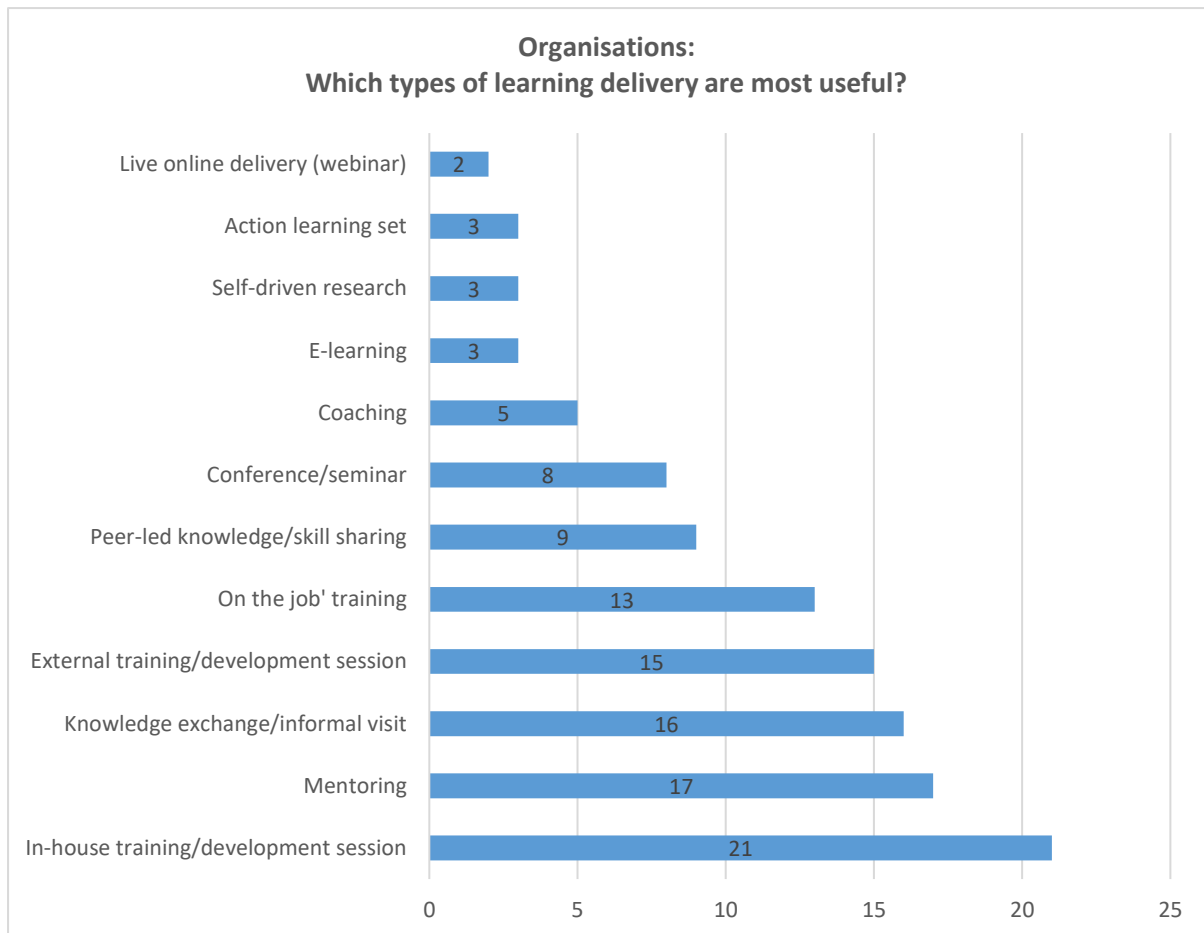
For organisations, the most significant barriers to training are lack of cover (61%) and lack of time (55%), followed by lack of training/travel budget (39%). Lack of cover, time and budget ranked strongly above all other barriers. Lack of cover is likely to be a significant issue for organisations with fewer FTE staff, as well as for larger services where overall staffing levels have been reduced. Advance notice of training opportunities is key to enabling the arrangement of staff cover.

Opportunities to support museums by funding the organisational costs of training could be considered where this is a significant problem. This could include creative solutions such as museums being the host venue to reduce time and travel costs. Creating a regional context in which training and development is strongly valued may help at both an organisational and individual level, to ensure that training is prioritised.

For individuals, lack of time is significantly the strongest barrier (75%), followed by lack of travel/training budget and lack of cover (c.52%). These factors could lead individuals not to seek or request training due to time pressure in the workplace or expectations about lack of cover and budget for travel/training costs. Again, advance notice is key to supporting people to manage their time and priorities in order to attend training.

- **MDY will focus on providing detailed, advance notice of training events to enable planning for staff cover, use of time, and allocation of budgets.**
- **MDY will focus on training and development messages to emphasise the importance and potential benefits of best practice.**

3.8 Preferred forms of learning delivery



This question showed perhaps the strongest variance between organisational and individual responses. This may relate to the different perspective of junior/middle/senior managers, as well as the impact of the different demographic in organisational/individual responses suggested by the questions on professional level and length of service.

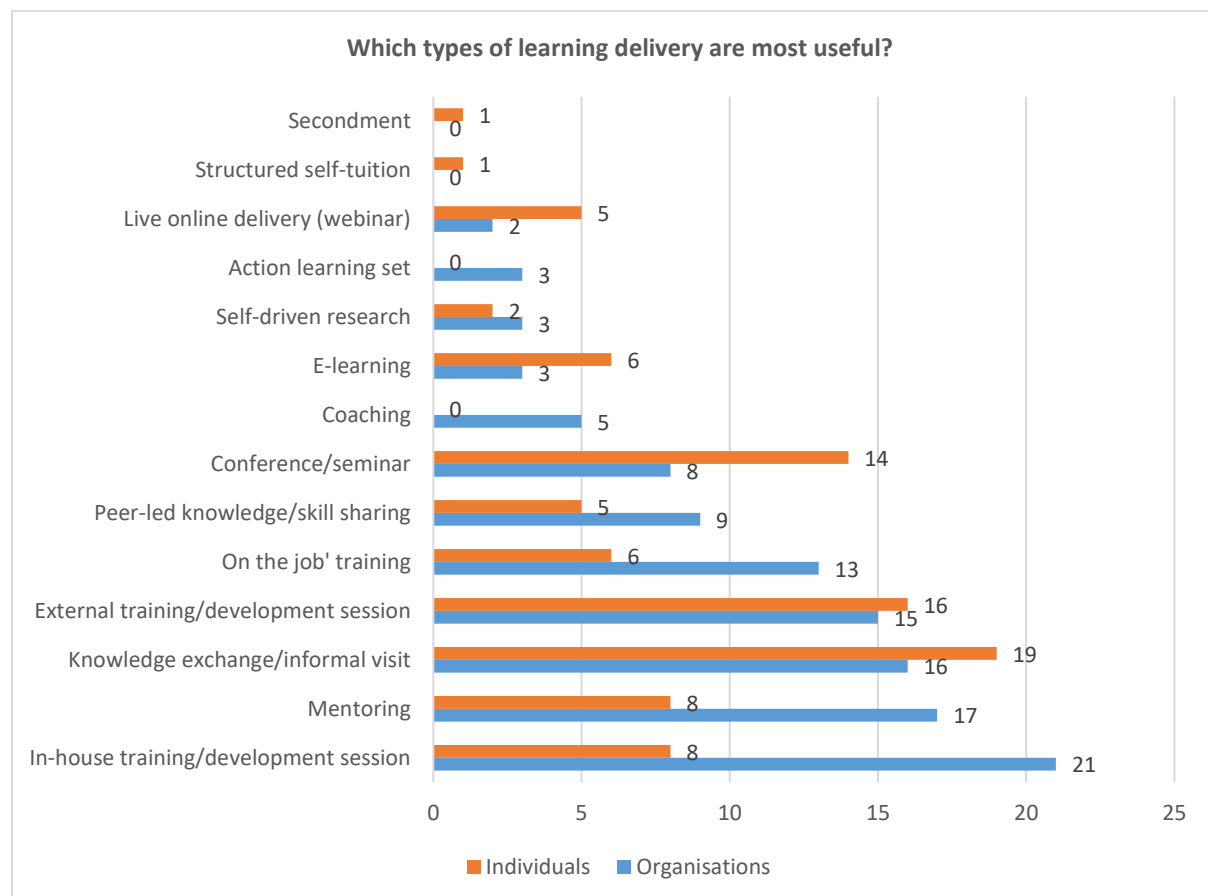
For organisations, a strong preference is shown for bespoke forms of training, led by **in-house training** (68%), followed by **mentoring** (55%), **knowledge exchange/informal visit** (52%) and **external training/development** (48%). Apart from mentoring, the leading preferences are for person-to-person, group training delivery. From experience, bespoke group activities on site are likely to have a stronger impact on organisational change, which may have influenced respondents, and this should be kept in mind when planning training opportunities.

Virtual learning options score the least highly. This may correlate with the prior experience of senior professional respondents, who (based on length of service) are likely to have undertaken the majority of their education prior to the development of online learning methods.

These preferences suggest that MDY's methods of delivery currently correlate with respondents' own preferences.

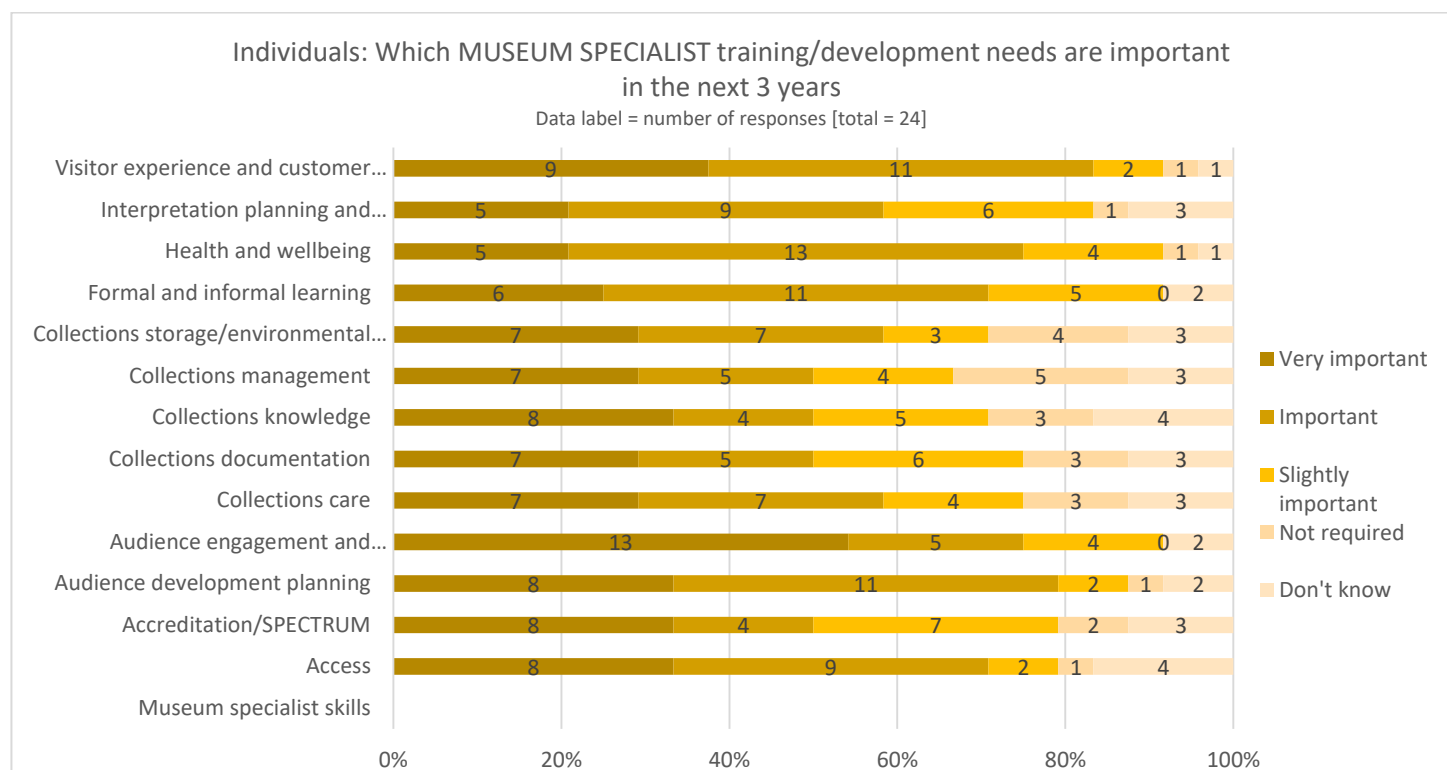
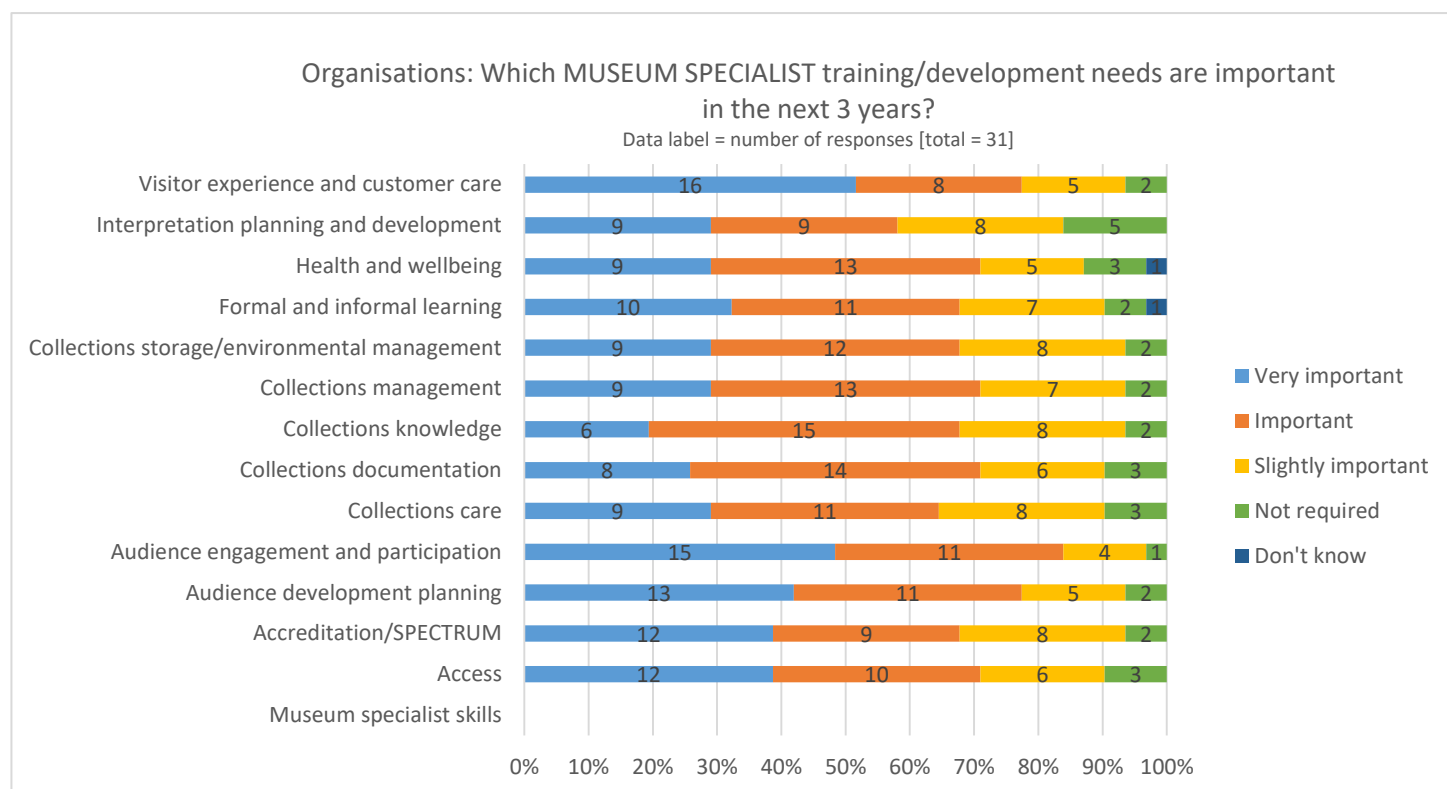
A comparative table shows the different responses from individuals who favour **knowledge exchange/informal visit**, followed by **external training/development**, and **conference/seminar**. Preference for in-house training/development and mentoring is much weaker, however there is more willingness to engage through **live online delivery** and **e-learning**.

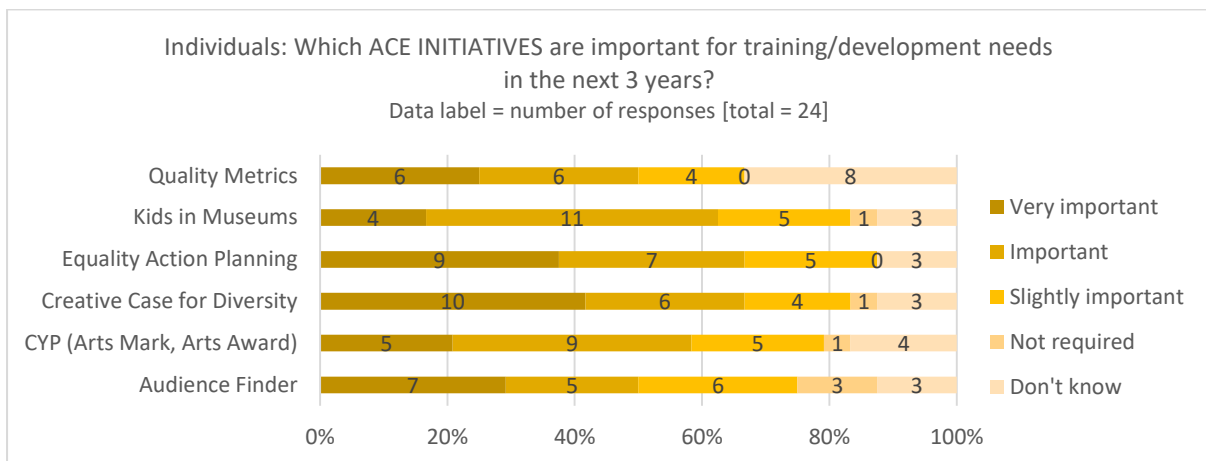
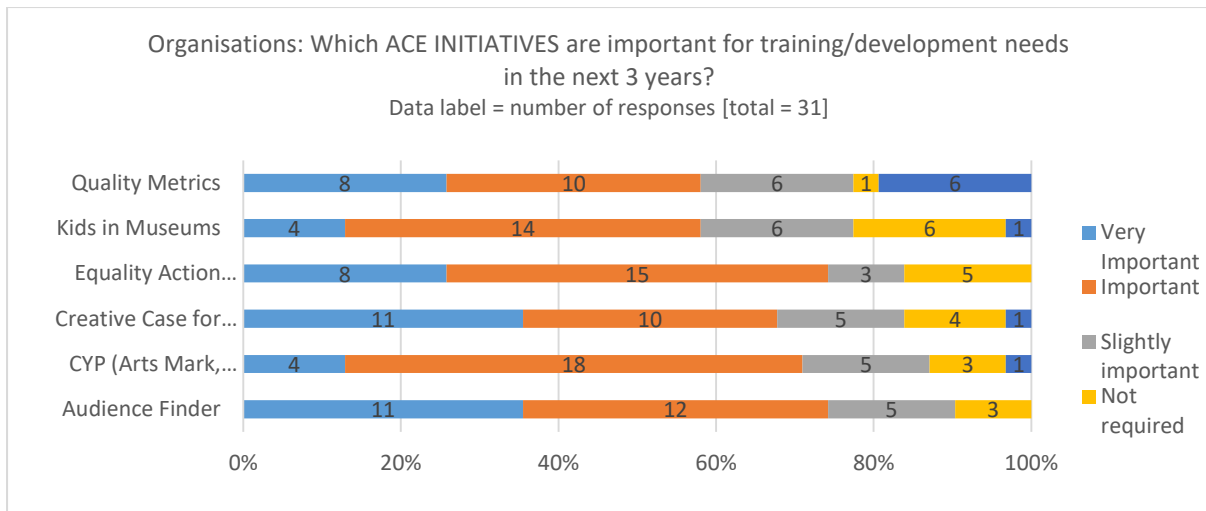
It is possible that these variances are due to a combination of different experiences of learning delivery as well as different perspectives on organisational and individual learning.



- **MDY to consider appropriate opportunities to offer in-house training and development, as well as opportunities for informal knowledge exchange, e.g. brokering site visits within cohorts, and mentoring.**

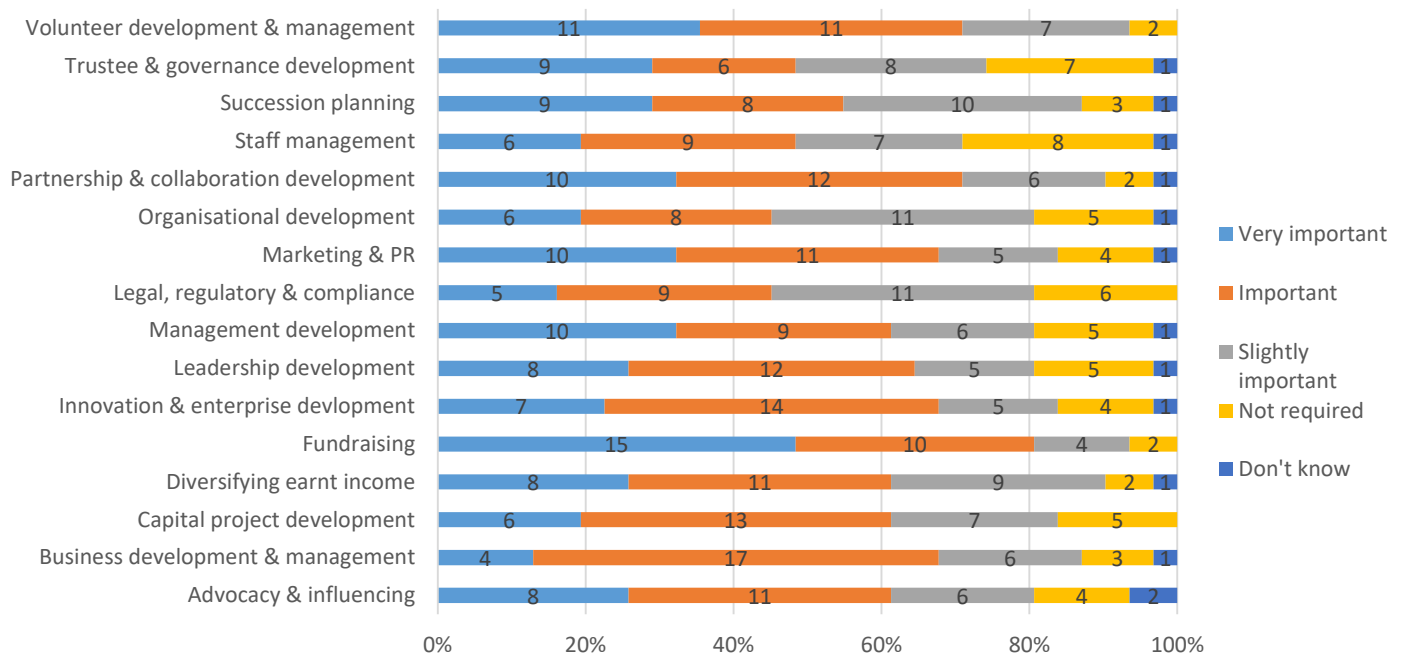
Appendix 1 - Survey data





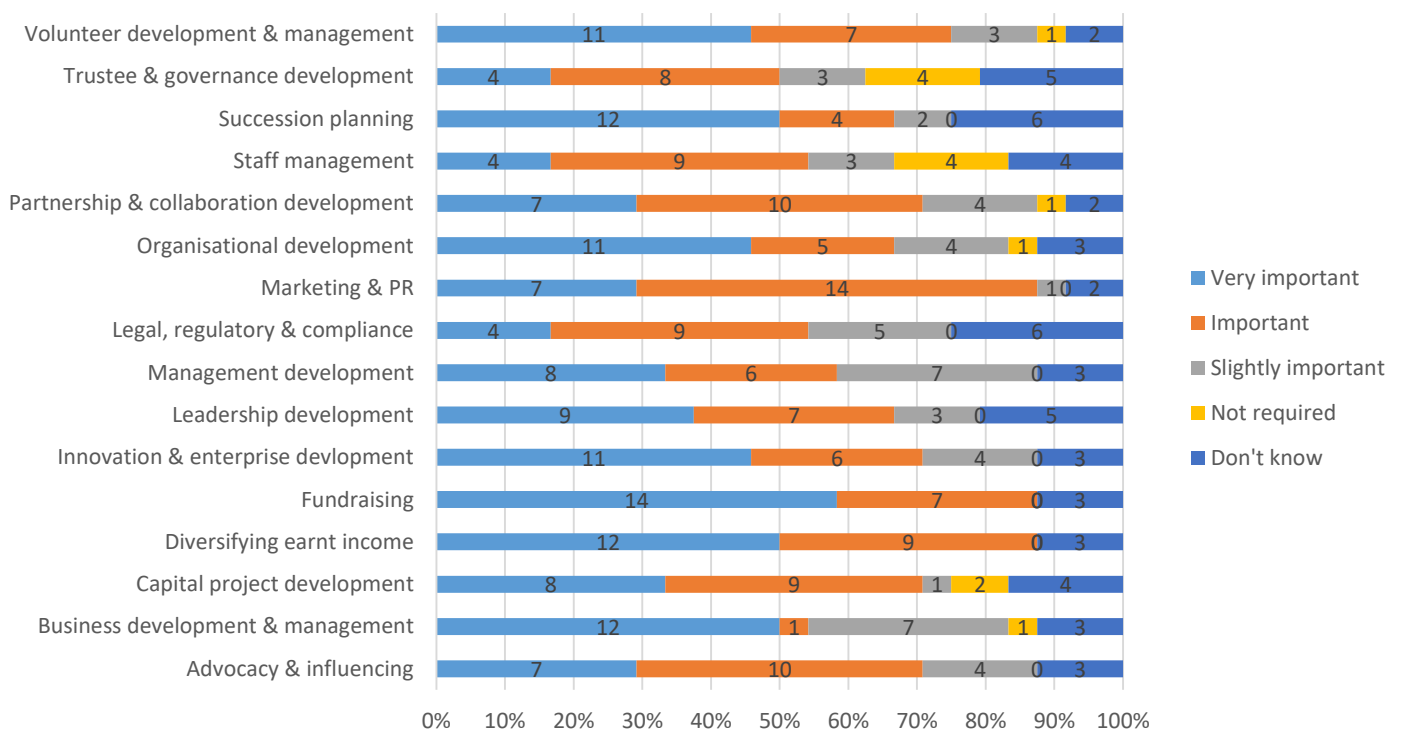
Organisations: Which MANAGEMENT/BUSINESS SKILLS are important
for training/development needs in the next 3 years?

Data label = number of responses [total = 31]



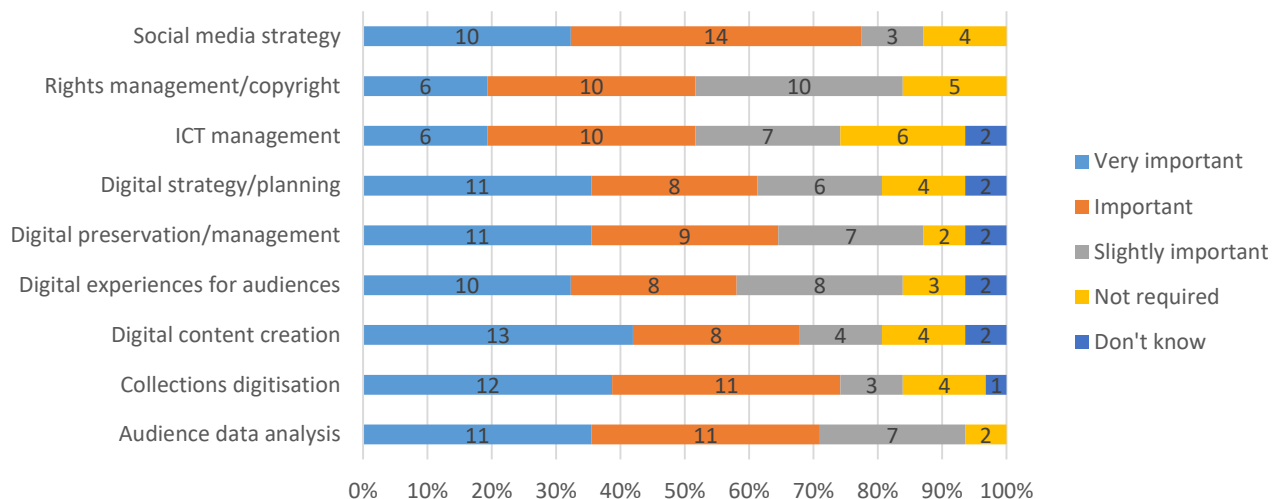
Individuals: Which MANAGEMENT/BUSINESS SKILLS are important to develop in the next 3 years

Data label = number of responses [total=24]



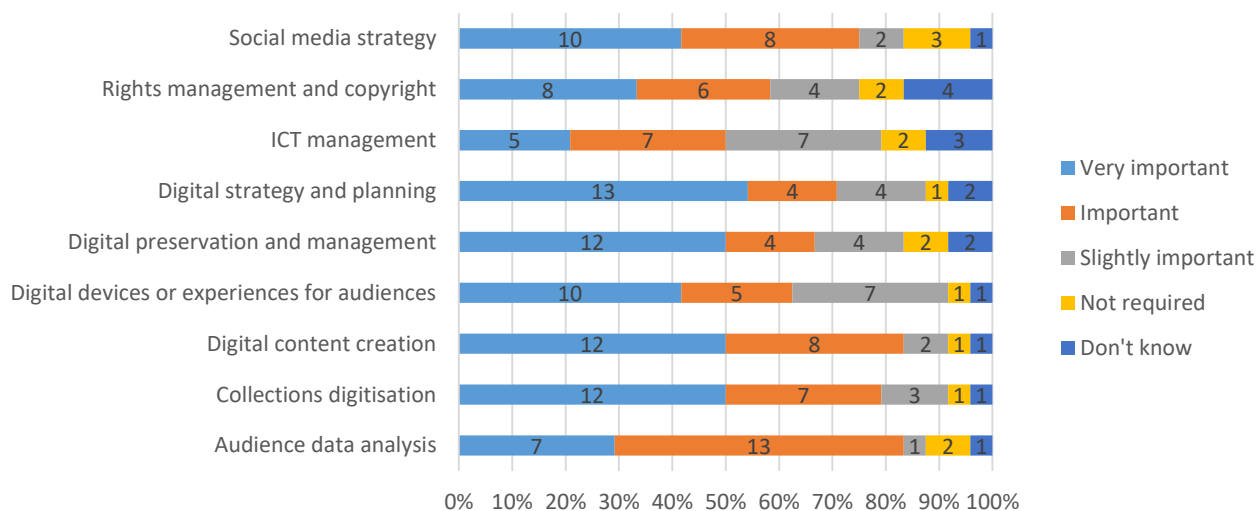
Organisations: Which DIGITAL SKILLS are important for training/development needs in the next 3 years?

Data label = number of responses [total = 31]



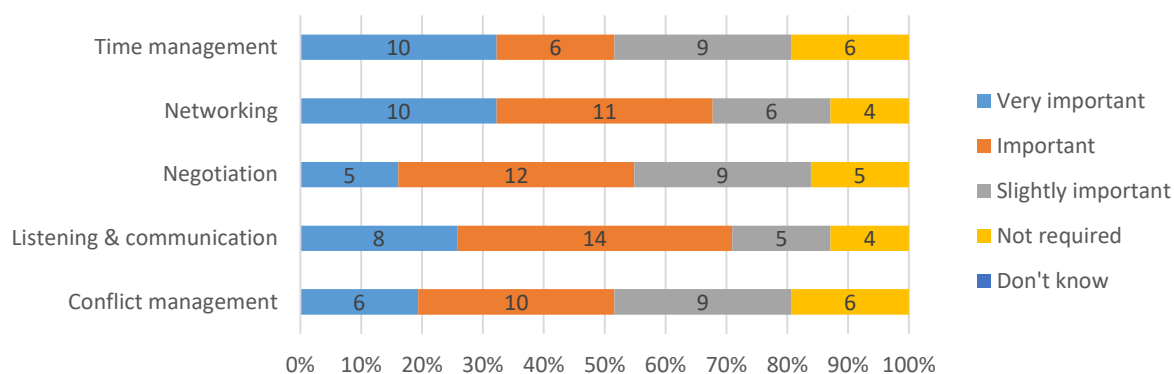
Individuals: Which DIGITAL SKILLS are important to develop in the next 3 years?

Data label = number of responses [total= 24]



Organisations: Which PERSONAL SKILLS are important for training/development needs in the next 3 years?

Data label = number of responses [total = 31]



Individuals: Which PERSONAL SKILLS are important to develop in the next 3 years

Data label = number of responses

