



Te Rauemi

Resource Guides

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

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- 11 Maungaroa Community Museum's training plan

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 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.



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.

Remember, in training no effort equals no results.

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.



Developing the plan

Overview of the process

We suggest that you use a three-step process for developing your training plan. See *Museum Training Plan Templates*, the supplement to 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 11-23 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 group or individual's position.

List the tasks they do.

Note the number of people involved

Enter their average weekly hours.

Museum Maungaroa Community 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.
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

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

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.

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

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 12 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.

Needs assessment checklist example

1. Museum Management

1.1 Governance and Strategic Management

Who does this? Enter group or individuals

When required? ✓ appropriate column

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

	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 Conduct Strategic and Annual Reviews	✓			Yes	Yes		
1.1.11 Negotiate and Resolve Complex Issues			✓	-	-		
1.1.12 Review and Approve Policies	✓			Yes	Yes		
Overall Assessment:				No	Yes		
Priority (A this year; B next year; C none)				-	B		

Training required? → No Yes

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

If 'A', carry forward to Programme

Refer to the example on page 13 to see what the completed form looks like overall.

A group of tasks within the programme (forms one block in the checklist)

The programme

Identify whether your museum does this now or will need to in the future (as appropriate).

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.

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.

Give an overall assessment for each individual or group for the whole block.

Individual task

Enter each A into the training programme form.

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.

Training Programme form example

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
1.3 Human Resource Management	2	<ul style="list-style-type: none"> Curator Assistant Curator 	✓	-	-	-	JW													100
1.4 Leadership	1	<ul style="list-style-type: none"> Assistant Curator 	✓	-	-	-	JW													300
2.1 Customary Iwi Principles and Practices	7	<ul style="list-style-type: none"> 2 x Board Curator Assistant Curator 3 x Volunteer Guides 	✓	-	-	-	JW													-
2.5 Customer Interaction	10	<ul style="list-style-type: none"> All new hosts/ guides 	-	✓	-	-	DF													-
3.3 Collections: Handling Storage Access Security	2	<ul style="list-style-type: none"> Collection Assistants 	-	-	✓	-	DF													-
3.10 Induction/Orientation	10	<ul style="list-style-type: none"> All new hosts/ guides 	-	✓	-	-	DF													-
Put this in your budget																			Total	\$400

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

When: Enter when the training will occur.

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

Who: List individuals who will attend.

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)

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



- 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.

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.

Maungaroa Community Museum's **training plan**

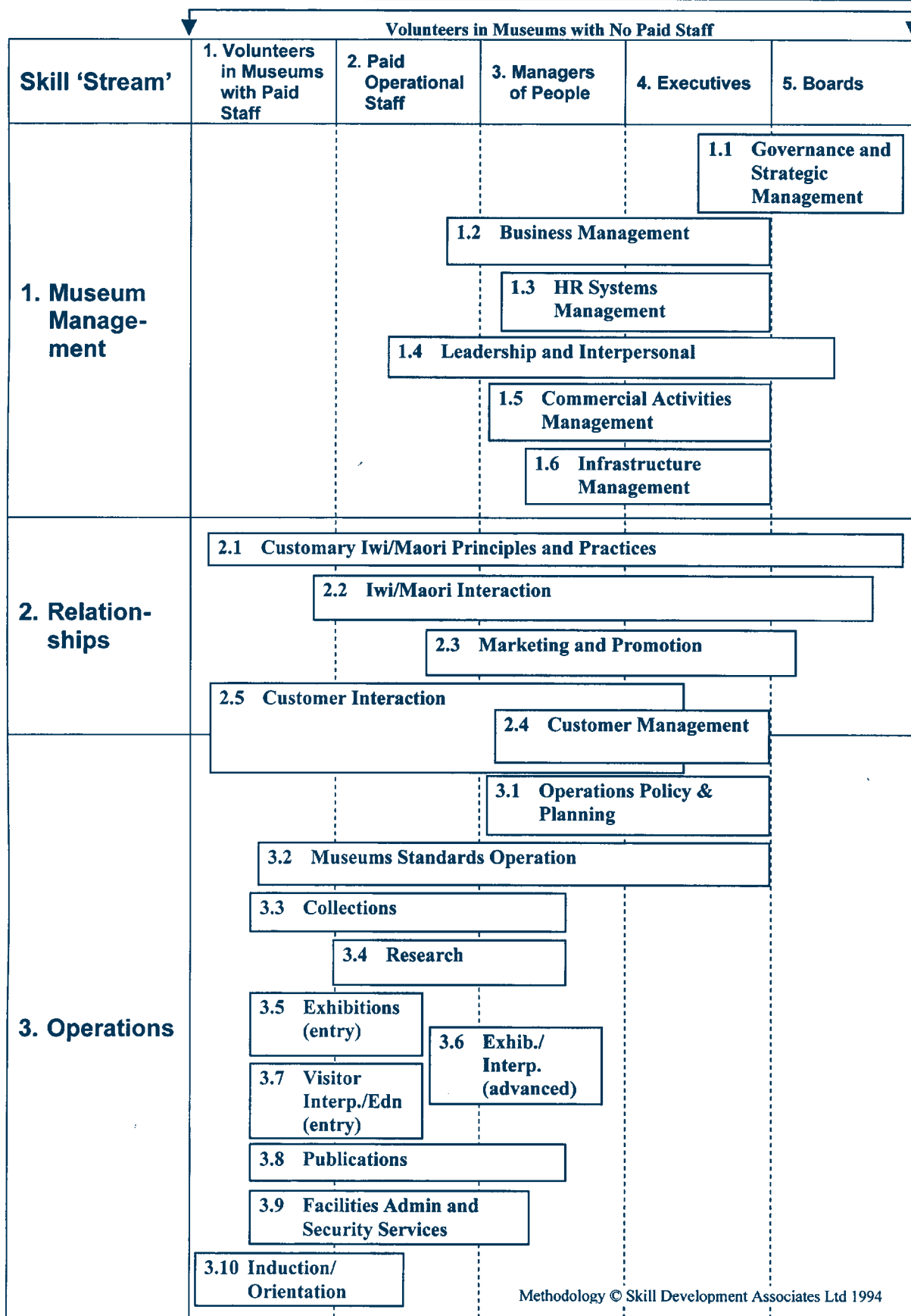
1 Role Definition

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
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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			Board	Curator	
		When required? ✓ appropriate column			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never			
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	Conduct Strategic and Annual Reviews	✓			Yes	Yes	
1.1.11	Negotiate and Resolve Complex Issues			✓	-	-	
1.1.12	Review and Approve Policies	✓			Yes	Yes	
Overall Assessment:		Training required? →			No	Yes	
Priority (A this year; B next year; C none) →					-	B	
If 'A', carry forward to Programme →							

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

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

1.4 Leadership and Interpersonal							
		Who does this? Enter group or individuals			Curator	T Curator	
		When required? ✓ appropriate column			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never			
1.4.1	Induct/Orient Staff and Colleagues	✓			Yes	Yes	
1.4.2	Develop Performance Plans	✓			Yes	No	
1.4.3	Train/Develop Staff and Volunteers	✓			Partly	Partly	
1.4.4	Coach Staff/Volunteers	✓			Yes	Partly	
1.4.5	Motivate People	✓			Yes	No	
1.4.6	Conduct Performance Reviews	✓			Yes	No	
1.4.7	Manage Terminations	✓			Yes	No	
1.4.8	Facilitate a Small Group	✓			Yes	No	
1.4.9	Interact with Staff and Colleagues	✓			Yes	Partly	
1.4.10	Build a Team	✓			Yes	No	
1.4.11	Negotiate and Resolve Issues	✓			Yes	No	
Overall Assessment:		Training required?			No	Yes	
		Priority (A this year; B next year; C none)			-	A	
If 'A', carry forward to Programme							→

1. Museum Management (continued)						
1.5 Commercial Activities Management		Who does this? Enter group or individuals				
		When required? ✓ appropriate column			Can they do it? Enter 'yes', 'no' or 'partly'	
		Now	Future	Never		
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	✓			Yes	
1.5.6	Develop Revenue Streams	✓			Yes	
1.5.7	Develop Pricing Policies			✓	-	
1.5.8	Hire Facilities			✓	-	
1.5.9	Develop Joint Ventures			✓	-	
Overall Assessment:		Training required? →			No	
Priority (A this year; B next year; C none) →					-	
						If 'A', carry forward to Programme →

1.6 Infrastructure Management						
1.6 Infrastructure Management		Who does this? Enter group or individuals				
		When required? ✓ appropriate column			Can they do it? Enter 'yes', 'no' or 'partly'	
		Now	Future	Never		
1.6.1	Develop Infrastructure Policy and Procedures		✓		Yes	
1.6.2	Negotiate Purchases/Leases			✓	-	
1.6.3	Maintain Physical Assets (buildings, car parks, grounds, roads, etc.)	✓			Yes	
1.6.4	Develop a Capital Programme	✓			Yes	
1.6.5	Set Up and Maintain Services (e.g., IT, cleaning, communications, security)	✓			Yes	
Overall Assessment:		Training required? →			No	
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			Board	Curator	Assist Curator	Vol. Hosts
		Now	Future	Never	Can they do it? Enter 'yes', 'no' or 'partly'			
When required? ✓ appropriate column								
2.1.1	Recognise Tangata Whenua and their Needs	✓			No	No	No	No
2.1.2	Describe the Principles of and Legislation Relating to Partnership Obligations and the Treaty of Waitangi	✓			No	No	No	No
2.1.3	Describe Māori Belief, Values, Tikanga and Taonga	✓			No	No	No	No
2.1.4	Recognise and Speak Basic Te Reo (words and phrases)	✓			No	No	No	No
2.1.5	Describe Customary and Contemporary Māori Social Systems and Structures	✓			No	No	No	No
Overall Assessment:		Training required?			→ Yes	Yes	Yes	Yes
		Priority (A this year; B next year; C none)			→ A	A	A	A
					If 'A', carry forward to Programme →			

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

2. Relationships (continued)

2.3 Marketing and Promotion

Who does this?
Enter group or individuals

Curator

When required?
✓ appropriate column

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

	Now	Future	Never				
2.3.1		✓		No			
2.3.2		✓		No			
2.3.3		✓		No			
2.3.4		✓		No			
2.3.5	✓			Yes			
2.3.6		✓		No			
2.3.7	✓			Yes			
2.3.8	✓			Yes			
2.3.9	✓			Yes			
2.3.10	✓			Yes			
2.3.11	✓			Yes			
2.3.12	✓			Yes			
2.3.13	✓			Yes			
2.3.14	✓			Yes			
2.3.15	✓			Yes			

Overall Assessment:

Training required? → Yes

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

If 'A', carry forward to Programme →

2.4 Customer Management

Who does this?
Enter group or individuals

Curator

Assist
Curator

When required?
✓ appropriate column

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

	Now	Future	Never				
2.4.1	✓			Yes	Yes		
2.4.2	✓			Yes	Yes		
2.4.3	✓			Yes	Yes		
2.4.4	✓			Yes	Yes		
2.4.5	✓			Yes	Yes		
2.4.6	✓			Yes	Yes		

Overall Assessment:

Training required? → No

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			Asst Curator	Vol. Hosts/ Guides		
		Now	Future	Never				
		When required? ✓ appropriate column			Can they do it? Enter 'yes', 'no' or 'partly'			
2.5.1	Make a Presentation to a Customer Group	✓			Yes	Partly		
2.5.2	Host/Guide a Group	✓			Yes	Partly		
2.5.3	Sell Products	✓			Yes	No		
2.5.4	Interact with Different Cultures	✓			Yes	No		
2.5.5	Give Information	✓			Yes	Partly		
2.5.6	Find Out Facts	✓			Yes	Partly		
2.5.7	Listen	✓			Yes	No		
2.5.8	Relate to People	✓			Yes	Partly		
2.5.9	Deal with Extreme Feelings	✓			Yes	Partly		
2.5.10	Resolve Customer Problems	✓			Yes	Partly		
Overall Assessment:		Training required?			→ No	Yes		
Priority (A this year; B next year; C none)					→ -	A		
					If 'A', carry forward to Programme →			

3. Operations

3.1 Operations Policy and Planning

Who does this?
Enter group or individuals

Curator

Assist
Curator

When required?
✓ appropriate column

Now

Future

Never

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

	Now	Future	Never			
3.1.1 Manage Operations Contracts			✓	-	-	
3.1.2 Develop Collections Plans, Policy and Procedures	✓			Yes	Yes	
3.1.3 Integrate Tikanga Māori into Collection Management		✓		No	No	
3.1.4 Acquire Collection Items	✓			Yes	Yes	
3.1.5 Develop Exhibitions Policy and Procedures	✓			Yes	Yes	
3.1.6 Assess Audiences and their Needs	✓			Yes	Yes	
3.1.7 Plan an Exhibitions/Events Programme	✓			Yes	Yes	
3.1.8 Develop Visitor Interpretation/ Education Policy and Procedures	✓			Yes	Yes	
3.1.9 Engage Iwi Māori in a Programme or Event		✓		No	No	
3.1.10 Plan a Visitor Interpretation/ Education Programme	✓			Yes	Yes	
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?

→ No

No

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

→ -

-

If 'A', carry forward to Programme

3.2 Museum Standards Operation

Who does this?
Enter group or individuals

Curator

Assist
Curator

When required?
✓ appropriate column

Now

Future

Never

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

	Now	Future	Never			
3.2.1 Describe Quality Management Principles and Methods		✓		No	No	
3.2.2 Identify and Set Standards Appropriate to Museums		✓		No	No	
3.2.3 Assess Performance and Practice against Standards		✓		No	No	
3.2.4 Act to Meet or Maintain Standards		✓		No	No	
3.2.5 Improve Processes		✓		No	No	
3.2.6 Benchmark for Best Practice		✓		No	No	

Overall Assessment:

Training required?

→ Yes

Yes

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

→ B

B

If 'A', carry forward to Programme

3. Operations (continued)

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

3.4 Research		Who does this? Enter group or individuals			None		
		Now	Future	Never			
		When required? ✓ appropriate column			Can they do it? Enter 'yes', 'no' or 'partly'		
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?			→ No		
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			Assist Curator	Collection Assist		
		Now	Future	Never				
		When required? ✓ appropriate column			Can they do it? Enter 'yes', 'no' or 'partly'			
3.5.1	Plan an Exhibit/Event	✓			Yes	Yes		
3.5.2	Create an Exhibit/Event	✓			Yes	Yes		
3.5.3	Interpret an Exhibit/Event	✓			Yes	Yes		
3.5.4	Install an Exhibit	✓			Yes	Yes		
3.5.5	Maintain an Exhibit	✓			Yes	Yes		
3.5.6	Run an Event	✓			Yes	Yes		
3.5.7	Close Down/Debrief an Exhibit/ Event	✓			Yes	Yes		
3.5.8	Maintain Security	✓			Yes	Yes		
3.5.9	Evaluate an Exhibit/Event	✓			Yes	Yes		
Overall Assessment:		Training required?			→ No	No		
		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			Assist Curator			
		Now	Future	Never				
		When required? ✓ appropriate column			Can they do it? Enter 'yes', 'no' or 'partly'			
3.6.1	Develop Multimedia Applications		✓		No			
3.6.2	Develop Electronic Technology Applications		✓		No			
3.6.3	Tour an Exhibit			✓	-			
Overall Assessment:		Training required?			→ Yes			
		Priority (A this year; B next year; C none)			→ B			
								→ If 'A', carry forward to Programme

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

3. Operations (continued)

3.8 Publications

		Who does this? Enter group or individuals			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never	Curator		
3.8.1	Develop a Publications Project Plan	✓			Yes		
3.8.2	Research Audience and their Needs	✓			Yes		
3.8.3	Write a Publication	✓			Yes		
3.8.4	Produce a Publication	✓			Yes		
3.8.5	Manage Publication Contracts	✓			Yes		
3.8.6	Distribute a Publication	✓			Yes		
3.8.7	Evaluate a Publication	✓			Yes		

Overall Assessment: Training required? → No
 Priority (A this year; B next year; C none) → -
 If 'A', carry forward to Programme →

3.9 Facilities Administration and Security Services

		Who does this? Enter group or individuals			Can they do it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never	Curator	Assist Curator	
3.9.1	Develop Facilities Administration and Security Services Standards	✓			Yes	Yes	
3.9.2	Set Up and Operate Facilities Administration and Security Services Programme	✓			Yes	Yes	
3.9.3	Identify and Manage Security Risks	✓			Yes	Yes	
3.9.4	Operate a Security System	✓			Yes	Yes	
3.9.5	Operate Plant and Equipment	✓			Yes	Yes	
3.9.6	Maintain Grounds	✓			Yes	Yes	
3.9.7	Maintain Buildings	✓			Yes	Yes	
3.9.8	Operate Fire and Safety System	✓			Yes	Yes	
3.9.9	Liaise with Contractors	✓			Yes	Yes	


Overall Assessment: Training required? → No
 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			Do they know it? Enter 'yes', 'no' or 'partly'		
		Now	Future	Never	Coll. Assists	Coll. Help	Vol. Hosts
3.10.1	Mission, Values, Objectives	✓			Partly	No	Partly
3.10.2	Museum Structure	✓			Partly	No	Partly
3.10.3	Museum Policy and Practices	✓			No	No	Partly
3.10.4	e-mail network	✓			No	-	-
3.10.5	Records	✓			No	No	Partly
3.10.6	Communications	✓			No	No	Partly
3.10.7	Other	-	-	-			

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

3 Annual Training Programme

What training? Programme/Skills	Who is to be trained?		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
1.3 Human Resource Management	2	<ul style="list-style-type: none"> • Curator • Assistant Curator 	✓	-	-	-	-	JW		█										100
1.4 Leadership	1	<ul style="list-style-type: none"> • Assistant Curator 	✓	-	-	-	-	JW		█										300
2.1 Customary Iwi Principles and Practices	7	<ul style="list-style-type: none"> • 2 x Board • Curator • Assistant Curator • 3 x Volunteer Guides 	✓	-	-	-	-	JW			█									-
2.5 Customer Interaction	10	<ul style="list-style-type: none"> • All new hosts/ guides 	-	✓	-	-	-	DF		█					█					-
3.3 Collections: Handling Storage Access Security	2	<ul style="list-style-type: none"> • Collection Assistants 	-	-	✓	-	-	DF			█									-
3.10 Induction/Orientation	10	<ul style="list-style-type: none"> • All new hosts/ guides 	-	✓	-	-	-	DF		█					█					-
Put this in your budget 																			Total	
																			\$400	

References

Museum of New Zealand Te Papa Tongarewa (1999). *National Training Framework for Museums | Te Anga Kaiako ā Iwi mō Ngā Whare Taonga o Te Motu*. Wellington: Museum of New Zealand Te Papa Tongarewa. (Available from Te Papa National Services.)

Acknowledgments

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

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.

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

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