



British Columbia
Museums Association
SINCE 1957

Best Practices Module

WORKPLACE AND IN-SERVICE LEARNING

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Canadian
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Introduction

Museums and related organizations need competent staff and volunteers to operate. One means of ensuring competency is to provide adequate training in your organization. Many of the most successful business enterprises invest heavily in training for their staff and it is seen as a vital investment. The payback in the business model is a better bottom line. In the museum and gallery, the result is a better-run institution that provides excellent service to its community and visitors. Too often training is seen as a frill that will be supported when the funds are available. Trained staff and volunteers are a vital asset and essential to the success of a museum or gallery.

While there is some post-secondary training for people in the museum community, the reality is that many people in the sector do not come out of formal training programs. Often we have short-term grant workers, summer students, lay volunteers and enthusiastic “amateurs”. Even those people that have taken professional training require upgrades to their skills.

This best practices document will focus on strategies towards developing in-service & workplace learning within the institution and also touch on some of the training resources that can be found outside the institution.

Larger institutions or those associated with larger entities, like municipal governments, may well have access to a human resources department. Typically, you will find these departments will have education components and may have developed “competencies” list showing the skills and qualities needed in specific occupations. (Also review the BCMA Best Practices document on Human Resources Management).



Understanding Needs \ Evaluation

One of the first tasks your organization should do is an assessment of your institutional and staff training needs. The size and the scope of this assessment will to some degree be based on the size and complexity of your organization. Yet, for most organizations, these assessments do not have to be complicated endeavours. Reviewing training needs is a form of 'gap' analyses. The question that is being answered is what are the gaps between skills and knowledge the staff have and what they need to do their jobs well.

The institutional needs can be broken down into the following: job related competencies and institutional needs including statutory \ regulatory requirements.

Job Related:

A key tool in determining training requirements for any particular job is a list of competencies for the position. While it is possible to develop your own list, a number of organizations have developed documents for workers in the museum field (see ICOM in the resources section for an example). These catalogue the skill sets required for various positions. Using these as guides, you can develop a list of specific skills across positions that your staff \ volunteers need for their positions. Competencies are not the only ways of assessing training needs. These needs are identified in staff performance evaluations and other techniques as follows:

- Direct observation
- Questionnaires
- Consultation with persons in key positions, and/or with specific knowledge
- Review of relevant literature
- Interviews
- Focus groups
- Tests
- Records & report studies
- Work samples
- Institutional, Statutory and Other

While certain skills are obviously related to particular jobs, there are also institutional needs that may or may not be part of an individual's job description. Often there are legal requirements that an institution must meet. As an example, it is very common for museums to have openings or other special events that serve alcohol. In BC, a special occasions license is required and that means having a staff person that has taken the 'Serving It Right' program. Other examples include 'Worker's Compensation Board' (WCB) rules on having staff members with first aid training, 'Food Safe' if you carry out any food services, or 'Workplace Hazardous Material Information System' (WHMIS) training for chemicals.

Other training that is not necessarily legislated, but that your institution may consider important for your organization could include diversity in the workplace, harassment, disaster management, etc.



Understanding Needs \ Evaluation, cont'd...

Your organization's mission, vision, goals and objectives are also very important to your training needs. This linkage is to the planning documents that exist for the institution. These can have profound effects on training requirements. Your staff and volunteers need to understand what the purpose of your institution is. That purpose informs what it is they need to know.

There may also be training needs emerging because of the relationship of the museum to local government and its priorities.

Database \ Matrix

A database is useful to evaluate the skills you have, those you need and those you want in order to develop your plan of action. You can do this by making a list of the skills and training that individuals in your organization have and those they want. Then compare this database to the skills identified above. This will allow you to see where either individuals or the organization are missing required skills.

One benefit of doing an individual database is that you may discover hidden talents amongst your staff and volunteers.

A simple example of a database for an individual could be done in a spreadsheet format along the following lines:

| | Jane Doe | John Doe |
|----------------------|---|------------|
| CPR | Yes | No |
| Cultural Training | Yes | Yes |
| Care & Handling | Yes | Yes |
| Serving it Right | No | Yes |
| Super Host | Yes | Yes |
| Building Orientation | Yes | Yes |
| Emergency Procedures | Yes | Yes |
| Fire Arms Handling | Yes | No |
| Other | BA History, MA History, Small Boat Handling | BA Pol Sci |

TIP:

Give individuals an opportunity to express their needs in both a public and private manner. The enthusiasm of the group can help individuals recognize their needs, but they may also feel uneasy about admitting their perceived shortcomings in front of their colleagues.



Understanding Needs \ Evaluation, cont'd...

Did the training work?

In addition to evaluating the need for training, it is important to evaluate the outcomes of your training programs. Did the necessary information get across? Questionnaires can be useful to assess how your training has worked. Additionally, consider if it might be appropriate to have a “test” component. The test could have a fun outcome with as simple as a gold star in recognition or it could be a condition of employment.

Having a person either participating in the training or as an observer that is then tasked with providing feedback to the instructor can be a useful tool.

The important piece here is to ensure that the barriers are removed for applying the training in the workplace. For example, if one staff member or volunteer receives cultural sensitivity training and others do not there may be barriers to the application of this training.

TIP:

Many other organizations in your community also require training. You may be able to collaborate. Examples of this type of training could include fundraising, volunteer management, first aid, etc. In communities with a United Way, contact them to see if they have a training program.



Training Techniques

Just as we generally try a variety of techniques to get information across to our visitors, it is important to recognize that we will need a variety of training techniques for our internal needs. While it is true people have learning preferences, learners rarely utilize a single style for all their learning. The trick is to use a variety of methods for presenting material. Often the teacher/trainer uses the style that he/she prefers as a learner, as his/her teaching style. There are a variety of classifications of learning styles. The simplest relates to our sensory inputs – auditory, visual and kinaesthetic. Other classifications use personality traits as indicators of learning styles, such as people whose preference is for the concrete examples to those who revel in abstraction. In assessing a trainer or in presenting training, it is just enough to say that the approaches to presenting information need to be varied to be effective for most people. If there is an interest in pursuing the learning styles question further in the references see the book by Barbara Prashnig entitled *Practical Guide to Learning Styles*.

TIP:

As part of your needs assessment, it may be useful to identify the different learning styles of your staff. Typically, most people have a sense of the type of training that works for them, but you might want to contact a local adult education department to see if they could offer formal assessments of individuals.

Workshop

Perhaps, the most common method of internal training is the workshop where staff are brought together and taught either by another staff person or outside specialist. Peter Renner's publications listed in the resource section provides a great guide to developing your own workshops.

TIP:

Inviting people from other organizations to participate in the workshop you are organizing can help reduce costs to your organization and improve your relationships with the larger community.

It is important to remember that if you are going to put on an internal workshop that having an adequate facility is important. Things like fresh air, access to washrooms, refreshments and having the necessary technology available do have an impact on the success of a workshop. If need be, consider using an off site meeting space such as a hotel or community college.



Training Techniques, cont'd...

Training Manual

A simple training resource can be a binder with key institutional documents such as mandate, collections policy, personnel policy, emergency plan, examples of donation forms, condition forms, etc. A more detailed manual could be similar to the BCMA's *Basic Museums Studies Manual* that includes review questions, simple quizzes, etc.

These can be used in a self-directed manner or as part of a workshop environment. Try not to overwhelm with material and make sure any manual is adequately divided and indexed and that it contains the correct information in a readable format.

Manuals can also deal with specific topics and are useful in staff succession and emergency situations. Many museums develop reference manuals such as a cataloguing manual that would include key forms and copies of key reference documents. (An example of this would be a reference manual in a museum that houses a significant collections of stone tools that includes articles by a specialist describing different types of stone artefacts or photos of common tools found in the collection).

In addition to your in-house produced manual, you can find other examples or ask other museums to share what they have produced..

Correspondence \ Internet

Traditional correspondence programs are fast being replaced by programs delivered over the Internet. There are more and more museum related programs online (see CHIN in resources).

Many Internet based courses have become sophisticated and interactive learning opportunities. Using such tools as chats rooms with other students participating, quick feedback from instructors and live video feeds are just some of the way these types of courses offer effective learning opportunities.

Informal Training

Perhaps one of the most used, and yet, most unrecognized forms of training is informal self-directed training. Sharing of information with friends and colleagues at conferences, on computer listserves (such as BCMA-L listserv, subscribe at: BCMA-L@museumsassn.bc.ca or CANMUSE-L, subscribe at: canmuse-l-request@chin.gc.ca), over coffee or at staff meetings can be invaluable learning opportunities.

It is often useful to have a staff member or volunteer who has attended a conference, such as the BCMA Annual Conference or have gone to workshops, give a report to the rest of the staff. The focus of the presentation is often on the information, techniques etc. that struck the attendee as worth trying.



Training Techniques, cont'd...

Library

With the many books written on museums and subjects like non-profit administration, developing a library is another means of providing training resources. This would also be a useful place to keep your own in-house produced information such as emergency plans, collections management guides, etc. Additionally, books on subjects related to the mandate of your museum are useful to have.

A good source of suggestions on what might be useful to include in your library are the reviews that are done in publications such as the BCMA's *Museums RoundUp*. Many museums associations also sell publications that you may find useful (see the resource section for some key sources).

Also, consider putting a request out on one of the museum listserves if you are looking for publications on specific museum issues. You will find your colleagues more than willing to share their insights on the many publications that come out each year.



Training Targets

Staff

All staff will have training requirements and as a good employer you should encourage an atmosphere of life-long learning.

Recurring Training Needs

Your institution will likely require recurring training from year to year. Summer students are common in the museum sector. Having a formal training program will improve their performance and job satisfaction. Similarly, if you use volunteers, a formal training program will go a long way towards improving their effectiveness.

TIP:

A number of Provincial Museums Associations have developed training packages for summer students. Examples include the Museums Association of Saskatchewan and the Museums Association of Newfoundland & Labrador, both of which are listed in the resource section of this document.

Boards are also an area where reoccurring training needs exists. In addition to developing a standard board package that includes key documents like the constitution, collections policy, emergency plan, etc, it is useful to hold an annual training session with board members.

As an example, spending time on an annual basis reviewing the BCMA Standards document provides a good opportunity to inform new members about the basics of a museum's operations. In addition, it provides a simple in-house operational review by comparing how your museum operates in relationship to standards developed by the community.

Volunteers

As with anyone working for your institution, volunteers need basic and specialized skills. They should receive a core-training program that is appropriate for their volunteer task. Ideally, they would receive a version of the basic museum training as this will give them a good overview of how and why museums operate in the manner that they do. They should also input their information in the training database both to identify needs and skills.

The length and detail of training can vary widely from institution to institution. A simple orientation session may be sufficient, but there are organizations that require training over many weeks (usually a few hours each week).

Volunteers need to know about training requirements and agree to take the training before committing to volunteer. Given the nature of the volunteerism, the training schedule needs to be established well in advance of the delivery, so volunteers can make the time available.



Training Targets, cont'd...

TIP:

Many communities have volunteer bureaus; they often have training sessions and materials that you may find useful.

Train the Trainers

When developing in-house training, it is important that the person designated to do the training has the required skills. They may have the knowledge of the subject area, but not necessarily the skills of a trainer. Once again, keep an eye out for local courses aimed at trainers or check your library for material. Teachers and post-secondary institution branches in small communities are local resources that can provide support on training trainers.

TIP:

Your institution can also become an important training resource, a trainer for other organizations in your community. This may be as a location to host workshops or by providing workshops related to your mandate, such as a history course for the local visitor centre.

Teachers & other museum users

One kind of training session that some museums hold are for their potential users. As an example, many museums offer sessions for teachers that plan to bring students to the museum. These can be designed to highlight specific exhibits or a more generic understanding of how to “read” a museum. Other museums do workshops of things like blacksmithing, saddle repair, etc. These sessions help further the mandate of the museum in general.



Marketing your training to staff

By getting your staff and volunteers involved in the identification of training, they will be more inclined to participate in the training.

Having one location where all training course information is posted is a very effective means of marketing. This can be done through a physical bulletin board or as an online resource.

Listserve and event \ workshop listings put out by the Canadian Heritage Information Network (CHIN) and museums associations are good sources of information on upcoming training opportunities. Consider having one staff person do a weekly review of these sites and either forward the information electronically to staff or post information on the bulletin board.

Funding

Typically, outside funding is designed to assist people with travel costs associated with particular workshops. As an example, the Canadian Museums Association (CMA) has a travel bursary fund for training (see CMA Bursary Program at:

http://www.museums.ca/en/funds/cma_bursary_program for details). The BCMA also offers a Travel Bursary Assistance fund to assist with Annual Conference and Regional Workshop Series expenses. For application details, please contact BCMA Member Services Coordinator at (250) 356-5700 or email: members@museumsassn.bc.ca. For further information on funding, take a look at the BCMA Best Practices paper on 'Grantmanship and Fundraising.'

Providing the Resources and Making the Time

Training needs to be included in your budget and work-plan for the year. While it can be difficult to find the time to participate in training, the benefits of a properly constructed training regime are too large to ignore.

Your funders and boards should be aware that you take ongoing training seriously and that it is an important part of your future success.



What Training?

There are many possibilities for further training. The evaluation process described above will help you decide on a particular area of study. Training needs also have to respond to trends in society. Over the years training on such subjects as evaluation, cultural sensitivity, etc. have become higher priorities both to meet internal needs and meet external expectations.

Ideally, all staff and most volunteers will have some form of basic museum training that includes information on what museums are, care and handling of objects, collections management, design, programming, etc. The BCMA publication *Basic Museums Studies* would be a good foundation for this training, as would the summer student manuals listed in the resource section. The Learning Coalition publication on entry-level museum practices would be a useful tool if you plan to build your own program, but would like to know the types of subjects to include.

Examples of some key training courses are:

Basic Museums Studies: A general introduction to the primary functions of a museum (contact BCMA Membership Coordinator at (250) 356-5700 to order a copy).

Targets - New staff, volunteers, board members, summer students and grant workers

Museum Topics: Collections Management, Preventive Conservation, Care & Handling, Exhibit Development, Programming, etc. These specific courses would add to the general knowledge provided in the above basic courses, but are focused towards specific tasks and responsibilities.

Target – Volunteers, new staff and grant workers

Current Issues: Ranging from training on new reporting requirements of granting agencies to cultural sensitivity.

Target - Volunteers, existing staff, board members and general public

Health & Safety: First Aid training, safe power tool handling and WHMIS.

Target – Staff & volunteers

General Knowledge: Local history, blacksmithing, etc. Can be part of your public programming, but also useful for staff and volunteers.

Target - General public, volunteers and new & current staff

Management & Administration: Computer software, bookkeeping, grant writing, human resource management, etc. These are not necessarily museum specific, but are skills that need to be honed and renewed.

Target – New & current staff and volunteers



Community Partners

The following are examples of potential community groups that may be able to assist with training:

United Way: Community development including training for managers and leaders of non-profit organizations, information on related topics such as board governance and leadership

The Canadian Red Cross and St. John's Ambulance: First Aid Certification

Universities / Community Colleges: In BC, both the University of Victoria (UVIC) and University of BC (UBC) offer related museum studies training. The Cultural Resource Management Program at UVIC (through Continuing Studies) offers both distance learning and on campus short-term sessions that can be taken for credit. In addition to degree and certificate programs, extension programs can offer everything from board development to lectures on historical topics.

Municipal Recreation Departments: Similar to college extension programs, local recreation departments often have board development, bookkeeping, carpentry and first aid programs, etc.

YMCA \ YWCA: First aid certification and, in some cases, board and volunteer development programs

Volunteer Bureau: Volunteer management programs and reference libraries

Tourism Offices: Often your local tourism office puts on workshops such as 'Superhost.' These are very good for front-line staff who will be dealing with the general public

BC Museums Association (BCMA): Annual conference, quarterly regional workshops, quarterly magazine *Museums Roundup*, published and online resources and travel bursary funding

Canadian Museums Association (CMA): Annual national conference, regional symposiums and workshops, books, guidelines, reports, training videos, benchmarking surveys, *Muse* publication and professional development scholarships

Western Museums Association (WMA): Annual meeting, *WestMuse* quarterly newsletter and travel scholarships

Check out the CHIN website for a list of organizations that provide specific training for museums. There are programs offered by universities and colleges across Canada, plus many provincial museums associations offer certificate programs. The CHIN site tries to keep these up to date.

Annual Conferences are excellent venues for training. Often they have pre-conference training workshops that are eligible for travel funding from the CMA and/or BCMA.



Conclusion

Lifelong learning is important both for your institution and for the individuals that work and volunteer at it. An organization that encourages learning by providing the atmosphere and the resources will not only be a smarter place, it will be a happier one.



Resources

Online

Canadian Heritage Information Network (CHIN) has online training resources and provides a list of museum training institutions in Canada. Go to 'Online training' at:

See: <http://www.chin.gc.ca/English/Knowledge-Exchange/index.php>

CHIN List of Training.

See: http://www.chin.gc.ca/English/Conferences_Training/index.html

The International Council of Museums (ICOM) Curricula Guidelines for Museum Professional Development is an excellent resource on competencies.

See: <http://museumstudies.si.edu/ICOM-ICTOP/index.htm>

The Smithsonian Institute offers an excellent site that provides a wide variety of information about museums, including online lectures about various museum topics and links to many other resources.

See: <http://museumstudies.si.edu/>

Canadian Conservation Institute (CCI) offers both online information and publications related to conservation of artefacts. They also do workshops across the country and are often willing to partner with local museums to conduct training.

See: <http://www.cci-icc.gc.ca/>

Serving-it-Right Certification.

See: <http://www.pssg.gov.bc.ca/lclb/licensing/serving-it-right.htm>

Publications

There are many books on museum topics. Check out the Vancouver Public Library, as they were the repository of the old BCMA library and have been adding to the collection (www.vpl.ca).

The BCMA and CMA sell some titles. The American Association for State and Local History (www.aaslh.org) has an extensive list of books and technical leaflets as does the American Museums Association (www.aam-us.org).

Australia, the UK and New Zealand all have active museum organizations that have both publications and online resources.

A Handbook for Cultural Trustees, (CMA)

A useful reference tool for both new and experienced board member and staff.



Resources, cont'd...

Human Resources Management in Canada, Carswell

Carswell is the publisher of a series of business reference books. Usually these are done in binder format and are updated on a regular basis. This particular publication has a section of training and includes articles on trends in training. A useful publication for those interested in greater detail about the human resources aspects of training and current theory. You can often find copies in your local library or chamber of commerce.

The Learning Coalition

This organization made up of museums associations from Alberta, Saskatchewan, Manitoba and Ontario has researched and published the following two booklets:

Guidelines for Developing Entry-Level Museum Practice Programs, 2002, Learning Coalition, This outlines the type of topics that should be covered in a basic training program. Available from participating associations

Improving Performance Through Evaluation: A Resource Guide for Museum Training Providers and Managers, 2004, Learning Coalition

Basic Museums Studies: Training Resource Package (BCMA)

A good overview of museum operations that can be used as a self-directed study tool or by an instructor as a guide. To order a copy visit the BCMA website at <http://www.museumsassn.bc.ca/content/home.asp> or call BCMA Member Services Coordinator at (250) 356-5700.

Training Summer Staff MANuaL, Museums Association of Newfoundland and Labrador

How to Train Your Summer Staff, Museums Association of Saskatchewan

The Quick Instructional Planner, Peter Renner. As a Vancouver based consultant who has published books on teaching adults (<http://www.peter-renner.com/books.html>) and has an excellent bibliography related to adult education and training (<http://www.peterrenner.com/pdf/Glossary%20references%20WEB.pdf>)

A Practical Guide to Learning Styles by Barbara Prashnig

