

Please note: the following document is a pdf version of the online Business Diagnostic. This allows you to look at the questions in advance of completing the online survey. You can submit your diagnostic return here: <http://bit.ly/MDEM2018>

Introduction

The Museum Development Business Diagnostic is a self-assessment tool for museums. It is designed to help you to highlight and celebrate your current best practice, to prioritise areas of working over the next 12 months, and to provide you with a benchmark for your work going forward.

The diagnostic asks an overarching question about your museum's Forward Plan and then addresses six themes:

- governance and leadership
- financial planning and sustainability
- people development and management
- working practices
- audiences
- collections

Each theme is followed by several statements for you to score your organisation against between 0-4:

- **0: We don't do this at all**
- **1: We only do this a small amount**
- **2: We're okay at this**
- **3: We're good at this**
- **4: We're excellent at this**

You then have the opportunity to state what you think your museum is doing really well in that theme, and what you'd like to develop or improve. If you are struggling to complete the form then please let us know and we can offer further support. Please note there are no right or wrong answers or penalties for low scores, it is a self-assessment tool for your museum.

The information in this diagnostic will be used by Museum Development and our specialists regionally to create targeted support programmes to address need. As we repeat the diagnostic annually it will also allow you to see how your museum has evolved, highlighting where you've developed and potential areas for growth in the future. We will also share anonymised information nationally to inform wider sector support for museums.

Advisory report:

By completing the diagnostic you will receive a bespoke advisory report with a summary of your results and suggestions of where to access support in your highlighted areas of need.

How to fill it in:

We only need one submission from each museum, but we recommend at least two people engage with the process. The questions will require someone from the management of your organisation, either a senior member of the team or someone from the governing body, as well as someone involved in operations. These can be staff or volunteers. It should take no longer than 45 minutes.

Section 1: Forward Planning

We are asking all museums that engage with our support to submit their Forward Plans to Museum Development alongside completing this diagnostic. This is to further enable us to tailor support to your organisation and will avoid duplication of work when applying for grants and development programmes, where we ask for Forward Plans to be submitted. Your Forward Plan will not be assessed by Museum Development, but will be used for reference and to inform our work with you.

More information about how to submit your Forward Plan can be found at the end of this diagnostic.

	0	1	2	3	4
We have a forward plan/business plan for the next 2-3 years that clearly outlines the museums aims and objectives.					

Section 2: Governance and leadership

Good governance is at the heart of a thriving museum. For an independent museum governance is delivered through a Board of Trustees, and in a Local Authority museum this can be through varying levels of leadership.

	0	1	2	3	4
We regularly review our governance and management structure to ensure it is effective and fit for purpose.					
Our leaders provide us with a compelling vision and purpose and offer the workforce the right balance of support and challenge.					
We actively manage risk and are confident we meet statutory requirements such as health and safety, data protection and safeguarding. We uphold our sector’s ethical standards.					
We consult widely with the workforce when creating our Forward Plan, and effectively communicate the current plan internally.					
Within the theme of governance and leadership, what do you think your museum does really well: <i>(We’d encourage you to write as much as you like in these boxes, but we ask for a minimum of one point for each)</i>					
Within the theme of governance and leadership, what would you like to improve or develop:					

Section 3: Financial planning and sustainability

Sustainable and resilient museums secure, allocate and manage financial resources to deliver their core purpose.

	0	1	2	3	4
We are aware of our assets and liabilities and manage these effectively.					
We set realistic budgets which are linked to the museum’s aims and objectives.					
We are confident in our financial procedures, including how we mitigate against financial risk.					
We have the right business skills within our team to income generate and fundraise, to enable our museum to deliver its core purpose.					
Within the theme of financial planning and sustainability, what do you think your museum does really well:					
Within the theme of financial planning and sustainability, what would you like to improve or develop:					

Section 4: People development and management

An effective museum workforce has the right set of skills needed to deliver the museum’s aims and objectives. The people that help you achieve this can be staff or volunteers, as well as freelancers and other stakeholders where appropriate.

	0	1	2	3	4
We actively plan to recruit and develop our workforce. We are aware of the skills we need at all levels and we recruit in an open and transparent way.					
We communicate effectively with each other, giving people the opportunity to know as much as they need to.					
We have processes to reward and recognise excellence within the museum workforce, and to tackle poor performance.					
We have succession planning in place for all levels of the organisation; including at governance and leadership level.					
We invest in our workforce, including continual professional development such as training and networking.					
Within the theme of people development and management, what do you think your museum does really well:					
Within the theme of people development and management, what would you like to improve or develop:					

Section 5: Working practices

Working practices encompass the culture of an organisation. Good working practices encourage communication, innovation and partnership working. A thriving museum welcomes new ideas and is open to change.

	0	1	2	3	4
We encourage all staff and volunteers to be creative and entrepreneurial and we embrace change. This might be to develop innovative services, marketing approaches and funding solutions.					
We actively seek ideas from partners, audiences and wider stakeholders to help improve the services we provide.					
We embrace working with digital technologies. This includes in marketing and communication, as well as general working practices.					
The museum is committed to and plans for environmental sustainability. This includes reducing pollution, waste, energy and water consumption.					
Within the theme of working practices, what do you think your museum does really well:					
Within the theme of working practices, what would you like to improve or develop:					

Section6: Audiences

A museum has both current and potential audiences. An effective museum consults and includes audiences in the creation and delivery of activities. It is aware of potential and target audiences and plans for these appropriately. It markets and communicates in a variety of ways, always putting the visitor first.

	0	1	2	3	4
We understand the needs and service expectations of our current and potential audiences. We know this from consultation and research.					
We ensure our facilities are physically accessible for everyone where possible. If there are unsurmountable physical barriers (e.g. we are unable to have a lift to upper floors) we make reasonable adjustments.					
We ensure our stories are intellectually accessible to our current and target audiences. This includes adjustments for different ages and abilities and takes into account neurodiversity such as autism and dyslexia.					
We listen and consult with current and target audiences when delivering new activities, including exhibitions. We adjust/learn from feedback.					
We have an effective marketing plan, which is tailored to our current and target audiences. We proactively use print and digital methods.					
Within the theme of audiences, what do you think your museum does really well:					
Within the theme of audiences, what would you like to improve or develop:					

Section 7: Collections

A museum’s collection is at the heart of the organisation. It is central to the purpose of the organisation and is what makes museums unique. Good collections management shows a clear understanding of the collection, its needs and how to use it to engage with audiences.

	0	1	2	3	4
We actively maintain high collections standards and have a plan to improve the condition of the collection where possible.					
We are aware of any need to review and rationalise the collection. We are confident we can address outcomes of any collections reviews, including ethical disposal of collections.					
We fully understand the significance of the collections and how they can be used to engage current and potential audiences.					
We understand the opportunities that digital tools and technologies present to our collection and are exploring these accordingly. This goes beyond digitising the collection.					
We are maximising the potential of the collection to benefit the organisation, whilst ensuring that its care and its long-term future is not compromised, e.g. merchandise designs, publications and filming.					
Within the theme of collections, what do you think your museum does really well:					
Within the theme of collections, what would you like to improve or develop:					

Section 8:

You've answered questions based on the six key themes. Out of the list below, please rank the top three priority areas for you to develop, with one being the most important:

Governance and leadership	
Financial planning and sustainability	
People development and management	
Working practices	
Audiences	
Collections	
Other:	

Are there any specific areas or projects you would like to receive support from Museum Development for in the next 12 months?

Name of person(s) completing diagnostic:	
Contact email(s) Which we will send the museum advisory report too following from this diagnostic.	
Do you also want your emails adding to your regional Museum Development mailing list? This will allow Museum Development to send relevant opportunities to your museum. We do not pass contact details on to third parties without your permission. Please see our privacy policy for more information.	Y/N

What happens next:

Thank you for taking the time to fill in Museum Developments Business Diagnostic. We understand capacity within museums can be very limited, however we believe the time taken to complete this tool will be beneficial to the whole organisation.

Now we will use the information you have provided to create a short advisory report for your museum. This will highlight your self-identified priority areas over the next 12 months and will provide suggestions and advice as to where you can receive targeted support for these.

Museum Development will also be looking at the regional trends coming from the diagnostic and Museum Accreditation areas for improvement and will use these to create bespoke development programmes based around the specific themes. Your museum will be invited to join these programmes if you have indicated that they are a priority for your organisation.

Forward Plan:

As a reminder we are also asking all museums that engage with our support to submit their Forward Plans to Museum Development alongside completing this diagnostic.

Please submit your current Forward Plan to Museum Development (sarah.hartshorne@leics.gov.uk) within 4 weeks of completing the online diagnostic.

Thank you for completing the diagnostic, we look forward to working with you further.