

**Museum Development Network**

**Museums’ Organisational Health Check**

Guidance and instruction for completion

<https://online1.snapsurveys.com/jywuqb>

The Museums’ Organisational Health Check is a self-assessment tool for museums.

It is designed as an **indicator** to help you highlight your museum’s current best practice, understand where the museum has areas of development and to feed into your forward planning. This will enable you to prioritise areas of working over the next 12 months and provide you with a benchmark for future work.

Please note there are no right or wrong answers or penalties for low scores, it is a self-assessment tool for your museum.

The Museums’ Organisational Health Check asks an overarching question about your museum’s Business Plan and then addresses six themes:

1. governance and leadership
2. financial planning and resources
3. people development and management
4. working practices
5. audiences
6. 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

As the sector emerges from the Coronavirus pandemic and subsequent lockdowns, museums completing the Health Check can reflect on the ongoing impact of Covid-19 in the free text fields at the end of each section (what your museum does well / what you would like to improve) where you feel this is relevant. This will capture information on how your museum is adapting to the ‘new normal’ and provide context for your scoring.

Museum Development England is for diverse, inclusive and innovative museums that welcome people from all backgrounds. The Health Check includes questions about equality, diversity and inclusion, adopted from the Association of Independent Museum’s [Tackling Inequalities Hallmark](https://aim-museums.co.uk/helping-organisations/aim-hallmarks/tackling-inequality/).

**Getting started:**

Museum Development England needs one completed Museums’ Organisational Health Check from each museum.

The questions need consideration by a cross section of your team and require involvement from someone managing your organisation, either a senior member of the team or someone from the governing body, as well as someone involved in operations, for example collections management, learning or front of house; these can be staff or volunteers. We recommend at least two people engage with the process.

Completion times will vary from museum to museum. The more people you involve with the process, the richer the discussions will be. Remember, this is a development tool and the more you engage with it, the more you’ll get out of the process. You should allow at least 90 minutes to complete the self-assessment process.

Consider each theme and the individual statements within it. It’s helpful at this stage to discuss with colleagues what a score of ‘**4: We’re excellent at this**’ could look like for the museum and how your current practice matches up against it. It may also be useful internally to make a note of how you have determined your scoring so that you can review this in future.

Next, discuss a possible score for the statement; can you think of evidence or real examples to support this score? On reaching a consensus record the score in the assessment form and move on to the next statement.

Once you have completed the scoring please complete the section within each theme to identify what your museum is doing really well and what you’d like to develop or improve.

**Advisory report:**

By completing the Health Check, you will receive a bespoke advisory report from your regional Museums Development team with a summary of your results and suggestions of where to access support in your highlighted areas of need.

**The Museums’ Organisational Health Check Questionnaire**

Please complete all sections outlined below.

1. **Business Planning:**

**The business plan is fundamental in helping your museum to plan ahead. It is a tool that helps everyone understand the museum’s priorities, opportunity and challenges and it should be used to monitor progress and developments.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | 0 | 1 | 2 | 3 | 4 |
| A1 | We undertake business planning and we have a plan which clearly outlines the museum’s aims and objectives. |  |  |  |  |  |
| A2 | We recognise that diversity is fundamental for the success of our organisation and this is reflected in our business planning. |  |  |  |  |  |

1. **Governance and leadership:**

Good governance is at the heart of a thriving museum. For an independent museum governance is typically 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 |
| 1.1 | We regularly review our governing document and management structure ensuring it is effective and fit for purpose. |  |  |  |  |  |
| 1.2 | The governing body provides us with a clear vision and purpose and makes sure that the museum’s values are reflected in all of its work. |  |  |  |  |  |
| 1.3 | Our leaders offer the workforce a balance of support and challenge. |  |  |  |  |  |
| 1.4 | We actively assess and manage risks to the museum. |  |  |  |  |  |
| 1.5 | We consult appropriately with stakeholders and our workforce when creating our Business Plan, and effectively communicate the current plan internally. |  |  |  |  |  |
| 1.6 | We ensure equality of opportunity and have a plan to embed diversity in our leadership team and governance (board). |  |  |  |  |  |
| 1.7 | Within the theme of governance and leadership, what do you think your museum does really well? What evidence e.g. policies, plans or activities would you put forward to support your score? | | | | | |
| 1.8 | Within the theme of governance and leadership, what would you like to improve or develop? What policies, plans or activities would your museum focus on in order to realise this improvement or development? | | | | | |

1. **Financial planning and resources**

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

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | 0 | 1 | 2 | 3 | 4 |
| 2.1 | We understand and regularly review our financial position. |  |  |  |  |  |
| 2.2 | We manage our resources effectively; we set realistic budgets that are linked to the museum’s aims and objectives. |  |  |  |  |  |
| 2.3 | We actively plan to diversify our income. |  |  |  |  |  |
| 2.4 | We are confident in our financial procedures and our decision-making framework. |  |  |  |  |  |
| 2.5 | We have the right business skills within our team to income generate and fundraise, to enable our museum to deliver its core purpose. |  |  |  |  |  |
| 2.6 | Within the theme of financial planning and sustainability, what do you think your museum does really well?  What evidence e.g. policies, plans or activities would you put forward to support your score? | | | | | |
| 2.7 | Within the theme of financial planning and sustainability, what would you like to improve or develop? What policies, plans or activities would your museum focus on in order to realise this improvement or development? | | | | | |

1. **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 |
| 3.1 | We are aware of the skills we need to deliver our aims and objectives across all levels within the museum. |  |  |  |  |  |
| 3.2 | We have a strategic approach to planning for succession within our workforce, including our leadership and volunteer teams. |  |  |  |  |  |
| 3.3 | We recruit openly and transparently and aim to reflect the diversity of our audiences and communities in our workforce, including governance / board. |  |  |  |  |  |
| 3.4 | We communicate effectively, across all levels, with everyone in the museum. |  |  |  |  |  |
| 3.5 | We have processes to reward and recognise excellence within the museum workforce, and to tackle poor performance. |  |  |  |  |  |
| 3.6 | We invest in our workforce, including continual professional development such as training and networking. |  |  |  |  |  |
| 3.8 | Within the theme of people development and management, what do you think your museum does really well? What evidence e.g. policies, plans or activities would you put forward to support your score? | | | | | |
| 3.9 | Within the theme of people development and management, what would you like to improve or develop? What policies, plans or activities would your museum focus on in order to realise this improvement or development? | | | | | |

1. **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 |
| 4.1 | We are committed to acting with integrity and following appropriate ethical guidance; we are aware of the Museums Association Code of Ethics. |  |  |  |  |  |
| 4.2 | We promote equality and inclusion; and our practices ensure that we challenge inequality. |  |  |  |  |  |
| 4.3 | We plan for the museum’s long term global environmental sustainability. |  |  |  |  |  |
| 4.4 | We work to enhance the lives of our workforce, audiences and communities. |  |  |  |  |  |
| 4.5 | We enable staff and volunteers to be creative and innovative and we embrace change. This might be to develop innovative services, marketing approaches and funding solutions. |  |  |  |  |  |
| 4.6 | We actively seek ideas from partners, audiences and wider stakeholders to help improve the services we provide. |  |  |  |  |  |
| 4.7 | We review performance regularly to improve the customer experience. |  |  |  |  |  |
| 4.8 | Within the theme of working practices, what do you think your museum does really well? What evidence e.g. policies, plans or activities would you put forward to support your score? | | | | | |
| 4.9 | Within the theme of working practices, what would you like to improve or develop? What policies, plans or activities would your museum focus on in order to realise this improvement or development? | | | | | |

1. **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.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | 0 | 1 | 2 | 3 | 4 | |
| 5.1 | We understand the needs and service expectations of our current and potential audiences. We know this from consultation and research. |  |  |  |  |  | |
| 5.2 | 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. |  |  |  |  |  | |
| 5.3 | 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. |  |  |  |  |  | |
| 5.4 | We listen and consult with current and target audiences when delivering new activities, including exhibitions. We adjust/learn from feedback. |  |  |  |  |  | |
| 5.5 | We listen to and act on a range of voices from diverse backgrounds to ensure our programmes and services represent our wider community and Britain today. |  |  |  |  |  | |
| 5.6 | We have an effective marketing plan, which is tailored to our current and target audiences. We proactively use print and digital methods. |  |  |  |  |  | |
| 5.7 | Within the theme of audiences, what do you think your museum does really well? What evidence e.g. policies, plans or activities would you put forward to support your score? | | | | | |
| 5.8 | Within the theme of audiences, what would you like to improve or develop? What policies, plans or activities would your museum focus on in order to realise this improvement or development? | | | | | |

1. **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 |
| 6.1 | We understand the significance of the collections and their relationship to our statement of purpose. |  |  |  |  |  |
| 6.2 | We meet the appropriate collections management standards for museums. |  |  |  |  |  |
| 6.3 | We are actively reviewing the collections. |  |  |  |  |  |
| 6.4 | We understand how our collections can be used to engage current and potential audiences and to benefit the organisation. |  |  |  |  |  |
| 6.5 | We actively develop our understanding of our collections, identify missing perspectives and histories and use them to encourage debate and discussion. |  |  |  |  |  |
| 6.6 | We understand how to manage our digital assets effectively. |  |  |  |  |  |
| 6.7 | Within the theme of collections, what do you think your museum does really well? What evidence e.g. policies, plans or activities would you put forward to support your score? | | | | | |
| 6.8 | Within the theme of collections, what would you like to improve or develop? What policies, plans or activities would your museum focus on in order to realise this improvement or development? | | | | | |

**Please list here the Areas of Improvement/Areas of Development identified in your most recent letter from Arts Council England confirming your Accreditation status.**

You’ve answered questions based on the Business plan and the six key themes and you’ve considered your Accreditation Areas of Improvement/Areas of Development.

Using the list below, please rank the top three priority areas to develop for your museums, with one being the most important:

|  |  |
| --- | --- |
| Governance and leadership |  |
| Financial planning and resources |  |
| People development and management |  |
| Working practices |  |
| Audiences |  |
| Collections |  |
| Other: | |

|  |
| --- |
| Are there any specific areas or projects, which in the next 12 months, you consider may benefit from support from Museum Development? You might include support you need related to the Coronavirus Pandemic here. |

|  |  |
| --- | --- |
| Name of person(s) completing diagnostic: |  |
| Governance type of the museum organisation |  |
| Contact email(s) which we will send the museum advisory report too following on from completion of this Organisational Health Check. |  |
| 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. |  |

**Data protection**The information supplied as part of the Museums’ Organisational Health Check will be used by your regional Museum Development team to provide a tailored advisory report, plus signposting and support for your museum.

The Museum Development Network will use data from all surveys to understand the trends and indicators across museums in England. This will support development of programmes and advice for museums in the future and assist in determining investment priorities for Museum Development.

Any data published may be in a variety of forms although no personal information will be published and museums will not be individually identified.

If for any reason you do not wish any of the information you have submitted about your museum to be published or shared then please let us know by contacting [hello@mduk.org.uk](mailto:hello@mduk.org.uk)

All information is kept and managed in accordance with the General Data Protection Regulation Act 2018.

**What happens next?**

Thank you for taking the time to fill in the Museums’ Organisational Health Check. 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.

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 signposting to potential areas of Museum Development support and external resources which may be useful.

The information gathered via this Museums’ Organisational Health Check will be used by Museum Development regionally and nationally to understand current trends and create targeted support for museums.

We will use the information gathered to inform programming and development support. Your museum will be invited to join programmes if you have indicated that they are a priority for your organisation.

Repeating the Museums’ Organisational Health Check at regular intervals will allow you to see how your museum has evolved, highlighting where you’ve developed and potential areas for growth in the future.

*Thank you again for completing the Museums’ Organisational Health Check, we look forward to working with you further.*