

Museum Development  
England  
Museums'  
Organisational Health  
Check

2021/2022



# Purpose of the session

- The aims of this session are to:
  - Introduce the 2021/22 Museums' Organisational Health Check
  - Understand how completing it will feed into your museum's forward planning
  - Discuss and consider the sections of the Health Check
  - Enable you to self assess and score the museum - providing an indicator of the museum's organisational health

# What is the Museums' Organisational Health Check?

- It is designed as a self assessment tool and **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.
- The health check includes questions about equality, diversity and inclusion, reflecting that museums welcome people from all backgrounds.
- Completing the Health Check will enable you to prioritise areas of working over the next 12 months and provide you with a benchmark for future work.
- There is space to reflect on the impact of Covid-19 in the free text field at the end of each section.
- Completion time will vary, the health check will encourage discussion and engagement – you should allow at least 90 minutes for completion.

# Museums' Organisational Health Check – how it works

- The Museums' Organisational Health Check is completed online.
- It enables museums to discuss and understand the areas they are doing well and also areas of challenge.
- It feeds directly into a museum's forward/business plan.
- Museums across England, in all regions, are completing it and results feed into regional and national MD/MDE information.
- Museums are asked to score themselves as a self-assessment exercise based around the forward/business plan and six themes.
- The six themes provide an opportunity for discussion around key developments for the museum.

# Getting started

- You need:
  - A cross section of the museum team to complete the Health Check
  - A copy of the Museums' Organisational Health Check
  - The scoring page
  - The Areas of Improvement/Areas of Development identified in your most recent letter from Arts Council England confirming your Accreditation status.
- We need:
  - One completed Museums' Organisational Health Check from each museum, completed using the online link – [please contact your Museum Development provider for more information and the link to complete the survey.](#)
- Once completed 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.

# Health Check themes

## A. Forward Plan

1. Governance and leadership
2. Financial planning and resources
3. People development and management
4. Working practices
5. Audiences
6. Collections

Within each theme are a short series of questions for you to consider and score.

# Scores

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

# Evidence

When you discuss each theme with your colleagues, think about the evidence you have available and examples of how the museum works.

When considering the statements within each theme discuss what a score of '4 – we're excellent at this' looks like and how this matches best practice.

Working together and discussing evidence will enable you to reach a consensus and it will support your scores for each section.



# Forward/ business planning

*The forward/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.*

- What does the museum do well?
- What will a score of '4 we're excellent at this' look like?
- Where are the challenges?
- How does the plan reflect the museum's aims and objectives?
- How is diversity reflected throughout the business plan?
- What evidence/best practice is available to support the score?

Discuss Forward/Business  
Planning and complete your  
scores and notes

# 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.*

- What does the museum do well?
- What will a score of '4 we're excellent at this' look like?
- What would you like to improve or develop?
- What evidence/best practice is available to support the score?

Discuss Governance and Leadership and complete the scores and notes.

## 2. Financial planning and resources

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

- What does the museum do well?
- What will a score of '4 we're excellent at this' look like?
- What would you like to improve or develop?
- What evidence/best practice is available to support the score?

Discuss Financial Planning and Resources and complete the scores and notes.

### 3. 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.*

- What does the museum do well?
- What will a score of '4 we're excellent at this' look like?
- What would you like to improve or develop?
- What evidence/best practice is available to support the score?

Discuss People Development and Management and complete the scores and notes.



## 4. 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.*

- What does the museum do well?
- What will a score of '4 we're excellent at this' look like?
- What would you like to improve or develop?
- What evidence/best practice is available to support the score?

Discuss Working Practices and  
complete the scores and notes.

# 5. 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.*

- What does the museum do well?
- What will a score of '4 we're excellent at this' look like?
- What would you like to improve or develop?
- What evidence/best practice is available to support the score?

Discuss Audiences and complete  
the scores and notes.

## 6.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.*

- What does the museum do well?
- What will a score of '4 we're excellent at this' look like?
- What would you like to improve or develop?
- What evidence/best practice is available to support the score?

Discuss Collections and complete the scores and notes.

# Accreditation Areas of Improvement/Development

- Don't forget to refer back to your most recent Accreditation award letter from Arts Council England.
- Please list the Areas of Improvement/Areas of Development identified in the spaces provided.

What are your top three priority areas for development?

**Governance and leadership**

**Financial planning and resources**

**People development and management**

**Working practices**

**Audiences**

**Collections**

**Other:**



# Final Stages

**Now complete the online Museums' Organisational Health Check using the link available from your Museum Development Provider.**

# What happens next?

- The information you have provided will be used 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.

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- The information gathered will be used by Museum Development regionally and nationally to understand current trends and create targeted support through programmes and development for museums.
  - 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.

# 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.

Thank you.

