
HUMAN RESOURCE PLANNING TOOL

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“Historically, Canadian cultural organizations have not hired human resource professionals on staff or accessed professional HR consultants, resulting in an underdeveloped knowledge base and skill base in HR matters. As a result, and compounded by a chronic shortage of resources over the past two decades, cultural organizations across the country have had weak human resource management practices, with an inadequate focus on human resource needs, policies, best practices, and requirements.”

Face of the Future: A Study of Human Resource Issues in Canada's Cultural Sector

INTRODUCTION

As leaders, staff and volunteers, we know that if we do our jobs well the museum is more likely to do well. As heritage organizations museums have goals they are mandated to achieve, and as workers we have a desire to improve our performance so that the museum's goals will be achieved and our community will benefit. Is this an accident? Some will say yes, others will say somewhat, and others will say no it is planned.

Having the right people with the right skills doing the right jobs should not be an accident, an afterthought or the last thing on the to-do list. It requires planning to ensure that all the people working in the museum are doing and are capable of doing those tasks that need to be done. How often do we give more thought to the collections, the facility or the finances than we do to the people? How could we do anything without the people?

This Human Resource Planning Tool was created to provide an easy-to-use step-by-step process for thinking about the people doing the work in the museum and integrating that information into the museum's annual and/or strategic plans. There is a wealth of information available on human resource management and planning. But for many of us it takes time to become familiar with the information and to distill it down into a useable form that makes sense. This tool is designed to gather together key pieces of information from both fields and combine it into a user-friendly format.

The development of the Human Resource Planning Tool is another project of *The Learning Coalition* – an alliance of five provincial museum associations dedicated to advancing the performance of museum workers and their institutions. The Learning Coalition members are the Alberta Museums Association, Museums Association of Saskatchewan, Association of Manitoba Museums, Ontario Museum Association, and the Federation of Nova Scotian Heritage. The Coalition would like to recognize and thank Maureen Matthew of Innova Learning for her support and contribution to the completion of this project. Cultural Careers Council Ontario is also recognized for their support in distributing and endorsing the tool to the broader cultural sector.

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HUMAN RESOURCE PLANNING TOOL

Purpose

The purpose of this tool is to provide a model for identifying the training and development needs of museum workers and integrating those needs into the activity/strategic plans of the museum. The model recognizes some of the key realities within the museum community including:

- Knowledge and experience in human resource management is often weak among museum boards and staff
- Focus for most museums is their collections and then their financial resources
- Training and development is often not incorporated into the museum's planning processes
- Museum personnel who attend training and development often lack the necessary support to ensure that the museum receives the full benefit of their learning experience, for example individuals pay for their own training, there are no transfer-of-learning strategies in place after the individual returns from the training, or training is not considered essential to the success of the museum
- There is a vast amount of information available on human resource management and strategic planning as well as governance and management, but few museum personnel including boards have the time to become familiar with all of the information and its inter-connectedness and then apply it to their institutions. The real problem is the relevance of the current information to non-profit organizations, and the level of skill required to understand and apply the information, which is the reason for this human resource planning tool.

Understanding these realities, this tool brings together **key points** in the effective operation of an organization, in this case a museum, and leads the user through some basic tasks in each area, revealing useful information and resulting in a training plan that supports the museum's strategic plan.

The tool is specifically designed for:

- Boards with little experience in human resource management including museums with no paid staff
- Directors/managers not trained in management or human resources
- Museum personnel who use entry-level training programs such as museum practice/studies certificate programs
- Institutions with small numbers of paid staff and with little or no access to human resource specialists

How to Use the Human Resource Planning Tool

The tool provides practical approaches to planning human resources in the museum and will guide you through the questions and decisions you need to make.

The tool is divided into four sections:

Section 1: Managing the Museum (page 3)

This section reviews the role of the Board in managing all aspects of the museum operation.

Section 1(a) provides a series of key questions to determine where improvements are required in the major human resource management functions in your museum.

For those museums that do not have a written short or long term plan, section 1(b) aids in providing a starting point to draft a plan.

Section 2: Getting the Right People with the Right Skills to do the Right Jobs (page 9)

Section 2 provides a step-by-step process to conduct an inventory of the skills, knowledge, experience and interests of staff and volunteers. This is critical information in making decisions to address gaps in:

- the number of staff/volunteers required to complete the museum's plans,
- the types of skills required.

Options for addressing those gaps are also addressed.

Section 3: Addressing Gaps in Skills and Knowledge (page 13)

Section 3 focuses on addressing gaps in skills and knowledge through training and development initiatives, as opposed to other human resource management strategies such as recruiting/reassigning staff or volunteers. The section also asks questions to help decide on the type or source of training.

Section 4: Resources for Further Information (page 23)

Resources are listed which provide additional sources of information on human resource management issues.

In addition to the templates, the tool includes several appendices to help in:

- Conducting a Staff/Volunteer Profile – Inventory
- Transfer of Learning Plan
- Developing Job Descriptions

SECTION 1

Managing the Museum

The role of a non-profit museum is to serve the public trust and be legally and morally accountable. These roles are fulfilled through the following functions:

- creating policy to guide decision-making,
- planning and evaluating the organization’s progress,
- ensuring that there are sufficient and appropriate resources for the organization, and
- communicating with the public.

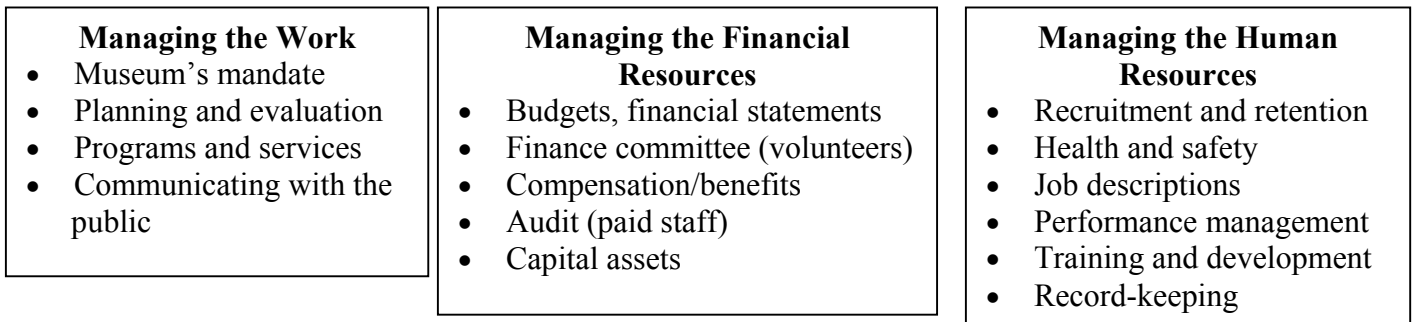
The board has specific responsibilities in all of these functions. Planning and managing the human resources are two of the most critical. Planning provides the road map for achieving the museum’s mandate. Managing the museum’s human resources ensures that the work needed to achieve the mandate is done effectively.

The responsibilities of the board in planning are to:

- create a vision for the organization,
- analyze the internal and external operating environment,
- determine goals and objectives, and set the priorities, and
- monitor progress and evaluate the extent to which the museum has achieved its goals.

For museums with paid staff, the board’s responsibilities in managing the human resources extends to the senior staff person who, in turn, is responsible for managing all other staff and volunteers of the museum. If a museum has no paid staff, then the board is responsible for the volunteer human resources, in addition to the board members.

The functions described above can be grouped into three key systems that allow an organization to be effective as illustrated below. These systems work in tandem with one another and when all three systems are functioning effectively, the museum as an organization is effective.



What is the organization doing to support its people?
(Proceed to Section 1(a) – this checklist will help your museum decide on which needs to incorporate as objectives in your plan?)

Does the museum have the right people with the right skills doing the right job? *(Proceed to Section 2)*

SECTION 1(a)
Human Resource Management Checklist

Using the checklist, **describe** how your museum could improve in each of the areas of human resource management. The list provides essential elements of an effective human resource strategy.

Human Resource Areas	Improvements Needed
<p>Staffing Does the museum:</p> <ul style="list-style-type: none"> • Have job descriptions for all positions (volunteer and staff) • Have a process for recruiting and interviewing volunteers <u>and</u> staff • Conduct performance appraisals to support training and development and human resource planning • Have current staff or volunteers who can assume <u>new</u> activities. 	
<p>Employee and Labour Relations Does the museum:</p> <ul style="list-style-type: none"> • Have a human resource policy, for both volunteer and paid staff • Have a process to ensure that workloads are distributed throughout the museum • Take action to support teamwork • Help everyone in the museum understand how they contribute to accomplishing the museum's goals • Comply with labour legislation and, if applicable, union agreements 	
<p>Compensation Does the museum:</p> <ul style="list-style-type: none"> • Have a process to review and determine compensation and benefits policies • Have an annual or on-going recognition activity for volunteers 	

Human Resource Areas	Improvements Needed
<p>Workplace Health and Safety Does the museum:</p> <ul style="list-style-type: none"> • Comply with all health and safety legislation and regulations, • Have an emergency preparedness plan, • Have policy to address issues such as discrimination and sexual harassment 	
<p>Human Resources Information Management Does the museum:</p> <ul style="list-style-type: none"> • Record key volunteer information (<i>such as number of volunteers, number of hours worked, types of volunteer work being done, etc.</i>), • Record key staff information (<i>such as overtime, years of service, continuing education and training, vacation time earned, etc.</i>) • Have processes to ensure effective communication with all staff and volunteers? 	

Incorporate any improvements or new directions you have identified from the checklist into your museum's existing plan.

If your museum does not have an annual or long-term plan, proceed to Section 1(b) – page 7, otherwise go to Section 2 (page 9).

SECTION 1(b)
Creating a Plan for the Museum

If your museum **does not** have a written short or long term plan, use this section to begin drafting a plan for your museum. The following is a template to help your museum start planning.

Mandate of the Museum: _____

In Column 1 **describe** the major areas that any museum needs to address so that it can fulfil its mandate. Examples of the type of activities associated with each area are provided.

In Column 2 **confirm** that your museum will or will not continue to do specific activities identified in the first column. If possible, describe activities specific to your museum.

In Column 3 **identify** new activities **OR** any changes to existing activities that your museum will need to undertake.

Column 1	Column 2	Column 3
What is your museum currently doing? (examples provided)	What will your museum continue to do (and which supports the mandate of your museum)?	What new activities or changes does your museum plan to do and which will support the mandate of your museum?
Governance <ul style="list-style-type: none"> • Strategic planning • Policy development • Accountability • Communicating the direction of the museum to its community and stakeholders 		
Management <ul style="list-style-type: none"> • Financial management – <i>ensuring budgets reflect the direction and needs of the museum</i>, fundraising, • Facility maintenance • Human resource management 		

Column 1	Column 2	Column 3
<p>What is your museum currently doing? (examples provided)</p>	<p>What will your museum continue to do (and which supports the mandate of your museum)?</p>	<p>What new activities or changes does your museum plan to do and which will support the mandate of your museum?</p>
<p>Collections</p> <ul style="list-style-type: none"> • Collections management • Collections care • Storage 		
<p>Communications</p> <ul style="list-style-type: none"> • Exhibitions • Education programs • Special events • Partnerships/ collaborations 		

Use additional sheets as necessary

Columns 2 and 3 comprise the basis of a plan for your museum.

Column 3 will need particular focus since these activities may require existing staff/volunteers to learn new skills to do different jobs, or new staff/volunteers may need to be recruited.

SECTION 2

Getting the Right People with the Right Skills to do the Right Jobs

To get the right people with the right skills to do the right job, the museum must know the skills, knowledge, experience and interests/goals of staff and volunteers. If your museum does not keep this information already, it is best to collect the information through an inventory of the people currently working for the museum, including board members, paid staff, and/or volunteers.

The information you learn from creating the profiles will be useful in several ways aside from the purpose of this tool. The profiles will provide you with information for planning volunteer recognition, organizing work/project teams, correcting wrong or misinformation, addressing misunderstandings, etc.

Step One:

In column 1, **list** the objectives (what specifically will the museum achieve) from the plan/directions your museum outlined on pages seven and eight.

Step Two:

In column 2, **identify** the jobs/skills required to achieve the plan/directions your museum outlined on pages seven and eight – particular focus should be on those activities that are new to the museum or require changes to existing activities.

Step Three:

Have each board member, paid staff and volunteer complete the template listed in Appendix 1. Existing job descriptions may help volunteers and staff think about the work they do, however job descriptions rarely provide all the information required to create a complete inventory that will help your museum address its human resource gaps.

Once all the profiles are complete, **summarize** the information, with emphasis on skills/experiences that contribute to new activities or changes in activities in the museum's plan – put the summary into column 3.

Step Four:

The next step is to develop a picture of what new skills, new positions or changes to existing positions are needed in order to accomplish the objectives in the museum's plan. This is called **gap analysis**.

Compare columns two and three for each objective listed and ask the following:

- Is there a gap between the skills of current staff and volunteers and the skills required to achieve the objective?
- Will the museum be able to accomplish its plan given the human resources it has and the jobs that need to be done?

Continue this comparison (gap analysis) using the questions listed below the template for each objective of the museum's plan. Once you have completed the comparison, rank the museum's priorities and determine what can be accomplished in the next year, in two years and over three years.

LINKING THE HUMAN RESOURCES TO THE MUSEUM'S PLAN

Column 1	Column 2	Column 3	Column 4
Museum's Plan (List the objectives from your plan in each area.)	Museum's Future Human Resource Needs (List the types of jobs and/or skills that will needed)	Museum's Current Human Resources (List the names/positions of current staff/volunteers and their skills - this should come from their profile.)	Gap Analysis (Determine the types of skills or positions the museum still needs to achieve its plans)
Governance • • • • •			
Management • • • • •			
Collections • • • • •			

Column 1	Column 2	Column 3	Column 4
<p align="center">Museum’s Plan (List the objectives from your plan in each area.)</p>	<p align="center">Museum’s Future Human Resource Needs (List the types of jobs and/or skills that will needed)</p>	<p align="center">Museum’s Current Human Resources (List the names/positions of current staff/volunteers and their skills - this should come from their profile.)</p>	<p align="center">Gap Analysis (Determine the types of skills or positions the museum still needs to achieve its plans)</p>
<p>Communications</p> <ul style="list-style-type: none"> • • • • 			

When you are finished analyzing the gaps, record this information on the chart on page 12.

Questions to consider when analyzing the gaps:

1. Are there omissions in reporting the skills/knowledge or work currently being done? The work may be done, however staff or volunteers may have failed to list the work or their skills in their profile.
2. What work is not getting done, but is important to the museum’s mandate?
3. Is the planned activity new to the museum?
 - 3a. If so, will other activities be decreased or discontinued (see question 4)?
 - 3b. If not, will additional staff or volunteers be required to accomplish the activity (see question 5)?
4. Are current activities being discontinued or decreased?
 - 4a. If so, can staff or volunteers currently working in those areas be assigned to new activities? (see question 7)
 - 4b. If not, how can your museum recognize their contribution to the museum, but also release them from the museum?
 - 4c. If they can be re-assigned, can their skills be transferred or will new skills be required?
 - 4d. What type of training will be required for them to undertake new activities (see question 8)?
5. When will new or changed activities be started?
 - 5a. Is there sufficient time to train staff/volunteers for their new work?
6. If additional staff or volunteers are required, how/where will they be recruited?
7. Does the museum have job descriptions for new or revised positions? (if not see Appendix 3)
8. If training is required, who will provide it? How much may it cost? (see Section 3, page 13).

Most human resource gaps can be grouped under the following areas listed in the chart. In column 1 describe, as specifically as possible, the gaps under the appropriate type. In column 2 describe the actions or strategies you plan to take or implement to address the gaps (some examples are provided). Be as specific as possible, for example how many new staff/volunteers may be required.

Remember to begin with the objectives that are the highest priority for your museum.

GAP ANALYSIS RESULTS

Column 1	Column 2
Type of Gap	Action to Address Gap (examples)
Shortages (<i>e.g. not enough people to accomplish the work planned</i>)	<ul style="list-style-type: none"> • recruit additional (how many?) staff and/or volunteers • discontinue some activities which are not important to the museum achieving its mandate
Overages (<i>e.g. too many people working in specific areas</i>)	<ul style="list-style-type: none"> • Transfer people (which people?) to work on other activities •
Jobs/tasks (<i>e.g. specific tasks are not being done</i>)	<ul style="list-style-type: none"> • Reassign people to do the tasks/jobs specified •
Demographics (<i>e.g. specific staff/volunteers are preparing to retire</i>)	<ul style="list-style-type: none"> • Recruit new volunteers/staff • Re-assign existing volunteers/staff •
Attitudes (<i>e.g. resistance to doing work differently</i>)	<ul style="list-style-type: none"> • Job training • Re-state expectations • Monitoring work
Skills/Knowledge (<i>e.g. skills/knowledge are missing</i>)	Go to SECTION 3
Other	<ul style="list-style-type: none"> • •

Depending on the priorities your museum has identified in its plans, incorporate the actions to address the human resource gaps into the plan. If there are gaps in skills/knowledge go to Section 3.

SECTION 3
Addressing Gaps in Skills and Knowledge

In this section you will focus specifically on the gaps in skills and knowledge. These types of needs are normally addressed through training and development strategies, such as attending a workshop or course, enlisting the help of a coach or mentor, putting together a self-study plan, etc.

Use the following chart to create a training and development plan that will be part of the museum’s plan.

INTEGRATING TRAINING AND DEVELOPMENT INTO THE MUSEUM PLAN

Column 1	Column 2
<p>Plan Priorities <i>(List the objectives of the museum’s plan in order of priority. Refer back to the chart used to do the gap analysis.)</i></p>	<p>Training Needed <i>(List the skills/knowledge needed to address the gap in skills/knowledge and to do the planned work.)</i></p>
<p><i>For example:</i> 1. <i>Increase our research activities leading to publication</i> 2. <i>Need at least one additional staff/volunteer to lead the activity and need to train up to 4 existing volunteers</i></p>	<ul style="list-style-type: none"> • Use of archival material as research documents • Oral history interviewing • Publishing (writing/editing) • Marketing publications

For each group of skills/knowledge identified, answer the following questions:

Who will provide the training?

1. Are there existing training courses offered on the topic(s)? Courses could be offered through a variety of sources including public institutions (*continuing education departments of universities/colleges, part of a credit degree or certificate program*); non-profit organizations (*including, but not limited to provincial museum associations, professional organizations, etc.*); or private training suppliers?
 - 1a. If you decide on a training course to address the gap, what are the qualifications of the instructor and organization providing the training (such as previous experience, length of time offering the training, etc.)?
 - 1b. Can the organization provide examples of how their training was successful for previous participants?
 - 1c. Does the course emphasize application of learning to workplaces (*Do assignments/discussions use the participant's workplace situations*)?
 - 1d. How often is the course offered – the course may only be offered once a year or once every two or three years. If the training is required immediately, waiting for a course may not be the most effective approach.
2. If your museum has several individuals who need the same type of skills/knowledge, is it possible to contract an individual to deliver a course in-house? Doing so may save money. As well, when people learn together, the results are more focused and relevant to the needs of the museum.
3. Are there online courses that could be used? Increasingly more public institutions are providing training through online options. While a relatively new approach, online learning is usually less expensive and can be paced to accommodate available time. However, it does require relatively up-to-date equipment and high-speed internet access for best use. As well, it is important to include time in the staff/volunteer's work plan to complete online training.
4. Are there individuals in your museum who have the skills/knowledge required by others and are willing to coach or mentor another individual to learn the skills/knowledge?
 - 4a. If so, how long would it take for the skills/knowledge to be learned?

What will be the cost of training?

All training has budget considerations. When finalizing decisions on training the following costs should be identified:

1. Course fee - often the course fee is relatively minor in relation to other costs associated with the training. If you are comparing costs of courses, it is important to compare the cost/training hour. For example, an 18 hour course at \$425 is less cost per training hour (\$23.61/hour) than a 12 hour course at \$325 (\$27.08).
2. Length of course - longer courses will involve time away from work for both staff and volunteers. For staff this is a direct cost to the museum as it is an expectation that staff will be paid for attending a training course. However, the time away from the museum for a volunteer also has a cost – if the volunteer is on training, then they are not available to complete work for the museum.
3. Location of course - consider such costs as travel, accommodation and meals.
4. Materials - such as reference texts, handouts, or other supplies may be in addition to the course fee.

How can we ensure that any training is actually applied to the museum's activities?

Transfer of learning/training is not an afterthought. It is a planned activity that supports the individual who received the training to apply it to their work in the museum. The Learning Coalition has prepared a Transfer of Learning form, see Appendix 2, which will help your museum plan for transfer of learning.

SECTION 4

For Further Information

There are many resources available to aid museums in addressing human resource management issues. The following is a list of some resources that you may find useful. The websites listed are current as of June 2006, however you should check frequently as information will change and new resources will be added.

1. Provincial Human Resource Associations

Almost all provinces have associations of human resource professionals. These associations are a good source of information, with networks of individuals and companies that can help you work through a specific problem or issue in your museum. Most associations have local chapters in major cities and many local chapters sponsor monthly meetings on current HR topics.

Visit the Canadian Council of Human Resource Association's website, www.chrpcanada.com for links to provincial associations' websites.

2. Cultural Human Resource Council (www.cultureworks.ca/cultureWorks/default-e.asp)

The council addresses specific issues in the cultural community by conducting studies/research on cultural sectors, producing HR tools, providing information on cultural careers.

Of particular interest is the section on HR Tools which provides downloadable booklets on various HR Management topics, such as:

- Benefits and Retirement Plans
- Coaching/Mentoring and Succession Planning
- Job Descriptions
- Managing Employee Performance

Additional resources are continually in development.

3. HR Council for the Voluntary/Non-profit Sector

The HR Council is an independent non-profit organization that provides leadership on issues related to paid employment in the voluntary/non-profit sector. It brings sector employers and employees together to work collaboratively on research, strategies and action. The website holds a collection of practical tools and information on human resources management for non-profit organizations.

http://www.hrcouncil.ca/council/index_e.cfm

4. Nova Scotia

- a) Federation of Nova Scotian Heritage (contact information at www.fnsh.ns.ca)
- b) The provincial government as part of the Community Museums Assistance Program produces standards for Nova Scotian museums. Information on heritage can be obtained through the government website <http://www.gov.ns.ca/dtc/heritage/default.asp>.

5. Ontario

- a) Ontario Museum Association members can access the following resources in the Member Resources area of the website www.museumsontario.com
 - Cultural Management Portal provides over 6,000 links to institutions offering training and resources in all aspects of cultural management.
 - Resources - policy samples, case studies, legislative links and other information shared by your colleagues in 10 areas of museum work
 - *Recruiting and Hiring Museum Curators and Directors: A Human Resource Tool for Local Government, Museum Trustees and Cultural Managers* – This OMA publication is available free to OMA members or is in the Resource Area of your provincial museum association.
- b) Ontario Ministry of Culture – Human Resources Standard (and other Standards for Community Museums in Ontario) are accessible at the Ministry website www.mcl.gov.on.ca
- c) Cultural Careers Council Ontario – Human Resource materials including tip sheets at <http://www.workinculture.ca>

6. Manitoba

- a) Association of Manitoba Museums (contact information at www.museumsmanitoba.com)
 - *Standards for Manitoba Museums* contain standards for human resources under 1.3 Personnel Management. Standards are listed at <http://www.museumsmanitoba.com/pubs/index.html>

7. Saskatchewan

- a) Museums Association of Saskatchewan (contact information at www.saskmuseums.org)
 - *Standards for Saskatchewan Museums* contain standards for human resources.
 - The following publications provide a variety of approaches to aid museums in planning their human resources:

- *Trends and Directions: The Paid Labour Force in Saskatchewan Museums, 2006* – identifies issues and directions affecting paid staff in Saskatchewan museums.
 - *A Planning Guide for Small Museums, 1997* – is a workbook which provides the user with a step-by-step process leading to a realistic plan the organization can implement.
 - *How to Train your Summer Staff, 1997* – is a workbook for trainers of summer staff in community museums; when the trainers have completed the workbook, it becomes a manual to be used by the trainers of summer staff and is a permanent museum resource.
 - *A Basic Understanding of the Program Outcome Evaluation Model, 1999* – increasingly public organizations are being called upon for clearer evidence that the resources they expend actually produce results – this workbook offers a step-by-step process to help in undertaking basic evaluation in the museum.
- b) SaskCulture Inc. (www.saskculture.sk.ca) website (Cultural Resources section) contains multiple resources to help cultural organizations manage their human resources (both paid and volunteers) including:
- Under Personnel Policies is a Human Resource Policy template – the template contains sample policies for use in cultural organizations. Information on minimum labour standards is specific to Saskatchewan, but the template is a starting point for any organization looking to develop human resource policies. Each province will have comparable minimum labour standards that should be referred to when using the template – provincial labour standards are found on provincial government websites.
- c) Knowledge Network (www.spra.sk.ca/knowledge/Resources)
- This website is designed to provide an easy link to information designed for the non-profit voluntary organization and connects organizations to statistics, information, resources, organizations and an inventory of best practices. Under Resources, information on managing both volunteer and paid human resource is available.

8. Alberta

- a) Alberta Museums Association (contact information at www.museumsalberta.ab.ca)
- The association sponsors the Museum Excellence program – including Standards Practices Handbook for Museums – section 2.2.5 covers human resources standards and performance criteria
- b) *Resource Centre for Voluntary Organizations* is an on-line resource, with a library, newsletter and other services useful for managing organizations in the voluntary sector (www.rcvo.org)

9. The Learning Coalition (TLC)

The Learning Coalition is an alliance of five provincial museums associations for the purpose of joint action in individual and organizational resources. Members of TLC include:

- Alberta Museums Association
- Museums Association of Saskatchewan
- Association of Manitoba Museums
- Ontario Museum Association
- Federation of Nova Scotian Heritage

TLC has produced several publications and tools to aid museum training providers and museum managers in addressing training and development within museums.

These include:

- Guidelines for Developing Entry-Level Museum Practice (2002)
- Improving Performance through Evaluation – A Resource Guide for Museum Training Providers and Managers (2004)
- Transfer of Learning Tool (2004)
- HR Planning Tool (2006)

Copies of the publications are available through the members of TLC.

10. Resources from Consultants

- *Evaluating Human Resources in the Cultural Sector* is available from the Maureen Matthew, *INNOVA Learning* (innovalearning@sasktel.net) and provides a step-by-step guide to help you assess your organization's current human resources and plan action to address gaps.
- *Planning for Staff & Volunteer Training* OMA tip sheet by M. Christine Castle. This resource is also available to print at Christine's website www.mccastle.com/publications.asp
- www.drakeintl.com – site provides “webinars” as well as “white papers” regarding human resources.

11. Relevant Articles/Reports

- *Responding to Change, Challenges for Professional Education in the Museum Sector*, Joy Davis, Curator 48/4, October 2005 pp. 427 to 438.
- “*People, Survival, Change and Success – A Human Resource Action Strategy for the Canadian Museum Community*” 1995; Canadian Museum Human Resource Planning committee c/o Canadian Museum Association

APPENDIX 1:

VOLUNTEER/STAFF PROFILE - INVENTORY

(Duplicate pages 16 and 17; distribute to museum staff and volunteers. Include a cover letter or memo explaining the purpose of the profile with examples of how it might be used. Also provide a deadline to return the profile.)

1. Name:
2. Position Title:
3. Areas worked in the museum (include number of years in each area)

Work Areas	Years Worked	Primary Job/Tasks
Management and Governance		
Collections Management (registration/research)		
Collections Care		
Exhibitions		
Education programs		
Special events		

4. Summarize your education or training (including any continuing education courses).

APPENDIX 2:

Transfer of Learning Plan

Section A:

Section B: Complete with Board or Supervisor.

First Area to Improve: (attach separate sheet if needed)

Actions	Resources Required (time, people, supplies, money, artifacts)	By When	Responsibility

Changes to look for: In 3 months	In 6 months
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Second Area to Improve: (attach separate sheet if needed)

Actions	Resources Required (time, people, supplies, money, artifacts)	By When	Responsibility
In 6 months			

Third Area to Improve: (attach separate sheet if needed)

Actions	Resources Required (time, people, supplies, money, artifacts)	By When	Responsibility

<p>Changes to look for: In 3 months</p>	<p>In 6 months</p>
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<p>Signature of Learner:</p>	<p>Signature of Board/Supervisor:</p>
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<p>Progress on changes in 6 months:</p>	<p>Signature of Learner: Signature of Board/Supervisor:</p>
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APPENDIX 3:

Job Description Format

Position Title:

The job title should be relevant and understood throughout the museum.

Developed/Revised:

Indicate when the position description was developed or last revised.

Position Overview:

This provides a summary of the general type of work involved and how the position “fits” in the museum. It is not intended to be a detailed description.

Functions/Tasks:

This section details the specific work of the position. It may be useful to group similar tasks together and label each with a title relevant to the position, such as

- Administrative – list tasks
- Program Development – list tasks
- Supervisory – list tasks

Always include a clear statement that the tasks of the position will change as the needs of the organization change. This allows the organization to be flexible on assigning staff to do new/emerging work. Human resource policies should also outline how the organization will assist a staff person to assume new tasks.

Resources Available to the Position:

Indicate what physical, human, financial resources are available to the position.

Supervision/Reporting:

Indicate any supervisory responsibilities, as well as to whom the position reports.

Skills/Knowledge:

Skills and knowledge can be specific (positions requiring highly technical skills, or where employment depends on holding specific designations), or equivalent (skills and knowledge which can be derived from many different sources). Make sure that the skills and knowledge of the position relate to the results expected from the position.

Expected Results:

Identify specific groups who will benefit from the work of the position and identify how these groups will benefit. Without clearly identifying results from the work of the position, it is difficult to manage the performance of the individual.

Special Conditions of Employment:

All employment situations have conditions of employment, such as travel, expectation of overtime, etc. Indicate the extent of such conditions and any remedy to address the conditions (such as time off in lieu).

The LEARNING COALITION



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