

LEARNING OUTSIDE THE CLASSROOM HERITAGE SECTOR PARTNERSHIP

Guidance Notes

STAFF PERFORMANCE MONITORING AND MANAGEMENT

WHAT DO WE MEAN BY STAFF PERFORMANCE MONITORING AND MANAGEMENT?

You expect your team to be professional, polite and helpful, whether they are dealing with other colleagues, visitors or outside bodies. But how well do your staff carry out their duties? Do you know what their training needs are? Do you have targets or business objectives to meet and are not sure how to judge whether these are being met or not? Do you offer staff a range of professional development opportunities so they can build on their skills and offer your users a better service?

Performance monitoring and management refers to the approach you take to understanding and responding to what each member of staff needs in order to do their job well, to contribute to the team they work with and to deliver the goals of the organisation as a whole.

Did you know.....?

According to Creative & Cultural Skills, 68% of organisations did not arrange for training in 2005/6 and only 27% of heritage organisations report that all their staff have either undertaken or been offered training, and this includes health and safety and ICT training. The main barriers that people face are a lack of time and money. Also, less than 20% of employers are aware that they can access funding for training, while, of those that were aware, only 31% did so. www.ccskills.org.uk.

WHY DO IT?

It will help improve your service

The outcome of a good performance management system not only benefits the individual, the workplace and the profession at large, but it leads to a better service for the public.

It will help you recruit and retain staff and volunteers

By offering diverse, interesting and coherent skills development opportunities, as well as the supervision that goes with monitoring performance, the organisation is far more likely to be seen as a 'partner of choice' by potential volunteers. Paid staff will feel more supported and will be more motivated and will, consequently, want to stay with the organisation.

It will help you make the most of your staff

Professionally the heritage sector has a duty to care for its collections, sites and resources to the highest standards, to offer service users the best possible experience and to ensure the long-term viability of the heritage in our care. This cannot be achieved without investing in staff development. According to the Cultural Heritage Blueprint (Dec. 08), 'the cultural heritage sector requires continuing

development of the workforce to ensure sustainability and growth. Skills gaps must be addressed, and it is essential to ensure that staff and volunteers are equipped to deal with the changing nature of their work’.

It will help you achieve the Quality Badge

In order to be awarded the LOtC Quality Badge, there is a need to ensure that ‘staff members of my organisation are competent’ (Indicator 3e) and that your organisation ‘has a process in place for monitoring and evaluating the quality of the teaching of our educational staff members’ (Indicator 3f). Having a system to monitor and manage performance will also allow you to change practice as a result of evaluation (Indicator 4c) and to assess the overall quality of provision across your site (Indicator 5d).

HOW TO IMPLEMENT A STAFF PERFORMANCE SYSTEM

It is important not to alienate staff and volunteers – many will be wary of something called a ‘performance management system’ so perhaps call it a staff development programme.

Appoint someone as the lead – this can be anyone, a senior manager or a keen volunteer, as long as they are committed, have the right skills and are properly resourced.

Staff performance systems need time and investment to set them up, to let them settle in and to see the outcomes, so a clear policy statement should show long-term commitment to the process.

The performance management system you use should reflect the needs, aspirations and context of your staff and your organisation. It also needs to be achievable within the resources and time you have available, so be realistic. There are many systems available through the internet or in management guides, but you may find it easier to devise your own.

All those working in your organisations should be included in any performance monitoring system you use, that includes part-time volunteers and short-term contract staff. However senior or experienced, there is always more to learn. If the ‘old hands’ really feel they have ‘had enough of the classroom’, ask them if they’ll share their knowledge with others and don’t ignore the development needs of senior managers and trustees.

THE STEPS

The key elements are an assessment process, a discussion about current needs and future performance, an agreed course of action and a review process.

Step 1: the assessment process: this is carried out to understand the current competencies and skills levels across the organisation. Ideally it should be done at the organisational level, the team level and at the individual level. This is sometimes called a Training Needs Analysis – for an excellent guide to TNAs, see the NCVO website (link below).

A simple staff questionnaire will draw out much of the information you need:

Question 1: You need to ask a question about past experience (career, qualifications, places where people have worked, their hobbies and interests). It is surprising how much this can reveal – perhaps you have a financial wizard or an admin expert hidden in the staffroom.

Question 2: You then need to ask about their current tasks and how well they feel they are carrying them out. Ask them what they feel are their skills needs at the moment and for the foreseeable future in order to do their job effectively.

Question 3: It is useful to ask what barriers people face in accessing professional development/ training.

Question 4: Ask how they view the training opportunities on offer to them at present (either through the organisation, a local network or from regional agencies).

Step 2: the discussion: using the questionnaire as the guide, each person should be invited to speak to their line manager (or the person with responsibility for staff development) about their role, their needs and how these support the work of the organisation. The questionnaire will have flagged up a number of issues about what each person can offer, what they need to do their job better, what sort of training they prefer and where they might go to develop their skills. Discuss all these openly and in confidence. Although this process is effectively an appraisal of people's roles, it must be constructive and lead to positive outcomes for both the individual and the organisation. Nonetheless, it is also an opportunity to discuss any difficult or unresolved issues.

Step 3: the course of action: *for the organisation*, the questionnaires and the meetings with staff will give a picture of generic and specific needs across the organisation and (if you are large enough) across departments, as well as a set of priorities for action. This evidence needs to be analysed and a set of action points agreed which will allow the organisation to develop its staff in ways that meet both their needs and the objectives of the organisation. Basically, it is now the role of the organisation to establish a working environment where performance can be monitored without being intrusive and to introduce a framework that helps everyone contribute to the success of the organisation. Making the process simple and allowing time for staff to take up development opportunities are just a couple of ways the organisation can help.

For the individual, each person should draw up a plan of their own actions (sometimes called a Professional Development Plan or Learning Plan). This should outline what course of action has been agreed and when the review date is. This should both meet their own personal needs (including future career needs), as well as the requirements of the team they work in and the organisation. The Review process should also be agreed at this stage.

Remember: think beyond sending staff just to 'training days'.

In a survey of 22 heritage sites in Bath and North East Somerset in 2006 (by MLA South West & the SW Museum Hub), the three most popular forms of learning were:

1. Learning 'on the job' with someone to help
2. Being in a group situation with a trainer or teacher leading the session
3. One-to-one chats with a colleague

The least popular forms of learning are:

1. Physical activities or competitive events, like a team challenge to build a raft
2. Using email discussion groups
- 3= Going regularly to someone else's place of work for an extended period
- 3= Watching a TV programme or video about a subject

From the Porthcurno Telegraph Museum training policy

'Not every skill or body of knowledge can be improved by going on a course, sometimes observing others in the workplace or having on-the-job experience is a better way of finding out how to do things effectively. The important thing is to allow [staff] to express what they feel their needs are, what sort of training they want, and then give them opportunities to go on courses or to give them experience of particular jobs in the workplace. Regular meetings to review their needs and how much they feel they are benefiting from working with you are a valuable exercise' (www.porthcurno.org.uk/html/Skills)

Step 4: the review: meetings with staff and teams to review performance and progress usually take place each year, although these can be more frequent if necessary. These annual appraisals give everyone the opportunity to review the actions agreed previously, reflect on the training and learning that has occurred during the year, and to agree the next set of action points.

Feedback from users and other colleagues on staff performance adds another dimension to the review process. This needs to be handled sensitively, of course. Views can be sought anonymously via a 'Comments Box' or visitor surveys, and observations by a manager or experienced colleague are also a good way of assessing someone's work.

There is no shortage of skills & training providers

A survey carried out by the Group for Education in Museums (GEM) in 2007 found that over 30 separate agencies across the UK provide regular skills development opportunities to the heritage sector.

RESOURCES

Training and skills Guidance

1. The Museums Association section on professional development: www.museumsassociation.org.
2. The Association of Independent Museums (AIM) guidance notes, particularly on 'Working with Volunteers' and 'Recruiting & Retaining Volunteers' - www.aim-museums.co.uk and then 'Focus Papers'.
3. Cultural & Creative Skills (CCS) - www.ccskills.org.uk. Try the 'Creative Choices' Work Placement Toolkit or their national 'Find a Course' section.
4. The resource 'The ABC of Working with Schools' is very helpful. In the section on 'Developing Services for Schools', they have guidance on 'Training Staff & Volunteers'.
www.museumse.org.uk/ABC_working_with_schools.
5. The National Council for Voluntary Organisations website (www.ncvo-vol.org.uk) has a useful section on 'People, HR & Employment', including a step-by-step guide to doing a Training Needs Analysis.
6. The 'Managing Volunteers' section of www.volunteering.org.uk (Volunteering England) is also very useful.
7. There are also funding sources that may help, such as the Historic & Botanic Gardens Bursary Scheme (www.hbgbs.org.uk) and HLF bursaries to support traditional heritage skills (www.hlf.org.uk/HLFBursaries).

Training and skills providers

8. Your local Museum Development Officer (MDO) can signpost you to training opportunities. A list of MDOs can be found at www.aim-museums.co.uk – click on 'Museum Advisors'.
9. Your regional Federation of Museums & Galleries will also be able to help – search for 'federation of museums' and then your region.

10. The Collections Trust offers extensive training opportunities to all those responsible for collections care and management – see www.collectionslink.org.uk/training.

11. GEM offers support for everyone working in the heritage learning sector and their Regional Convenors run regular training and network events across the UK – check out www.gem.org.uk.

12. The Museum Hubs (England), CyMAL in Wales and Museums Galleries Scotland offer a great range of training opportunities.

www.mla.gov.uk/what/programmes/renaissance

www.cymal.wales.gov.uk

www.museumsgalleriesscotland.org.uk

13. If you are attached to a local authority, then you should be able to access council training opportunities – phone your local council offices or look at their website.

14. You may find events run by engage (www.engage.org) and the Visitor Studies Group (www.visitors.org.uk) useful.

15. Your local adult education service or local college is also likely to run courses and evening classes relevant to your work.

FURTHER INFORMATION

For more information about LOtC, the Quality Badge and learning through heritage, visit the following websites:

www.lotc.org.uk

www.lotcqualitybadge.org.uk

www.gem.org.uk

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