

Diversify toolkit

Practical guidance and advice for employers in the museum sector on introducing positive-action schemes and creating a diverse workforce

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Thanks must also be given to all the trainees and host venues that have participated in the scheme, and to Harsha Dudley, project coordinator for Birmingham City Council's Bridges into the Future programme, for her advice and guidance for the original toolkit; Lucy Shaw who developed the toolkit; and Jane Arthur, museum and heritage consultant, for updating the current version.

Thanks also to the trainees, host organisations and museums that have provided case studies for this edition.

'Over ten years ago the MA began work to encourage greater diversity in the museum workforce. Along with many other public and private organisations, the MA recognised the business, legal and moral case for having a workforce that reflected the audience that museums aimed to serve.



A stylized, handwritten signature in black ink, appearing to read 'Mark Taylor'.

Mark Taylor
Director, Museums Association

There is good and bad news. The good news is that the case is well made and accepted throughout the sector. Museums and their senior staff are committed to working towards greater diversity of all types. National and local government are committed, and a special mention here for the MLA which has funded Diversify for ten years and consistently and vocally championed it.

Diversify is extremely successful and is recognised in and outside the sector as one of the best schemes of its type. It is no longer simply a modest exemplar with symbolic value. It has played a key role in winning hearts and minds and has encouraged over 113 people from Black, Asian and Minority-Ethnic communities (BAME) backgrounds into museum work. Slowly but surely these energetic, ambitious and talented people are changing the sector and people's perceptions of it.

The bad news is that achieving genuine, sustainable and institutional change is a long, hard struggle and it is a long way from being over. Any high-level intervention such as Diversify aims for obsolescence as the transformation becomes part of the landscape. Individuals and institutions understand what is required and it becomes an almost unnoticed part of their culture.

The fact that we are not at that stage is not so surprising. Budgets are tight and museums are often limited in their freedom to undertake such work by being part of a much wider body and the nature of their funding. There is also a pervasive and understandable lack of confidence in how to address some of the issues involved.

The MLA and the MA have been working on a number of initiatives to help museums confront the many challenges in embedding workforce diversity at the core of their operations. The will is there, the principle is accepted, and by launching the Smarter Museums project and working with the hub museums on their diversification plans we are helping to turn intent into action.

This new edition of the toolkit is integral to the success of Diversify. Not all museums can get involved in projects, some must make their own way and are looking for guidance and inspiration. This toolkit will help museums at every stage of their plans for greater workforce diversification. It will help in making the case, drafting policies, understanding the legalities and the inevitable jargon. It provides a step-by-step guide for museums of all sizes to embrace workforce diversity in all its forms and reap the undoubted benefits that come from such a cultural change.'

Introduction

Purpose of the Diversity toolkit

'Diversity is much more than a programme, it has to be lived daily, at the heart of an overdue cultural shift in the culture sector. Governance boards do not yet reflect the richness of our nation's population; it is a government priority to broaden the base of those who govern our museums. Apart from ethical and legal arguments, diverse approaches have been shown to be of economic and social value. But museums and their funding bodies, including local government, still have much to do to embed the philosophy and make it real, and sustainable.'

Roy Clare, chief executive, MLA

This toolkit provides practical guidance and advice to any organisation interested in diversifying its staffing profile. Although it draws on the Diversify scheme, managed by the MA, it is relevant across the cultural sector. The advice and guidance presented within the toolkit covers a number of key issues including: embedding diversity, preparing your organisation, advertising and recruitment, partnership agreements, writing training contracts and designing work programmes. The toolkit provides information on the basic principles for developing training initiatives for other minority groups; however, reference should be made of relevant equalities legislation.

The toolkit can be used by all those involved in the process of setting up positive-action initiatives including museum managers, those with direct line-management responsibility for trainees and Human Resources (HR) managers.

It should be noted that there are different models for positive-action training within the museum sector. The examples used here are mainly based on traineeship and the bursary models that the MA and its partners have developed through Diversify.

The Diversify toolkit is provided as an information guide only. It is not a full authoritative statement of the law and does not constitute legal advice.

Positive-action training schemes are a relatively new legal concept. Consequently, there is no guidance to the extent to which training schemes are likely to be challenged in tribunals on the grounds of constituting employment rather than training. Therefore, as there has been no case law in this area there is no absolute guarantee that the current framework put forward in this toolkit could be not be challenged as being employment and therefore not lawful.

Introduction

Background to the Diversify scheme and the need for workforce diversity

The MA's Diversify scheme makes museum careers more accessible to people from Black, Asian and Minority-Ethnic communities (BAME). Through Diversify we aim to ensure that in the longer-term there are more minority-ethnic people who are qualified as potential applicants for mid- and senior-level positions in museums. Diversify is a strategic initiative delivered under section 37(1) of the Race Relations Act 1976.

Since 1998, working with a range of partners, the MA has established a sustainable programme of positive-action bursaries and traineeships. The MLA, through the Renaissance in the Regions programme, is the main partner and funder. Additional support comes from the museums and galleries hosting placements and traineeships, universities providing postgraduate museum studies qualifications and the Paul Hamlyn Foundation.

Since the start of Diversify over 113 people have/or are currently benefiting from the scheme as either full or affiliate members. Full members are individuals who were recruited directly by the MA using the Diversify funding from MLA. Affiliates are individuals who are funded through their host museum. Hosts can take out affiliate membership for their trainees at a cost of £500 per year. This gives them access to the MA's full range of professional development opportunities. Around 64 former Diversify participants are now working in the museum sector, eight individuals are no longer working in the sector and the remainder are in training. Without Diversify it is unlikely that most of these individuals would have considered a museum career.

In 2008 the MA, in partnership with the University of Leicester and Colchester & Ipswich Museum Service with support from Shape, piloted the first Bill Kirby traineeship for deaf and disabled people.

The MA has led the cultural heritage field in advocating and supporting workforce diversification and has been successful in bringing people from BAME backgrounds into the museum sector, however there is still more work to be done.

The 2007 Annual Population Survey (www.statistics.gov.uk) showed that 11.9 per cent of England's working age population is of BAME background. It is important to note that the Race Relations (Amendment) Act 2000 places a general duty on public authorities to promote race equality. The legislation applies regardless of the size of the local BAME population. The recent monitoring data gathered by the MLA diversity mapping exercise (2008) shows that the representation of these groups within the museum sector workforce still has a long way to go.

Introduction

Background to the Diversify scheme and the need for workforce diversity

Ethnicity and level of staff in national and hub museums in England

	Strategic operations management	Middle managers	Specialist staff	Admin staff	Front-line staff
White	96.6%	95.5%	95.4%	89.7%	87.4%
BAME	3.3%	4.4%	4.5%	10.5%	12.5%

Government Office region in England
Annual Population Survey 2007

Percentage of non-white working age population

Northeast	3.6%
North west	7.8%
Yorkshire & Humberside	8.8%
East Midlands	8.1%
West Midlands	14.5%
East	7.6%
London	35.4%
South east	7.0%
South west	3.5%
Total	11.9%

Breaking down the working age population within the Government Office regions for England shows the importance of considering regional and sub-regional difference as well as national statistics when developing a recruitment programme.

The 2005 Disability Discrimination Act placed a duty on local authorities to promote disability equality.

Nearly one in five people of working age in Great Britain has a disability. Only about half of those are in work. Mental health problems, such as depression and anxiety, now account for more Incapacity Benefit claims than back pain. One in four people will be affected by mental ill health in the course of their life. (source Chartered Institute of Personnel and Development [CIPD] fact sheet).

The 2007 Annual Population Survey highlighted that the fastest growing age group are those of 80 years and older who now make up 4.5 per cent of the total population. People over state pension age now exceed those of 16 years and younger for the first time.

The distinction between diversity and equality is the subject of continuing debate as the words are often used synonymously. Equality of opportunity is underpinned by legislation and equality is often taken as a shorthand term for the various legal requirements that promote equality of opportunity and anti-discrimination, the equality strands – race, faith, age, gender, disability and sexual orientation.

The language of the debate is changing. There is a greater emphasis now on what makes us the same, what makes us equal and what is common to all people in society. Diversity focuses on the individual and on difference, on the ways in which people can develop their full potential and how this can bring positive benefits to organisations and to society.

Diversity is about people. We are all individuals and we thrive when valued as such. Who we are is an amalgam of our skills, knowledge, life history and viewpoints, which may in turn relate to our demographic characteristics – age, ethnic origin, ability or disability, religious faith or non-religious belief, gender and sexual orientation. We also share many things in common, not least the wish to be treated with fairness, dignity and respect for who we are.

Why your organisation should undertake positive-action training initiatives: Cultural diversity - the case for change

There are three key drivers that make diversity and equality important for all organisations (whether public sector or private). These are:

The business case This focuses on developing an organisation that mirrors the diverse market place in the population and uses its diverse workforce to stimulate creativity and innovation and increase competition

The legal case This is about equality and social justice. Public bodies have a requirement under UK legislation to eliminate discrimination. It not only makes business and moral sense to create a culturally-diverse environment, but also it makes sense to stay within the law.

The moral case This sees diversity as 'adding value'. A culturally-diverse environment demonstrates a caring, inclusive and respectful organisation.

In addition an 'accountability' case has been put forward stating that there should be 'no taxation without representation'. All communities contribute to universal taxation therefore it follows that the diverse needs of these communities should be taken into account by organisations receiving public funding.

Introduction

Diversity and equality

The business case

There is much that the museum sector can learn from business and the private sector where progress on diversity has already been achieved. The Confederation of Business Industry and Trades Union Congress joint report *Talent not Tokenism* (2008) looks at the business case for diversity and identifies tangible benefits for companies including:

- increased employee satisfaction, which in turn helps attract new staff, retain those already there, reduce recruitment costs and increase productivity
- better understanding of how the company's diverse customers think and what drives their use of its products and services. This in turn helps them to access new markets previously not reached.

The creative case for diversity – for the cultural and creative sectors in particular there is also a creative case within the business case. This highlights the inspiration and creativity generated by a diverse workforce working together. Diversity is seen as a strategic tool, one that influences society by creating a sense of identity, stimulating debate and promoting the positive benefits of a diverse society. There is a view that an organisation with a role in preserving, interpreting and using our cultural heritage as a creative resource should be proactive in celebrating the positive aspects of diversity.

The MA's Code of Ethics for Museums shows how central diversity is to the function and ethical principles of museums. Collections are held on behalf of society, that is, for everyone. To be effective in serving the public museums need to take account of the differing needs of people within today's diverse society. Finding ways to broaden access to collections and enable people to gain insight, learning and inspiration from them requires museums to have an awareness of the difficulties and barriers that people face, whether as a user or as a member of the workforce, and to be responsive and proactive in making changes to eliminate or reduce these.

The legal case

Compliance with legislation is cited as the greatest driver for diversity in businesses in the UK in a recent study by the CIPD www.cipd.co.uk (Diversity in business: a focus for progress, survey report, March 2007). If your museum is seeking to set up a positive-action traineeship, or make reasonable adjustments to a historic building to provide access for disabled people, or provide concessionary entrance charges for children or senior citizens you will need to be aware of the legal issues involved.

There has been significant legislation passed by the UK government relating to anti-discrimination and the promotion of equality and human rights from the third quarter of the 20th century onwards. Information on the various acts and the bodies that regulate and promote them can be found at www.equalities.gov.uk and at www.equalityhumanrights.com, the website of the Equality and Human Rights Commission (EHRC).

The moral case

Documents such as the Universal Declaration of Human Rights underpin both the legal and moral case for diversity. The moral case is about treating people with integrity, fairness and respect. It is about ensuring and upholding their rights. There is also the ethical case adopted by many businesses through corporate social responsibility. For example, using the procurement process to ensure that suppliers have equality and diversity policies and practices. Or, as many museums are doing already, setting up positive-action traineeships to build capacity within the sector.

Members of governing bodies and managers should model behaviour that demonstrates a commitment to inclusion, equality of opportunity and valuing diversity. They should communicate clearly what is expected of their employees and create a common sense of purpose through the values and aspirations that drive the organisation.

For individuals working in museums it is as much about being aware of and understanding your own values, biases, motivations and emotions as it is about being aware of the needs of other people. It is about taking responsibility for your own actions and the impact these have on other people.

Chapter 1

Embedding diversity and equality in your organisation

Embedding diversity and equality	The legalities	Preparing your organisation	Implementing positive-action training	Recruitment	Partnership agreements	Training contracts	Exit strategies	Professional development	Guidance on answering complaints	Useful contacts	Appendices
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Embedding diversity and equality in your organisation



As the business case suggests, a holistic approach to embedding diversity and equality will ensure that initiatives like positive-action traineeships are set in the context of continuous improvement.

The EHRC suggests that 'The starting point for any effort to promote equality in the workplace is to assess what you are doing already and look for areas where you can improve. This might include:

- carrying out an equality audit or equal pay review using your audit as a basis for ongoing monitoring
- investigating the possibility of more flexible work patterns
- looking for examples of good practice in other organisations
- talking to staff representatives such as unions about where improvements could be made
- checking that you use clear and justifiable job criteria that are demonstrably objective and job-related.'

www.equalityhumanrights.com



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Case study

How planning supports diversity at Museums Luton

Museums Luton has a workforce diversity plan in place and progress is monitored against the targets set. At the time of auditing staff in July 2007 we found that:

- 62% of staff were White British
- 21% were White European
- 6.3% were Asian British-Bangladeshi
- 2.1% were Black British-African
- 8.5% classed themselves as of other ethnic background

The percentage of BAME staff within Museums Luton was 8.4 per cent compared to the national average in museums of 2.49 per cent (MA, 2007).

Current diversity initiatives

- Positive-action traineeships. The first placement was in 2004. Following her placement the trainee went on to be recruited to the position of assistant curator within the museum team. A second positive-action trainee currently has a placement at the museum.
- Museums Luton has hosted two South African curatorial trainees funded by the Department for Culture, Media and Sport. They have gained valuable experience from working on projects alongside curators but the learning has very much been a two-way process with both trainees conducting a number of presentations on their museums and collections.
- Contemporary collecting and Hidden Histories programmes. As a renaissance hub museum the collecting programme aims to identify the diverse populations of Luton within the existing and contemporary collections.
- Developing work experience. Although no data has been formally collated of the ethnicity of the students, informal collation by the performance and development manager shows a higher level of diversity of work experience students than the workforce in general.
- Performance and development manager. This post was created to support workforce development across the service, co-ordinating the training and development of all staff and volunteers, ensuring that all staff have equal opportunities for development. Workforce diversity is also a priority for the service's current forward plan developed through consultation events and sub group meetings with all museum staff.

'We learn so much through working with staff from different cultures, backgrounds and faiths. We reflect this diversity in our exhibitions and programmes. As a result we have been able to broaden our audiences and create links to the local population through employment. Diversity has helped us to achieve our service targets.'

Karen Perkins, interim director, Museums Luton

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Renaissance in the Regions and workforce diversity action plans

Hub museums/services implementing workforce diversity action plans is one of a number of measures the MLA is currently undertaking to progress workforce diversity including leadership development, work placement and positive-action programmes.

Workforce diversification forms a key part of the renaissance outcome that knowledge and expertise is shared between institutions and communities, and museums' diverse staff actively facilitate learning, discovery and research. Workforce diversity action plans form part of the 08/09 and 09/10 hub business plans.

One of the renaissance objectives flowing from this outcome is to develop the diversity of the workforce, both front and back of house, to reflect the communities the museum is seeking to serve. It is acknowledged that workforce diversity cannot be tackled in isolation. The overall hub plan will also be contributing to developing a diverse workforce through projects focused on audience and collections' development.

The workforce diversity action plans would contain:

- (a) Introduction: A brief outline of the museums/services overall vision and mission; a brief outline of the museums/services workforce, pulling out key points from workforce diversity audit data; the overall aims of the plan; and why the museums/services want workforce diversity.
- (b) The main body of the plan: This would set out the actions needed to support the development of a diverse workforce.

Hub museums/services workforce diversity action plan content themes

1. Developing the vision and rationale.
2. Establishing and using the baseline workforce composition.
3. Actions with targets – areas that could be included:
 - 3.1. Careers advice/development.
 - 3.2. Workforce recruitment (includes governors, staff, volunteers, trainees and advisory panels).
 - 3.3. Staff development of existing and new workforce (includes permanent and temporary staff and volunteers).
 - 3.4. Governance and leadership.
4. Developing, monitoring and evaluation (quantitative and qualitative and how data is used).
5. Developing partnerships, linkages and external influences.

6. Embedding a culture of valuing diversity.
7. Communication: internal communication of the workforce diversity action plan, aims, reasons; external communication of aims of the museums/services in diversifying the workforce.
8. Any other items.

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Renaissance in the Regions and workforce diversity action plans continued

In 2008 the MA undertook research that investigated the hubs' progress in implementing their workforce diversification action plans, what support might enable them to be more effective and what barriers stood in the way of greater progress. As a result of the findings the MLA has commissioned the MA to undertake a programme of work to challenge and support the hub museums to embed workforce diversity in every area of operation and commit to workforce diversity as a key area of work.

This new strand of funding is also supporting the MA to undertake a programme of organisational development work with non-hub museums that is designed to embed diversity, in its broadest sense, and create more inclusive working practices.

A cohort of ten museums has been recruited to the Smarter Museums programme. They will be given the opportunity to develop and strengthen their vision and values to help create more sustainable, open and inclusive organisations for the benefit of the museum workforce and visitors alike.

Smarter Museums and the work with the regional hubs are taking the term diversity in its broadest sense, shifting the emphasis from ethnicity to all forms of workforce diversity, in line with the current social policy thinking.

National Occupational Standards

The National Occupational Standards for Management and Leadership (Equality and Diversity) www.ukstandards.org contains specific standards relating to equality and diversity as follows:

- B8 Ensure compliance with legal, regulatory, ethical and social requirements
- B11 Promote equality of opportunity and diversity in your area of responsibility
- B12 Promote equality of opportunity and diversity in your organisation
- B9 Develop the culture of your organisation

These are useful for organisations and individuals that are looking generally at embedding diversity and equality in their organisations or specifically, to manage positive-action programmes. The standards define the generic skills, knowledge and understanding and behaviours required and outline the outcome of effective performance.

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Case study

Supporting Diversity in the West Midlands

Participating museums were the Shakespeare Birthplace Trust, Staffordshire Arts & Museums, Worcestershire County Museum Service, Warwickshire County Museum Service, Sandwell Museums and the Black Country Living Museum. The Supporting Diversity programme was developed and managed by Jane Arthur, museums and heritage consultant for Renaissance West Midlands.

'As a charity with a global mission, we need to embrace a diverse approach in order to be sustainable in the long term.'

Diane Owen, director, the Shakespeare Birthplace Trust

In 2008 Renaissance West Midlands set up Supporting Diversity in the West Midlands, working with non-hub museums to build capacity and sustainability for diversity in museums in the region. The project has five stages:

1. A baseline for diversity practice is established for each museum through a site visit and interview.
2. Participants attend a Business Case for Diversity workshop that covers the legal, moral and business cases.
3. A follow-up surgery helps the museum identify priorities, actions required and the organisational and individual training/development needs.
4. Targeted training and skills development for museum staff is provided through Renaissance West Midlands.
5. The impact/change on organisations and individuals is measured through evaluation.

Six museums took part in the 2008 programme. Several had already considered aspects of diversity and the project's staged approach enabled further opportunities for skills sharing, mentoring and dissemination of best practice.

'Participating in Supporting Diversity has been a timely and helpful part of our organisational development, providing welcome support and helping us to embed diversity principles into our planning. Organisational change is not always easy and we feel we have just begun our journey.'

Karen Spry, museum development officer, Worcestershire County Museum Service

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What an organisation that values diversity looks like

The profile:

- The organisation learns. It actively promotes feedback from staff and visitors and takes action as a result.
- The organisation has a clear vision and values that are communicated and shared across and outside the organisation.
- There is a focus on the positive impact and benefit of the services that the organisation provides to its users, including internal and external clients.
- There is a focus on developing the skills and expertise of the workforce.
- There are flexible work practices and supportive HR policies.
- The workforce feels empowered and engaged, people are keen to work at and remain with the organisation.

To do this, organisations need:

- Commitment from the top and visible leadership – having a diversity champion and advocate at a senior level, one who can drive the process forward and make sure that diversity is represented at all levels. The process has to challenge the status quo and seek better alternatives. Leaders should model behaviour that demonstrates a commitment to inclusion, equality of opportunity and valuing diversity.
- Good communication – with staff, stakeholders and customers. Making it happen is a case of ‘hearts and minds’. Without this nothing will happen. Building commitment with staff by involving them in the process, giving people the opportunity to provide feedback and respond to them. Being an advocate for the customer’s (audience or users) interests.
- A holistic approach – the benefits and value of diversity have to be owned by the entire workforce. The organisation has to recognise the opportunities presented by diversity in the workforce. There has to be a sense of common purpose across the organisation.
- The right support infrastructure in place with the resources (time, people and money) to find practical ways to overcome barriers and constantly seek to improve performance.
- Robust performance measurement – through monitoring and evaluation of the workforce and users/non users. The organisation should have a clear understanding of its different customers (audience or users) and their needs. There should be systems to gather and manage information and knowledge (on customers, audience or users) effectively, efficiently and ethically. The same goes for the workforce. Without monitoring how do you know if your workforce is representative of the working population and if your diversity policy is working?

Chapter 1

Embedding diversity and equality in your organisation

What holds organisations back?

The three 'I's' were developed by the equality and human rights practitioner Gallant 2000 as a way of expressing why organisations resist thinking about diversity.

Ignorance often accompanied by fear of risk, fear of change, a misconception of the cost implications of equality legislation and uncertainty of the benefits of diversity practice

and

Indifference where diversity is not seen as a priority or as something that is an 'add on' and not central to the function of the organisation

These lead to

Inaction where organisations carry on doing the same thing, working in well-established, traditional ways, often reinforced by a tendency to employ 'people like ourselves'.

By not taking action on diversity museums will fall behind in what is an increasingly competitive market place. At a time when museums are combating declining visitor figures, have greater competition to access grant funding, and are still perceived by some people as elitist they cannot ignore or be indifferent to the benefits of diversity.



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The Race Relations Act 1976, section 37 (1)

All public authorities have a duty to promote race equality under the Race Relations (Amendment) Act 2000. This could include taking positive action. The Race Relations Act 1976, section 37 (1) sets the legal framework for organisations to do just this.

The Race Relations Act does not allow positive discrimination or affirmative action, therefore an employer cannot try to change the balance of the workforce by selecting someone for a job mainly because they are from a particular racial group. This would be discrimination on racial grounds and unlawful. Selection must be based on merit and all applicants should be treated equally.

However, employers and others can take positive action. The aim of positive action is to ensure that people from previously excluded minority-ethnic groups can compete on equal terms with other applicants. It is intended to make up for the accumulated effects of past discrimination. The law does not compel employers to take positive action, but it allows them to do so. Section 37 (1) is the section relevant to running positive-action training initiatives and can be seen in full in Appendix 2.



The Equality Bill

The Equality Bill was published on 27 April 2009. It will 'Make provision to require Ministers of the Crown and others when making strategic decisions about the exercise of their functions to have regard to the desirability of reducing socio-economic inequalities; to reform and harmonise equality law and restate the greater part of the enactments relating to discrimination and harassment related to certain personal characteristics; to enable certain employers to be required to publish information about the differences in pay between male and female employees; to prohibit victimisation in certain circumstances; to require the exercise of certain functions to be with regard to the need to eliminate discrimination and other prohibited conduct; to enable duties to be imposed in relation to the exercise of public procurement functions; to increase equality of opportunity; and for connected purposes.'

The Equality Bill will do three main things:

Standardise, simplify and consolidate discrimination law where appropriate.

This covers measures to simplify definitions, exceptions, provisions on equal pay and disability-related provisions, including an ability to harmonise the legislation where changes are required as a result of European law.

Make the law more effective. This covers measures to widen the scope for voluntary positive actions, establish an integrated duty on public authorities to have due regard to the need to promote equality including in their procurement activities, and to achieve better handling of discrimination cases by the courts and a duty on public authorities to consider socio-economic inequalities.

Modernise the law. This covers measures to extend protection from discrimination on grounds of gender reassignment and pregnancy/maternity; to provide protection against unfair discrimination on grounds of

age in the provision of goods, facilities and services and exercise of public functions; to provide a power to require gender pay gap reporting by the private sector, and to enable courts and tribunals to make wider recommendations and to extend statutory protection against harassment outside the workplace.

The equality duty on local authorities and other public bodies has been increased from the existing duty on race, gender and disability to include age, sexual orientation, faith, pregnancy and new mothers. A new socio-economic duty has been added. The aim is to ensure public authorities take into account, in their planning, commissioning and resourcing of services, the need to identify and have due regard to inequalities associated with socio-economic disadvantage.

Consultation on the Equality Bill took place in 2009 and it is due to become law in Spring 2010.

www.equalities.gov.uk

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Equality Impact Assessments

All public bodies are required to conduct Equality Impact Assessments (EIA) to assess the impact of their policies, services and functions on their users, residents and staff.

By carrying out an EIA public bodies can show that the services they provide fulfil the requirements of anti-discrimination and equalities legislation. EIAs focus on the equality strands – age, race, ethnicity, gender, sexuality, disability, faith or belief – though it should be noted that people within these groups have different and individual needs. People may belong to several of the targeted groups and their experience of discrimination can involve many different factors. EIAs should be undertaken when developing new policies and strategy, when initiating changes to process or function, and for undertaking projects, service reviews and during organisational change.

The EHRC provides information on undertaking an EIA for pay (see www.equalityhumanrights.com). The Improvement and Development Agency gives clear information and tips on completing an EIA (see www.idea.gov.uk).

The process of conducting an EIA has six stages:

Initial screening – checking whether the proposed changes have the potential to cause adverse impact or discriminate against different groups in the community. If they do then a full EIA has to be completed.

Scoping and defining – bringing together the expertise to complete the assessment and setting a timetable. EIAs must be completed before the formal implementation of a policy, strategy, procedure or function takes place. The process could bring in technical expertise, specialist knowledge or service users to help make the assessment.

Information gathering – bringing together all the information needed to assess impact. This could include data on users, workforce, past user feedback and consultation, demographic and census statistics etc. It is a legal requirement that consultation takes place with appropriate stakeholders as part of the EIA process. To meet the race and gender duties, it is necessary to consult with interest groups. A requirement of the disability duty is that disabled people are engaged in the impact assessment process.

Making a judgement – this is the crucial part of the process. It uses the information gathered to decide whether or not there is potential for the policy, strategy, procedure or function to result in a less favourable outcome on any group in the community or unlawful discrimination of any kind.

Action planning – actions need to be SMART (strategic, measureable, achievable, relevant and targeted) with a timescale for implementation and review and allocation of responsibility. Actions arising from the EIA should be built into relevant service plans and team plans.

Publication and review – it is a legal duty to publish the result of the EIA. It is important to show the local community that your service is actively engaged in promoting equality and challenging potential discrimination. The action plan should be reviewed regularly.

A local authority museum that is considering a workforce diversification programme including positive-action traineeships should undertake an EIA before proceeding.

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What is positive action and how does it work?

Positive action is a set of measures that aim to prevent discrimination, or to overcome past discrimination.

A lack of applications from a certain section of the community may not be due to unfair recruitment and selection processes operated by the organisation. However, in order to achieve the objective of widening diversity, positive action may be required to encourage applications from specific groups and equip individuals with the skills they need to compete equally with others. It is recognised that positive-action training initiatives are likely to have a better chance of making a difference if there are already workplace practices and policies that work to eliminate unlawful discrimination and to promote equality of opportunity.



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What is positive action and how does it work? continued

The Race Relations Act recognises that because of past discrimination or disadvantage, people from particular racial groups may not have fully recognised their potential and may not have the qualifications or experience to make them eligible for particular work. Positive action under section 37 (1) of the Race Relations Act 1976 allows for targeted training programmes or encouragement if it can be demonstrated that at any time in the previous 12 months there were no persons of a racial group doing particular work within Great Britain, or that the proportion of people from that racial group was small in comparison to the proportion of that racial group in the population of Great Britain as a whole. Then, it is lawful to provide access to training or to encourage and help members of the underrepresented groups to undertake such work.

Encouragement means making it easier for people from a racial group, underrepresented in particular work, to take advantage of job opportunities. Examples are explicit encouragement such as in recruitment adverts, mentoring, support networks, open days, career fairs and in information that is given to schools with large BAME populations. Encouragement does not include actually providing the opportunity to do the work or a decision to recruit a person because they come from an underrepresented group. There must still be equality of opportunity at the point of recruitment.

'Training' means training to fit a person for the particular work. It includes trainee posts and outreach training. It can include classes in preparing CVs and interview and assessment skills. Trainees cannot be paid a salary but they can be offered training allowances.

Before positive action is undertaken an organisation needs to collect evidence that demonstrates the need for action. Data could be based on personnel records for the previous 12 months showing the lack of applications from the specific group targeted. Alternatively, statistical data regarding the percentages of specific racial groups working in the museum profession can be found in the census statistics: contact census customer services on www.statistics.gov.uk/census2001/customerservices.asp

Information gathered by the MA from the regional hubs can be found on the MA's website

www.museumsassociation.org

It is crucial that museums and galleries undertaking positive action make it clear to all parties involved, including existing staff that any positions that come under positive-action training schemes are traineeships or placements, they are not employment. Employment can only be achieved by trainees applying for a job and going through a competitive selection process. Trainees should not be guaranteed employment on completion of their traineeship as this is positive discrimination and is illegal.

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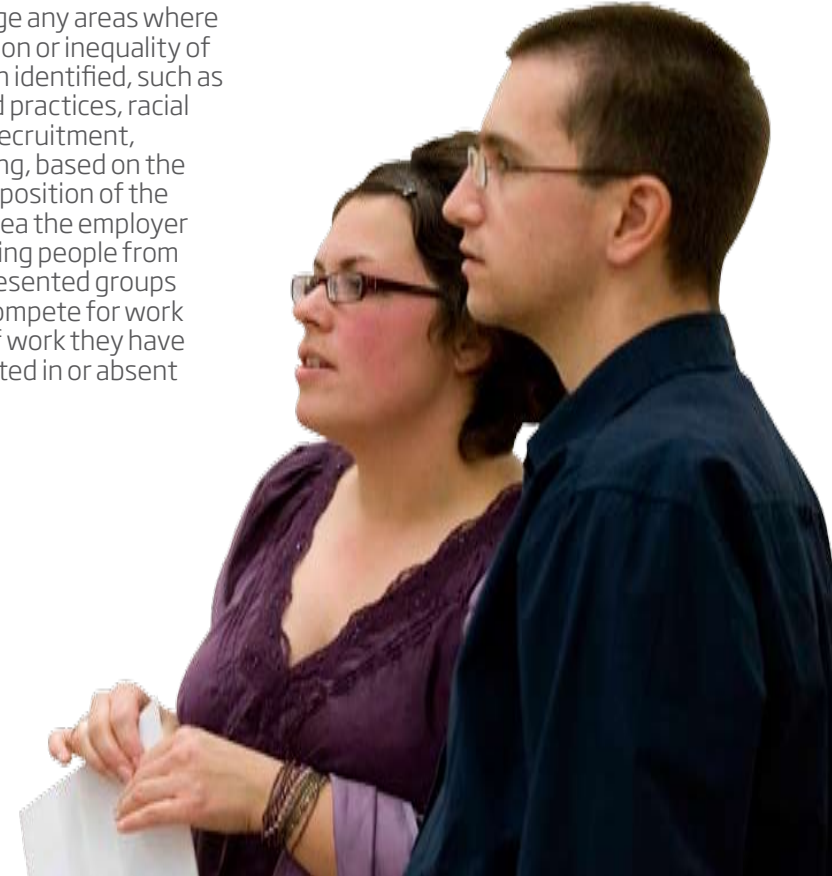
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What does positive action cover?

Positive action as a term is not defined in the Race Relations Act. In its widest sense it is sometimes used to refer to a range of measures to eliminate unlawful discrimination and to promote equality of opportunity, in short to level the playing field so that everyone has an opportunity to compete for work. Such measures can include the following examples:

- putting into practice equal opportunities, recruitment and employment policies designed to eliminate unlawful discrimination and to promote equality of opportunity
- action designed to reveal areas where there may be unlawful discrimination which for public and private sector employers includes monitoring employees and others by racial group and monitoring and assessment of workplace policies generally; and for public sector employers includes compliance with the legal requirements imposed on them by the statutory public duty to promote race equality
- action taken to change any areas where unlawful discrimination or inequality of opportunity has been identified, such as changing policies and practices, racial equality targets for recruitment, promotion and training, based on the ethnic and racial composition of the workforce and the area the employer recruits from and giving people from identified underrepresented groups the opportunity to compete for work in a particular type of work they have been underrepresented in or absent altogether.



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Examples of positive action

The MA's training models for positive action are explained in detail in Chapter 3. However, there are other measures that can also be taken:

- job advertisements designed to reach members of underrepresented groups and to encourage their applications: for example, the use of the minority-ethnic press and other minority newspapers
- use of employment agencies, community organisations and career offices in areas where underrepresented groups are concentrated
- recruitment and training schemes for school leavers designed to reach members of underrepresented groups
- encouragement to employees from underrepresented groups to apply for promotion opportunities (although it must be shown that the proportion of employees doing that particular type of work is small compared to either its proportion in the workforce or in the population of the area from which the employer recruits for that particular type of work)
- training for promotion or skills training for employees of underrepresented groups who lack particular expertise but show potential (again it must be shown the proportion of employees doing that particular type of work is small compared to either its proportion in the workforce or in the population of the area from which the employer recruits for that particular type of work)
- outreach events, working with community organisations
- positive-action statements of encouragement in job advertisements encouraging applications from people with disabilities, women/men and BAME people in areas where traditionally they have been underrepresented.

Positive action is **not** about giving more favourable treatment to particular groups in the recruitment process. Selection for recruitment or promotion for employment **must** be based solely on merit.



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The benefits of positive-action training initiatives

Positive-action training schemes bring benefits to the employer, trainee and the museum sector more generally. The MA has identified the benefits of its Diversify Positive Action Trainee Scheme as follows.

Benefits for the museum sector:

- supports its emerging race equality and diversity strategy
- opens up access to the widest possible pool of talent from which to recruit and develop employees
- encourages people to work in the sector, which may not have been an obvious career choice
- brings new perspectives into the sector
- brings out issues of managing a diverse workforce
- promotes a more diverse workforce that will enable the sector to improve customer-focused service delivery, by being able to better relate to, understand and therefore meet a diverse range of customer needs
- provides marketing opportunities – valuing equalities and diversity through positive action
- improves reputation and image of the sector among the diverse community it serves
- helps place the sector as an employer of choice
- leads to better morale and motivation of staff.

The sector needs to 'keep up the good work' though...

'The museum sector has made considerable progress in developing and increasing the work it does with diverse and underrepresented audiences through new programmes of work and outreach projects. It now needs to do more to translate these experiences and contacts into a desire to work in the cultural heritage sector. In particular, it needs to reach young people when they are making decisions about their careers.'

The Cultural Heritage Blueprint. A workforce development plan for cultural heritage in the UK. December 2008, CCSkills

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Benefits for the employer:

- addresses current skills shortages
- supports delivery of wider corporate goals and HR strategies through managing diversity in employment
- creates a diverse workforce to meet the needs of the customers and the communities served
- introduces managers and supervisors to the role of coaches.

Feedback from host organisations indicates how hosting a trainee can bring a fresh eye and new enthusiasm to the work of the museum:

'Having interns on the Diversify scheme has enabled us to develop new ideas, and it is a credit to [her] that some of her work will continue after her placement has finished. [She] dealt with all the administrative details of setting up programmes but also delivered face-to-face work with participants including object handling and discussion sessions.'

(bursary host)

'Input into all areas of our activities and policies by the trainee [is] helping us to look afresh at our work.'

(bursary host)

'Hosting this MA traineeship has reinforced our commitment to diversity.'

(bursary host)

Benefits for the trainee:

- a structured training programme
- training allowance (tax free) for duration of traineeship
- professional qualification at postgraduate level
- networking opportunities
- access to MA membership
- mentoring
- increased employability.

In 2007 the MA undertook an evaluation of the Diversify scheme. Key statements made by trainees during telephone interviews and the focus group meetings signal the enthusiasm and recognition of the impact of the training on their professional and career development:

'The opportunity is immense: we get to develop ourselves at such an amazing speed compared to others in the profession.'

'It is a great opportunity to develop a lot of transferable skills which is useful in terms of career opportunities.'

'I particularly value the combination of academic as well as vocational/practical training.'

'It is not just about skills, it is about confidence.'

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Positive-action do's and don'ts

Do

Be clear about the type of job you are targeting. Positive-action measures can only be used for 'particular work', eg journalist not a career in broadcasting; librarian not a career in libraries.

Have evidence of underrepresentation within the past 12 months - ethnic-monitoring data and census statistics are the most commonly used, but evidence from surveys or research material may be sufficient.

Carefully identify the particular racial group you are targeting. If you use a broad category, such as Black, be clear which ethnic groups are included in that category, and be able to demonstrate underrepresentation for each group. In one Commission for Racial Equality case the training provider restricted the training opportunity to Asian candidates only. The data showed that Indians were well represented in the profession, but not Pakistanis or Bangladeshis; yet an Indian candidate was selected, with the result that the selection was probably unlawful.

Make it clear that the contract is a training contract and not a contract of employment, and make sure you provide genuine training.

Consult staff, trade unions or workers' representatives on proposals for positive-action programmes and on the reasons for them, and encourage support.

Review and monitor the use and success of positive-action programmes.

Don't

Make assumptions that all people from BAME communities are underrepresented in particular types of work.

Offer employment contracts, salaries and other terms and conditions usually associated with employment. Positive-action training cannot constitute employment.

Offer or guarantee a job at the end of the training programme, or imply that a job may be available.

Use positive-action programmes for apprentices. The Race Relations Act 1976 includes apprenticeships in the definition of employment and as such they cannot be considered as training.

Be easily dissuaded from using positive-action measures; provided the conditions are met, they are lawful and a useful component of a good equal opportunities policy.

Assume that people from BAME communities are only interested in training in particular areas of work. Such assumptions are career limiting and must be avoided in order to encourage well-rounded professional development.

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Several key elements should be in place in order to maximise the chance that positive action has the desired outcome of creating a more diverse workforce. Good organisational preparation will help prevent positive action being perceived as tokenism by staff and the wider sector.



Positive-action training models

Positive-action traineeships can include a range of models and can last for differing time frames, but typically will involve a one- to three-year timescale.

Organisational culture and strategic objectives

Before embarking on any positive-action training initiatives it is useful to review the organisation's culture, both in terms of the museum service – staffing and operation on all levels and the governing body. Organisations that have successfully hosted traineeships have found it helpful to include positive-action training within their strategic objectives – setting it within a wider framework of an equal opportunities policy and action plan. Ideally organisations should already be working towards addressing diversity across a range of services' provision, ie staffing

(workforce diversification), collections management and exhibitions, audiences and communications. Existing policies may need to be reviewed before implementing any positive-action training. Additional information is provided in Chapter 2 with case studies and advice.

It is advisable to contact and enter into discussions with the relevant local trade unions at an early stage.

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Championship Support structure

The MA recommends that there should be support for positive-action training initiatives at the highest level within both the senior management team and the governing body. Championship at directorate level helps to embed positive action within organisational policy and ensure the success of any positive-action training initiative. To create investment in the traineeship, consideration could also be given to incorporating the trainee's targets within their supervisor's performance plan.

Successful positive-action training initiatives depend on the level of support that the trainees receive. Host organisations should focus on the trainee's needs and be as responsive as possible. The direct support needed for a trainee from a host venue includes:

- time
- pastoral care / champion / supervisor / mentor / buddy
- practical support ie providing office equipment
- induction programme
- training and development programme
- communication and networking opportunities
- professional development opportunities beyond the training course.

Hosts can benefit from external support offered by the MA and the Renaissance Hub Diversity training programmes. They should encourage trainees to take advantage of networking opportunities through Diversify and the Associate of the Museums Association (AMA) networks.

Supervision structure

Successful positive-action training largely depends on the capacity of staff to successfully supervise a trainee, including sensitivity to the individual's needs and the difficulties that could arise. Consideration should be given to developing a supervision structure for the trainee prior to the placement, which all staff should be made aware of. This structure could include:

- a champion at senior level
- a supervisor (this term is preferable to line manager as it emphasises the fact that this is a training position)
- a mentor or buddy
- a home-base department.

Ideally there should be clear lines of communication between the champion, the supervisor and the HR department and all those involved should be aware of their responsibilities regarding the positive-action trainee. Specific guidelines outlining each parties' involvement and responsibilities should be drawn up. They should refer to what is expected of the trainee and give details of the support they will receive and who they will be reporting to etc. See Chapter 4 and Appendix for further details.



Supervisors

The trainee's most important relationship will be with their supervisor. It is important that the supervisor is prepared for this role as for some it may be the first time they have had line-management responsibility for an individual.

The supervisor will need to:

- ensure that they produce a positive learning environment for the trainee
 - understand the trainee's needs
 - be able to identifying the learning activities and training opportunities that will suit the trainee
 - support the trainee in setting goals and objectives
 - help the trainee put together a training and development plan and help them to reflect on and record their learning
- during their placement
- be capable of managing performance
 - provide informative and constructive feedback
 - help the trainee identify strategies for working through challenging situations
 - give the trainee well-rounded career development advice without making assumptions and generalisations about career choices. It is important to not assume that people from BAME communities are only interested in training in particular areas of work such



Budgeting for a positive-action training initiative

The funding format outlined below is an exemplification of the costs of a traineeship in the MA Diversify Positive Action Trainee Scheme.

Hosts should give serious consideration to paying the training allowance as a bursary or grant, thereby avoiding the need to pay national insurance and payroll costs etc. This also indicates that it is a training opportunity and that the trainee is not an employee. The Arts Council Inspire Fellowship uses this method to award the training allowance to its fellows. Trainees should be made aware that HM Revenue & Customs may consider the training allowance to be taxable income at a later date and should therefore make provision to pay tax and National Insurance should this arise.

Suggestive costs for trainee hosts

The figures that follow are indicative costs for a traineeship. The trainee bursary is less than a typical museum starting salary, but higher than the minimum wage. Please note that this is a training allowance, bursary or grant.

Bursary including postgraduate course 2009

	Cost	Notes
Postgraduate course fees	£ 5,500	1
Course expenses	£ 2,000	2
Work experience (over five months)	£ 5,000	3
Professional development package	£ 500	4
Total	£13,000	

- 1 Course fees vary considerably; this is at the higher end. Note too that course fees generally increase faster than the general rate of inflation.
- 2 This is a payment to the individual to cover the cost of books, course-specific costs and course-related travel. It does not cover day-to-day living expenses, which individuals are expected to fund themselves.
- 3 This is based on five months' work experience with a scholarship payment equivalent to £12,000 per year, pro rata. This is less than a typical museum starting salary, but higher than the minimum wage. Please note the comments made above regarding paying this as a training allowance, bursary or grant.
- 4 This is a contribution towards the cost of the professional development package offered by the MA. The package includes membership, free attendance at the MA annual conference and events, free registration for the AMA, Diversify mentor and professional development opportunities. (For full details of the professional development package see Appendix 8).

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Bursary based on work-based learning 2009	Cost	Notes
Payment to trainee	£12,000	5
Training costs	£1,000	6
Professional development package	£ 500	7
Total	£13,500	

5 This is based on 12 months' work experience with a scholarship payment equivalent to £12,000 per year, pro rata. This is less than a typical museum starting salary, but higher than the minimum wage. Please note the comments made above regarding paying this as a training allowance, bursary or grant.

6 Personal development, course and conference fees and travel related to training

7 This is a contribution towards the cost of the professional development package offered by the MA. The package includes membership, free attendance at the MA annual conference and events, free registration for the AMA, Diversify mentor and professional development opportunities. (For full details of the professional development package see Appendix 8).

Bursary for BAME management-level traineeship	Cost	Notes
Payment to trainee	£21,000	9
Training costs	£ 5,000	10
Total	£26,000	

9 Equivalent of £1,750 per month for 12 months. Please note the comments made above regarding paying this as a training allowance, bursary or grant.

10 Personal development, course and conference fees and travel related to training.

Coaching, networking and training (provided centrally by the MA for all trainees)	£6,000	
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Budgeting for a positive-action training initiative continued

Bursary for entry-level traineeships for people with disabilities	Cost	Notes
Payment to trainee	£6,000	11
Course fees	£5,500	12
Course expenses	£1,000	13
Access fund for hosts	£3,000	14
Professional development package	£ 500	15
Total	£16,000	
11 Training allowance for six-month work placement with host organisation. This is less than a typical museum starting salary, but higher than the minimum wage. Please note the comments made above regarding paying this as a training allowance, bursary or grant.		
12 Course fees vary considerably; this is at the higher end. Note too that course fees generally increase faster than the general rate of inflation.		
13 This is a payment to the individual to cover the cost of books, course-specific costs and course-related travel. It does not cover day-to-day living expenses, which individuals are expected to fund themselves.		
14 To cover necessary adjustments, equipment and materials for the host organisation to prepare the workplace.		
15 This is a contribution towards the cost of the professional development package offered by the MA. The package includes membership, free attendance at the MA annual conference and events, free registration for the AMA, Diversify mentor and professional development opportunities. (For full details of the professional development package see Appendix 8)		

Please note these figures do not include advertising and recruitment costs.

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Briefing staff

Once an organisation has decided to embark on a programme of positive-action training all staff, especially supervisors, should be fully informed. Briefing meetings should define what positive action is and why the organisation is participating. It should be made clear to staff that positive action is not the same as positive discrimination, and that any positions that come under positive-action training schemes are temporary traineeships or work placements – not employment. Employment can only be achieved by trainees who apply for a position and go through a competitive selection process.

The MA runs training seminars to help host venues and supervisors develop and implement successful positive-action training initiatives. For further information email cpd@museumsassociation.org



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Evaluation

Evaluation should be built into the framework of the traineeship to ensure reflection and improvement, with regular opportunities to review progress. Review meetings should be held at quarterly intervals and established at the beginning of the traineeship. The trainee's progress should be reviewed against the structured training and development plan.

A mid-point review meeting should establish what the trainee hopes to achieve during the remainder of their training. It is also a chance to give thought to exit strategies for the trainee (see Chapter 8).

At the end of the training all parties should formally conclude with a closure meeting to evaluate its success. The supervisor and the trainee should complete evaluation forms as part of this process. (For suggested questions to ask in evaluation forms see Appendix 3).

Useful contacts

For useful additional advice on preparing your organisation go to the EHRC's website at www.equalityhumanrights.com

Preparing your organisation Checklist

- ☐ Review the culture of your organisation
- ☐ Include positive-action training within your organisation's strategic objectives and ensure that it is set within a wider framework of an equal opportunities policy and action plan
- ☐ Have the support of the senior management team and governing body
- ☐ Have funding in place
- ☐ Establish a clear supervision structure
- ☐ Draw up specific guidelines for each party involved, including the trainee, outlining their individual responsibilities
- ☐ Fully brief all staff, but especially supervisors, clearly defining what positive action is. Emphasise and make clear to all staff that positive action is not positive discrimination and provides training and not employment
- ☐ Have evaluation built into the framework in order to ensure reflection and improvement
- ☐ Have systems for supporting the individuals participating in positive-action training built in
- ☐ Ensure that supervisors have received appropriate training prior to the start of the traineeship

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Case study

Running a positive action traineeship at Tyne & Wear Archives & Museums

Ann Fletcher-Williams,
hub projects manager,
North East Regional
Museums Hub

The Positive Action Traineeship (PAT) scheme is run by Tyne & Wear Archives & Museums (TWAM) and the North East Regional Museums Hub (NERMH). TWAM is a major regional museum, art gallery and archives service. TWAM manages 12 venues on behalf of five local authority districts and Newcastle University. TWAM is also the lead partner for the NERMH, which consists of Beamish Museum, the Bowes Museum and Hartlepool Museums.

This programme forms a part of a wider 'workforce diversification plan' for TWAM. There is also an Arts Council England North East funded positive-action Curatorial Fellowship (modelled on the London Inspire programme) due to finish in September 2009. This will be replaced by an Inspire Fellow from the, now national, programme run by the Royal College of Art funded by the Arts Council England.

Programme to date

Since 2003 TWAM has worked with six people through the PAT scheme. A new 2009-11 candidate has recently been appointed.

Interest in the scheme has varied – generally there were six to 15 applications, however one year it dipped to three. This was probably as a result of a change in application procedures from Newcastle City Council (the lead authority). Following this a more bespoke application process was devised which has improved the situation considerably. This year TWAM received 31 applications.

Structure of the programme

TWAM and Newcastle University work closely on the recruitment, selection and appointment of candidates and support the trainee through their work placement and studies.

The trainee undertakes a part-time MA in museum studies. They attend taught sessions and have time built into their programme to carry out research and complete written work. The rest of their time is spent at the museum on placement. The placement programme differs from student to student and is devised in partnership between the student and the supervisor. Trainees are given the opportunity to specialise in one area if appropriate, usually towards the end of the two years.

Initially the trainees were supervised by the HR department. Since 2006 the programme has been run and supervised by the manager leading on diversity for TWAM and the NERMH.

Impact of the programme

The impact is very much interlinked with the workforce diversification plan and continuing diversity initiatives for TWAM. Cross-organisational initiatives such as the diversity working group and the development and delivery of bespoke diversity training for staff and volunteers has increased staff awareness and led to a shift in organisational culture.

Learning points

Key learning points include:

- a good induction – where the supervisor spends time with the trainee enabling them to become familiar with the organisation. This takes the form of a series of visits, meetings and introductions
- a work plan devised between the supervisor and the trainee – to ensure that they are getting experience in the areas required
- a learning log which is filled out at the start of each placement and allows the trainee to monitor progress with each placement host and their supervisor
- recognition that the trainees are here to learn – but also that it is vital for them to gain good experience – so some project work is essential
- linking the trainee's placements with their university work where possible (for example – we try and give them time in documentation just before or after their collections management module)

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Case study

Diversify placement at Calderdale Museums

Claire Selby, curator, social history, Shibden Hall, Calderdale Museums

Calderdale Museums had a number of reasons for applying for non-hub bursary placements. It has always been committed to offering training and development opportunities to those interested in careers in museums by providing advice and volunteer and work placement opportunities on a relatively 'ad hoc' basis. But the diversify scheme provided an opportunity to offer a role to someone who may not otherwise be able to work in the sector and it enabled a more structured approach.

Although Calderdale council is committed to fair and equal opportunities, the museum service often finds it difficult to attract employees, whether volunteer or paid, from diverse backgrounds. The scheme was a chance to directly appeal to people from a variety of backgrounds.

Finally, the scheme provided the service with an additional member of staff for a significant period. As a small service, which often struggles with staffing resources, this was certainly a bonus to the scheme.

The trainee has now been working with the museum for a number of months and is committed to developing a career within the museum sector. He has embraced all the training and development opportunities offered to him. He has become an invaluable member of staff, not just working on the projects assigned to him but also participating fully in the work of the collections team as a whole. Some of the areas that the trainee has now had practical experience of include: managing volunteers; developing procedures for digitisation; cataloguing and accessioning; answering enquiries; and developing and producing temporary exhibitions. The placement has also encouraged staff as a whole to be more open to the possibilities of working with people from different backgrounds.

It should be acknowledged that managing a traineeship takes a large amount of commitment and time. The museum's curator of social history directly supervised the trainee. It was felt that it was best for one person to take overall supervisory responsibility for the post, although there was a large amount of input from other colleagues. The trainee was treated exactly as a new member of staff would be, with the same induction procedures and support networks.

A mentor was also put in place for the placement. This was an experienced member of staff from another local authority museum. The trainee visited his mentor, and she also came to Calderdale to see the work carried out. This was an important element of the placement, as it allowed the trainee to see the work of other museum services and was a good networking opportunity.

The trainee also found the placement to be extremely beneficial.

'The diversify placement has been incredibly helpful to me. Not only has it eased the financial stresses of pursuing postgraduate study but has also allowed me to gain invaluable hands-on experience of working life in the museum sector. My placement at Calderdale has been really beneficial and all the staff have been fantastic in making me feel welcome and allowing me to get fully involved with the work and projects that were in progress when I first arrived. Having the opportunity to work with different members of the team and on a number of varying projects has been really helpful in enabling me to have an all round experience.'



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Implementing positive-action training

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Chapter 4

Implementing positive-action training

This chapter draws on the experience of other positive-action training schemes such as the MA's Diversify scheme which is outlined in detail later (see case studies), as well as the PATH/CILIP Encompass scheme for the library and information services sector.

An essential component of positive-action training is the inclusion of an academic element alongside the placement and most importantly, the implementation of a comprehensive training and development programme for the trainee. A training and development programme will help focus the training and ensure that the trainee is not just filling in where needed.



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Positive-action training models

The Diversify toolkit is based on the best practice that has been developed by the MA and its partners as part of the Diversify scheme. There are currently three training models within diversify:

- one-year bursary with a full-time masters plus five-month placement
- two-year traineeship with part-time or distance learning masters in museum studies plus a part-time placement in a museum or gallery over the two years
- 12-to 18-month management-level traineeship with package of training tailored to the individual's requirements and a full-time placement in a museum or gallery for the duration of the traineeship.

MA Diversify programme 2010-11

It has long been the MA's ambition to build on the successes and extend the scope of diversify. With funding from the MLA, the MA is currently launching a new programme of flexible diversify bursaries for 2010-11.

The programme is different to the existing diversify bursary scheme. It will be open to anyone from a low-income background, rather than being specifically targeted at BAME people. In response to findings from research carried out last year, the MA wants to offer a more flexible approach to the training available. Some of the bursary awards will include a postgraduate qualification with a five-month placement in a museum as now, but the MA will also pilot some work-based, 12-month placements to see if these can attract good applicants and succeed in equipping trainees to apply for jobs in museums.

In summary:

Bursary package A – three bursaries which include a masters in museum studies, a five-month placement in a museum or gallery, a contribution of £2,000 towards essential course expenses and the MA's diversify professional development package.

Bursary package B – three bursaries which include a 12-month placement in a museum or gallery, a contribution of £1,000 towards a tailored programme of formal learning (which may include NVQs or a foundation degree) and the MA's diversify professional development package.

The MA is currently determining eligibility for these bursaries, based on methodologies used elsewhere.

Further information on diversify bursaries and traineeships can be found on the MA's website at www.museumsassociation.org and also in Appendix 1.

The MA is also looking at other models that encourage people from diverse backgrounds into careers in museums. These need not necessarily be positive-action schemes but may result in developing a diverse workforce through targeted training. One such scheme started at Thinktank, Birmingham's Science Museum in 2007. This is shown on the following page.

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Chapter 4

Implementing positive-action training

Case study

The Science & Heritage Career Ladder at Thinktank, Birmingham's Science Museum

**Catherine Price, head of
HR, Thinktank**

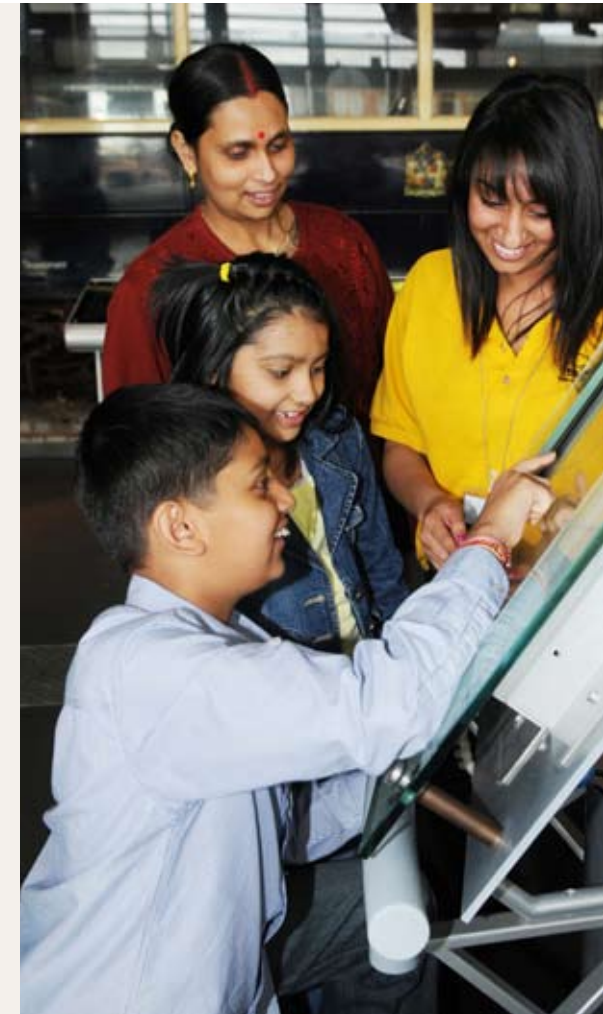
Still in its early stages, Thinktank's career ladder programme was inspired by a long-running and successful model pioneered at the New York Hall of Science in the socio-economically deprived and ethnically-diverse district of Queens.

Thinktank, based in the inner-city of Birmingham, an area not dissimilar to Queens, also provides paid summer traineeships for young people living or studying in the neighbourhoods in its immediate vicinity. This is not a positive-action scheme, but one whose locally-targeted recruitment results in participants reflecting the diversity of the local population.

The Science & Heritage Career Ladder is a series of predominantly public-facing roles within the museum's galleries, assisting visitors of all ages to get the most out of their visit. Those on the first rung of the ladder, trainee enablers, receive training in customer service skills, science communication, disability awareness and the care of collections. At the end of the summer all participants have the chance to apply for part-time permanent positions as junior enablers, the next rung on the ladder. This is a weekend job that they can carry out alongside their college/university studies. Subsequently, as vacancies become available higher up the ladder such as gallery enabler, then junior enablers can apply for internal promotion.

One of the main recruitment methods for trainees involves attending careers events and meeting those responsible for careers advice at local schools, colleges and community youth group. An application form must be completed, followed by a strict short-listing process whereby skills and experience are scored against the criteria of the person specification. Approximately 30 people are invited to one of two selection sessions, where candidates carry out a series of group activities in an informal, enjoyable way, using skills that will be necessary for the role. Those who display the right combination of skills, attitude and enthusiasm are then selected.

The logo for Thinktank's Science & Heritage Career Ladder is a 'ladder-tree'; the idea being that although there is a clear upwards progression from entry-level in this area, once a certain level is attained the rungs disappear leaving the individual equipped with a range of skills to follow whichever branch most interests them. Sustainability is incredibly important, so offering permanent positions after the trainee level is an integral part of this career ladder.



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Positive-action training models continued

An important component of positive-action training is the inclusion of an academic element alongside the work experience. With the exception of the management-level traineeship model, the diversify models both include postgraduate study for a masters in museum studies. However, the academic training does not necessarily have to include a formal qualification. The Arts Council Inspire Fellowship scheme has been designed for people already in possession of a postgraduate qualification or equivalent and has implemented a programme of tutorials instead. The MA's diversify management-level traineeship scheme encourages individuals who already have significant work experience in another sector to consider a move into museum work. Trainees are offered a tailored package of management and leadership development opportunities rather than a masters in museum studies.

For further information on the Inspire Fellowship scheme, visit the Arts Council website at www.artscouncil.org.uk

Throughout this chapter, we refer to the trainee, meaning the two-year traineeship described above. However, much of the advice can also be applied to the one-year bursary model.

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Case study

The MA management-level traineeship at Leicester City Museums

Leicester management-level traineeship

Following on from a successful positive-action traineeship, Leicester City Museum Service hosted an 18-month management trainee post funded by the MA. The trainee successfully secured the place with the service in 2007 after a career in the community and adult education field, bringing with her a wealth of experience from her previous employment.

The traineeship enabled both the trainee and the service to gain from the experience. A programme of development was devised to provide the trainee with first-hand contact across a broad range of activities in the museum sector. This included community engagement, stakeholder consultation, exhibition marketing, museum service and renaissance business planning, site and project management.

The service gained from the traineeship by drawing on the trainee's skills base. A specific example included using her knowledge of diverse community groups in Leicester to support the relaunch of Newarke Houses Museum, including a royal visit, and its audience development strand following a major refurbishment of the site. Visits were arranged with hard to reach groups and this resulted in site targets being met ahead of schedule. This work has not only met short-term targets but has also built the foundation for a long-term relationship to be established between various Leicester communities and the museum service.

Since completing the traineeship, the trainee has worked with the museum service to develop its offering as part of the Cultural Olympiad programme for the 2009 Special Olympics held in Leicester. This involved a package of cultural events incorporating six exhibitions, three national festivals and over 40 events.

'Our management-level traineeship has been a huge success for Leicester Arts and Museums Service. Not only have we benefited from having an outstanding manager working with us, but the trainee's specific knowledge and perspective have been of inestimable value to our service.'

Sarah Levitt, head of arts and museum services, Leicester City Museums

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Case study

The MA pilot for the Bill Kirby traineeship for deaf and disabled people at Colchester & Ipswich Museum Service

Benefits to Colchester & Ipswich Museum Service of hosting the traineeship

'The traineeship has furthered the museum's commitment to inclusion and access for people with disabilities.'

Tom Hodgson, community history manager, Colchester & Ipswich Museum

Colchester & Ipswich Museum Service hosted the first Bill Kirby Trainee from April to October 2009. The early weeks of the placement helped the trainee define exhibition interpretation as her main area of interest.

The trainee brought her own, pre-existing skills to the traineeship gained through a background in arts, social services and museum volunteering. She also gave museum staff, working alongside her on a daily basis, a practical insight into the issues she faced as a person with a visual impairment. This built on the raised awareness of disability issues at the museum service and access solutions based on experience, generated through PORTAL, the museum's access advisory group.

The most obvious benefit to the museum that the trainee provided was the extra capacity to deliver exhibition projects, especially as a member of the team creating a new Egyptian Gallery at Ipswich Museum. The six-month duration of the traineeship meant that there was time for the initial investment of getting the trainee up to speed on the project to be repaid by what was delivered.

The traineeship included:

- payment of course fees for the distance learning MA in museum studies at the University of Leicester
- a six-month work placement, with a training bursary at Colchester & Ipswich Museum Service
- a contribution of a total of £1,000 towards essential course expenses, such as books and course-related travel
- a mentor from outside Colchester & Ipswich Museum Service
- professional development benefits from the MA including membership and attendance at conference and seminars
- additional advice, information and support, as required, from Shape
- opportunities to network widely within the museum sector.

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Training and development programme

It is essential to establish a training and development programme/plan for the trainee, which includes a comprehensive induction programme, before the start of the traineeship or work placement. The programme will benefit from forward planning and there should be discussion with all staff involved in the supervision structure and all relevant departmental staff. This will ensure that the trainee receives a flexible, broad and balanced museum experience. Factors to take account of when planning a programme of training and development include the following:

- if the trainee needs to attain a formal academic qualification, such as a masters in museum studies then the forward planning process should include a decision on which course the trainee will be undertaking. Once selected the course timetable and syllabus should be taken account of within the training and development programme at the host museum or gallery
- explore the potential of linking course content with placement activity – this is often possible in modules and in the final dissertation
- if the training doesn't include a formal qualification, time must be spent working up a programme of formal learning that will enable the trainee to compete on an equal basis for employment within the sector once the training has been completed
- take account of the geography of the traineeship if you are in partnership with another host organisation, and decide in advance whether to produce separate or joint training programmes
- establish a thorough induction programme
- give the trainee opportunity for delegated responsibility. MLA research shows that the trainees who benefited most from the MA's diversify positive-action traineeship scheme were offered considerable delegated responsibilities; encouragement and managerial support to work across departments, especially across collections and the public services department; a sense of strong championship beyond their immediate work section; and access to external resources and networks. Those who benefited least were working within a single department (sometimes within a single discipline or section) and with a single member of staff; being given a series of tasks on a day-to-day or week-to-week basis; having no visible and explicit overarching structure and work programme; and having limited access to external resources and networks
- consider opportunities for other types of training such as external training events and seminars, including local authority opportunities
- include opportunities for job shadowing to provide an overview of the whole organisation
- in the early planning stage think about how you can help the trainee build up their CV
- consider exit strategies early on (see Chapter 8).

Identifying key goals for trainee placements

At the start of the traineeship, the supervisor should spend some time with the trainee exploring what they want to get out of the traineeship. They should try and help the trainee identify at least four goals for the coming year – these should be skills or knowledge they need to improve or learn.

It may help to encourage the trainee to write a SWOT analysis (strengths, weaknesses, opportunities and threats) to help them identify their strengths, the areas they would like to develop and where the greatest opportunities lie. It can also reveal where they are weaker or face a potential threat so they can take action.

When trying to identifying goals the trainee should think about:

- what further knowledge or skills they need
- what areas they need to develop greater self-confidence or upgrade skills
- what is realistically achievable during the traineeship.



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Identifying learning and development needs

The trainee should be encouraged to look at their goals and think about how to break them down into learning needs:

- what do they do well?
- what could they do better?
- what knowledge and skills do they need?

For example:

Goal

To improve my project management skills to be able to lead small projects

Needs

- To understand basic project management techniques and tools
- To understand how techniques and tools are put into practice
- To utilise new skills on a practical project

The supervisor should then work with the trainee to explore the types of activities they could do to meet these learning needs:

Activities

Placement-based learning

- Shadowing others
- Secondments
- Contributing to planning / report writing
- Liaising with other organisations

Professional learning

- Join a local network or specialist group
- Join the MA

Formal learning

- Attend courses / seminars
- Run or contribute to seminars / courses etc

Informal learning

- Reading and reviewing journals, books, newspapers
- Using other kinds of learning materials such as videos, DVD's, CD ROMs, audio tapes, etc
- Using the internet



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Training and development plans

Once the trainee has identified their key goals the supervisor should encourage them to consider what skills or knowledge they will need to develop to meet them during their traineeship. The supervisor will play a pivotal role in helping them think of activities to meet their goals once they've started their placement. Placement goals and learning/training needs should be recorded in a training and development plan which the supervisor and trainee should draw up and agree together.

Placement goals - skills or knowledge to be improved			
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Goal - skill or knowledge to be improved	What do you want to achieve? What are your learning needs?	Activities	Completion date

For example:

Goal - skill or knowledge to be improved	What do you want to achieve? What are your learning needs?	Activities	Completion date
To improve project management skills and be able to lead in small projects	To understand basic project management techniques and tools	Read Project Management, by Barbara Allen, Facet, 2004 (ISBN: 978-1-85604-504-9)	October 2009
	To understand how techniques and tools are put into practice	Meet with two managers (one within the host organisation, one from outside) to discuss good techniques	November 2009
	To utilise new skills on a practical project	Take a role in the project team redesigning the education programme	November - December 2009

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Recording and reflecting on learning

The supervisor should encourage the trainee to consider recording their learning activities, along with specific outcomes, in a learning log. Recording and reflecting on what you have learned can be a useful process – it can be particularly helpful when it comes to completing application forms for jobs as it acts as a good reminder of what you have done and achieved.

The trainee should be encouraged to fill in their learning log on a regular basis, as they undertake key activities.

Learning logs

Learning logs should include:

- dates of activities
- description of the activities – presentation, project, piece of writing, course, etc
- what they have learned – encourage them to assess what learning objectives/ goals were fulfilled and what is still lacking – if not fully met, what other activities could they do?
- how have they applied, are applying or will apply what they have learned.

The trainee may not have learned or achieved what they expected to but it is still valuable – they may have discovered a strength or weakness in themselves that they can address.

Trainees should be asked to think about:

- how their learning relates back to their training and development plan
- what they need to do better / differently / change / improve
- if they can apply their new knowledge and skills to other areas to help them become more effective
- if their new skills prepare them for planned future responsibilities and challenges.

Sample learning log:

Date of activity	Activities undertaken	What did I learn? How can I apply it?	Actions
5-20 Oct 09	Read Project Management, by Barbara Allen and made notes on relevant sections	<ul style="list-style-type: none"> • How to define a project and what preparation needs to be done • The basic tools and principles of project management including responsibility assessment matrix <p>I understand some of the basic principles but am still not sure how to apply them. I feel armed with lost of questions now for my subsequent meetings with colleagues about project management</p>	<ul style="list-style-type: none"> • Organise a shadowing opportunity with the head of operations • Ask colleagues for other suggested reading material around budget planning

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Chapter 5

Recruitment

This section provides host venues with guidance and examples on how to recruit people to positive-action training positions. The crucial factor is that the schemes offer training and not employment. At all times the wording of all documents produced by your organisation should refer to training and not to employment, job, post or work. In order to constitute training, the focus should be on the training provided by the traineeship, rather than the work that the host venue expects to get from the trainee. The work produced must be secondary to the training offered and this should be reflected in the documentation produced for the application pack, especially the person specification / trainee description and all advertising material.



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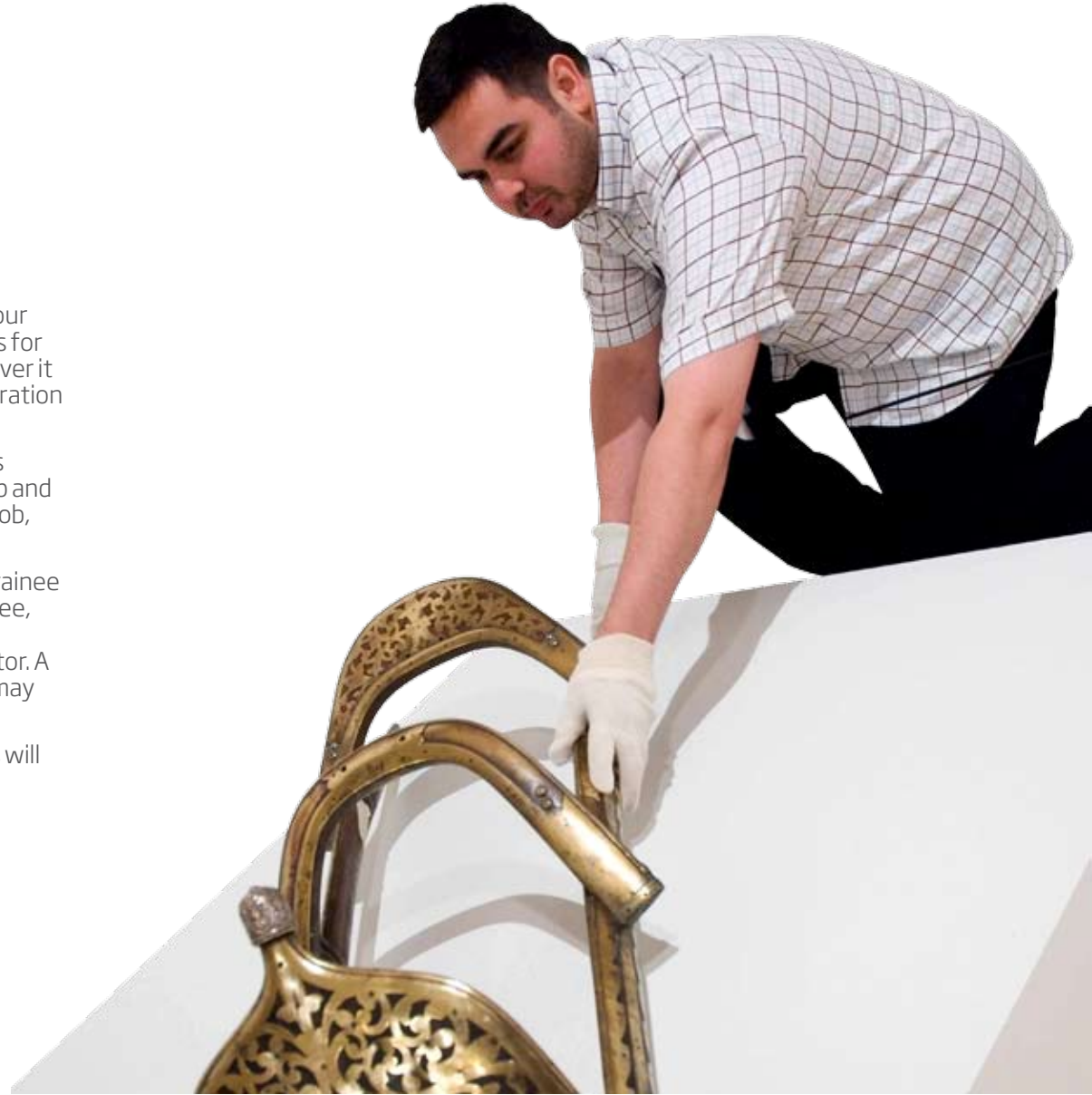
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Trainee specification / trainee description

The Cultural Heritage National Occupational Standards are an invaluable source for developing the trainee specification and description. They set out in detail the skills and understanding required to do a particular task or role and the performance indicators for successful completion.

Existing person specifications from your organisation can be used as templates for the positive-action traineeship; however it is important to give particular consideration to the following:

- ensure that all the new documents emphasise that this is a traineeship and avoid terms such as employment, job, post or work
- title of the trainee – examples of trainee titles have included graduate trainee, trainee curator, trainee museum assistant or trainee assistant curator. A title that refers to positive action may alienate the trainee
- do not assume that BAME trainees will want to take on cultural diversity projects or roles.



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The Cultural Heritage National Occupational Standards: Creative & Cultural Skills

The Cultural Heritage National Occupational Standards provide details on the knowledge and understanding required for a specific task and show what performance indicators need to be met when undertaking it. See www.ccskills.org.uk

CCS30 Understand the sector in which you work and the wider creative and cultural context

Unit summary

This unit is about understanding the cultural heritage sector and the wider creative and cultural context in which you work, which involves keeping up to date with developments in your profession, considering how your work might impact wider activities in the sector and thinking about how these activities might influence and impact the way you work. This unit is based on (derived from) Creative & Cultural Skills Community Arts Standards CA9 Keep up to date with developments in the arts.

Performance indicators

You will:

- a) Identify the main issues and challenges to the sector including past activities or recent developments, as well as key individuals or organisations that influence the sector.
- b) Join membership associations, specialist groups, committees and organisations that have an important role in the sector.
- c) Attend conferences or meetings to develop your ideas and involvement in sector issues.
- d) Develop your networks and professional contacts to provide you with information, support and resources about your sector.
- e) Identify ways to make new contacts using formal and informal techniques, making sure that you follow any relationship guidelines set by your organisation.
- f) Take the opportunity to become involved in any continuing professional development opportunities that are on offer through your organisation or from membership groups to develop your body of knowledge and experience about the sector.
- g) Illustrate, explore and develop your understanding of the sector by contributing to conferences and giving talks or lectures where possible.
- h) Consider the way in which your organisation contributes to the sector.
- i) Identify opportunities to improve your working practices based on wider sector practices.
- j) Develop your organisation or sector as a result of your specialist experience and knowledge, working with other staff and colleagues to share best practice.
- k) Develop your organisational policy and activities in relation to sector issues, communicating your work to the sector where possible.

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The Cultural Heritage National Occupational Standards: Creative & Cultural Skills *continued*

Knowledge and understanding

You will know and understand:

- 1) The importance of keeping up to date with developments in the sector.
- 2) How to research information and seek advice about your sector.
- 3) The importance of making a contribution to the sector in which you work.
- 4) The different ways in which the sector communicates.
- 5) How to identify, build and maintain professional contacts and networks.
- 6) How to contribute to and make the most of membership of associations and specialist groups.
- 7) Where and how your organisation fits within the sector and the contribution it makes.
- 8) The importance of openness and transparency and of maintaining discretion when necessary.

Examples of other relevant units:

HSS1 Make sure your own actions reduce risks to health and safety.

BA105 Store and retrieve information.

CCS1 Provide effective customer service.

CCS13 Present a positive image of yourself and your organisation through effective communication.

CCS17 Contribute to safeguarding children, young people and vulnerable adults.

CCS22 Assist customers, visitors or audiences in getting the best from their experience of a creative and cultural organisation.

CCS28 Work with volunteers in a creative and cultural organisation.

CCS32 Take responsibility for your work in a creative and cultural organisation and self evaluate.

CCS33 Plan and implement your personal development in the creative and cultural industries.

CCS34 Work effectively with other people in the context of a creative and cultural organisation.

CCS70 Assist with learning for a creative and cultural organisation.

CCS80 Assist with marketing for a creative and cultural organisation.

CH54 Provide specific information on a collection for a cultural heritage organisation.

CH59 Maintain collection management procedures for cultural heritage.

CH67 Preventative conservation measures for cultural heritage.

CV9 Catalogue objects and collections within a cultural venue.

CV15 Contribute to the care of items within a cultural venue.

CV16 Preparing for and giving guided tours for visitors to cultural venues.

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Defining eligibility criteria

The main criterion for eligibility for positive-action training initiatives is the applicant's ethnic background. The census provides a model for defining ethnicity and is also a source of data. As mentioned in the positive-action do's and don'ts (page 28) it is important to identify the particular racial group or groups you are targeting. If you just use a broad category, such as BAME or Black you must be clear which ethnic groups are included within that category and be able to demonstrate underrepresentation for each group.

The MA has developed the following criteria for defining eligibility for applicants to diversify, all of which are essential:

- enthusiasm for developing a career within museums and galleries in the UK
- a first- or second-class honours degree (or equivalent qualification or experience that will meet university admission requirements)
- eligibility for home student university fees unless the trainee is able to cover the cost of the excess fees on top of the home student university fees
- to be from the particular racial group or groups your organisation has decided to target. Defining a person's ethnicity can be difficult and the MA recommends that this should be left to the applicant's self-assessment.

See Appendix 5 for a sample ethnic monitoring form, guidance on selection criteria and a sample trainee specification used by Birmingham Museums and Art Gallery.

Application form

Your normal recruitment application form can be used as a template for the traineeship application form. However, the wording should be changed significantly to clearly show that this is an application for a training position and not for employment. The pack should include an ethnic-monitoring form that will be used as part of the selection process and which may be in addition to any recruitment monitoring forms your HR department would normally use to help monitor its equal opportunities policy (and is often removed by the HR department before shortlisting).

Application pack Checklist

- ☐ Explanation of the rationale for the traineeship
- ☐ Eligibility criteria
- ☐ Trainee description
- ☐ Suggested training and development plan
- ☐ Application form (along with any guidance material produced to aid completion of form)
- ☐ Equal opportunities monitoring form
- ☐ Ethnic-monitoring form
- ☐ Information on your organisation - leaflets, etc
- ☐ Information on the course or formal training to be provided

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Interview process

The interviewing process should follow your normal format. Give consideration to the make-up of the interview panel and try to include a former positive-action trainee. The MA would be happy to give advice on this. It is advisable to include a representative from the university course that the successful trainee will be attending. At the end of each interview make it clear that there will be no offer of employment at the end of the traineeship.

A sample interview format and interview questions can be found in Appendix 6

Writing an advertisement

The process of writing and placing advertisements should follow the procedure usually undertaken by your organisation's HR department. The advert should include the following:

- traineeship title
- venue
- hours
- training allowance
- brief description of why your organisation is offering this training opportunity and what it will provide for the successful applicant
- brief description of eligibility and selection criteria
- brief details of the course or formal training to be provided (ie where formal training will take place, qualification to be obtained, duration of formal training)
- closing date
- contact address for application pack and / or further information
- statement on the Race Relations Act, ie section 37(1) of the Race Relations Act 1976 applies.

Adverts should be placed in national, local and ethnic press and specialist journals, such as Museums Journal. Also send them to relevant websites including your Regional Hub Partnership, local authority, the MA and university undergraduate sites. You may also be able to take advantage of disseminating information about the traineeships through local networks and community organisations.

Useful contacts

The Voice Online Jobs:
www.allthetopbananas.com/voice/

The Asian News:
www.theasiannews.co.uk
 search under jobs

Asian Job Site:
www.aisianjobsite.co.uk

Asian Voice:
www.gujarat-samachar.com

Museums Journal:
www.museumsassociation.org
 search under jobs

The Guardian:
www.guardian.co.uk search under jobs

Local Government Careers website:
www.lgcareers.com

Undergraduate careers websites:
<http://www.tedlazio.com/hobsons-springboard/useful-links.html>

http://www.prospects.ac.uk/cms/ShowPage/Home_page/plaLaXi

http://www.le.ac.uk/ms/jobs/job_titles_jobid.htm?searchterm=museum+jobs

<http://www.courses-careers.com/graduate-careers/jobs/the-bigchoice.htm>

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Partnership agreements

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Chapter 6

Partnership agreements

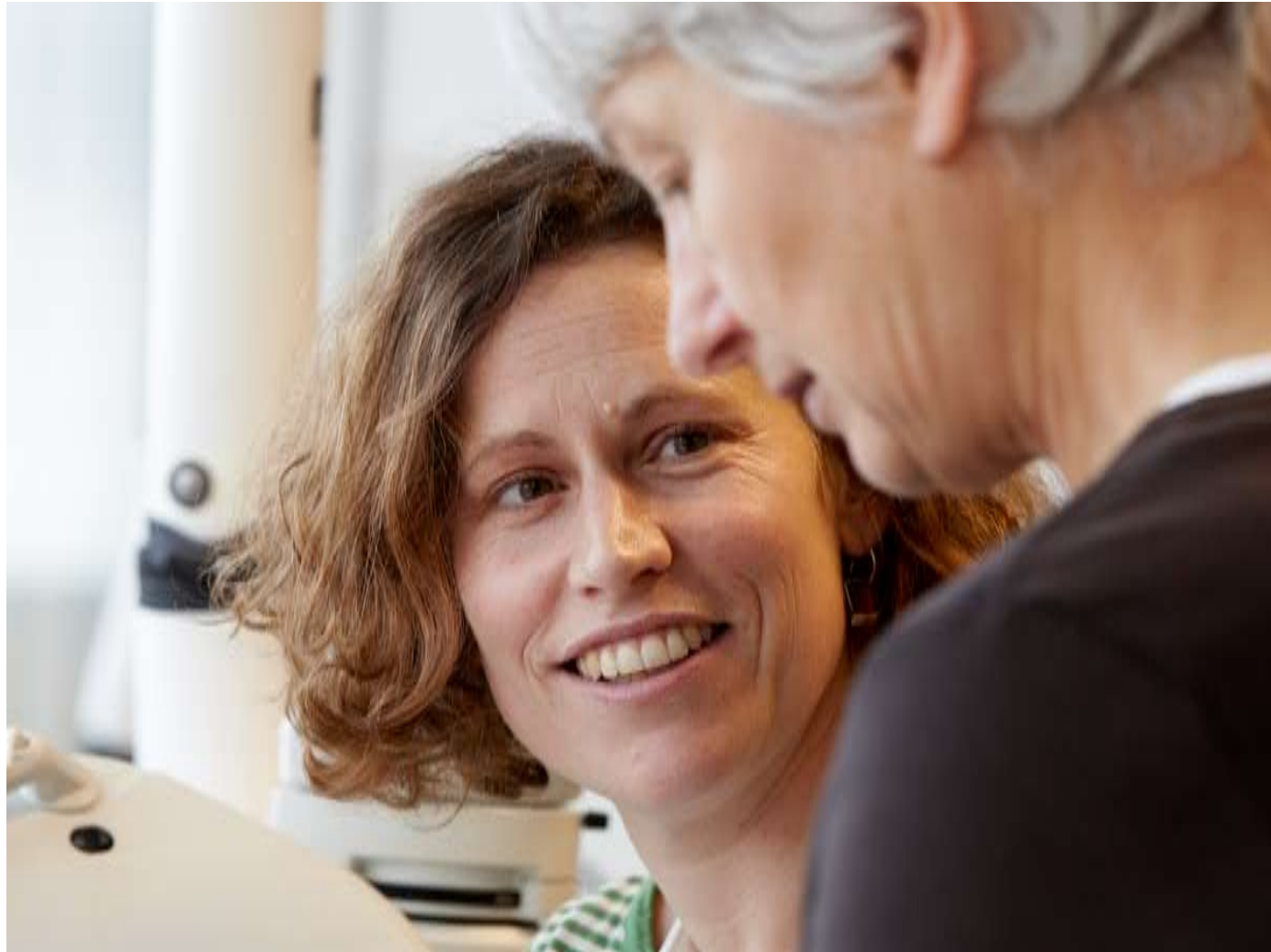
Partnerships are likely when putting together positive-action training initiatives.

Potential partners include:

- other host museums
- universities
- Regional Hub Partnerships
- external funders (such as the MLA).

Careful planning of these relationships needs to be considered at the set-up stages of the training initiative. Particular attention should be given when there are two or more host venues involved. The MA recommends that for a two-year traineeship there are no more than three host venues. A maximum of two hosts is preferable, in order to ensure that the trainee has time to settle in at each organisation and gain a meaningful and useful experience there.

When a traineeship is spread between two or more host organisations consideration should be given to the impact this will have on the trainee. For example, will the trainee have to move house part way through the traineeship if the hosts are geographically far apart?



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A partnership agreement between host venues should include:

- clarifications of roles ie are all the hosts equal partners or will one of the hosts be taking a leading role. If the latter, the second host could be viewed as a secondment
- names of supervisors and lead officers responsible for the trainee at each venue
- details of how the traineeship is being funded
- details of how the training allowance will be awarded to the trainee
- details of how the traineeship will be split between the host venues – a year based in each venue or splitting each week between each host over the duration of the traineeship
- details of each host's duties and responsibilities, including reference to the responsibility for funding additional costs such as travel
- details of the induction period at each venue – time needs to be allocated to settle the trainee into one site at a time
- details of the learning outcomes to be gained by the trainee at each venue (ie training and development programme for each venue)
- outline of the trainee's objectives and responsibilities at each venue
- inclusion of additional travel expenses to account for travelling between two or more hosts if spread over a geographical area
- details for monitoring the trainees progress, including regular review meetings between the trainee and their supervisors and/or mentor
- details of how the traineeship will be evaluated by each host venue.

Within the Diversify scheme there have been two different, but equally successful models of partnership working:

- In the West Midlands, Birmingham Museum and Art Gallery has undertaken two positive-action traineeships in partnership with Wolverhampton Art Gallery. In both cases the trainee spent a proportion of the week at each venue. Birmingham took the role of lead host.
- In the north west, the Harris Museum & Art Gallery in Preston and Manchester City Galleries have also undertaken two traineeships. Both partners took an equal lead role with the trainee spending the entire first year at the Harris and the second year at Manchester City Galleries.

Partnerships between host venues should be formal and subject to written agreements. When working with other partners, such as the course providers, a more flexible approach can be adopted. However, consideration should be given to selecting the best course for the trainee, taking account of the course content, length of time taken to complete the course, mode of learning, location, etc. You should aim to work with course leaders when preparing the traineeship and build in regular meetings with them during the course of the traineeship.

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Chapter 7

Training contracts

Writing the training contract for the trainee needn't be a difficult task or legal minefield. Current host venues have had specific training contracts or agreements drawn up by their HR and legal departments and these have been amended from their standard contracts of employment. The key differences are that the documents clearly define that it is a contract of training that is being offered, on a fixed-term basis, with no offer of a job at the end of the traineeship and they outline the training.

The contract should include reference that it is a training contract for a positive-action training scheme which is delivered under section 37 (1) of the Race Relations Act 1976 and make it clear what the expectations of the trainee are.



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Key elements for training contracts

The key elements that should be included in a training contract or agreement, based on current practice are as follows:

- details of who the training contract is being made between, ie This training contract is made on the ____ day of ____ 2009 between X [host organisation] and X [name of trainee]
- emphasis that this is a fixed-term training contract for X years/months and that there will be no offer of employment at the end of the contract
- emphasis that this contract is made on condition of the trainee undertaking the formal training, eg part-time masters course in museum studies
- details of what will be provided during the traineeship, for example:
 - formal training, such as part-time study for a masters in museum studies
 - a suitable and safe work place, access to equipment, etc
- experience of working in a museum based on a specifically-tailored training and development plan (you may wish to be specific here and provide details of exactly what the trainee will have access to in terms of an induction period, the museums operation, staff, management team meetings, collections, professional development opportunities, etc)
- details of how the traineeship will be undertaken, for example:
 - hours/days to be spent in the museum per week – remember that study time needs to be allocated each week so that the trainee can complete their formal training
 - lunch hour
 - location of the traineeship
 - how the trainee will combine their academic studies with the work experience element of the traineeship
- details of leave entitlement and absence through sickness
- details of what your organisation expects from the trainee
- details of how the trainee will receive their training allowance
- details of supervision and mentoring arrangements, including how regularly training review meetings will be held
- outline of grievance procedures
- reference to copyright ie any material produced by the trainee will remain copyright of your organisation
- reference to observance of your organisations policies, such as health and safety, equal opportunities, etc
- details of how your organisation will terminate this contract if it is breached by the trainee
- details of the notice the trainee should give if they decide to withdraw from the traineeship
- details of how the host can terminate the traineeship by a period of notice in writing (the period of notice should be given).

The MA recommends that a lawyer approve the training contract before it is finalised and given to the trainee.

A sample trainee contract can be found in Appendix 7.

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Exit strategies

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When setting up a positive-action training initiative museum supervisors and HR staff should think about how they can prepare the trainee for the end of their training.

The following points should be considered:

- exit strategies should be discussed as part of the appraisal / review / evaluation process
- the training and development plan should enable the trainee to develop their own particular interests and skills. The plan should be flexible enough to allow the trainee to develop along the lines of their greatest interests and chosen future area of work within the museum sector
- as part of the trainee's professional development opportunities, hosts should provide training on job search skills
- the host venue should discuss previous trainees' experiences with the trainee
- towards the end of the traineeship hosts should give the trainee advice on preparing for interviews, identifying their key skills and CV building
- hosts should recommend that the trainee register with specialist museum and heritage recruitment websites
- hosts organisations should ensure clarity around early exit from the traineeship. For example, they may wish to negotiate with the course provider about what will happen regarding fees if the trainee leaves the traineeship and course before completion
- hosts should establish a formal exit / interview process as part of the overall evaluation of the training.



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Professional development

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Relationship between professional development and positive-action training

Professional development underpins every successful career. MA members benefit from associateship and fellowship to develop their careers and recognise their achievements and learning.

Associateship of the Museums Association (AMA) is a continuing professional development scheme for the workplace. Through setting development goals and undertaking activities to achieve them applicants show they have the qualifications, skills and commitment to museums that is essential for a successful and forward-thinking museum professional.

In order to achieve the AMA you must be able to:

- demonstrate an understanding of and commitment to museums, their purpose and their work
- develop and maintain effective relationships within and beyond the workplace.
- think critically around issues facing the sector
- develop and enhance skills, knowledge and experience in a specific area
- effect positive change in your work
- demonstrate effective management of yourself, time and resources.

Fellowship of the Museums Association (FMA) aims to recognise and encourage an advanced level of professional contribution, development and achievement and a commitment to Continuing Professional Development by people in all areas of museum work. An FMA has a noteworthy record of achievement, contributes to museums in general, undertakes professional development and upholds, promotes and abides by the MA's ethical codes.

A key element of providing positive-action training is that the trainee receives formal academic training that will enable them to compete on an equal basis for a job. To date the diversify model has focused on providing a formal qualification in the form of postgraduate study for a masters in museum studies.

Postgraduate museum studies courses

There is an ever increasing number of postgraduate museum studies courses available across the UK. Up until September 2009 the MA maintained a list of recognised postgraduate museum studies courses but has now taken the decision to end this policy as courses were formerly validated by the Cultural Heritage National Training Organisation which ceased to exist in 2002.

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Often when a positive-action training initiative is advertised someone will complain that it is unfair and discriminatory. Sometimes, but not often, they can be malicious. Complaints come from the general public and even from within the sector. Many complaints come from people who are seeking a museum career and are disappointed that they are not eligible for the traineeship.

In this case refer them to advice on careers in the museum sector that can be found on MA's website: www.museumsassociation.org

Writing a statement for answering complaints

The MA recommends that you consider your organisation's potential response to negative criticism before it happens and draw up a statement that can be used when a complaint or query arises. The key factors to emphasise within your statement are as follows:

- positive-action training initiatives are legal under the Race Relations Act 1976 section 37 (1)
- the Race Relations (Amendment) Act 2000 places a general duty on public authorities to promote race equality. Public institutions should ensure that the communities they serve are represented within the make-up of their workforce.
- positive-action training within the museum sector is part of a much wider initiative designed to address the underrepresentation of BAME staff in museum services locally, regionally and nationally. Nationally 11.9 per cent of England's working age population is from a BAME background while only 4.5 per cent of specialist staff working in the care and preservation of museum collections are from BAME backgrounds
- the position advertised is for a fixed-term training contract and is **not** an offer of a permanent job. This would be positive discrimination, which is illegal
- positive-action training has been advocated within the museum sector since the late 1990s and is a strategic initiative of the MA through its Diversify scheme, which aims to create long-term changes in the cultural diversity of the museum workforce. Diversify has received significant government funding through the MLA
- positive-action training is a means of helping people from underrepresented racial groups to compete on an equal basis for jobs by helping them to develop the necessary skills
- positive-action training is not a quick fix but is designed to create long-term sectoral and cultural changes that will encourage a wider pool of potential applicants for permanent positions.

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If you need further help with designing or implementing your positive-action training initiatives the following organisations may be able to help you:

Museums Association (MA)
www.museumsassociation.org

Museums, Libraries & Archives
 Council (MLA)
www.mla.gov.uk

Equality and Human Rights Commission
 (EHRC)
www.equalityhumanrights.com

Professional Associations Research
 Network (PARN)
www.parnglobal.com

Lifelong Learning UK (LLUK)
www.lluk.org

Trades Union Congress (TUC)
www.tuc.org.uk

Work Smart
www.worksmart.org.uk

Confederation of British Industry (CBI)
www.cbi.org.uk

Chartered Institute of Personnel and
 Development (CIPD)
www.cipd.co.uk

Office of National Statistics
 (for Census data)
www.statistics.gov.uk

National Occupational Standards
www.ukstandards.org.uk

Creative & Cultural Skills (CCSkills)
www.ccskills.org.uk

IDEA, Improvement & Development
 Agency
www.idea.gov.uk



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List of venues that are hosting/have hosted positive-action traineeships and/or bursary students on work placement

Bilston Craft Gallery
Birmingham Museums and Art Gallery
Bradford Museums, Galleries & Heritage
Bristol City Museum & Art Gallery
British Museum
Calderdale Museums
Edinburgh City Council
Fitzwilliam Museum
Florence Nightingale Museum
Galleries of Justice
Gallery Oldham
Glasgow Museums
Grange Museum of Community History
Hampshire County Museums Service
Harris Art Gallery, Preston
Herbert, Coventry
Horniman Museum & Gardens
Imperial War Museum North
Leicester City Museums
Lincolnshire Heritage
London's Transport Museum

Manchester City Galleries
Manchester Museum
Museum in Docklands
Museums Luton
Museum of Garden History
Museum of London
National Trust West Midlands (Wightwick Manor)
National Trust London (Sutton House)
National Gallery
National Portrait Gallery
Nottingham Castle Museum
Petrie Museum of Egyptian Archaeology
Potteries Museum & Art Gallery
Tyne & Wear Museums
UCL Museums and Collections
Victoria & Albert Museum
Whitworth Art Gallery
Wolverhampton Art Gallery
Women's Library
Yorkshire Sculpture Park

Management-level traineeship hosts

Birmingham Museums and Art Gallery
Leicester City Museums
London Transport Museum
Royal Pavilion & Museums, Brighton and Hove

Bill Kirby traineeship hosts

Colchester & Ipswich Museums

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Appendix 1

Guidance notes for positive-action training

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Guidance notes for positive-action training

Guidelines for developing traineeships

These notes may be used by host venues as a guide to structuring their traineeships. They are by no means definitive but demonstrate areas for consideration and highlight important issues. They are based on best practice already established by host venues that have had successful traineeships.

- 1 Positive action is the term used for measures taken under section 37(1) of the Race Relations Act 1976 and your organisation must take these legal issues into consideration.
- 2 The personnel/HR department of the host venue should be involved in developing the traineeship, providing specifications for the role, monitoring progress and appraising performance. Implications for the museum service's equal opportunity and diversity policies also have to be considered and documented, as does the wording of the advert which should take guidance from the Race Relations Act 1976.
- 3 The purpose of any positive-action scheme should be explained to staff and the relevant trade unions consulted
- 4 If the host venue is entering into a partnership with other museum services to provide additional secondments/resources for the traineeship, it is advisable to draw up formal written agreements between all parties involved setting out each others' roles and obligations. Attention should be given to clarifying the financial obligations of each party; this should even include provision for basic expenditure, such as deciding who pays for the trainee travel costs if they have to commute between two venues.
- 5 Where possible, those responsible for supervising the trainee should have the opportunity to visit the course providers and discuss the contents of the course. This is important in terms of developing the trainee's programme and also in establishing all the costs likely to be incurred by the host for this element of the traineeship. For example, in planning for summer schools.
- 6 Championship at a senior level on the museum service's management team is essential in embedding diversity within museum policy and will help ensure the success of the traineeship.
- 7 The trainee's title should be established before commencement of the traineeship to help them feel like part of the established team. Examples include trainee curator, trainee assistant curator or trainee museum assistant. A title that includes reference to the positive-action tag may alienate the trainee.
- 8 Identify one member of staff who, throughout the entire traineeship, will act as mentor to the trainee. This person should be separate to the supervisor.
- 9 Ideally, an initial meeting should be held prior to the start of the traineeship to discuss what the host and the trainee hope to achieve and to establish a work programme outlining the areas of involvement for the trainee.

Appendix 1

Guidance notes for positive-action training

- 10 At the start of the traineeship the supervisor should discuss the planned programme of training and development with the trainee. The supervisor should consider the areas of learning that the trainee will be working on as part of their postgraduate studies in order to ensure that the practical experience of the traineeship complements the academic work. The supervisor should make it clear that this programme is flexible, will be regularly reviewed and may be altered to meet the changing needs of the trainee. It should be agreed that the mentor will meet with the trainee at regular intervals to ensure that their needs are being met. Dates for these review meetings should be set at the start of the traineeship.
 - 11 Ensure that an induction programme, relevant to the host venue is in place at the start of the traineeship and decide how long this will last. Each department should give the trainee an overall view of the workings of the service. Also include an induction with the governing body. The type of induction should also be considered, for example shadowing a colleague within each department for a day. The host may wish to use their general staff induction programmes if these are deemed sufficient.
 - 12 Throughout the traineeship the host should ensure that the trainee is not seen as a useful pair of extra hands or as an employee, but as a person being prepared for future employment in the sector. The traineeship is in place to provide learning and development for the trainee. Therefore, wherever possible, the trainee should be given the opportunity to take on responsibility for the management of individual projects. The host may wish to identify such projects prior to the commencement of the traineeship, but the trainee should be enabled to work on projects where their interests lie in order to develop a professional specialism.
- During research carried out on the impact of positive-action traineeships for the MLA it emerged that trainees who benefited most from the scheme were offered considerable delegated responsibilities; encouragement and managerial support to gain experience across departments within the museum(s), especially across collections and public services departments; a sense of strong champion beyond their immediate base section; access to external resources and networks. Those who benefited least were based within a curatorial department (sometimes within a single discipline or section) and with a single member of staff; being given a series of tasks on a day-to-day or week-to-week basis; having no visible and explicit overarching structure and work programme; having limited access to external resources and networks.
- The Impact of Positive-Action Traineeships, Gaby Porter Associates, 2004*
- 13 The trainee should be given the opportunity to observe management team meetings.
 - 14 The host should ensure that all the equipment the trainee will need, such as office space, a computer, access to the Internet, phone lines, etc are in place for the start of the traineeship.
 - 15 The host should provide the trainee with professional development opportunities, such as attendance at conferences, seminars, training days, membership of special interest groups and meetings, networking with colleagues within other museum services, etc.
 - 16 Ensure that the trainee is given enough time and support to complete their postgraduate studies. Hosts should try and be flexible and provide opportunities for their trainee to take study leave. The length of the traineeship should also match the length of the course.
- The training and development plan is one of the most important aspects of the traineeship. The plan should include learning task-based skills, developing interpersonal skills and acquiring sector specific knowledge and understanding.

Appendix 1

Guidance notes for positive-action training

Areas to include within training and development plans

Customer care and communication

- Working with front of house to develop effective customer care skills
- Assisting in or undertaking projects that work directly with users eg in outreach, education or learning
- Marketing the service
- Using new and emerging technologies
- Developing presentation skills
- Interpretation and exhibition development

Collections management

- Using automated databases
- Undertaking complex research enquiries
- Understanding copyright, intellectual property rights and licensing issues
- Familiarisation with web-based services
- Preventive conservation and collection care

Teamwork and management

- Trainees role within the team they will work directly with
- Attendance at management team meetings, board meetings, local authority meetings, etc
- Opportunities for involvement in budgeting and expenditure
- Project management
- Meeting deadlines and delivering a quality service
- Involvement in policy and strategic planning
- Staff management

Professional development

- Soft skills / emotional intelligence
- Networking
- Membership of professional groups
- Conferences and seminars

Appendix 1

Guidance notes for positive-action training

Learning styles

Be aware of the different learning styles a trainee may have and ensure that the environment in which they work is one that provides the best opportunities for them to learn.

Inspiring Learning for All (ILfA)

ILfA provides information on the ways in which we learn and the optimal environments for learning. www.inspiringlearningforall.gov.uk

We perceive and process information in very different ways. Through recent research on the brain, we now know that we:

- do not have a fixed single IQ
- have a range of at least seven or eight different forms of intelligence [Gardner's Multiple Intelligences Theory]
- will tend to develop some of these intelligences more than others and prefer to use them
- have preferences which help to account for our personal learning style [See learning styles activity download]
- learn according to whether a learning experience is geared towards our particular style of learning rather than whether or not we are 'clever' in an academic sense
- can become more effective and receptive learners if we strive to develop a balance in our learning styles.

The implications are important for museums, archives and libraries as learning providers and for anyone who wants to become a more skilled learner.

The optimal learning environment is one that:

- **has a positive learning environment:** People learn best in a positive physical, emotional, and social environment that is both relaxed and stimulating. A sense of wholeness, safety, interest, and enjoyment is essential for optimising human learning
- **has total learner involvement:** People learn best when they are totally and actively involved and take full responsibility for their own learning. Learning is participatory; knowledge is actively created by the learner, not passively absorbed. Thus accelerated learning tends to be based more on activity than on materials or presentations
- **involves collaboration among learners:** People generally learn best in an environment of collaboration. All good learning tends to be social. Accelerated learning emphasises collaboration between learners in a learning community

- **has variety that appeals to all learning styles:** People learn best when they have a rich variety of learning options, use all their senses and exercise their preferred learning style
- **provides contextual learning:** People learn best in context. The best learning comes from doing the work itself in a continual process of 'real-world' immersion, feedback, reflection, evaluation, and re-immersion.

Appendix 2

The Race Relations Act 1976

In 2001, the Race Relations Act was amended to give public authorities a new statutory duty to promote race equality. The aim is to help public authorities to provide fair and accessible services, and to improve equal opportunities in employment.

The legislation ensures that we all receive the best from our public services. Previously many public bodies were failing to address the problems of racial discrimination and inequality; this was highlighted by the inquiry into the murder of Stephen Lawrence. The way in which public bodies carry out their functions can vary based on the size of the authority, its geographical location and local demography but they all need to take account of race equality.

The duty to promote race equality is commonly referred to as the race equality duty. The EHRC use this as a generic term to refer to the general statutory duty under section 71(1) of the Race Relations Act 1976, as amended (the Act) and the various specific duties (including the employment duty) that were introduced by way of statutory instruments.

For further information visit the EHRC website www.equalityhumanrights.com or the Government Equalities Office at www.equalities.gov.uk

Extract from the
Race Relations Act 1976

Part VI
General exceptions
from parts II to IV

Special needs of racial groups in regard to education, training or welfare.	35 Nothing in parts II to IV shall render unlawful any act done in affording persons of a particular racial group access to facilities or services to meet the special needs of persons of that group in regard to their education, training or welfare, or any ancillary benefits.
Provision of education or training for persons not ordinarily resident in Great Britain.	36 Nothing in parts II to IV shall render unlawful any act done by a person, on grounds other than race or ethnic or national origin, for the benefit of persons not ordinarily resident in Great Britain in affording them access to facilities for education or training or any ancillary benefits, where it appears to him that the persons in question do not intend to remain in Great Britain after their period of education or training there.

Discriminatory training by certain bodies.	37 - (1) Nothing in parts II to IV shall render unlawful any act done in relation to particular work by any person in or in connection with- (a) affording only persons of a particular racial group access to facilities for training which would help to fit them for that work; or (b) encouraging only persons of a particular racial group to take advantage of opportunities for doing that work, where it reasonably appears to that person that at any time within the 12 months immediately preceding the doing of the act- (i) there were no persons of that group among those doing that work in Great Britain; or (ii) the proportion of persons of that group among those doing that work in Great Britain was small in comparison with the proportion of persons of that group among the population of Great Britain. (2) Where in relation to particular work it reasonably appears to that person that although the condition for the operation of subsection (1) is not met for the whole of Great Britain it is met for an area within Great Britain, nothing in parts II to IV shall render unlawful any act done by that person in or in connection with- (a) affording persons who are of the racial group in question, and who appear likely to take up that work in that area, access to facilities for training which would help to fit them for that work; or (b) encouraging persons of that group to take advantage of opportunities in the area for doing that work. (3) The preceding provisions of this section shall not apply to any discrimination which is rendered unlawful by section 4(1) or (2).
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Appendix 2

The Race Relations Act 1976

For a full copy of the act go to: www.statutelaw.gov.uk/Home.aspx and search for Race Relations Act 1976. The UK Statute Law Database is the official revised edition of the primary legislation of the United Kingdom made available online by the Office of Public Sector Information.

As described in Chapter 2, section 37(1) sets the legal framework for organisations to take positive action. In summary:

'If at any time within the previous 12 months there were no members of a particular racial group engaged in particular work in Great Britain, or that the proportion of persons of that racial group among those engaged in such work was small in comparison with the proportion of persons of that group in the population of Great Britain, it is lawful for any person to discriminate in or in connection with affording access to training for such work to that racial group, or to take steps to encourage members of that racial group to take advantage of opportunities for doing that work.'

Appendix 3

Sample monitoring and evaluation forms

Host form

This part of the form should be completed by the supervisor and traineeship champion

Trainee name:

Supervisor name:

Host champion name:

Start date: / / Completion date: / /

Recruitment process

Timing:

Was the lead up time to recruitment and selection appropriate?

Yes☐ No☐

If no, please comment below:

Application process and materials:

What worked well / what would you change?
(Please comment on advertising material, advert placement, timing of adverts, coordination of interviews, documentation and materials produced, short-listing and interviews).

Do you have any recommendations for improving the selection and recruitment process?

Support

Please comment on the support you received from your organisation during this phase of the traineeship. Has there been enough support - what worked well / what didn't work?

Do you have any recommendations for improving the support given to supervisors?

Traineeship structure

Please comment on the overall traineeship structure
- what works well / what doesn't work?

Consider how the formal learning element of the traineeship fits in with the placement in the organisation? Is there enough time for training?

Do you have any recommendations for improving the traineeship structure?

Development opportunities

Please comment on the development opportunities that your organisation has offered to the trainee (including mentoring, one-day events, development days and meetings with senior sector figures for example). Have these been useful? What else could be offered?

This part of the form should be completed by the supervisor in conjunction with the trainee

Trainee name:

Supervisor name:

Start date: / / Completion date: / /

Background history of trainee

What was the trainee doing prior to this placement?

Induction

Please outline the induction programme the trainee undertook at the start of the traineeship.

On reflection are there any parts of the induction programme that you would do differently?

Yes ☐ No ☐

If yes, please give details:

Training and development - using transferable skills

Please outline the findings from any training needs analysis undertaken at the beginning of the traineeship. This should be divided into two sections: skills the trainee has brought to the traineeship and skills identified as needing to be developed during the traineeship.

Section 1 - skills the trainee has brought to the traineeship:

Please give details of how these skills are being utilised, specifically highlighting areas that have made an impact on the organisation.

If specific skills are not being utilised please give the reasons why.

Section 2 - skills identified as needing to be developed during the traineeship:

Please give details of how these skills are being developed
(include details of specific projects, courses or training that will address these areas).

If specific skills are not being developed please give the reasons why.

Training programme

Has a training and development plan been drawn up for the trainee?

Yes ☐ No ☐

If yes, please attach a copy of the plan to this form.

If no, please comment.

Supervision

How often has the supervisor been meeting with the trainee?

Please comment if you think this level of supervision is appropriate and whether the trainee is happy with this frequency of meeting. Please give details (if any) of how this relationship could be improved.

Roles and responsibilities

Was the trainee's attendance and punctuality satisfactory?

Yes ☐ No ☐

If no, please comment.

Did the value of the trainee's work come up to the expectation you had at the outset?

☐ Exceeded expectation ☐ Matched up to expectation ☐ Fell below expectation

Working relationships

How effective was the trainee in dealing with others in the organisation and working as part of a team?

☐ Excellent ☐ Above average ☐ Below average ☐ Unsatisfactory

Taking the initiative

How resourceful was the trainee in accomplishing tasks with minimum supervision?

☐ Excellent ☐ Above average ☐ Below average ☐ Unsatisfactory

Contribution made

Did the trainee make suggestions for improvements and have the ability to develop ideas?

☐ Excellent ☐ Above average ☐ Below average ☐ Unsatisfactory

Motivation

Did the trainee appear motivated, enthusiastic, willing and determined?

☐ Excellent ☐ Above average ☐ Below average ☐ Unsatisfactory

Overall placement performance rating

☐ Excellent ☐ Above average ☐ Below average ☐ Unsatisfactory

Please comment on the trainee's overall progress during the placement.

Supervisor:

Title:

Name:

Signed:

Date:

Trainee's form

This part of the form should be completed by the trainee

The contents of this form shall be treated in the strictest confidence and will not be disclosed to your host venue unless agreed otherwise.

Trainee name:

Supervisor name:

Host champion name:

Start date: / / Completion date: / /

Traineeship structure

Please comment on the overall traineeship structure
– what works well / what doesn't work?

We are interested in finding out how the formal learning element of the traineeship fits in with the placement in the organisation. Is there enough time for training?

Do you have any recommendations for improving the traineeship structure?

Development opportunities

Please comment on the development opportunities that your host has offered you. Have these been useful? What else could be offered?

Support from your host

Did the value of the support for you come up to the expectation you had at the outset?

☐ Exceeded expectation ☐ Matched up to expectation ☐ Fell below expectation

Please make any specific comments you may have below.
What could be done to improve the support offered to trainees?

Induction

Please outline the induction programme you undertook at the start of the traineeship.

On reflection are there any parts of the induction programme that you feel would benefit from being done differently?

Yes ☐ No ☐

If yes, please give details:

Training and development

Did you undertake a training-needs analysis at the beginning of the traineeship?

Yes ☐ No ☐

If yes, please comment:

Please outline the findings from any training-needs analysis that has been undertaken. This should be divided into two sections: skills you brought to the traineeship and skills identified as needing to be developed during the traineeship.

Section 1 - skills you have brought to the traineeship:

Please give details of how these skills are being utilised specifically highlighting areas that have made an impact on the organisation.

If specific skills are not being utilised please give the reasons why.

Section 2 - skills identified as needing to be developed during the traineeship:

Please give details of how these skills are being developed (include details of specific projects, courses or training that will address these areas).

If specific skills are not being developed please give the reasons why.

Training programme

Has a training and development plan been drawn up for you?

Yes☐ No☐

If yes, please comment on how useful this has been for you:

If no, please comment:

Supervision

How often have you been meeting with your supervisor?
Please comment if you think this level of supervision is appropriate.
Please give details (if any) of how this relationship could be improved.

Working relationships

Have you been made to feel part of the team?

Yes☐ No☐

If no, please comment:

Contribution made

Has the host taken on board any suggestions or recommendations you have made?

Yes ☐ No ☐

If no, please comment:

Overall placement performance rating

☐ Excellent ☐ Above average ☐ Below average ☐ Unsatisfactory

Has your perception of work in the museum sector changed since you started your placement?

Yes ☐ No ☐

If no, please comment:

Do you still wish to pursue a career in the museum sector?

Yes ☐ No ☐

If no, please comment:

Would you recommend a positive-action traineeship to others?

Yes ☐ No ☐

If no, please comment:

[illegible][illegible]

This image shows a single page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, leaving small margins at the top and bottom. There is no handwriting or other markings on the paper.

Date:

Appendix 4

Sample trainee description and specification

Appendix 4

Sample trainee description and specification

A sample trainee specification from Tyne & Wear Archives & Museums

Trainee specification

Diversify museum trainee (curatorial):
(Positive-action traineeship)
director:

Tyne & Wear Archives & Museums
Ref No: M920

Factors	Essential criteria	Desirable criteria	Means of assessment
1 Skills, knowledge and aptitudes	(a) Committed to a career in a museum or heritage organisation (b) General knowledge of an area covered by museum collections or services (c) Good organisational skills (d) Good written and verbal communication skills (e) Good keyboard skills	(f) An understanding of the role of museums, galleries and heritage in contemporary society (g) Able to use Microsoft Word and communicate by email	Application form Interview References
2 Qualifications and training	(h) First- or second-class honours degree in a relevant subject, or equivalent qualification or experience		Application form Certificates
3 Experience		(i) Practical experience of working with and / or handling collections	Application form Interview

Appendix 4

Sample trainee description and specification

4. Disposition	<ul style="list-style-type: none"> (j) Able to work as an effective member of a team (k) Able to relate to all members of society (l) Able to prioritise effectively and meet deadlines (m) Enthusiastic 	<ul style="list-style-type: none"> (n) A desire to acquire new skills and knowledge (o) Able to cope with routine tasks 	<ul style="list-style-type: none"> Application form Interview References
5. Special requirements	<ul style="list-style-type: none"> (p) Of African, African-Caribbean, Asian or Chinese descent (section 37 and section 38 of the Race Relations Act 1976 apply) (q) Committed to equal opportunities and anti-discriminatory practice (r) Able to commence the MA course in September 2009 (s) Eligible for home student university fees (t) Applicants whose first language is not English require IELTS 6.5 with 6.0 in writing, TOEFL 90 (Internet-based) or 577 (paper-based), or equivalent 		<ul style="list-style-type: none"> Ethnic origin form Interview Test following interview

Appendix 4

Sample trainee description and specification

Sample person specification for a positive-action traineeship

Traineeship title	Museum trainee
Terms of traineeship	This traineeship forms part of a strategic initiative, delivered under section 37 of the Race Relations Act 1976, aimed at reducing this underrepresentation through offering a training programme to members of these underrepresented ethnic groups.
Training allowance	£ non-taxed bursary for fixed term of xxx
Hours per day	The traineeship is for four days per week with one day a week placement allocated for study. The trainee will be based in the museum for seven hours per day.
Location	XXX museum service

Background

People from ethnic minorities are underrepresented in the museum sector workforce. As part of its equal opportunities programme XXX museum service is offering a fixed-term positive-action traineeship

The successful applicant will have the opportunity to:

- gain training and experience in the museum supported by a training bursary
- participate in the planning and/or delivery of at least one significant project as part of their training
- undertake a training programme tailored to their needs, which will include an introduction to the museum sector and the development of appropriate museum skills
- receive professional development benefits from the MA including membership and attendance at its annual conference and seminars.

Through completing the traineeship the museum trainee will have:

- a better understanding of the museum sector and its wider creative and cultural context
- identified their professional development needs
- experienced delivery of museum projects, working alongside other people
- learned how to store and retrieve information
- learned how to plan and implement the effective use of resources
- contributed to safeguarding children, young people and vulnerable adults
- learned how to present a positive image of the museum through effective communication
- assisted customers in getting the best from their experience of the museum.

Appendix 4

Sample trainee description and specification

Recruitment text for the Bill Kirby traineeship

The Bill Kirby traineeship:

Funding for a work-placement at Colchester & Ipswich Museum Service and an MA in museum studies at the University of Leicester.

An estimated ten million people in the UK are covered by the definition of disability as outlined in the Disability Discrimination Act 2005. This is approximately 18 per cent of the UK population, but research shows that the employment figures for museums and galleries are much lower. Where disabled and deaf people do have a role in an organisation, they are primarily working as front-of-house staff, followed by administrative or clerical roles and then customer services (MLA, 2005).

Since 1998 the MA's Diversify scheme has offered training opportunities to enable people of African, Caribbean, Asian or Chinese descent to train for work in UK museums and galleries. The MA recently announced an expansion of Diversify to offer opportunities to disabled and deaf people. It is using the social model of disability whereby disability is caused by the barriers that exist within society and the way society is organised, which

discriminates against people with impairments and excludes them from involvement and participation. For more information about diversify see www.museumsassociation.org/careers/diversity

Background:

When the Museums and Galleries Disability Association (MAGDA), wound up its operation in 2006, its funds were transferred to the MA to expand diversify to include disabled and deaf people. This opportunity has been made possible with additional funding and support from Colchester Museums, the University of Leicester's department of museum studies and Shape.

The MA and its partners named the traineeship after the late Bill Kirby. Bill was an inspirational art and museum consultant who died in 2006. He was the country's first visually-impaired consultant and was the long-standing chairman and president of MAGDA and a member of the MA council. In a joint article in Museum News (autumn 1989) with Marcus Weisen he wrote: 'The museum professions must be opened to disabled and deaf people. If the Science Museum in Paris attracts high numbers of disabled and deaf visitors, it is because it employs a blind and a deaf worker, both of

whom bring to the museum a unique expertise. Their daily presence changes staff attitudes.'

The MA and its partners are therefore delighted to offer:

The Bill Kirby traineeship - this package of training and development includes a distance learning masters in museum studies at the University of Leicester and a six-month work-placement at Colchester & Ipswich Museum Service

The traineeship includes:

- payment of course fees for the distance learning MA in museum studies at the University of Leicester
- a six-month work placement, with a training bursary at Colchester & Ipswich Museum Service
- a contribution of a total of £1,000 towards essential course expenses, such as books and course-related travel
- a mentor from outside Colchester & Ipswich Museum Service
- professional development benefits from the MA including membership and attendance at seminars and the annual conference

- additional advice, information and support, as required, from Shape
- opportunities for additional training, in discussion with the MA
- opportunities to network widely within the museum sector.

A training bursary will be paid to the successful candidate during their placement. However, participants will need to fund their living expenses while undertaking the masters (by distance learning).

Appendix 4

Sample trainee description and specification

Recruitment text for the management-level traineeship

Have you ever considered training for a career in the museum and gallery sector?

- Are you a professional looking for management opportunities in an exciting sector?
- Are you a future leader?
- Are you of African, African-Caribbean, Asian or Chinese descent?

The MA's Diversify scheme offers training opportunities for museum and gallery work to individuals of African, African-Caribbean, Asian or Chinese descent, who are underrepresented in the museum workforce in the UK. So far over 80 individuals have joined the scheme at entry level and two at management level. Diversifying the workforce and particularly senior management is essential for our national and regional museums.

Management-level training opportunities in museums and galleries, 2008

Museum work can be varied, enjoyable and challenging. The management-level traineeships are designed to attract individuals who already have significant work experience in another sector but wish to move into museum work. These individuals will have proven management experience and understanding and transferable skills that can be directed to the museum sector. Each individual will gain structured general and management-level training in a museum full time for 18 months. They will also undertake a limited amount of museum studies and management training specifically tailored to their needs.

Diversify is supported and funded by the MLA part of the renaissance initiative. In order to encourage change at a senior level we are delighted to be able to offer two management-level traineeships; one at the London Transport Museum and one at the Royal Pavilion & Museums, Brighton & Hove. These traineeships are the second phase of a pilot of four management-level traineeships. The first two traineeships were recruited in 2006 at Birmingham Museums and Art Gallery and Leicester City Museums.

Each successful applicant will have the opportunity to:

- join a leading museum service to gain training and experience over 18 months, with a training bursary
- deliver a significant project as part of their training
- undertake a programme of training tailored to their needs which will include an introduction to the museum sector and development of management skills
- receive professional development benefits from the MA including membership and attendance at the annual conference and seminars
- network widely within the museum sector as well as with other diversify participants.

Applicants will need:

- a minimum of 12 months' management experience in their current field of employment
- enthusiasm for developing a career within museums and galleries in the UK
- the ability to demonstrate management outcomes and key competencies that could transfer to a management role in the museum sector
- to be of African, African-Caribbean, Asian or Chinese descent
- to be able to demonstrate that they are legally entitled to work and train / study in the UK.

Appendix 5

Eligibility and selection criteria

Sample equality and diversity monitoring form

Equality and diversity monitoring

This museum service is committed to equality and diversity. In order to monitor the effectiveness of this policy we would be grateful if you could complete this form.

This information is confidential, and will not impact on your application.

Ethnic background:

☐ White British ☐ White Irish ☐ White other

If other please specify

☐ Black British ☐ Black African ☐ Black Caribbean ☐ Black other

If other please specify

☐ Asian British ☐ Asian Indian ☐ Asian Pakistani ☐ Asian Bangladeshi

☐ Asian other

If other please specify

Mixed or dual nationality

☐ White British and Black British ☐ White British and Asian British

☐ Other dual or mixed backgrounds

If other please specify

☐ Chinese background ☐ Other cultural backgrounds

If other please specify

Gender:

☐ Female ☐ Male

Other

Age:

☐ 18 - 25 years ☐ 25 - 65 years ☐ 56 - 70 years ☐ Over 70 years

Do you consider yourself to be deaf or disabled?

☐ Deaf ☐ Disabled ☐ Neither

Employment status:

☐ Employed full time ☐ Employed part time ☐ In full-time education

☐ In part-time education ☐ Self employed ☐ Unemployed ☐ Retired

☐ In receipt of incapacity benefit

Please state where you saw the advert for this traineeship

Guidance on selection criteria

The table below has been developed by the MA for general guidance when short-listing and interviewing candidates for positive-action traineeships. Consideration should also be given to the criteria outlined in the trainee specification / role description.

Diversify traineeship selection criteria

Applicant's name

Ethnic background

First- or second-class honours degree or equivalent experience

Eligibility for home fees (unless willing to contribute excess fees)

Ability to balance study with training

5 ☐ 4 ☐ 3 ☐ 2 ☐ 1 ☐

Ability to demonstrate enthusiasm / commitment for a career within the museum sector

5 ☐ 4 ☐ 3 ☐ 2 ☐ 1 ☐

Likelihood of gaining employment in the museum sector

5 ☐ 4 ☐ 3 ☐ 2 ☐ 1 ☐

Realism and flexibility regarding future job opportunities/salaries/etc

5 ☐ 4 ☐ 3 ☐ 2 ☐ 1 ☐

Good interpersonal skills

5 ☐ 4 ☐ 3 ☐ 2 ☐ 1 ☐

Total score

Each criterion is scored out of five as outlined below:

5 - very strong evidence of meeting the criteria

4 - good evidence of meeting the criteria

3 - some evidence of meeting the criteria

2 - no evidence of meeting the criteria

1 - negative evidence

When developing the essential and desirable elements of your selection criteria the MA recommends that previous experience of working in the sector as a volunteer is seen as desirable and not a prerequisite for a candidate being shortlisted in order to encourage applicants from a wider field.

Appendix 6

Sample interview format and questions

1	Welcome and introductions	
2	Explanation of the traineeship package: <i>(*may vary according to host venue)</i> <ul style="list-style-type: none"> • two years' training at the host venue including a training and development programme tailored to your individual needs • part-time study for a postgraduate museum studies qualification • free membership, conference attendance, publications and other benefits from the MA for four years on commencement of training • opportunities to meet and network with other diversify participants. 	<ul style="list-style-type: none"> • As you know, part of this traineeship package includes studying as a part-time/distance learning student for a masters in museum studies from the university of X. Postgraduate study is demanding and intensive and much more self-directed than undergraduate study. How would you organise yourself to cover the course material? • How do you think you would go about balancing your traineeship in the museum with your studies? • What do you feel are the current issues facing museums?
3	Questions: <ul style="list-style-type: none"> • Can you tell us which museum or museums you have visited most recently? Follow up with asking what the candidate liked/disliked about it and why. • Why have you applied for this diversify traineeship? • What appeals to you about working in a museum? What job would you like to do in a museum? Discuss issues of low pay in the sector and the need to move about to find jobs. Are they prepared for this? • What skills and qualities do you feel you can bring to the museum sector? Probe candidate to reflect on previous experiences. • Museums are very diverse institutions; you need to be able to work on your own and under your own initiative as well as co-operating and working as part of a team. Are you able to adapt to different working environments and can you give any examples of how you have had to do this in your experience so far? 	
4	Opportunity for the candidate to ask the panel questions.	
5	Close the interview, thank the candidate and explain the next steps in the process. Make it clear to the candidate that there will be no offer of employment at the end of the traineeship.	

Appendix 7

Trainee contracts

Sample training contract

The MA recommends that trainee contracts include reference that it is a training contract for a positive-action training scheme which is delivered under section 37 (1) of the Race Relations Act 1976 and that there is no automatic offer of employment at the end of the training. The training contract should make it clear what the expectations of the trainee are.

Sample trainee contract

Dear X

Museum assistant positive-action traineeship between X and XXX [host organisation] museum service - letter of agreement

This letter of agreement is to confirm the terms of the positive-action traineeship between the XXX museum service [the host] and X [the trainee].

Background:

This positive-action traineeship has been devised by XXX [host organisation] as part of its wider equal opportunities programme and is delivered under section 37 (1) of the Race Relations Act (1976). The trainee will gain structured training in order to enable them to compete on a level playing field for employment in the museum sector on completion of their traineeship.

Recent research by the MA has demonstrated that there are a number of ethnic groups currently underrepresented in the museum sector including the following: Asian, Asian British descent (including people from Indian, Pakistani, Bangladeshi, Chinese and any other Asian background) and Black, Black British descent (including people from African, African-Caribbean and any other Black background). This traineeship forms part of a strategic initiative, delivered under Section 37 (1) of the Race Relations Act 1976, aimed at reducing this underrepresentation through offering a training programme to members of these underrepresented ethnic groups.

Duration:

The traineeship is for a period of X months starting on X and finishing on X.

Terms and conditions:

The traineeship will last for X with terms agreed between the trainee and the host venue. There will be a three-month trial period with a review meeting at the end. Subsequent review meetings will be at six-monthly intervals. All review meetings will be conducted with the trainee and their supervisor. Dates for review meetings will be as follows:

For the avoidance of doubt, this arrangement is not intended to be, and shall not be construed, as a contract of employment or an apprenticeship.

The training programme will be agreed between the trainee and XXX museum service. Typically this will consist of 37 hours per week with allowance for lunch consistent with the host’s existing procedures. The trainee will be entitled to take one day a week as study leave. The trainee will be entitled to a holiday allowance of X days over the X-month duration of the traineeship, plus public holidays and statutory days during the placement subject to agreement with the host. The trainee will be expected to comply with the host’s existing procedures for absence reporting.

Any disputes which arise will be dealt with by XXX museum service following its grievance procedures.

In the case of the trainee’s voluntary resignation, the traineeship may be terminated at any time by one month’s notice in writing. XXX museum service may also terminate the traineeship by one month’s notice in writing.

While the trainee is not an employee and therefore not entitled to Statutory Sick Pay, they will be entitled to sickness pay as follows:

Period of training completed	Total entitlement (ie not cumulative)
X months	Up to X month’s bursary pro rata
Between X months – end of traineeship	Up to X month’s bursary pro rata

Where sickness absence occurs trainees must ensure that they adhere to the sickness absence procedure set out by XXX museum service.

Funding:

The trainee will receive a training bursary of £X for the duration of the X-month traineeship (tax-free). XXX museum service will pay the trainee on a monthly retrospective basis directly into their bank account. The first payment of £X will be on (or around) X date followed by X subsequent payments of £X on X day of each month. The last payment of the training bursary will be made on X date.

Tax free bursaries:

XXX museum service understands that awards such as these training bursaries are tax exempt. If however, HM Revenue and Customs deem that the trainees have to declare the bursaries as self-employed income derived from a Contract for Training that is liable for taxation, then the trainees should ensure that they have made provision to cover this from their training bursary.

Training programme:

XXX museum service will offer an internal training programme, which will provide an overview of the work of the institution and the sector and is in line with the trainee specification and description. At the start of the traineeship XXX museum service will work with the trainee to identify their training needs in order to establish the programme of training most suited to the trainee. XXX museum service will devise a tailor-made training programme of external training opportunities. In addition, XXX museum service will make funding available for the trainee to undertake a part-time masters in museum studies.

Supervisors:

The trainee’s nominated supervisor is X. The supervisor will be the trainee’s first point of contact and is responsible for briefing the trainee about what they will be expected to do on their placement. The supervisor will provide training and guidance throughout the traineeship. The supervisor will work closely with the trainee to ensure that role objectives and specific projects are achieved by the end of the programme. Regular one-to-one review meetings will be held between the trainee and the supervisor. The frequency of these meetings should be established and agreed at the beginning of the traineeship.

Mentors:

The trainee will have access to a mentor from outside the host venue who will provide individual advice and guidance. X has agreed to be the trainee's mentor for the duration of the traineeship.

Evaluation:

Milestones have been built into the traineeship at the review meetings. Key evaluation areas will be:

- impact on the individual during and at the end of the traineeship, and two years after completion
- impact on the host venue
- assessment of the formal learning element.

At the traineeship, XXX museum service will undertake further evaluation to gauge the success and impact of the traineeships before the model is launched into the sector as another model for positive-action training. The trainee will co-operate fully, openly, honestly and frankly with this evaluation.

The trainee shall, by signing this agreement, accept these terms and conditions. One copy of the agreement signed by the trainee should be returned to XXX museum service within one month.

Yours sincerely

Museum assistant positive-action traineeship

Training contract between X and XXX museum service

The trainee shall, by signing this agreement, accept these terms and conditions.

This agreement was signed by

Date: / /

[Name of representative signing on behalf of XXX museum service]

☐ I hereby confirm that I will comply with these conditions and adhere to the policies of my host, XXX museum service.

Date / /

[Name of trainee]