

# Diversify toolkit

Creating a more diverse workforce  
through positive-action training schemes

MUSEUMS  
ASSOCIATION

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Thanks must also be given to all the host venues who have participated in the scheme, and in particular to Harsha Dudley, the project coordinator for Birmingham City Council's Bridges into the Future programme for her advice and guidance and for giving permission to use the Bridges into the Future documentation within the Diversify toolkit.

All partners receiving funding or support from Renaissance in the Regions are asked to use the Renaissance logo in order to help promote the programme and to give it a consistent identity. Please see the guidance on the MLA website at the following link: [http://www.mla.gov.uk/resources/assets//R/ren\\_logo\\_guidelines\\_pdf\\_4369.pdf](http://www.mla.gov.uk/resources/assets//R/ren_logo_guidelines_pdf_4369.pdf)

# Introduction

## Background to the Diversify scheme

The MA's Diversify scheme makes museum careers more accessible to people from black and minority-ethnic communities (BME). Research has shown that the African-Caribbean, Asian and Chinese communities are under-represented in the museum workforce. 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 our 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.

Over 60 people have benefited from the scheme since it began. The benefits are now being seen across the sector with over 35 former Diversify participants now working in museums. Without Diversify it is unlikely that most of these individuals would have entered museum work.

## Why should your organisation undertake positive-action training initiatives?

Diversification of the workforce is now on the national agenda for the sector with high-level support and recognition. The scheme has not only diversified staff, but has helped break down long-established institutional barriers by injecting enthusiasm, new skills and ideas, which in turn have directly influenced host venues' core activities.

The MA is delighted by the success of Diversify but additional positive-action traineeships and initiatives are needed in more museums and galleries before the sector can really represent the diversity of the UK population. Positive-action training is not tokenistic – it is an indispensable way forward.

## Aim of the Diversify toolkit

The Diversify toolkit is based on a wealth of best practice and experience that has been gained by the MA and participating venues from the Diversify scheme. Particular mention must be made of the help and advice given by Harsha Dudley, the project coordinator for Birmingham City Council's Bridges into the Future programme.

The aim of the Diversify toolkit is to enable any museum or gallery to develop positive-action training initiatives by providing general advice and guidance on a number of key issues such as: preparing your organisation, advertising and recruitment, partnership agreements, writing training contracts and designing work programmes.

The Diversify toolkit can be used by all those involved in the process of setting up positive-action training 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 but the examples used within this document are based on the two-year traineeship and the one-year 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. It does not appear that schemes such as Diversify have yet been challenged in the courts. 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, there is no absolute guarantee that the current framework put forward in this toolkit could not be challenged as being employment and therefore not lawful.*

# Chapter 1 The legalities

## **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 – in other words, 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.

## **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.

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 under-represented groups to undertake such work.

Encouragement means making it easier for people from a racial group, under represented in particular work, to take advantage of job opportunities. Examples are explicit encouragement such as in recruitment adverts, mentoring, support networks, open days, careers fairs and in information that is given to schools with large BME populations. Encouragement does not include actually providing the opportunity to do the work. It does not include a decision to recruit a person because they come from an under-represented 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, interview and assessment skills. Trainees cannot be paid a salary but they can be offered training allowances.

Before positive-action is undertaken the organisation needs to collect evidence that demonstrates the need for action. Data could for example 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 museums profession can be found in the census statistics: please contact census customer services on [www.statistics.gov.uk/census2001/customerservices.asp](http://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](http://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. Gaining employment can only be achieved by trainees applying and going through a competitive selection process.

### What does positive action cover?

Positive action as a term is not defined in the Act. In its widest sense the term is sometimes used to refer to a range of measures the overall aim of which is 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 under-represented groups the opportunity to compete for work in a particular type of work they have been under represented in or absent altogether.

### 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 under-represented groups and to encourage their applications: for example, the use of the minority-ethnic press, as well as other minority newspapers
- use of employment agencies, community organisations and careers offices in areas where these groups are concentrated
- recruitment and training schemes for school leavers designed to reach members of these groups
- encouragement to employees from these 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 these 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 women/men and BME people in areas where traditionally they have been under represented.

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.

## Positive-action do's and don'ts

Do	Don't
<p>Be clear about the type of job you are targeting. Positive-action measures can only be used for 'particular work', e.g. journalist but not career in broadcasting; curator not career in museums.</p>	<p>Use positive action simply to create a racially balanced workforce; the conditions of the relevant sections of the Race Relations Act 1976 must be met.</p>
<p>Have evidence of under-representation 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.</p>	<p>Make assumptions that all minority-ethnic groups are under represented in particular types of work.</p>
<p>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 under representation for each group. In one Commission for Racial Equality (CRE) 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 her selection was probably unlawful.</p>	<p>Offer employment contracts, salaries and other terms and conditions usually associated with employment. Positive- action training cannot constitute employment.</p>
<p>Make it clear that the contract is a training contract and not a contract of employment, and make sure you provide genuine training.</p>	<p>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.</p>
<p>Consult staff, trade unions or workers' representatives on proposals for positive- action programmes and on the reasons for it, and encourage support.</p>	<p>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.</p>
<p>Review and monitor the use and success of positive-action programmes.</p>	

# Chapter 2 Preparing your organisation

It is useful if certain key factors are in place within your organisation 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 both staff and the wider sector.

## Organisational culture and strategic objectives

Before embarking on any positive-action training initiatives it may be useful to review the culture of your organisation, both in terms of the museum service – staffing and operation on all levels and the governing body. Museums 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 your organisation should already be working towards addressing diversity across a range of your services' provision, ie staffing (workforce diversification), collections management and exhibitions, audiences and communications, etc and you may wish to review existing policies to ensure this before implementing any positive-action training.

## Championship

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 will help ensure the success of any positive-action training initiative. In order to create investment in the traineeship, consideration could also be given to incorporating the trainee's targets within their supervisor's own performance plan.

## Supervisor structure

Successful positive-action training largely depends on the capacity of staff to successfully supervise a positive-action trainee, including sensitivity to the needs of the individual and to the difficulties that could arise. Consideration could be given to developing a supervision structure for the trainee before the training begins 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, supervisor and the HR department and all those involved should be aware of their responsibilities regarding the positive-action trainee. Consideration should be given to drawing up specific guidelines outlining each parties' involvement and responsibilities. This could include defining a set of guidelines outlining the trainee's responsibilities. These guidelines should refer to what your organisation expects of the trainee, and give details of the support they'll receive and who they will be reporting to etc. See chapter 3 – Implementing positive-action training and appendix 1 – Guidance notes for positive-action training for further details.

## Budgeting for a positive-action training initiative

Within the Diversify scheme there are two training models; the bursary and the traineeship. The funding formats for these provide a useful guide to the potential costs involved, but these are not definitive and only reflect the training offered by Diversify. 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 this is a training opportunity and that the trainee is not an employee. The Arts Council Inspire Fellowship scheme use this method to award the training allowance to the fellows. Trainees should be made aware that the Inland Revenue may consider the training allowance to be taxable income at a later date and should therefore make provision to pay tax should this arise.

## (1) Bursaries

### Total cost per bursary in 2006–07

		Notes
Postgraduate course fees	£4,500	1
Course expenses	£1,000	2
Work experience (over 5 months)	£5,000	3
Professional development package	£500	4
<b>Total</b>	<b>£11,000</b>	

**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.

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

## (2) Traineeships

### Total cost per bursary in 2005–07

Payment to trainee (over two years)	£23,000	5
Course expenses	£4,500	6
Museum's own costs (25%)	£6,000	7
Trainee expenses	£4,000	8
<b>Total</b>	<b>£37,500</b>	

**5** This is based on two years' equivalent to the mid-point of local authority scale four (£16,800 as at 1 April 2005), for 0.67 time (typically 24.5 hours per week).

**6** Course fees vary considerably; this is at the higher end. Note too that course fees generally increase faster than the general rate of inflation.

**7** National insurance, pension, other payroll costs. Please note the comments made above regarding paying the training allowance as a bursary or grant.

**8** Including: professional development package, work-experience related travel, equipment, development and training, etc.

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

## Briefing staff

Once your 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 your 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 applying for a position and going through a competitive selection process.

The MA has developed training seminars to enable host venues and supervisors to develop and implement successful positive-action training initiatives. For further information email the MA at [cpd@museumsassociation.org](mailto:cpd@museumsassociation.org).

## Evaluation

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

The third review meeting should be used to 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 7).

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 sample evaluation forms see those used by Birmingham City Council in appendix 3).

## Support

Successful positive-action training initiatives depend on the level of support that the trainee receives. 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 can be summarised as follows:

- time
- pastoral care / champion / supervisor / mentor / buddy
- practical support ie providing office equipment, payroll, etc
- 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 Regional Agencies and they should encourage trainees to take advantage of networking opportunities through Diversify and the AMA networks.

## Useful contacts

For useful additional advice on preparing your organisation go to the Commission for Racial Equality's website at [www.cre.gov.uk](http://www.cre.gov.uk)

## 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

# Chapter 3 Implementing positive-action training

## 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 two training models within Diversify – the one-year bursary package and the two-year traineeship package. The bursary package includes a one-year full-time postgraduate course in museum studies and three-to-five-months' paid work experience in a museum or gallery. The traineeship package includes two-years' training at a host venue including a training and development programme tailored to the individuals' needs and part-time study for a postgraduate museum studies qualification that has to be completed by the end of the traineeship. Further information on Diversify bursaries and traineeships can be found on the MA's website at [www.museumsassociation.org](http://www.museumsassociation.org) and also in appendix 1.

An essential component of positive-action training is the inclusion of an academic element alongside the work experience. The Diversify models both include postgraduate study for a masters in museum studies from one of the university courses recognised by the MA. 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. For further information on Inspire, visit the Arts Council website at [www.artscouncil.org.uk](http://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.

## 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 positive-action 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 programme at the museum or gallery
- explore the potential of linking course content with work activity
- 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 scheme were offered considerable delegated responsibilities; encouragement and managerial support to work across departments within the museum(s), especially across collections and the public services department; a sense of strong champion beyond their immediate work section; and access to external resources and networks. Those who benefited least were working 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; and having limited access to external resources and networks (The Impact of Positive-Action Traineeships, Gaby Porter Associates, 2004)
- 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 trainee build up their CV
- consider exit strategies early on (see chapter 7).

Further detail on the actual content of the trainee's training and development plan can be found in appendix 1 – Guidance notes for structuring positive-action training.

# Chapter 4 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, jobs 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.

## Person specification / trainee description

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 training post and avoid terms such as employment, job 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 the positive-action tag, may alienate the trainee
- do not assume that BME trainees will want to take on cultural diversity projects or roles.

When developing the essential and desirable elements of trainee description, 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 widen the field of applicants. Emphasis should be placed on the individuals' potential rather than on their existing experience.

See appendix 4 for a sample trainee person specification from Birmingham City Council's Bridges into the Future programme for a positive-action traineeship at Birmingham Museum and Art Gallery (BM&AG).

## 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' (p4) it is important to identify the particular racial group or groups you are targeting. If you just use a board category, such as BME or black you must be clear which ethnic groups are included within that category and be able to demonstrate under representation 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 museum 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 the BM&AG.

## Application form

Your normal recruitment application form can be used as a template for the traineeship application form. However, the wording should be changed 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

## 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 Agency and 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 contact addresses

**The Voice:** [www.voice-online.net/advertising/voiceonline-advertising.pdf](http://www.voice-online.net/advertising/voiceonline-advertising.pdf)

**The Asian News:** [www.theasiannews.co.uk/about/s/180/180669\\_advertise\\_with\\_us.html](http://www.theasiannews.co.uk/about/s/180/180669_advertise_with_us.html)

**The Asian Times:** [www.asiantimesonline.co.uk/](http://www.asiantimesonline.co.uk/)

**Asian Job Site:** [www.asianjobsite.co.uk/rcrt\\_media.html](http://www.asianjobsite.co.uk/rcrt_media.html)

Asian Voice: [www.gujarat-samachar.com/contactus.html](http://www.gujarat-samachar.com/contactus.html)

**Ethnic Media Group:** [www.ethnicmedia.co.uk/](http://www.ethnicmedia.co.uk/) (publishes; Asian Times, New Nation, Eastern Eye and Caribbean Times)

**New Nation newspaper:** [www.newnation.co.uk](http://www.newnation.co.uk) (an additional African Caribbean focused paper)

**Museums Journal:** [www.museumsassociation.org/advertising/publications](http://www.museumsassociation.org/advertising/publications)

**The Guardian:** [www.jobsadvice.guardian.co.uk/advertisers](http://www.jobsadvice.guardian.co.uk/advertisers)

**Local Government Careers website:** [www.lgcareers.com/](http://www.lgcareers.com/)

### Undergraduate careers websites:

[www.springboard.hobsons.co.uk/hobsonssites.jsp](http://www.springboard.hobsons.co.uk/hobsonssites.jsp)

[www.prospects.ac.uk/cms/ShowPage/Home\\_page/plaLaXi](http://www.prospects.ac.uk/cms/ShowPage/Home_page/plaLaXi)

[www.le.ac.uk/careers/pgjobhunting.html](http://www.le.ac.uk/careers/pgjobhunting.html)

[www.thebigchoice.com/?source=ggst](http://www.thebigchoice.com/?source=ggst)

\*Please note these are suggestions rather than recommendations - some of the above have not been vetted or used by the MA before.

# Chapter 5 Partnership agreements

Partnerships are likely when putting together positive-action training initiatives. Potential partners include:

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

Careful planning of these relationships needs to be considered at the set-up stages of the 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?

A partnership agreement between host venues should include:

- clarification 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.

Partnerships between host venues should be formal and subject to written agreements.

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

- In the West Midlands, the BM&AG 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. The BM&AG 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.

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 a course for your the trainee, taking account of course content, length of time taken to complete course, location, etc. You should work with course leaders when preparing the traineeship and build-in regular meetings with them during the course of the traineeship.

# Chapter 6 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.

## 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 2006 between Stoneybridge District Council ('the council') and ('the 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, e.g. 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.

Please see appendix 7 for a sample training contract used by Birmingham City Council.

# Chapter 7 Exit strategies

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
- host 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.

# Chapter 8 University courses

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. The MA has compiled a list of recognised museum studies courses. Students that complete one of these courses will have the necessary knowledge and skills to take a fast-track route when working towards the Associateship of the Museums Association (AMA).

## **List of recognised postgraduate museum studies courses – March 2005**

### **Bournemouth University**

- MA in museums and collection management

### **City University**

- MA in museum and gallery management (FT/ & P/T)

### **Institute of Archaeology, University College London**

- MA in museum studies (F/T & P/T)

### **The Ironbridge Institute, University of Birmingham**

- Postgraduate diploma in heritage management (F/T & P/T)
- MA in heritage management (F/T & P/T)

### **The Nottingham Trent University**

- Postgraduate diploma in heritage studies
- MA in heritage studies

### **University of East Anglia**

- MA in museology/museum studies

### **University of Essex**

- MA in gallery studies

### **University of Greenwich**

- MA in museum management/MA in heritage management (F/T & P/T)

### **University of Leicester**

- Postgraduate diploma in museum studies (F/T, P/T and by distance learning)
- MA in museum studies (F/T, P/T and by distance learning)
- Postgraduate diploma in art gallery studies
- MA in art gallery studies
- Mgeol in geology, museums and earth heritage

### **University of Manchester**

- Postgraduate diploma/ MA in art gallery and museum studies (This course is not recognised between 1998 – 2000)

### **University of Newcastle**

- Postgraduate diploma in museum studies (F/T & P/T)
- MA in museum studies
- MA in heritage education and interpretation
- MA / postgraduate diploma in art museum and gallery studies (F/T & P/T)

### **University of Salford**

- MA/ postgraduate diploma in heritage studies

### **University of Southampton, Winchester Campus**

- MA museum studies: culture, collections and communication

### **University of St Andrews**

- Graduate diploma/M.Litt museum and gallery studies (FT&PT)
- M.Phil museum and gallery studies/ National Trust for Scotland studies

NB All of the above courses are recognised retrospectively to 1980, apart from the MA in gallery studies, University of Essex, which is retrospectively recognised to the start of the academic year 2001/2002.

# Chapter 9 Guidance on answering complaints

In the MA's experience it has found that when a positive-action training initiative is advertised on most occasions 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 career in the museums sector and are disappointed that they are not eligible for the traineeship. In this case refer them to advice on museum careers, such as the MA's website.

## 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)
- public institutions have a duty to promote the Race Relations Act and to 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 under-representation of BME staff in museum services locally, regionally and nationally. Nationally, around only 2 per cent of staff working in the care and preservation of museum collections are minority ethnic, compared to over 7 per cent of the population overall who are minority ethnic
- 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 1990's and is a strategic initiative of the MA's 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 under-represented 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.

# Chapter 10 Useful contacts

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**

[www.museumsassociation.org](http://www.museumsassociation.org)

**Museums, Libraries and Archives Council**

[www.mla.gov.uk](http://www.mla.gov.uk)

**Commission for Racial Equality**

[www.cre.gov.uk](http://www.cre.gov.uk)

**Birmingham City Council**

Harsha Dudley, Bridges into the Future project coordinator  
[www.birmingham.gov.uk](http://www.birmingham.gov.uk)  
tel: 0121 303 3778

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

- 1 Bristol City Museum & Art Gallery
- 2 Potteries Museum & Art Gallery, Stoke-on-Trent
- 3 Birmingham Museums & Art Gallery
- 4 Leicester City Museums
- 5 Grange Museum of Community History, Neasden
- 6 Harris Art Gallery, Preston
- 7 Manchester City Gallery
- 8 Herbert Art Gallery & Museum, Coventry
- 9 Bradford Museums, Galleries & Heritage
- 10 London's Transport Museum
- 11 Tyne and Wear Museums
- 12 Lincolnshire Heritage
- 13 The Horniman Museum & Gardens
- 14 Wolverhampton Art Gallery
- 15 Bilston Craft Gallery
- 16 The Petrie Museum of Egyptian Archaeology
- 17 Luton Museum & Art Gallery
- 18 The Fitzwilliam Museum
- 19 The British Museum
- 20 Nottingham Castle Museum
- 21 Edinburgh City Council
- 22 Glasgow Museum

# Appendix 1 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 may demonstrate areas for consideration and highlight issues that should be considered. These notes 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 (see chapter 1 and appendix 2 of the Toolkit for an explanation of positive action). Further details of the Race Relations Act 1976 can be obtained at [www.museumsassociation.org](http://www.museumsassociation.org)

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's equal opportunity and diversity policy 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. 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 travel

between two host venues. Contact the MA if further guidance on the actual content of such an agreement is required.

4. Where possible, those responsible for supervising the trainee should have the opportunity to talk to the course providers and visit them so that they can be briefed on what the course covers. This is important in terms of developing the trainee's programme of training and development 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.

5. Championship at a senior level on the museum's management team is essential in embedding Diversify within museum policy and will help ensure the success of the traineeship.

6. The trainee's title should be established before commencement of the traineeship. This will help make the trainee feel like part of the established team. Consideration could be given to titles such as trainee curator, trainee museum assistant or trainee assistant curator. A title, which includes reference to the positive-action tag, may alienate the trainee.

7. 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.

8. 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.

9. At the start of the traineeship the host should discuss the planned programme of training and development with the trainee. It may be useful for the host to 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 host 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 the needs of the trainee are being met. Dates for these review meetings should be set at the start of the traineeship. (appendix 1 of this guidance note provides additional guidance to the areas that should be considered for inclusion within the training and development plan).

10. Ensure that an induction programme, relevant to the host venue is in place at the start of the traineeship. Decide on the length of the induction e.g. a day (or other specified time). 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 can be a useful introduction. The host may wish to use their general staff induction programmes if these are deemed sufficient.

11. 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 trainee 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 should bear in mind that 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).

12. The trainee should be given the opportunity to observe management team meetings.

13. 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.

14. 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. The MA facilitates this by giving a package of benefits to trainees (see Toolkit appendix 8).

15. 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.

## Guidance note: appendix 1

### Areas to include within training and development plans

#### Communication

- Audiences
- Marketing
- Outreach
- Education

#### Collections management

- Care of collections
- Research
- Exhibitions
- Publications
- ICT

#### Management and financial awareness

- 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

#### Professional development

- Networking
- Membership of professional groups
- Conferences and seminars

## **Guidelines for developing bursary work placements**

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

### **Section A – Before the work placement starts**

1. When planning for the work placement the host venue should bear in mind that positive action is the term used for measures taken under section 37 (1) of the Race Relations Act 1976 and organisations must take these legal issues into consideration.
2. If the host venue is entering into a partnership with other museum services to provide additional secondments/resources for the work placement, it is advisable to draw up formal written agreements between all parties involved, setting out each others' roles and obligations. Contact the MA if further guidance on the actual content of such an agreement is required.
3. Championship at a senior level on the museum's management team is essential in embedding Diversify within museum policy and will help ensure the success of the work placement.

4. The title of the student should be established before commencement of the work placement. This will help make the student feel like part of the established team. Consideration should be given to titles such as trainee, trainee curator or trainee museum assistant. A title, which includes reference to the positive action/Diversify tag, is not recommended as it may alienate the trainee.

5. Ideally, a meeting should be held prior to the start of the work placement to discuss what the host and the student hope to achieve and to establish a work plan outlining areas of involvement.

6. Identify one member of staff who, throughout the entire work placement, will act as mentor to the student. Ideally, this person would be a member of the host venue's management team and would be in addition to the student's supervisor.

7. Where possible, those responsible for managing the student should have the opportunity to talk to the course providers and visit them so that they can be briefed on what the course covers.

### **Section B – The start of the work placement: the first few weeks**

8. At the start of the work placement the host should establish and go through the programme of work for the student. It may be useful for the host to consider the syllabus the student will be working on as part of their postgraduate studies in order to ensure that the practical experience of the work placement complements the academic work. The host should make it clear that this programme is flexible, will be regularly reviewed and may be altered to meet the changing needs of the student. It should be agreed that the mentor will meet with the student at regular intervals to ensure that their needs are being met.

9. Ensure that an induction programme is in place at the start of the work placement. Decide on the length of the induction e.g. a half a day with each department to give the student an overall view of the workings of the service, including an induction with the governing body if appropriate. The type of induction should also be considered, for example shadowing a colleague within each department.

### **Section C – General points**

10. The student should be given the opportunity to observe management team meetings.

11. The host should encourage the student to take advantage of 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.

12. Throughout the placement the host should ensure that the student is not just seen as a useful extra pair of hands: the work placement is there to provide learning and development in order to prepare the student for future employment in the sector. Consideration should be given to enabling the student to take on responsibility for the management of individual projects where appropriate.

13. Ensure that at least one project undertaken by the student can be completed during the work placement so that the student gains experience of a project from beginning to end.

14. The host should give consideration to projects that will enable the student to experience a range of museum practice. For example, producing a small exhibition – selecting and researching the objects for display, displaying the objects and assessing any environmental requirements for the duration of the exhibition, writing labels, producing publicity material, producing education/outreach material related to the exhibition and evaluating the success of the exhibition. Or, undertaking a collections management project – auditing and repacking a specific group of objects in storage, using and understanding the database or cataloguing systems to document and research the objects, handling, packing and storing of the objects, and evaluating the environmental requirements of the objects and monitoring systems in place.

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 work across departments within the museum(s), especially across collections and public services departments; a sense of strong champion beyond their immediate work section; access to external resources and networks. Those who benefited least were working 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).

# Appendix 2 The Race Relations Act 1976

## 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).

For a full copy of the act go to: [www.old.homeoffice.gov.uk/docs/part6.html](http://www.old.homeoffice.gov.uk/docs/part6.html)

As described in chapter 1, 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 Bridges into the Future evaluation forms

## Part A: Employers assessment of trainee/placement

This evaluation form must be completed by the supervisor/line supervisor in conjunction with the BIF trainee.

### Directorate/Section:

Trainee Name

Trainee placement title

Type of traineeship

PAT

12 weeks

YPPAT

Starting date

Leaving date

### Background history

1. What was the trainee doing prior to this placement?

### Roles and responsibilities

2. Please give a brief description of work done by the trainee during their placement, including routine responsibilities and projects and reports carried out.

3. Was the trainee's attendance and punctuality satisfactory? Yes / No

If no, please comment.

4. 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

**Skills and abilities**

5. What skills did the trainee gain?

---

6. What skills/attributes did the trainee bring to the council?

---

**Effort made during the placement**

7. Did the trainee take on extra tasks willingly?

Excellent  Above average  Below average  Unsatisfactory

---

**Working relationships**

8. 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**

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

Excellent  Above average  Below average  Unsatisfactory

---

**Contribution made**

10. Did the trainee make suggestions for improvements and have the ability to develop/improve ideas?

Excellent  Above average  Below average  Unsatisfactory

---

**Motivation**

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

Excellent  Above average  Below average  Unsatisfactory

---

**Overall placement performance rating**

12.  Excellent  Above average  Below average  Unsatisfactory

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

14. Please make any final comments on how the trainee's work has added value to your department or section.

15. Reasons for the trainee leaving i.e. a) Contract ending b) Returning to study c) Job d) Personal reason

If found permanent job, is it within the Birmingham City Council? Yes / No

If yes, which department is it?

If external organisation, please specify:

Supervisor

Title

Name

Signed

Date

**Part B: Trainee's personal views**

This evaluation form must be completed by the trainee and sent direct to the address at the end of this form. The contents of this form shall be treated in the strictest confidence and will not be disclosed to your section or line manager.

Directorate/section

Trainee name

Trainee placement title

Type of traineeship

PAT

12 weeks

YPPAT

Starting Date

Leaving date

1. What's your perception of the council and has this changed since undertaking your training here?

2. Would you want to come and work for the city council as staff? Yes / No

Why's that?

3. Would you recommend these placements to others? Yes / No

Why?

4. What problems did you encounter and how were these overcome?

---

5. What were the positive / negative aspects to the placement?

---

6. What support was given and was it adequate?

---

7. How did you find your supervisor – approachable, dealt with your problems, etc?

---

8. Where there any career and development opportunities while you were in the scheme and what were they?

---

Were they useful?

---

9. The next question is optional, you do not have to answer it if you don't want to, but it would be useful to see where help may be given if such a problem arises again in the future.

At any time, did you feel discriminated against?

---

10. Do you feel the environmental conditions were sufficient (eg accommodation, access, equipment facilities)?

---

11. Is there anything else you would like to add that you feel has been left out?

---

Signed

Date

---

# Appendix 4 Trainee specification

## Sample person specification for a positive action traineeship

Below is a sample trainee specification based on one from Birmingham City Council's Bridge's into the Future for a positive-action traineeship at BM&AG:

### Trainee description

Trainee title:  
Trainee assistant curator (history)

Ref No:

Allowance: £

Division:  
Museums and heritage projects

No of placements: 1

Section:  
Interpretations and exhibitions

Two-year positive-action traineeship under Birmingham City Council's Bridges into the Future programme aims to address areas where BME individuals are under-represented in the workforce. This traineeship is offered to BME people only (section 37 (1) of the Race Relations Act 1976 applies).

### 1.0 Trainee purpose

1.1 The trainee will be supervised by the curators and staff the BM&AG. The traineeship will specialise in the development of history displays and exhibitions work. The trainee will spend four days a week at the BM&AG.

1.2 The trainee will receive training in a range of museum skills through induction, shadowing, and work-based projects and will be assisted to undertake the accredited museum studies postgraduate course over two years at Leicester University via distance learning.

1.3 The trainee will be based at the BM&AG four days a week, in the interpretation and exhibitions section managing and interpreting the collections and with museum staff across the service in looking after collections, developing and delivering education and lifelong-learning activities and programmes that reflect the cultural diversity of the city.

### 2.0 Training specifications

#### Display and interpretation

2.1 To learn how to contribute to the long-term gallery redisplay strategies by carrying out research on specific topics.

2.2 To learn from the curators how to develop and deliver temporary exhibitions.

2.3 To be given specific projects in order to learn how to improve access to collections

2.4 To undertake one exhibition or display project as the lead curator.

### Collection management

2.5 To learn from museum staff how to look after the collections on display and in store.

2.6 To learn how to add records to the computer databases of collection information and organise manual records.

2.7 To learn how to carry out research in response to public and academic enquiries and to respond to requests for information.

2.8 To learn how to deliver the museum's public opinions service.

2.9 To develop expertise in an area of the collection.

### Community delivery

2.10 To learn how to develop and deliver education and lifelong-learning activities and other events for the public.

2.11 To learn about community consultation on developing and delivering museum services.

2.12 To learn how to work with partner organisations and networks to assist in promoting projects reflecting the cultural diversity of the city.

### General

2.13 To ensure that health and safety standards are maintained and monitored at all areas of the work and responsibility of the post.

2.14 To observe the department's equal opportunities policy.

2.15 To undertake any specialist and/or general training required for the traineeship including completion of distance learning qualification at Leicester University.

2.16 To undertake any other duties commensurate with the traineeship.

Observance of the city council's equal opportunities policy will be required

### 3.0 Supervision received

3.1 Supervising officer  
Jobtitle: Curator (art)

3.2 Level of supervision

1. Regularly supervised with work checked by supervisor.

### 4.0 Supervision received

**Supervision given:** (excludes those who are indirectly supervised i.e. through others)

Post title

Grade

No of posts

Level of Supervision\*

\*Use 1, 2 or 3 as in 3.2

### 5.0 Special conditions

5.1 The trainee may be required outside normal hours in connection with exhibitions, collection movements or specialist events, to visit other organisations and institutions outside the city in connection with exhibitions, collection movement etc.

5.2 The trainee will need to travel between the BM&AG and Bilston Craft Gallery.

5.3 The ability to drive is desirable but not essential

# Appendix 5 Eligibility and selection criteria

## Sample ethnic monitoring form

These categories are used in the 2001 census.

### A Mixed

Any mixed background  
(please write in)

### B Asian or Asian British

Indian   
 Pakistani   
 Bangladeshi   
 Chinese   
 Any other Asian background  
(please write in)

### C Black or black British

Caribbean   
 African   
 Any other black background  
(please write in)

### D Other ethnic background

Any other background  
(please write in)

## Guidance on selection criteria

The table below has been developed by the MA for general guidance when shortlisting and interviewing candidates for positive-action traineeships.

### Diversify traineeship selection criteria

Applicant's name	N/a
Ethnic background	N/a
First or second-class honours degree or equivalent experience	N/a
Eligibility for home fees (unless willing to contribute excess fees)	N/a
Ability to balance study with training	<input type="checkbox"/>
Ability to demonstrate enthusiasm / commitment for a career within museums and galleries	<input type="checkbox"/>
Likelihood of gaining employment in museums and galleries	<input type="checkbox"/>
Realism and flexibility regarding future job opportunities/salaries/etc	<input type="checkbox"/>
Strength of character	<input type="checkbox"/>
<b>Total score</b>	<input type="checkbox"/>

Each criterion is scored out of 5 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.

## Sample eligibility and selection criteria for a positive-action traineeship

Below is an example of eligibility and selection criteria used by the BM&AG

**Trainee title:** Assistant curator (history)

**Ref No:** EL406

**Allowance:** £

**Division:** Museums and heritage projects

**No of placements:** 1

**Section:** Interpretations and exhibitions

Criteria	Desirable	M.O.A.
Experience (Relevant work and other experience)	<ul style="list-style-type: none"> <li>• Knowledge of history and/or related fields</li> <li>• Carrying out research project</li> <li>• Organising projects or events</li> <li>• Working with the public and/or community groups</li> <li>• Voluntary work in museums</li> </ul>	<p>AF/I</p> <p>AF/I</p> <p>AF/I</p> <p>AF/I</p> <p>AF/I</p>
Skills and abilities (e.g. written communication skills, deadlines dealing with the public)	<ul style="list-style-type: none"> <li>• Ability to communicate clearly in speaking and writing</li> <li>• Good organisational skills with the ability to manage time and meet</li> <li>• Ability to work with a wide range of people</li> <li>• Ability to work as part of a team or alone</li> <li>• IT skills</li> <li>• Imagination</li> </ul>	<p>AF/I</p> <p>AF/I</p> <p>AF/I</p> <p>AF/I</p> <p>AF/I</p> <p>I</p>
Training	<ul style="list-style-type: none"> <li>• Willing to undertake specialist training</li> <li>• Committed to undertake an academic qualification in museum studies at the University of Leicester</li> </ul>	<p>AF/I</p> <p>AF/I</p>
Education / qualifications (NB Full regard must be given to overseas qualifications)	<ul style="list-style-type: none"> <li>• First- or second-class honours degree in a relevant subject or equivalent qualification.</li> </ul>	<p>AF</p>
Other	<ul style="list-style-type: none"> <li>• Interest in a career in museums/galleries</li> <li>• Commitment to widening access to museums</li> </ul>	<p>AF/I</p>

Method of Assessment (M.O.A.): A.F. = Application form; I = Interview; T = Test; P = Presentation

All Trainees are expected to be committed to the city council's equal opportunities policy

# Appendix 6 Sample interview format and questions

## 1. Welcome and introductions

## 2. Explanation of the traineeship package

(\*may vary according to host venue)

- 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.

## 3. Questions

- Can you tell us which museum or museums you have visited most recently?  
Follow up with asking what 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 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?
- 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?

## 4. Opportunity for candidate to ask the panel questions.

## 5. Close interview, thank candidate and explain 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 Training contracts

## Sample training contract

The MA recommends that training 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 very clear what the expectations of the trainee are.

For its Bridges into the Future programme, Birmingham City Council uses an offer letter, which doubles up as a contract. See below.

### Private and confidential

Dear

### Bridges into the Future – offer of a fixed-term positive-action training scheme placement

#### Trainee title

#### Introduction

Further to your interview, I am pleased to confirm your traineeship to the above position within (directorate) of Birmingham City Council with effect from (date).

May I take this opportunity to welcome you to the Directorate.

#### Fixed-term training contract

The traineeship is a fixed-term training contract from (date) for a period of (two) years expiring on (date). The City Council cannot guarantee a job at the end of the training contract. Trainees have to apply and go through a competitive selection process to obtain a job.

#### Medical assessment

Your traineeship is conditional on successful medical assessment.

#### National insurance number

Your traineeship is conditional on you successfully showing proof of your national insurance number and this being verified by the HR team.

#### Probationary period

Your traineeship is subject to a six-month probationary period. At the end of this period, subject to your performance being satisfactory, your traineeship for the remaining period with the council will be confirmed.

#### Remuneration

Your training allowance is £\_\_\_\_\_ a year.

Your training allowance will be paid monthly in 12 equal instalments by direct credit to a bank or building society of your choice. Please forward to the personnel office the completed bank form together with a note of your national insurance number, tax form P45, and your birth certificate without delay. Failure to produce any of these items may delay your first payment.

#### Placement location

Your placement location will be (sections/division). This is also your administrative centre for travelling expenses.

#### Hours of training

Your basic week is 36.5 hours from Monday to Friday. Normal office hours are 8:45am to 5:15pm, Monday to Thursday and 8:45am to 4:15pm on Friday.

The council operates in certain areas, a flexible hours scheme, which will allow you some discretion in arranging training time subject to the requirements of the service; further details are attached to this statement.

**Travelling expenses**

Approved travelling expenses (normally public transport) incurred by you in your placement will be reimbursed. If you are required to use your own car, you will be authorised by the director to claim an appropriate mileage payment. You should discuss this with your supervisor who will make the appropriate arrangements for your authorisation if necessary.

**Annual leave**

Your current leave entitlement is 20 working days a year. The leave year is from 1 April to the following 31 March. Trainees starting or leaving placement during the year are entitled to leave proportionate to the number of completed months' during the year. You will be paid at your full basic rate for all authorised absence on annual leave.

**Public holidays entitlement**

In addition to the above, Birmingham City Council will designate a number of public, extra-statutory and concessionary days, in a given year.

**Notice period**

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

**Sickness absence**

While you are not an employee and therefore not entitled to SSP, you will be entitled to sickness pay in accordance with the city council's policy, which is as follows:

During the first year of placement: One month's training allowance (after completion of four months on the programme) and two months' half of the training allowance.

During the second year of placement: Two months' training allowance and two months' half of the training allowance.

Where sickness absence occurs you must ensure that you adhere to the sickness absence procedure set out in the personnel handbook.

Code of conduct, disciplinary procedure, grievance procedure and anti-harassment

You will be subject to the city council's code of conduct, disciplinary, grievance and anti-harassment procedures, all of which are enclosed.

**Equal opportunities**

The city council has an agreed equal opportunities policy, copy of which is enclosed. Observance of the city council's equal opportunities in employment policy is a condition of your traineeship.

Acts of discrimination, victimisation, and harassment as defined in this document perpetrated by a trainee of the city council against other employees/trainees or members of the public will result in disciplinary action. This also applies to trainees who attempt to induce other trainees/employees unfairly or illegally to discriminate, victimise, or harass.

Failure to comply with or to adhere to the city council's equal opportunities policy will be treated as a disciplinary offence.

**Smoking**

The city council has decided that to reduce the risks of smoking related illness all appropriate enclosed workplaces are deemed to be smoke free areas. You are required, therefore, not to smoke in any such designated areas. This requirement is in addition to those areas to which a statutory prohibition of smoking applies.

**Safety**

A copy of the directorate safety policy statement is enclosed and your written acceptance of this letter will be deemed to be an acknowledgement of the receipt of the statement.

**Data Protection Act 1998**

All trainees have a responsibility to comply with the requirements of this Act. Information will be made available on commencement of placement. Your supervisor will identify the directorate data protection officer who will be able to offer advice and guidance.

Other rules or local agreement, which affect your placement made by the city council, include the flexible working hours and managing performance. Copies of all the above documents are enclosed.

**Summary of forms to complete and return**

The following forms are enclosed with this letter. Please will you complete and return them without delay:

- Acceptance of placement form
- Payment of training allowance (bank details) form
- Emergency contact form

You should also supply your:

- National insurance number
- Tax form P45
- Birth certificate

**Acceptance**

The return of the enclosed form of receipt signed by yourself will constitute your acceptance of the conditions set out in this letter and attachments; please let me have this as soon as possible.

You will be advised, as appropriate, either in writing or by the updating of reference documents, of any changes that affect the foregoing.

Yours sincerely,

**Acceptance form Bridges into the Future – positive-action training scheme**

If you have not received any of the attachments identified below or have any other enquiry related to this letter, please contact (name) on telephone (number).

Attachments

- Trainee description and trainee specification form
- Health and safety policy statement
- Code of conduct and departmental guidance notes
- Benefit fraud
- Sickness guide
- Equal opportunities policy
- Grievance and disciplinary procedures
- Anti-harassment procedures

Enclosures

- Acceptance of placement form
- Attendance record card
- Payment of training allowance (bank details) form
- Pension scheme details and A1 form
- Inland revenue tax form
- Medical questionnaire

I accept the training placement and the terms and conditions applicable to it.

Trainee name (BLOCK CAPITALS) \_\_\_\_\_

Signed \_\_\_\_\_

Date \_\_\_\_\_

# Appendix 8 Diversify professional development package

The MA has put together a benefits package as part of the Diversify scheme. Host museums can sign up for affiliate member status for their trainee. For a discounted annual fee of £500 the trainee will be given affiliate membership of Diversify. In order to provide a lasting legacy that continues after completion of training the MA recommends that hosts consider purchasing four years of benefits for each trainee. Affiliate membership entitles the trainee to take advantage of a range of significant benefits including annual attendance at the MA conference as well as events and training opportunities designed specifically for Diversify members.

## Professional development package for affiliate members of the Diversify scheme

- free membership of the MA
- the option of having a Diversify mentor
- free registration for the AMA, once you are ready to do so
  - Diversify trainees and bursary students are able to begin working towards their AMA during their traineeships. The timescale for the AMA, in these circumstances, will be over three years
  - Registration and the first year will be free. However, payment for the AMA annual fee in the two subsequent years and the professional review fee will be the responsibility of the individual or their employer
- free attendance at the MA annual conference (this does not include travel and accommodation expenses, or events that have a separate charge, such as the annual dinner, etc)
- free access to other one-day conferences organised by the MA

- free attendance at Diversify review days and Diversify professional and personal development training events. Several events are held throughout the year and present an excellent chance to network with other Diversify participants as well as providing programmed training and development opportunities
- free participation in a regional Diversify network (currently being set up)
- free subscription to Museum Practice
- free copy of Museums Yearbook
- opportunity to apply for additional funding to assist with specific training and professional development expenses. Should you wish to apply for any additional funding, you should do so in writing to the MA.

### **\*Please note that the following benefits will still be available after affiliate membership has expired:**

- free registration for the AMA
- attendance at appropriate Diversify events and training opportunities.