

## Business Diagnostic

The Business Diagnostic is a self-assessment tool for museums.

It is designed as an **indicator** to help you highlight your museum's current best practice, understand where the museum has areas of development and to feed into your forward planning. This will enable you to prioritise areas of working over the next 12 months and provide you with a benchmark for future work.



Please note there are no right or wrong answers or penalties for low scores, it is a self-assessment tool for your museum.

This Business Diagnostic asks an overarching question about your museum's Forward Plan and then addresses six themes:

- governance and leadership
- financial planning and resources
- people development and management
- working practices
- audiences
- collections

Each theme is followed by several statements for you to score your organisation against between 0-4:

- 0: **We don't do this at all**
- 1: **We only do this a small amount**
- 2: **We're okay at this**
- 3: **We're good at this**
- 4: **We're excellent at this**

### Getting started:

We only need one completed Business Diagnostic from each museum, but we recommend at least two people engage with the process. The questions will require someone from the management of your organisation, either a senior member of the team or someone from the governing body, as well as someone involved in operations; these can be staff or volunteers. It should take no longer than 45 minutes.

Consider each theme and the individual statements within it. It's helpful at this stage to discuss with colleagues what a score of '**4: We're excellent at this**' could look like for the museum and how your current practice matches up against it.

Next, discuss a possible score for the statement; can you think of real examples to support this score? When you have reached a consensus, record the score and move on to the next statement.

Once you have completed the scoring please complete the section within each theme to identify what your museum is doing really well and what you'd like to develop or improve.

### Advisory report:

By completing the museums' Business Diagnostic you will receive a bespoke advisory report with a summary of your results and suggestions of where to access support in your highlighted areas of need.

**Forward/Business Planning:**

The forward/business plan is fundamental in helping your museum to plan ahead. It is a tool that helps everyone understand the museum’s priorities, opportunity and challenges and it should be used to monitor progress and developments.

	0	1	2	3	4
We have a forward plan/business plan for the next 2-3 years that clearly outlines the museums aims and objectives.					

**Governance and leadership:**

Good governance is at the heart of a thriving museum. For an independent museum governance is typically delivered through a board of trustees, and in a local authority museum this can be through varying levels of leadership.

	0	1	2	3	4
We regularly review our governing document and management structure ensuring it is effective and fit for purpose.					
The governing body provides us with a clear vision and purpose and makes sure that the museum’s values are reflected in all of its work.					
Our leaders offer the workforce a balance of support and challenge.					
We actively assess and manage risks to the museum.					
We consult appropriately with stakeholders and our workforce when creating our Forward/Business Plan, and effectively communicate the current plan internally.					
Within the theme of governance and leadership, what do you think your museum does really well: <i>(We’d encourage you to write as much as you like in these boxes, but we ask for a minimum of one point for each)</i>					
Within the theme of governance and leadership, what would you like to improve or develop:					

**Financial planning and resources**

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

	0	1	2	3	4
We understand and regularly review our financial position.					
We manage our resources effectively; we set realistic budgets which are linked to the museum’s aims and objectives.					
We actively plan to diversify our income.					
We are confident in our financial procedures and our decision-making framework					
We have the right business skills within our team to income generate and fundraise, to enable our museum to deliver its core purpose.					
Within the theme of financial planning and sustainability, what do you think your museum does really well:					
Within the theme of financial planning and sustainability, what would you like to improve or develop:					

**People development and management:**

An effective museum workforce has the right set of skills needed to deliver the museum’s aims and objectives. The people that help you achieve this can be staff or volunteers, as well as freelancers and other stakeholders where appropriate.

	0	1	2	3	4
We are aware of the skills we need to deliver our aims and objectives across all levels within the museum.					
We have an active succession plan for recruiting our workforce, including our leadership and governance teams. We recruit openly and transparently and aim to reflect the diversity of our audiences and local communities in our workforce.					
We communicate effectively, across all levels, with everyone in the museum.					
We have processes to reward and recognise excellence within the museum workforce, and to tackle poor performance.					
We invest in our workforce, including continual professional development such as training and networking.					
Within the theme of people development and management, what do you think your museum does really well:					
Within the theme of people development and management, what would you like to improve or develop:					

**Working practices:**

Working practices encompass the culture of an organisation. Good working practices encourage communication, innovation and partnership working. A thriving museum welcomes new ideas and is open to change.

	0	1	2	3	4
We are committed to acting with integrity and following appropriate ethical guidance; we are aware of the Museums Association Code of Ethics.					
We plan for the museum’s long term global environmental sustainability.					
We work to enhance the lives of our workforce, audiences and communities.					
We enable staff and volunteers to be creative and innovative and we embrace change. This might be to develop innovative services, marketing approaches and funding solutions.					
We actively seek ideas from partners, audiences and wider stakeholders to help improve the services we provide.					
We review performance regularly to improve the customer experience.					
Within the theme of working practices, what do you think your museum does really well:					
Within the theme of working practices, what would you like to improve or develop:					

**Audiences:**

A museum has both current and potential audiences. An effective museum consults and includes audiences in the creation and delivery of activities. It is aware of potential and target audiences and plans for these appropriately; it markets and communicates in a variety of ways.

	0	1	2	3	4
We understand the needs and service expectations of our current and potential audiences. We know this from consultation and research.					
We ensure our facilities are physically accessible for everyone where possible. If there are unsurmountable physical barriers (e.g. we are unable to have a lift to upper floors) we make reasonable adjustments.					
We ensure our stories are intellectually accessible to our current and target audiences. This includes adjustments for different ages and abilities and takes into account neurodiversity such as autism and dyslexia.					
We listen and consult with current and target audiences when delivering new activities, including exhibitions. We adjust/learn from feedback.					
We have an effective marketing plan, which is tailored to our current and target audiences. We proactively use print and digital methods.					
Within the theme of audiences, what do you think your museum does really well:					
Within the theme of audiences, what would you like to improve or develop:					

**Collections:**

A museum’s collection is at the heart of the organisation. It is central to the purpose of the organisation and is what makes museums unique. Good collections management shows a clear understanding of the collection, its needs and how to use it to engage with audiences.

	0	1	2	3	4
We understand the significance of the collections and their relationship to our statement of purpose.					
We meet the appropriate collections management standards for museums.					
We are actively reviewing the collections.					
We understand how our collections can be used to engage current and potential audiences and to benefit the organisation.					
We understand how to manage our digital assets effectively.					
Within the theme of collections, what do you think your museum does really well:					
Within the theme of collections, what would you like to improve or develop:					

**Please list here the Areas of Improvement/Areas of Development identified in your most recent letter from Arts Council England confirming your Accreditation status.**


You've answered questions based on the six key themes and you've considered your Accreditation Areas of Improvement/Areas of Development.

Using the list below, please rank the top three priority areas to develop for your museums, with one being the most important:

Governance and leadership	
Financial planning and resources	
People development and management	
Working practices	
Audiences	
Collections	
Other:	

Are there any specific areas or project, which in the next 12 months, you consider may benefit from support from Museum Development?
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Name of person(s) completing diagnostic:	
Contact email(s) Which we will send the museum advisory report too following from this diagnostic.	
Do you also want your emails adding to your regional Museum Development mailing list? This will allow Museum Development to send relevant opportunities to your museum. We do not pass contact details on to third parties without your permission. Please see our privacy policy for more information. (Insert link to relevant privacy policy)	

**What happens next?**

Please submit the completed Business Diagnostic to [museum.development@bristol.gov.uk](mailto:museum.development@bristol.gov.uk) by 22 June 2020

Thank you for taking the time to fill in the Museums' Business Diagnostic. We understand capacity within museums can be very limited, however we believe the time taken to complete this tool will be beneficial to the whole organisation.

We will use the information you have provided to create a short advisory report for your museum by the 21 July 2020. This will highlight your self-identified priority areas over the next 12 months and will provide signposting to areas of Museum Development support and external resources which may be useful.

The information gathered via this Museums' Business Diagnostic will be used by Museum Development regionally and nationally to understand current trends and create targeted support for museums. We will use the information gathered to inform programming and development support. Your museum will be invited to join programmes if you have indicated that they are a priority for your organisation.

As we repeat the Museums' Business Diagnostic every two years it will allow you to see how your museum has evolved, highlighting where you've developed and potential areas for growth in the future.

*Thank you again for completing the Museums' Business Diagnostic, we look forward to working with you further.*