



12/15/2017

FINAL REPORT

Museum Evaluation Program

2017



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I. EXECUTIVE SUMMARY

The Association of Nova Scotia Museums (ANSM) is a non-profit organization which supports museums in Nova Scotia. Part of its mandate is "to encourage the development of professional best practices in Nova Scotia's museums". In 2014, ANSM agreed to take on the administration, redevelopment and implementation of a Museum Evaluation Program (MEP) for the museums of Nova Scotia. This program was previously administered as part of the Community Museums Assistance Program of the Department of Communities, Culture & Heritage (CCH) and applied to the 67 participating community museums.

The ANSM Museum Evaluation Program includes:

- working with a Museum Evaluation Steering Committee, which includes representation from the Nova Scotia Museum (NSM),
- application and review processes for selection of professional caliber evaluators,
- delivery of evaluation orientation sessions,
- follow-up support for participating museums,
- provision of evaluator training and resources, and
- comprehensive evaluation reports with detail photographs.

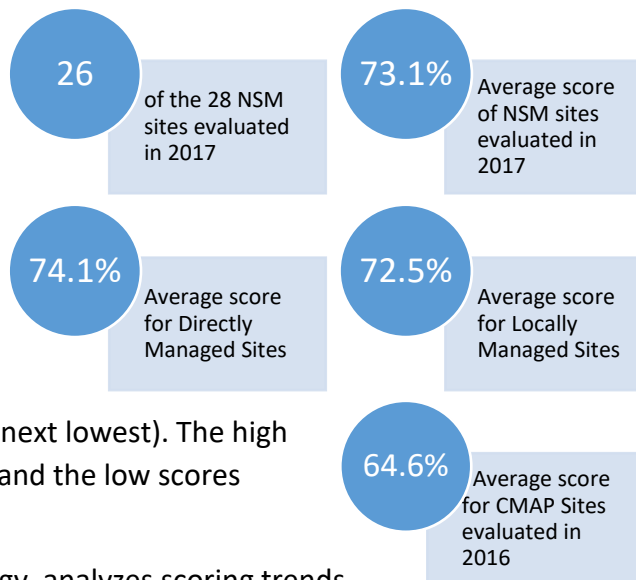
In 2017, the Association of Nova Scotia Museums evaluated 26 of the 28 sites that are part of the Nova Scotia Museum and its 5 collections storage facilities. NSM is a complex body within the provincial government. It has a centralized support staff who bring considerable specialized museum expertise and experience, as well as dedication and enthusiasm for the work that they do in helping the sites and their staff meet both provincial responsibilities for its' collections and other heritage assets, and audience needs and expectations. The sites themselves have differing management structures: directly-managed (DM) and locally-managed (LM), as well as 5 collections storage facilities that are managed directly by the NSM Collections Unit. In addition, all NSM sites' collections have one of two collections management relationships with NSM, 8 are Curatorial sites, 20 are Custodial sites. Finally, not all of the areas of management responsibility are actually in the purview of NSM directly. For example, the Department of Transportation and Infrastructure Renewal (TIR) is responsible for all provincial buildings, including museums, and the Department of Communications is responsible for communications such as websites. The NSM evaluation process revealed that there are variations in practice even within these various relationship models.

Following the evaluation process, in-depth reports were provided to each museum or site. These reports allow museums to review their strengths and weaknesses and determine where the scores originated in the evaluation process. Museums were encouraged to provide feedback on their reports, and 13 (5 DM and 8 LM sites) of the 26 museums evaluated did so, with a Collections Unit response on behalf of its 5 collections storage sites and an additional NSM response on behalf of its 9 participating DM sites. Responses ranged from simple thank-you messages or requests for a digital copy, to queries for clarification, as well as

comprehensive challenges to the evaluation process and scoring. Each query was responded to in detail.

Statistical analysis of the evaluation scores demonstrates:

- Of the LM sites, where one would expect to see more variation in some areas of museum good practice, 1 scored considerably higher at over 90% (over 10% more than next highest) and 2 scored considerably lower (below 50%) (between 15-20% lower than next lowest). The high score was higher than any DM site and the low scores were lower than any DM site.



This report outlines the evaluation methodology, analyzes scoring trends, provides feedback on the new external evaluation process for NSM museums and collections storage facilities, and includes considerations for specific areas of practice. Supporting documents are provided as appendices.

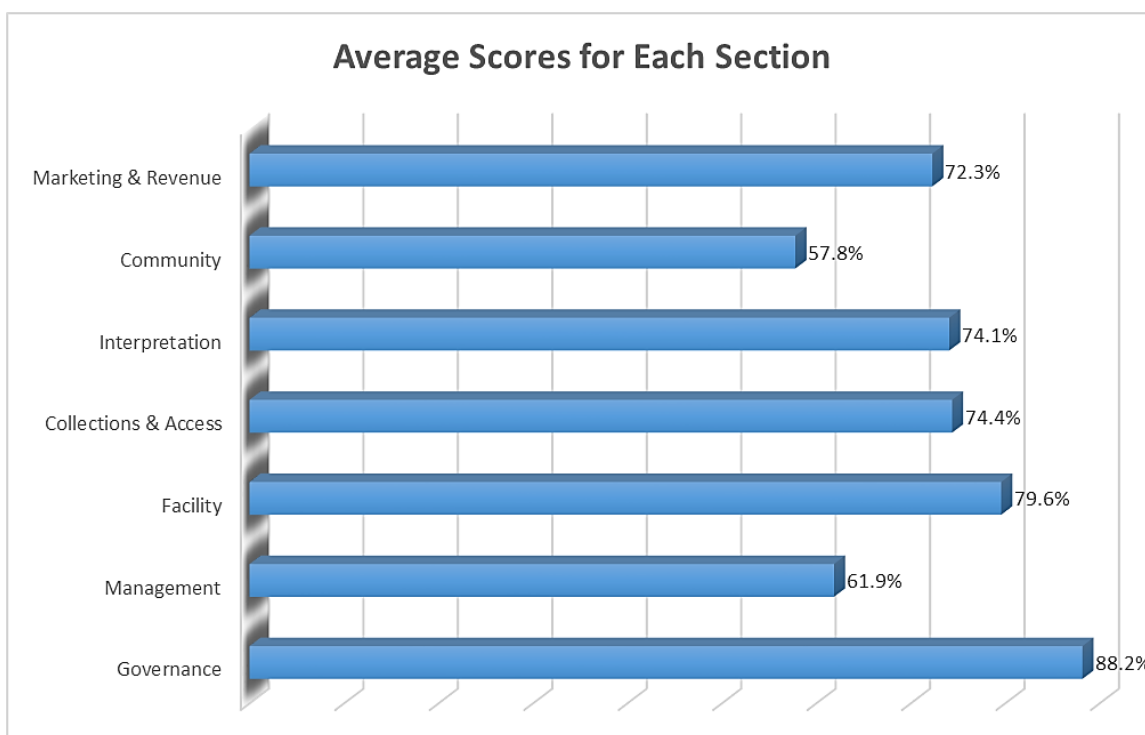


Figure 1: The average score for each section of the evaluation

II. PREPARATION WORK

Museum Evaluation Steering Committee

In 2014 a Steering Committee was established to provide vision, expertise, and guidance to ANSM on development and implementation of a Museum Evaluation Program (Appendix 1). The committee consists of 7 members who have expertise related to one or more areas of the MEP. Museum representatives applied to be part of the committee and were selected based on knowledge of and experience with museum evaluations, experience as CMAP recipients and as previous evaluators, regional diversity, and size and operating structure of museum. The committee was initially tasked with providing advice on the development and testing of evaluation criteria, on-site and documentation evaluation processes, determining evaluator criteria and selection, and reviewing evaluation score grievances.

2016/17 Committee members:

- Oralee O’Byrne (Chair), Age of Sail Heritage Centre/ANSM Board Rep.
- Lisette Bourgeois-Aucoin, Les Trois Pignons Centre Culturel
- Karin Kierstead, ANSM
- Stephanie Smith, NSM
- Janice Kirkbright, Cole Harbour Heritage Farm Museum
- Valerie Lenethan, MEP Evaluator
- Anita Price, ANSM

The committee meets 4-6 times per year. The next meeting agenda includes a review of the 2017 evaluation process, and discussion of questions or issues that could be improved for the 2018 evaluation cycle.

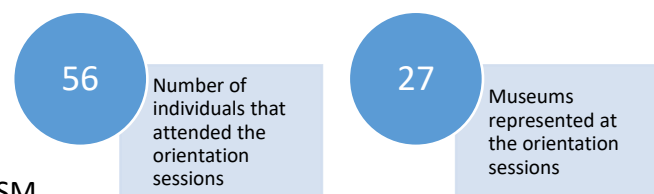
Evaluation Orientation

Three orientation sessions took place in October and November 2016, in White (Hunt’s) Point, Halifax and Port Hawkesbury.

Using site contact information provided by NSM,

every NSM museum and NSM central management was contacted and informed of the evaluation orientation sessions, and encouraged to send more than one representative from their museum. It was recommended that at least one attendee be a board member if applicable. One museum declined to attend.

At least one NSM central management representative attended each session. The three-hour orientation focused on background work with CCH and the Museum Evaluation Steering Committee, the evaluator selection process, and highlights of the evaluation process followed by a question and answer period. Museums were encouraged to start preparing for the evaluation immediately and to be in touch with ANSM with any questions. Sign-in sheets were used to capture up-to-date contact information, which was then used to develop a comprehensive email group.



Overall, 56 individuals representing 27 museums attended the sessions.

Attendance by Session:

- White (Hunt's) Point- 17 attendees from 10 sites
- Port Hawkesbury - 8 attendees from 3 sites
- Halifax – 31 attendees representing 16 sites and 5 collections storage facilities

Support for Museums

Following the orientation sessions, support was primarily delivered via an email group list. This support was continuous throughout the evaluation process, especially during the winter and spring as museums prepared to submit their documentation packages for review. Questions received from individual museums were responded to, and then stockpiled and revisited in group emails with responses and additional resources, presuming that if one museum had the question, others would find the responses useful as well. Brief updates and quick tips were also included in monthly updates on the ANSM blog (<http://passagemuseums.blogspot.ca>).

In addition to email and phone support, ANSM staff attended each regional heritage group meeting and provided updates on the process, gave reminders and tips on how best to prepare, and answered questions from museum staff, volunteers, and board members. Circulating information based on questions and responses was clearly beneficial to the evaluation results, although a few staff and board members seemed to have been unaware of them.

Evaluator Recruitment, Selection & Training

In January 2017 a call for evaluators was issued, using a simple application form submission process (**Appendix 2**). In total, 12 applications were received. The Museum Evaluation Program Steering Committee reviewed the applications and individually selected their top choices. Results were tabulated and the highest scoring evaluators' applications were reviewed and discussed again in order to ensure a variety of experiences and skillsets would be present on each evaluation team. The Museum Evaluation Program Steering Committee recommended that 1 or 2 marine museum specialists be recruited for the team(s) evaluating the NSM sites with this specialization. Twelve individuals were selected to form three teams of three and to form a backup list in the event that an evaluator was later unavailable. Biographies of the evaluation teams (**Appendix 3**) were provided to the museums in advance of the site evaluations. No museums requested that an adjustment to their team be made.

The use of teams is important for a number of reasons:

- It allows for **multiple perspectives and skillsets** on a team. Evaluators' specialties were charted and ANSM ensured that each team was capable of addressing all sections in the evaluation.
- It allows for the **averaging of the museum's score**, in the event that evaluators have differing opinions or notice different issues.

- A team of evaluators provides the museum with qualitative feedback – **three individual impressions of the museum** in the same way that the visiting public has diverse impressions and views of their museum experiences.

Evaluators participated in a full day of training on July 6th. They received an overview of the process, concerns expressed by museums, and the final list and schedule of museums they would be evaluating (**Appendix 4**). Evaluators were also provided with:

- Briefing notes on each of the museums were also provided
- NSM Mandate, Mission and Content identified for each site, and
- A Nova Scotia Museum Briefing Note Quick Reference Guide that explained Management Structures, Collecting Designations and the Collections Unit storage facilities.

Evaluators are encouraged to check in with each other to ensure all questions are adequately covered and there are no glaring discrepancies in scoring that require remedying prior to departure. Evaluation teams also discussed their findings as they traveled together, frequently adding additional notes and recommendations as they drove from site to site.

Site Evaluation Scheduling

Scheduling of the site evaluations was done in collaboration with the 26* museums. Museums were asked to submit blackout dates or other pertinent information (staff vacation time, fundraisers or other events) that would affect the site evaluation schedule. This information was used to develop a schedule of Tuesday – Thursday evaluations from July 11th – July 27th (Appendix 5).

*2 sites were withdrawn from the process by NSM and 3 of the 5 NSM collections storage facilities were evaluated separately.

III. EVALUATION PROCESS

Documentation Review

The first part of the evaluation was a documentation review, where museums submitted policies, procedures, and other supporting documentation and information about their operations. This was due May 5th, 2017. The documentation review questionnaire complements the site evaluation questionnaire, mirroring the sections and addressing those questions that cannot easily be addressed by the evaluators during the site evaluation. Museums were given a list of documents as well as the questionnaire to complete and submit.

A secure file transfer protocol (ftp) website was set up to receive file submissions, which is linked to the ANSM website. Museums were provided with a username and password, and were asked to identify their museum during the submission process. This enabled files to automatically be added to the museum's folder, regardless of how many times they uploaded.

In mid-April, ANSM contacted 6 museums that had not been in communication over the winter/spring. Three did not respond but submitted later, 2 replied that they had no questions yet, one replied NSM staff were providing assistance.

2,455 files were received from 26 sites and three collections storage facilities. Some museums combined documents and files into zipped folders or overarching documents. Others sent each one as an individual file. An additional 72 files were submitted by NSM on behalf of its 9 DM sites and 3 collections storage facilities.

All submissions were reviewed and scored by ANSM prior to the site evaluations. While Documentation scores are not shared with site evaluators, an overview of the submissions were provided in the museum briefing notes.

Site Evaluation

The second part of the evaluation was the visit, where a team of three evaluators visited the museum. Site visits varied according to the scale and complexities of each from three to seven hours. Time was spent talking with workers and making observations about the facility and

Association of Nova Scotia Museums Evaluation Program Submission Form

Welcome to the Museum Evaluation Program's online submission form. Please identify your organization by entering the full, legal name of the museum. You can submit multiple files by dragging and dropping them or by using the browse feature and selecting the appropriate files. You will receive a confirmation email outlining which files were successfully submitted. Files do not need to be submitted in one session. It is the responsibility of the museum to ensure that all files are submitted prior to the submission deadline.

Museum Name:

Your email address:

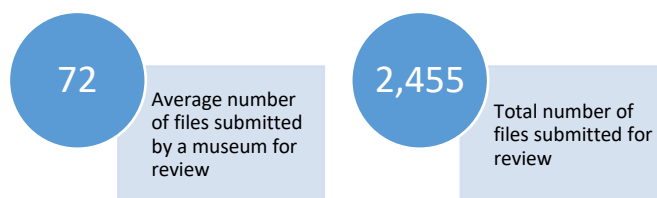
File 1 of 1: No file chosen

[Add another file?](#)

Let us know if you have a comment:

[Home](#) - [Logout](#) - [ANSM](#) - [NovaMuse](#) - [File Upload by Encodable](#)

Figure 2: FTP Site for Documentation Submissions



operations by completing the site evaluation questionnaire. Each evaluator completed their own questionnaire, and the scores were averaged to determine the museum's final results.

Briefing Notes

As previously mentioned, evaluators were given briefing notes on each of their museums as well as a useful "*Nova Scotia Museum Briefing Notes Quick Reference Guide*" to provide evaluators with the Management Structure, Collections Designations and implications of these for sites in each category. Beginning in 2016, this was a new component to the evaluation process. The briefing notes provided valuable background information about the museums – contact information, mission statement, annual budget, building ownership, human resources, links to online presence, community involvement highlights, and an overview of what was and was not submitted for the Documentation Review distilled into a one-page document. The briefing note is useful to site evaluators both in advance of their visit and during the site evaluation. Briefing notes were not shared with the museums, but highlights were included in the site report as part of the evaluation summary section.

Site Visit

At each site the staff and/or board were given 30 minutes to orient the evaluation team and provide information on its activities and operation. This time was used differently at almost every museum; some wanting to simply take the team on a tour, others sharing PowerPoint presentations about their work, others showcasing recent improvements or discussing future plans, and some referencing frustrations about lack of time or resources to implement plans and projects.

Evaluation teams reported that they sometimes had to ask questions and provide guidance during this time in order to learn more about the museum's work and what they were most proud of, and that they also used this time to reassure the museum workers that they wanted to hear about the museum and offer their constructive input through the evaluation.

The evaluation team then worked through the site evaluation questionnaire, conferring with museum workers when required, and otherwise making their own notes and assessment of the museum's operation. Evaluators discussed their findings to ensure that they were in general agreement and had not missed questions or answered questions in such different ways that it would cause confusion in the marking and reporting processes. Discrepancies were reconciled and, in some instances, different scoring was maintained so that the average would demonstrate mid-range or partial marks being given for questions.

Site Reports

During consultations with museums and in discussions with the Steering Committee, it was made clear that museums wanted concrete feedback about their evaluation. This feedback was shared with evaluators and they were encouraged to leave comments and share their expertise with the museums; to provide guidance and helpful insights whenever possible.

The site report provided the individual museums with a reminder of the evaluation process, a summary of their 2017 evaluation, and their results in each of 7 sections of museum practice. The evaluation scoresheet was also included so that museums could see their score for every question and by each evaluator. Evaluators were very conscientious in the remarks they left on the evaluation forms, in particular evaluators were encouraged to document where there were challenges, and these were transcribed and included in the museums' site reports. If remarks did not align with a particular question they were included as general remarks in the appropriate section. Remarks, tips and resources were provided on any question to which the museum received a score of 50% or lower. Standard responses to each question were provided by ANSM that included links to resources and other tips, which supplemented the evaluators' comments, or could be provided in cases where evaluators did not leave remarks. Evaluators were also encouraged to take photographs of both positive and negative issues at the museums for inclusion in the reports. This year there was some feedback from NSM about the informal tone of some evaluators' positive comments. Where identified, these were removed from site reports.

Compilation of this information resulted in reports ranging from 12-23 pages in length. Hard copies of the reports were mailed to each museum in reflection of the formal nature of the evaluation process. ANSM offered to provide digital copies as well, which many museums took advantage of in order to facilitate sharing among their boards of directors. How organizations share the reports within their management structure is their prerogative.

IV. SCORING TRENDS & ANALYSIS

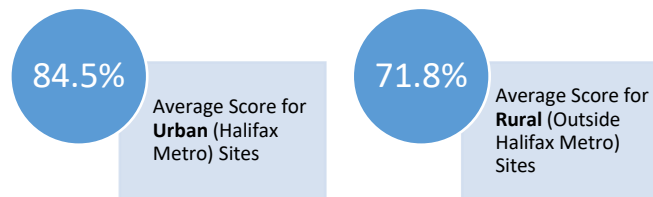
2017 Evaluation Scoring Trends

There are some very encouraging results in this evaluation, as the graph demonstrates. Twenty sites, almost two-thirds of those that were evaluated, scored above 70%, and 28 sites including the collections storage facilities scored above the 50% mark. Breaking out the **average scores by section** of the evaluation demonstrates the museums' areas of strength and weakness.

New to ANSM Museum Evaluation Program:

The complex NSM management structures, collections management relationships, inter-departmental relationships, and even geographic locations reveal some of the challenges of operating sites in a provincial government context.

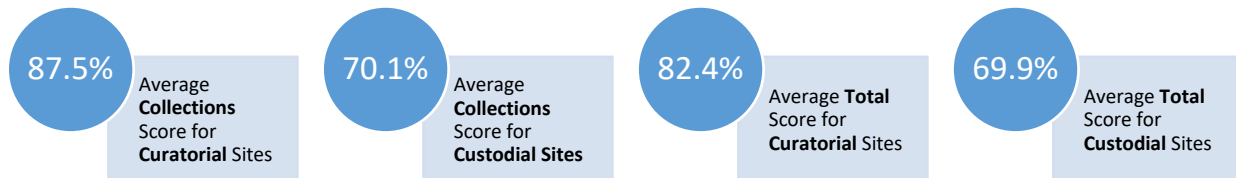
Urban vs Rural (Halifax Metro vs. The remainder of the province)



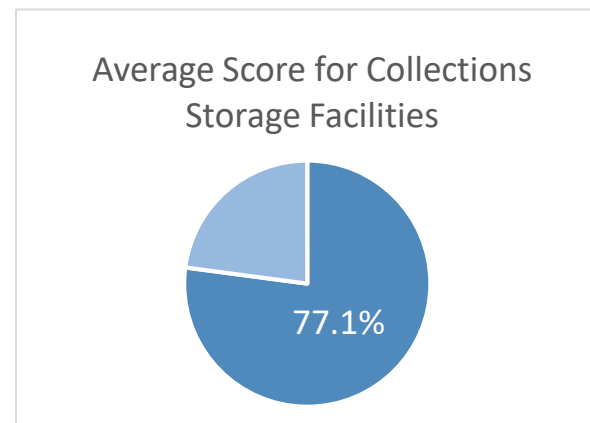
Directly-Managed vs Locally-Managed (identified throughout)



Curatorial vs Custodial

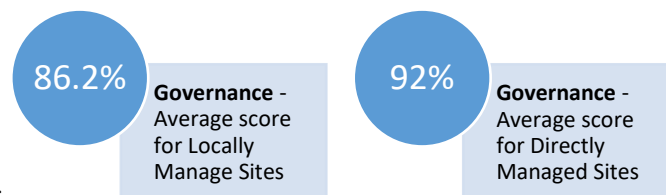


Collections Storage Facilities NSM has five collections storage facilities. This first time evaluating the storage facilities, two that are housed in the museum that collects and exhibits the artifacts/specimens, 3 are distinct collections storage facilities (Uniacke, Mines and Cultural History). In 2017 these three were evaluated separately. The Museum of Natural History and Maritime Museum of the Atlantic storage were evaluated as part of their overall museum site evaluation.

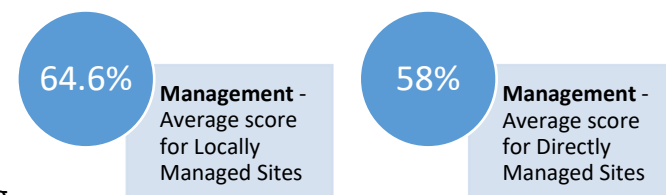


“After completing this process it is recommended that in future all five storage locations be evaluated into a single report as all of these facilities are managed by the ICI Collections Unit under the same policies, procedures and staff and all under the responsibility of the Manager of Collections. ... By evaluating the off-site facilities as part of the larger collections unit it would have a more complete assessment of the NSM collection.” NSM Collections Staff

Governance results were generally strong, but some LM museums shared that they are struggling with board and volunteer recruitment, which makes it very difficult to achieve the goal of staggered departures for board members. Strategic planning was also a weakness in this section. Some museums submitted plans that had expired, or did not provide adequate direction. Some museums simply did not have any form of strategic plan.

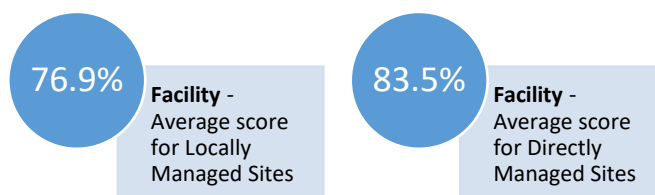


Governance scores were generally high with a dip in **Management**, partially because Governance is assessed solely on document review rather than on how a site follows its own policies, budget and planning responsibilities. This could demonstrate that some policies and procedures are not put into practice. Questions relating to human resources were especially problematic. Generally speaking, human resource policies were vague and/or limited, as were job descriptions for board members (LM), staff, and key volunteers. Some staff members are working without a contract in place, and many LM boards and/or management staff are not conducting



performance reviews of staff or volunteers. This leaves the institutions and individuals in very vulnerable positions.

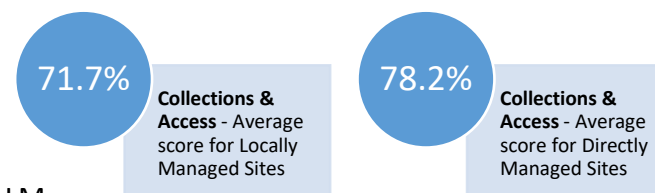
Encouragingly, the **Facility** section results are strong, which suggests that generally NSM's material culture and history is being housed in facilities that are safe, secure, and well-maintained. Of particular concern though, is:



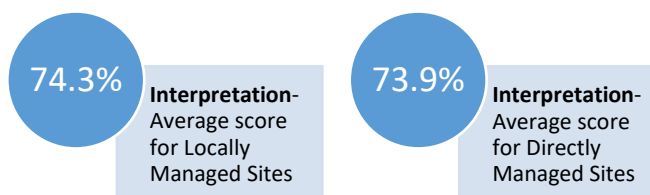
- The number of museums that are operating in provincially-owned buildings without a lease or management agreement that outlines responsibilities of both parties.
- Not all museums have current Safety Data Sheets (SDS) on file, and/or had up-to-date training in WHMIS, First Aid, or other safety protocols.
- 4 sites either do not have a site specific Emergency Preparedness plan in place, or that submitted the 1995 Nova Scotia Museum's Disaster Plan as their own.
- Sites were to identify from a list what measures were taken to **provide access for physically challenged individuals**. The **average score for all sites was 2.9 out of a possible 6**.

Collections & Access to Information

Evaluators conducted information integrity checks on random artifact and associated records to determine adherence to these standards. It was identified that a number of LM museums with curatorial collections designation do not always follow the Collections Management Policy or associated procedures.

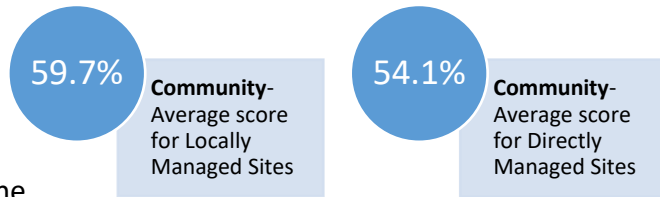


For **Interpretation**, it is clear that a number of museums are in the process of evolving from traditional largely static museums to institutions with dynamic programming. Those that provided interpretation plans have good understandings of the important stories and history of their communities, and are proactively working to diversify the way they share this information. A number of museums do not have any hands-on activities or programs available, and are still operating as static exhibition spaces. It should be noted that the number of museums that have no school programs available is very close to the number of those that do not have hands-on programming. The average score for this question was 17.3 out of possible 24.



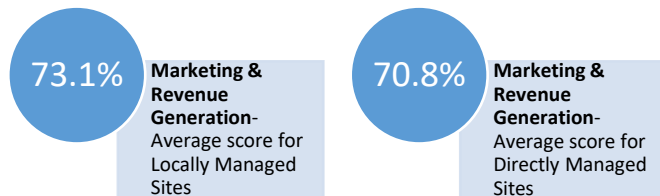
The **Community** section will be discussed further in scoring influences, but this has been flagged as a high priority for support initiatives. One area that would benefit from further research and work is the

use of visitor statistics to focus programming and marketing efforts. Less than half of the museums evaluated were able to demonstrate in a tangible way that visitor statistics are used in their planning efforts. The visitor statistics that are collected are not useful in program development.



Marketing & Revenue Generation, again demonstrated that overarching planning documents are often lacking. While many museums submitted fundraising plans, these were often vague, did not include

tangible goals or financial projections, and focused on small-scale activities. This section also asked about active social media presence. About ¼ of the sites are not active in social media.



Museum Feedback from Site Reports

Site reports were mailed and staff/board had one month to review and respond. Most often requests for change or review from sites were:

- Minor scoring and/or wording changes. Wording changes were required either when:
 - ANSM staff preparing the site report used a “boilerplate” response and did not have the context of the individual site or its evaluation to customize the response appropriately. ANSM has noted this challenge and is developing a process to avoid this in future.
 - ANSM had chosen to include unedited quotes from site evaluators and participants as, primarily positive, feedback. These quotes were sometimes noted as ‘unprofessional’ and were removed when noted.
- Emphasis on score rather than comment and recommendations. There seemed to be a prevailing sense that their NSM designation, or an independent site decision, prevented them from scoring well on some “good practice” statements or in some area of a standard, and so they should be considered “not applicable” and not scored. The score seemed to be more important than the recognition of where they did well or opportunities for improvement. Feedback from one site manager of DM sites, seemed to imply that the evaluation questions were weighted in favour of CMAP sites who didn’t have these “barriers”.
- A few organizations required detailed responses, repeat feedback and, in one instance, a one-on-one meeting with the ANSM executive director for clarification and discussion.

Scoring Influences

- There was some confusion about receiving different information from NSM, their usual source for advice and support, versus ANSM. Site staff were new to outside evaluation and many had trouble responding to questions outside their responsibility as site managers, despite regular Q&A correspondence from ANSM and the provision of specific documentation review and site evaluation expectations months ahead of the process.
- Some sites scored well in areas where a site manager has developed site-specific resources e.g. binders of research material on the site and its collections, emergency & disaster plans in a “quick review” format posted in strategic locations, self-produced labels with diagrams/photos to show how equipment worked, or what a site looked like in its working life, collections inventories which were then conducted by on-site staff, one site received a much needed and accessible outdoor washroom by partnering with a rails-to-trails group.
- Locally-managed sites, which also operate their own museum(s) and/or other services nearby their NSM site(s), were scored only for their NSM site as much as they could be separated. If evaluators had been asked to include Society offerings their scores might have been higher e.g. more programs, more washrooms and amenities etc.

Governance

A stronger relationship between the NSM Board of Trustees and DM sites would be beneficial. While the Board role is to provide an advisory function for NSM as a whole, it is important that site personnel have an awareness of Board role, background expertise and interest. Typical museum governance responsibilities such as **site-specific**: mission statements, strategic plans and policies are developed and provided by NSM central management staff.

Mission Statements

Similar to CMAP sites evaluated in 2016, this was an area of weakness. The majority of NSM sites seemed unaware of their site-specific “Mission and Mandate” that had been included in the Department’s useful [*NS Interpretive Master Plan Framework*](#). Evaluators saw long and dated statements or marketing “brand” statements, with the exception of a few LM sites whose governing body had developed their own. Evaluators noted an overall trend that museum staff had difficulty articulating their sites’ purpose or stated mission.

Management

As with governance responsibilities above, DM sites, in particular, lacked site-specific policies such as Education & Interpretation (a nationally recognized strength of NSM in the 1980s) and site-specific plans/procedures e.g. Emergency & Disaster plan, and work plans. These seemed inconsistent as was awareness of centrally-managed policies such as Collections, Human Resources, and Exhibition, which should provide important operational guidance for sites.

Facilities

The Province undertook a significant commitment, as did governments across North America, in the 70s and early 80s, assuming responsibility for facility maintenance as part of its agreement with its directly and locally-managed sites. In addition, the Department of Transportation and Infrastructure Renewal (TIR) is responsible for prioritizing financial and human resources for the needs of NSM facilities and other heritage assets owned by the Province. Many of these are operated by 3rd party non-profit organizations, among all the other structures, large and small the Province has to maintain. Some museum staff expressed to their evaluators and in response to evaluation reports that license agreements should have been scored N/A for NSM sites as the provincial government owns the facilities. They felt that the lack of agreements should not be counted against them. ANSM's response outlined that this is good practice, and it is important that site management staff and, for locally-managed sites, their governing body, be familiar with the details, responsibilities and implications for their museums's operation in the

"The maintenance of buildings is exceptionally well done by our staff with limited funding. That said, we would see facility management as a weak situation for [the site]."

"That should also have an impact on NSM sites which are primarily inaccessible, in all ways, for visitors and staff. One [DM site], had an accessibility project approved which was terminated when it was discovered that the planned work was going to be more expensive to do than originally planned."

government owned facility or facilities. The properties owned by the provincial government are numerous. Nova Scotia Museum is a museum and its staff need to have clear documentation on how to handle issues – clarification of responsibility vs. authority.

Collections

The Province has public trust responsibility for its collections in 28 sites and 5 collections storage facilities throughout Nova Scotia. NSM Innovation, Collections & Infrastructure staff and curatorial staff of two DM year-round sites are responsible for all collections management and preventive conservation functions, monitoring the collections in its care and providing direct and indirect advisory services to all of its museums. The variety and nature of the facilities that display and house these collections make this a daunting task and they are doing excellent work. Currently they are addressing the need to replace an out-of-date and fragile collections management system and a structurally unsound collections storage facility.

Lack of access to Collections Management System

As per all sites, staff should have access to more complete collection records and be part of a system which allows them to directly access on-line records of objects in their care and that is both complete and includes images.

“One central issue that seemed to recur was the problem associated with the centralized cataloguing that is headquartered in Halifax and in some cases is inaccessible to the local sites. It made some of the exercises we did regarding collections problematic. Though the in depth local knowledge of employees was able to overcome most of these issues.”

Curatorial vs. custodial

Some custodial sites, which do not have collections staff, are technically managed by the NSM Collections Unit, and are not authorized to acquire artifacts on behalf of the Nova Scotia government, are both collecting and accepting donations from their communities. This is an expectation of communities. Without clarity in procedures or understanding of the implications of this challenge at the site, this may place NSM and the provincial government in a vulnerable position regarding ownership, donations, income tax receipts, repatriation, 'permanent loans', etc.

“In the case of [one custodial] museum, there was rampant deterioration of a building that was retrofitted for the purpose and allowed to more or less molder for the past four decades. The staff tries to look after the artifacts; but it is a chaotic collection of big items and assorted memorabilia that is mostly donated material from enthusiastic collectors.”

Interpretation

At a majority of NSM sites, evaluators noted a **disconnect between the NSM Interpretive Master Plan**, which includes specific and useful interpretive guidance for each of its sites, and **practice**. NSM has also provided its sites with copies of the 2015 *Toolbox for Museum School Programs*, developed by NSM Interpretation staff. Evaluators seldom heard reference to these documents or saw evidence that these were guiding practice.

Restored interiors of heritage buildings are generally regarded in the heritage sector as exhibits, with the building(s) themselves as the museum's largest artifact. This is not the case for NSM with structures designated as material assets under the management of TIR. Many DM and LM examples of these restored houses and industrial sites, lacked the landscape context of what had made them important in time past or the opportunities to make connections that might make them relevant to visitors today.

"There is some ambiguity between the notion of a living history site and a special museum that happens to be in a recovered building. In these cases the intent is clearly to tell how life was in times past, but the vehicle for the discussion is a specialized sort of museum, where there is little re-enactment and no period costume, etc..."

They ... owe their origins to the development of specialized museum initiatives about 40 years ago and have not been much changed after their initial preparation for display. And the problem of defining them as living history museums is problematic since there is a shortage of demonstration. The key element in ... [some] cases is the long serving staff and their expertise with the material world within which they operate."

Marketing & Revenue Generation

Many of the larger NSM sites around the province excel in this area of museum practice including media and social media presence and promotional partnerships with other local organizations. These sites offer relevant and revenue generating services in their communities that are not duplicated by local businesses. Planning or strategy in areas such as developing a distinct visual identity, fundraising (including self-generated revenue) and marketing were areas of weakness for some.

V. MUSEUM FEEDBACK

17 museums, a Unit response on behalf of the 5 NSM collections storage facilities, and NSM Summary Comments on the Directly-Managed Sites, responded to the site evaluation reports in some capacity. Some museums simply requested a digital copy, but others had questions and/or were seeking clarification on scoring or comments from the report. Below are remarks received by email, separated into positive and negative feedback. Museum affiliations have been removed to protect the privacy of the individuals.

Positive

We appreciate the valuable feedback and recommendations for solutions to issues.

Well, it was a process but a good one to go through. Great team at our house! I enjoyed them all. Thank you for the opportunity to take a closer look at how we do business.

We were quite pleased with the results of the evaluation and it highlights where we can improve for the future, and where there are some areas of confusion. Lots of work to be done for the next season.

“... in future all five storage locations [should] be evaluated into a single report as all of these facilities are managed by the ICI Collections Unit under the same policies, procedures and staff and all under the responsibility of the Manager of Collections...Additionally, off-site storage facilities were evaluated under the same criteria as staffed storage facilities – this would be like evaluating a rental locker by the same conditions as a household. By evaluating the off-site facilities as part of the larger collections unit it would have a more complete assessment of the NSM collection...the Collection Unit also be evaluated on Governance, Management (HR), as well as some Interpretation and Community questions as these are areas of the Collection Unit’s work are not currently captured in any ANSM Evaluation.”

- NSM Collections Staff

Being this is our first evaluation, we have reviewed the document and feel that this report provides us with a good baseline assessment which we can use as we move forward in aligning our organization to the Nova Scotia Museum standards and guidelines. This report will help us to identify and establish our priorities as we put in place our business plan for the upcoming year. It should be noted that some concerns identified in your report are currently being addressed and by the end of our fiscal year these concerns will be resolved.

Again, on behalf of the board and staff, we want to thank you and your team in undertaking this initiative and we will work to address the concerns in this report. In doing so we will ensure that we continually use our unique cultural nuances defining our resolutions to the issues. These culture-centric solutions truly lend to the richness of our defining our diverse Nova Scotia history.

Negative

In general, I think the ASNM evaluation really needs to adapt itself going forward to the very different circumstances of a government run and administered museum. The mantra seemed to be from the outset that in a spirit of 'fairness' that we be evaluated exactly the same way as the community museums are.

As a general comment we felt the evaluators and the entire evaluation process had a very narrow view of what a museum should be and what they were looking for. The evaluation process seemed to have little understanding of how the Nova Scotia Museum operates. It seemed there was a lot of trying to fit a round peg in a square hole. The process also seems to set an expectation that each museum should attempt to be all things to all people. We feel this outlook may be a trap that results in trying to do too many things and doing none of them very well. We feel that each museum is unique and should focus on its strengths in an attempt to do a few things to a very high standard. Expecting that each museum offers a vast range of products and services set up an environment where sites try to compete and one up each other rather than an environment of partnership and collaboration between sites.

Many of the comments made by the evaluators and the scores received were appropriate and do reflect areas where we have work to do. None of these came as a surprise. Unfortunately the time to complete the evaluation process would have had a better impact on the site being dedicated to addressing these areas rather than on the evaluation itself.

Thank you for the opportunity to provide these comments.

The Museum evaluation report dated August 25th 2017, prepared by ANSM, consistently failed to recognize or acknowledge the existing site management agreement under which [the Society] manages [the Museum] on behalf of Nova Scotia Museum (NSM); it also fails to report statements made by the evaluation team during their onsite visit.

The [Society] hereby requests a complete and full review of the evaluation.

VI. CONSIDERATIONS

Mission – Those NSM sites that have not recently reviewed (the existing one for their site from the NSM Master Plan Framework) or developed their own mission statement, with input from their communities, would benefit from both the process and the result. This mission would provide keystone for policy, for planning, for its own evaluation, and help the institution recognize opportunities, rather than barriers, to making change.

*A well-conceived mission statement provides the foundation for leadership to shape institutional vision, values and strategic plans as well as other operational documents, such as policies, that guide the work and direction of the institution.”*¹Gail Anderson, Museum Mission Statements: Building a Distinct Identity

Typically, a museum’s mission statement will be:

- Specific
- Developed by the museum’s governance board and staff, in consultation with its communities
- Unique to its purpose i.e. community-focused, not internally focused
- And answers the questions:
 - What business are we in?
 - Who do we serve? *The communities or audiences we want to serve.*
 - Why do we exist? *The difference the museum makes in its community and what it will provide the community (audience) it serves in support of the end goal*

If a museum is also a designated heritage property, such as a national historic site, its’ mission – to protect and conserve the site – is established by the designation.

Relevance – This is a good news story. Our citizens and our visitors want to engage with their heritage and they want to develop personal relationships with their museums.

CONSIDERATIONS

1. Mission
2. Relevance
3. Volunteers
4. Heritage Assets
5. Recognition of the inherent collecting role of community-placed organizations
6. Consistency in Support & Communications
7. Current Museological Standards & Succession Planning
8. Provision/support for professional development

¹ Gail Anderson, ed. Museum Mission Statements: Building a Distinct Identity. Washington, D.C.: American Association of Museums, 2000, p.1.

- **Collections Management**

A number of museum staff shared that their sites are perceived by their local or cultural communities as “memory institutions”. People want to be able to donate their cherished family belongings, share their stories, and value opportunities to work or volunteer at “their museum”. The Nova Scotia Museum should consider developing clear procedures and empowering on-site staff to address these community needs, such as having a collections team at each site.

- **Interpretation**

Audiences want to engage with ideas, they want to engage with the staff, they want to engage with the place. They want an experience.

“We saw a number of restored houses, mill sites, and other restored buildings. In all cases the site itself was the exhibit. ... They are all [but one] suffering from lack of necessary upkeep and will sink into disuse if not recovered and enlivened with new interpretive initiatives.”

- **Marketing**

NSM feedback in this section is that their directly-managed sites are required to follow Department of Communications NS guidelines. While Communications’ mandate is to foster a standardized brand and style for all communication from the province, current audience expectations have the opposite effect. Social media is the audience reaching out to individual sites to create relationships. NSM should be able to participate with its publics in the manner and places they are looking for museum experiences. Likewise, restraints existing due to a central marketing “hub” represented by the general website for NSM mean flexible and timely response to changes are difficult to achieve. A number of sites have established their own marketing strategies and tools.

“Some directly-managed sites aren't online but people are taking photos, checking in, and so Facebook has created profiles for the museums automatically. People are trying to reach out and connect with them without response.”

Volunteers – It is solid practice and an important community engagement opportunity to offer a volunteer program. Feedback received from some sites was that NSM does not/should not have volunteers.

- NSM can encourage sites to develop their own volunteer program. Some examples of volunteer contributions are:

- ✓ Representing various audience perspectives on exhibit planning and/or public program planning teams; accessibility audits
- ✓ Collecting oral histories: from local citizens, from current interpreters
- ✓ Undertaking fundraising for a cherished site project, that the site's status won't enable the staff to undertake, but will benefit the local community

Heritage Assets – Nova Scotia has a stewardship responsibility for many heritage assets that are open to or used by the public and many of these are operated by non-profits. Suggest that TIR put in place **a team with a province-wide mandate and overarching approach to heritage asset management with specific expertise in heritage infrastructure**. This team could work in close partnership with NSM.

In its stewardship role and using a **Cultural Resource Management framework**, it can effectively implement mechanisms to ensure that:

- **staff, visitor and collections safety** is monitored regularly
- **staff and visitor accessibility** receives consistent consideration for all of its sites
- Identification of accessibility challenges and **plans for remediation are a priority**
- **Site integrity and structure is maintained while providing public access and interpretation.**

"[This museum] is a new build and only has a smoke detector."

"Directly-managed sites check off more of the safety boxes than locally-managed sites."

*"This offers another valuable opportunity to **work with volunteers from the community**, including those who experience accessibility challenges, to develop and conduct an accessibility audit of their site."*

"There are no exit signs for people in those historic houses. Safety is more important."

Recognition of the inherent collecting and custodial role of community-placed organizations –

How can the existing provincial collecting model be adapted to support this valuable community connection with its museum?

- **Site staff** (or a **collections volunteer/committee**) conduct a regular collections inventory that follows an appropriate process and includes a record with date of inventory, list of items (including accession number), notes on any damage or wear on objects, and anything that should be communicated to NSM staff. Good practice in the sector would be to conduct a collections inventory twice a year e.g. at the beginning of the season and end of the season (for seasonal sites).

- NSM needs a **collections management system that not only provides collections information access to all its' sites but also shares this information with the public**, following the current standard for Collections Management Systems (CMS).

Consistency in Support and Communications – Some sites expressed concerns that they didn't always have success knowing who to call, how to navigate government, and in developing a good working relationship with key individuals. Some sites appear to be receiving far more resources and support than others. Some say calls/emails are never returned, while others commended the support they receive from NSM.

Current Museological Standards & Succession Planning – As with the rest of the cultural sector, long-term staff are retiring and triggering a loss of institutional and professional knowledge. NSM takes its dual roles as part of the civil service and responsibility to serve museums and their publics seriously. **Working within the NS government HR framework impedes timely staffing, and also the flexibility to hire people with specialized skill sets within the HR structure.** There can be lengthy delays in the hiring process.

- NSM needs to **attract young professionals with museum training** who will bring their knowledge, ideas and enthusiasm for standards of good museum practice to NSM sites. Each year Nova Scotians are going out-of-province for diplomas and degrees in museum studies, few are finding opportunities to come back.
- If they cannot immediately advertise positions on the Canadian Museums Association job board or other accessible museum job sites where these people are looking, NSM needs to be able to **require museum educational qualifications in its job postings.**

Museums are about history and communication but they seldom document their own institutional history including decisions made.

- **Lack of detailed job descriptions**, in some cases, can mean that when an individual leaves, knowledge of the job leaves with them. An overlap or practice such as job shadowing would help. It was noted that in some cases people also retire with no period of notice.
- **Legacy information is critical.** Interpretive staff at many restorations and living history sites have a wealth of knowledge about their site, their communities; their culture, including way of life...the stories. Along with collections expertise and institutional practice, these stories need to be documented.

Provision/support for professional development including resources - NSM has brought in inspirational speakers, such as the recent co-author of the *Anarchist's Guide to Historic House Museums* Franklin D. Vagnone, and produced excellent audience-focused resources for all of its

museums, that do not appear to be implemented at the sites. **How can NSM enable its sites to transform these approaches and resources into good practice for the benefit of its audiences?**

- Broaden staff access to learning opportunities as well as scheduling that recognizes seasonal staffing framework. **How can NSM ensure that the professional development they are providing is communicated and applied back at the sites?**

“Training is a morale boost and good for succession planning. It can be rejuvenating.”

In Closing

As stated within many of our findings, **Nova Scotia’s Culture Action Plan**, identifies both challenges and opportunities. NSM has an important role to play in sharing the province’s stories. The audiences are there and it is up to “Nova Scotia’s provincial system” to help clear some of its’ own built-in obstacles to achieving “Excellence in Cultural Stewardship”.

Theme 5 Excellence in Cultural Stewardship

“The Nova Scotia Museum, Nova Scotia’s provincial museum system, tells our communities’ extraordinary stories—our natural history, our people’s history, our seafaring traditions, our industrial heritage, and our artistic life. The buildings themselves house enormously important artifacts and archives that are a crucial part of our shared culture. But to experience the true diversity and points of view of all Nova Scotians, we also need to collect and understand the stories and significant objects of today for the benefit of future generations.

The Nova Scotia Museum faces many challenges as it strives to tell Nova Scotia’s stories. Aging facilities, lack of access to technology, and limited support for updating interpretation and exhibits all hamper its efforts to tell those stories in a digital world. Traditionally, our museums have been telling stories predominantly through the lens of Anglo-Scottish culture. To reflect Nova Scotia’s diversity and ensure our museums remain relevant, especially for younger Nova Scotians, we need to refocus the system. We need the Nova Scotia Museum to focus on diverse stories of provincial significance to fill the gaps in our provincial narrative. We need to work with our museum colleagues to continue to meet the challenge of telling stories in the 21st century, stories that engage Nova Scotians.”

Terms of Reference

Museum Evaluation Program Steering Committee

Purpose:	To provide vision, expertise, and guidance to ANSM on the Museum Evaluation Program (MEP).
Roles & Responsibilities:	<p>The committee shall advise ANSM in some or all of the following areas:</p> <ol style="list-style-type: none"> 1. Development and testing of evaluation criteria 2. On-site evaluation process 3. Pre-Evaluation Review 4. The overall participant experience, at all levels and stages, within the scope of the program. 5. Evaluator criteria, selection, and training 6. Review of evaluation score grievances <p>Committee members will be expected to:</p> <ol style="list-style-type: none"> 1. Think broadly about the information needs and perspectives of stakeholders who are not represented in the planning process and ensure that a variety of perspectives is represented. 2. Act as champions for the Museum Evaluation Program. Demonstrate to other stakeholders an interest in the process and products of the evaluation. Reinforce the notion that evaluation activities are intended to be helpful to museum workers and other decision makers. <p>As this is a working committee and members have expertise in different areas, members may be asked individually to assist on certain aspects of the work. Regional representatives may assist with communications between ANSM and participating organizations.</p>
Membership:	<p>The MEP Steering Committee shall consist of 9 members who have expertise related to one or more areas of the evaluation program. Two representatives from the Department of Communities, Culture & Heritage (CCH) will provide government perspective. Committee members may be part of other ANSM groups such as the Board of Directors.</p> <p>The committee includes participants of MEP, representing a variety of museum types.</p> <p>Individuals applied for committee membership and were selected based on:</p>

Appendix 1

	<ol style="list-style-type: none"> 1. Knowledge of and experience with museum evaluations 2. Regional diversity 3. Size and operating structure of museum <p>ANSM & CCH shall have two members each on the committee, but only one vote each.</p> <p>The committee shall appoint a chairperson and a secretary. The chair will be responsible to ensure meetings are organized and held in timely fashion, committee goals, appropriate membership and participation in the committee is maintained. The secretary shall prepare, maintain and circulate minutes of meetings and other supporting documents.</p> <p>The committee may recruit specific expertise to advise it or address specific situations, as required. Any such individuals are not formal members of the committee and will not participate in final decision making.</p>
Meetings:	<p>The committee will meet 4-6 times per year depending on the program timeline. Meetings may be held in person or by teleconference and it is the responsibility of the chair to call and organize them. Members are expected to:</p> <ol style="list-style-type: none"> 1. Act collectively as a group and not in the interests of a specific region, board or organization. 2. Adhere to all ANSM policies and practices including confidentiality and privacy. 3. Respect decisions made by majority vote.
Commitment:	Members serve until the evaluation renewal process is complete and should expect 5-10hrs/month of work.
Formal Reporting:	<p>The committee liaises with the ANSM Managing Director who reports to the Board and membership through regular meetings and communications about the progress of its activities.</p> <p>The Executive Director acts as a fulcrum ensuring that all ANSM projects and initiatives, often inter-related, are carefully aligned and in accordance with the strategic plan.</p>
Review & Evaluation:	<ol style="list-style-type: none"> 1. The Terms of Reference shall be updated as required.
Endorsed by:	



Museum Evaluation Program Evaluator Application

The goal of the Museum Evaluation Program is to conduct professional assessments of museum operations by engaging with qualified, experienced individuals, which will result in helpful, practical feedback and advice to community museums of Nova Scotia.

Contact Information

Name	
Organization	
Street Address	
City, Province, Postal Code	
Daytime Phone	
E-Mail Address	
Available July 11-29, 2016	<input type="checkbox"/> Yes <input type="checkbox"/> No

Note: If possible please include a current résumé.

With which region in Nova Scotia would you most identify:

Region: ☐ Cape Breton ☐ Central/Halifax ☐ Northeast ☐ Southwest

Which position(s) have you held in museum-related work? (check all that apply):

Position: ☐ Staff ☐ Volunteer ☐ Board

Appendix 2

With which museum(s) in Nova Scotia do you have (or have you had) a working relationship?

Interest

Please tell us why you are interested in volunteering as an evaluator.

Special Skills or Qualifications

Please tell us about any experience you have in the following areas:

**Have you been involved previously with CMAP or other museum evaluation programs?
If yes, please explain:**

Appendix 2

Museum/heritage related experience. Please include relevant training & dates, and years of experience:

**Do you belong to any heritage organizations such as CMA or your local historical society?
If yes, please list them:**

Areas of Expertise. We are interested in learning about your specialty areas of knowledge and/or experience. Please check all that apply:

Governance:

☐ Policy Development

☐ Strategic Planning

☐ Working with Boards

Appendix 2

☐ Other:

Management:

☐ Accounting/Financial ☐ Human Resource Management ☐ Insurance ☐ Legal
☐ Other:

Facility:

☐ Built Heritage Standards ☐ Facility Maintenance ☐ Emergency Planning
☐ Security ☐ Other:

Collections:

☐ Conservation ☐ CMS Databases ☐ Documentation Standards
☐ Research ☐ Storage ☐ Other:

Interpretation:

☐ Exhibit Design ☐ Personal Interpretation ☐ Program Development
☐ Program Delivery ☐ Other:

Community:

☐ Partnership Projects ☐ Regional Heritage Groups ☐ Visitor Statistics Analysis
☐ Volunteering ☐ Other:

Marketing & Revenue Generation:

☐ Fundraising ☐ Marketing ☐ Retail ☐ Social Media
☐ Other:

2017 Evaluator Biographies

Joe Ballard: Joe Ballard holds the position of Senior Preservation Consultant at Vineberg & Fulton Ltd. He provides advice on the maintenance and treatment of heritage sites and buildings throughout Nova Scotia. He is the president of Heritage Trust of Nova Scotia and a past president of the Colchester Historical Society. Joe was an evaluator for the Museum Evaluation Program in 2016.

Cathy Blackburn: Cathy Blackburn has worked at the Ontario Museum Association and was a Museum Advisor for the Ontario Ministry of Tourism, Culture and Sport. She has conducted standards reviews, taught workshops, developed new resources, and worked in and with a wide variety of museums – large and small. Cathy was an evaluator for the Museum Evaluation Program in 2016.

Robert Ferguson: Robert Ferguson is a retired Parks Canada archaeologist. As well as leading excavations throughout Atlantic Canada, Rob has worked on the development of management plans and visitor centre exhibits at national historic sites, including Grand Pre and Canso Islands. He was the regional lead for the First Nations History Framework, working with FN communities to recognize and commemorate sites of national significance, and has been a team member in the development and presentation of Cultural Resource Management for First Nations workshops at the regional and national levels.

Cathy Gillies: Cathy Gillies is a retired teacher and volunteer with the Chestico Museum and Historical Society in Port Hood, and is President of Heritage Cape Breton Connection. She has a Fine Arts degree and Education degree and has worked in heritage organizations for the past 37 years both as an employee and volunteer. She has completed a certificate in Archival Management from the Council of Nova Scotia Archives and has organized a number of museum events in recent years. This year she is organizing a Canada 150 event for the Chestico Museum.

Denise Hansen: Denise Hansen worked in collections and heritage education at Parks Canada and currently works as a heritage and education consultant. She also tutors at a private learning centre. Denise's volunteer work has included teaching English as a second language and being a historic storyteller for a graphic recording program at nursing homes. Currently she is conducting interviews with residents at a local care facility as part of a new volunteer Living History program. Denise was an evaluator for the Museum Evaluation Program in 2016.

Del Muise: Del Muise is a retired professor of history from Carleton University whose experience with museums includes working at the Canadian Museum of History and as the director of a Public History Masters Degree program. He is on the boards of the Margaree Heritage River Society and the Margaree Salmon Museum. Recent scholarship includes

Appendix 3

Canadians and their Pasts, which surveyed Canadians on their heritage activities and engagement with museums. He has an ongoing project researching cruise tourism and heritage organizations in Nova Scotia.

Anita Price: Originally from Wales, where she participated in a museum apprentice program, Anita has over 25 years' experience working in the museum field. She has worked with community, municipal, provincial and federal museum and heritage organizations and brings this wealth of experience to her role as Executive Director for the Association of Nova Scotia Museums. Anita was an evaluator for the Museum Evaluation Program in 2016.

Maurice Smith: Maurice Smith is Curator Emeritus of the Marine Museum of the Great Lakes and remains very active in his retirement from the heritage sector. He has served as President of the Ontario Museum Association, Canadian representative on the Council of the International Congress of Maritime Museums, President of the Kingston Historical Society, and President of the Canadian Nautical Research Society.

Virginia Stephen: Virginia Stephen has experience as a consultant, staff member and volunteer at several museums, heritage and arts organizations, including the Art Gallery of Nova Scotia. She has taught museum studies, practice courses and workshops for staff and volunteers, and has previously served as an evaluator for the Alberta Museums Association Recognized Museums Program. Virginia was an evaluator for the Museum Evaluation Program in 2016.

Elisabeth Tower: Elisabeth Tower has experience in interpretation and education in museums and historic sites in both Ontario and Nova Scotia, including as Education Manager at Pier 21. She holds an education degree and license, a masters in educational technology, a postgraduate diploma in cultural resources management, and her work has specialized in the incorporation of Historical Thinking into museum interpretation.

Museum Evaluation Program
Evaluation Teams & Site List
2017

	Evaluators	Sites Evaluating
Team 1	Anita Price Virginia Stephen Maurice Smith (weeks 1 & 2) Rob Ferguson (week 3)	Black Loyalist Interpretive Centre Dory Shop Museum Fisherman's Life Museum Fisheries Museum of the Atlantic Fundy Geological Museum McCulloch House Perkins House Ross-Thomson House Sherbrooke Village Wile Carding Mill
Team 2	Cathy Blackburn Denise Hansen Del Muise	Balmoral Grist Mill Barrington Woolen Mill Cossit House Firefighter's Museum of NS Highland Village Lawrence House Mines Building Storage Facility Old Meeting House Sutherland Steam Mill Village Historique Acadien
Team 3	Joe Ballard Rob Ferguson (weeks 1 & 2) Elisabeth Tower (weeks 1 & 3) Cathy Gillies (week 2) Maurice Smith (week 3)	Haliburton House Maritime Museum of the Atlantic Museum of Industry Museum of Natural History Cultural History Storage Facility (MNH) North Hills Museum Prescott House Ross Farm Museum Uniacke Estate Museum Uniacke Storage Facility

Museum Evaluation Program
Site Evaluation Schedule
2017

	Morning	Afternoon
July 11th	Cossit House Fisherman's Life Museum Museum of Natural History	
July 12th	Highland Village Sherbrooke Village Uniacke Estate Museum	
July 13th	McCulloch House Museum of Industry Uniacke Storage Facility	
July 18th	Fisheries Museum of the Atlantic MOI Storage Facility Prescott House	
July 19th	Balmoral Grist Mill Black Loyalist Centre Haliburton House	Sutherland Steam Mill
July 20th	Lawrence House North Hills Museum Ross-Thomson House	Dory Shop Museum
July 25th	Firefighter's Museum Fundy Geological Museum Maritime Museum of the Atlantic	
July 26th	Ross Farm Museum Village Historique Acadien Wile Carding Mill	
July 27th	Barrington Woolen Mill Perkins House	Old Meeting House

