

12/4/2018

# Annual Report

Museum Evaluation Program

2018

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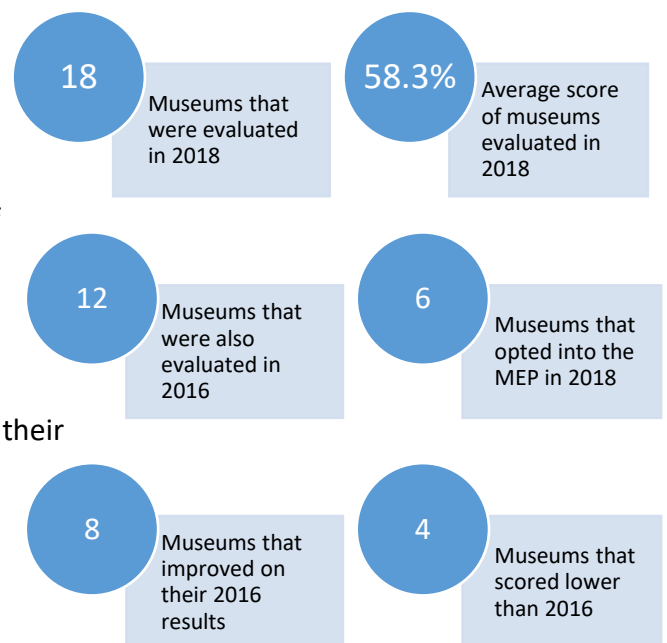
## I. Executive Summary

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 best practices in Nova Scotia’s museums”. In complement to its commitment to professional best practices, ANSM partnered with the Department of Communities, Culture and Heritage (CCH) to undertake the delivery of museum evaluations and implemented a Museum Evaluation Program (MEP) in 2016. Organizations participating in the Community Museum Assistance Program (CMAP) were the first to be evaluated in the new program, after which the Nova Scotia Museum sites were evaluated in 2017.

The Museum Evaluation Program includes:

- MEP Working Group
- Evaluation orientation sessions
- Guidance and support for participating museums
- Documentation Review
- Site Evaluation
- Application and review process for selecting evaluators
- Evaluator training and resources
- Evaluation reports for participating museums
- Research and development work in preparation for the establishment of an accreditation program

In consultation with CCH, in 2018 ANSM re-evaluated those CMAP organizations that struggled with the 2016 evaluation process. The MEP was also opened to other participants, and six organizations opted to participate. While the initial list of organizations to be evaluated was 21, three dropped out of the process in the final week before the Documentation Review deadline (May 4, 2018), and one dropped out of the process the morning of their Site Evaluation. The latter faced a unique situation and regretted being unable to participate fully and so was sent an amended report with the results of their Documentation Review submission. Two

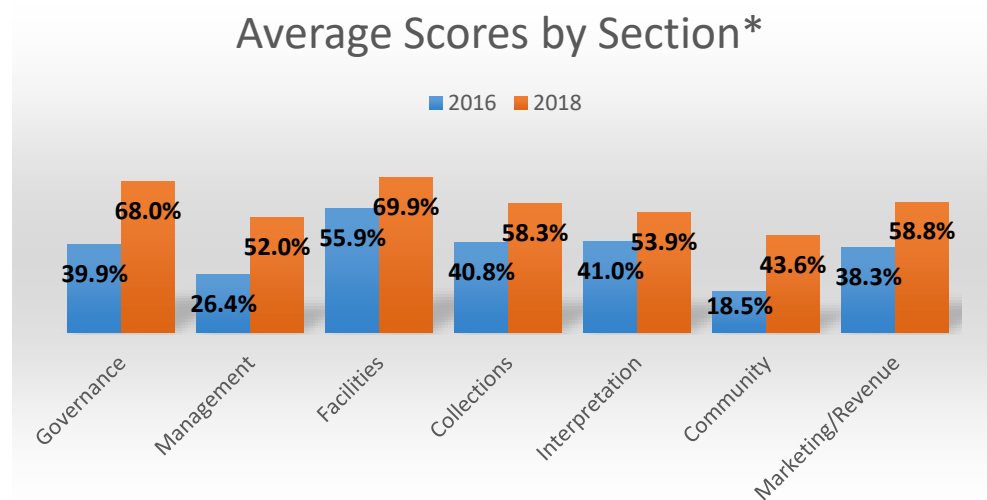


museums did not submit anything for Documentation Review, one of which experienced extenuating circumstances which resulted in an amended report.

The two-part evaluation process (Documentation Review and Site Evaluation), resulted in comprehensive reports for each organization. The reports enable museums to review their operations with the assistance and input from qualified museum professionals, so that they can build on strengths and address weaknesses. Analysis demonstrates that many museums utilized their 2016 evaluation reports and results to improve their organizational practices, but that more support, guidance, and time is required for others to alter longstanding methods of operation. It is also clear that the numerical results have

been greatly skewed by the two lowest scoring museums.

\*Note – section averages for 2016 were derived only from those museums re-evaluated in 2018.



This report outlines the Museum Evaluation Program methodology, analyzes scoring trends, shares feedback from participating organizations and evaluators, and details some considerations for specific areas of museological practice. Supporting documents are provided as appendices.

## II. Preparation Work

### Museum Evaluation Program Working Group

In 2014 a steering committee was established to provide vision, expertise, and guidance to ANSM during the development of the new MEP. This committee has evolved into a Working Group (MEPWG) (**Appendix 1**), which is a more accurate reflection of the dedication and hands-on approach taken by the group. The MEPWG consists of 10 members, representing museums of all sizes and operating structures, as well as evaluators and municipal and provincial government employees responsible for

museums/heritage assets. A standing invitation to work with the group has been offered to the program officer for the Community Museums Assistance Program.

The MEPWG meets 4-6 times per year. They review and revise questions to ensure clarity, select evaluators, discuss concerns or issues raised by museums and/or evaluators, and provide insights and guidance on how to improve the program for all involved.

Current MEPWG members:

- Oralea O’Byrne (Chair), Age of Sail Heritage Centre/ANSM Board of Directors
- Lyne Allain, Mahone Bay Museum
- Cathy Blackbourn, MEP Evaluator
- Karin Kierstead, ANSM
- Janice Kirkbright, Cole Harbour Heritage Farm Museum
- Valerie Lenethen, MEP Evaluator
- Maggie MacIntyre, Nova Scotia Museum
- Susan Marchand-Terrio, Isle Madame Historical Society
- Kellie McIvor, Halifax Regional Municipality
- Anita Price, ANSM

### Evaluation Timeline

ANSM strives to be as transparent and informative about the MEP as possible. As such, one of the first tasks for 2018 evaluations was to develop a timeline (**Appendix 2**) that could be posted on the ANSM website and enable museums to incorporate the MEP into work plans. All key dates and deliverables are included, so anyone can see the various elements included in the program, whether relating to a museum being evaluated, evaluator involvement, or ANSM’s reporting requirements to government. The timeline was also shared and discussed in detail during the Evaluation Orientation Sessions.

### Evaluation Orientation Sessions

Museums slated for evaluation in 2018 were invited to attend one of three orientation sessions, which took place in October 2017. Neutral venues in various parts of the province were chosen to host the sessions, easing travel time for museum representatives. CCH representatives were informed of the dates and locations and invited to attend.

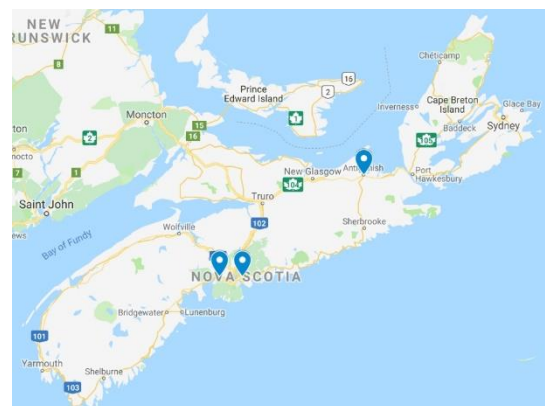


Figure 1: Evaluation Orientation Sessions

Each museum slated for evaluation was contacted directly and informed of the orientation sessions and encouraged to send multiple representatives. Results from 2016 and 2017 demonstrated that museums fared better with the evaluation when multiple people attended these sessions. It appears that more people receiving and sharing information within an organization results in a higher level of understanding of the program. ANSM theorizes that this demonstrates a higher success rate for those museums that take a team approach to preparing for evaluation. Multiple contact attempts were made with museums that did not register or respond to messages about evaluation and/or orientations. All communications and contact attempts were tracked throughout the course of the program (**electronic attachment**).

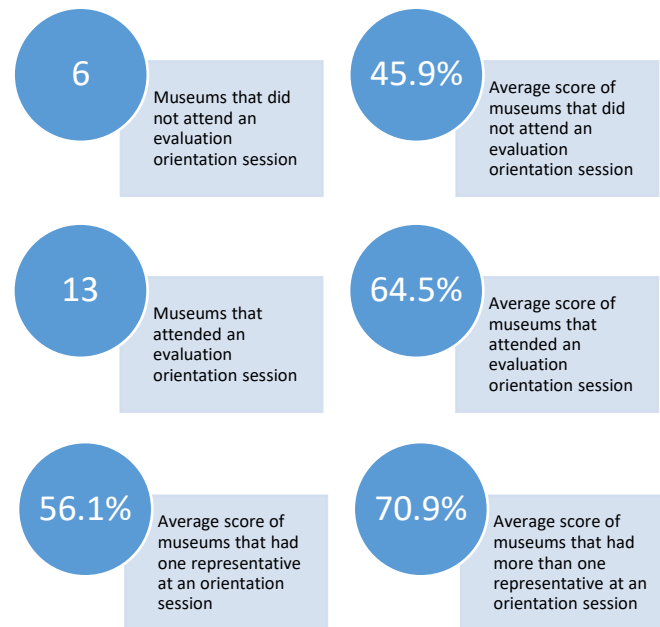
Overall, 24 individuals representing 13 museums attended the sessions:

Antigonish – 4 individuals from 3 museums

Dartmouth – 6 attendees from 4 museums

Upper Tantallon – 14 attendees from 6 museums

Of the 18 museums evaluated in 2018, 12 attended orientation. 6 museums declined or were unable to attend, and one museum registered but did not attend. Two of the three museums that dropped out of the MEP prior to the Documentation Review deadline did not attend orientation.



Orientation sessions were divided into two parts. The morning consisted of an overview of the evaluation program and process, with highlights on key areas and questions for each section. The afternoon focused on the two weakest areas of the 2016 and 2017 evaluations: Management and Community. Current standards and good practices were shared, meaning that attendees essentially received a primer on the subjects. A question and answer period at the end of the day enabled participants to ask about anything not covered during the orientation. Feedback on this approach was positive and appreciative, with many participants expressing how helpful the session was for both evaluation and daily operational purposes.

### Support for Museums

The primary means of support contact for museums participating in MEP was email. Sign-in sheets from the orientation sessions were used to build an email group list, and other museum contacts were added to ensure that each museum was receiving the

same information. Group emails were somewhat sporadic throughout Fall 2017, but became a weekly/bi-weekly occurrence in 2018. These “Q&A” emails addressed questions received from every museum. When a museum sent a question to ANSM, they received an individual response immediately, and then their question was added to the next Q&A email so the entire group would benefit. 16 Q&A messages were circulated to the email group over the winter/spring, leading up to the Documentation Review deadline. Email communications then lessened in frequency as there were fewer questions relating to the site evaluation.

Updates and resources were also shared via the [ANSM website](#), [Facebook page](#), and [staff blog](#). ANSM staff also attended regional heritage group meetings to provide updates on the program, process, give reminders and tips, and to answer questions directly from museum workers. Museums were encouraged to direct any questions relating to CMAP funding or other CCH-related issues to CCH staff. As in years past, those museums that engage with their regional heritage network and attend these meetings scored better than those that do not attend or participate. The networking and casual learning environment and opportunities fostered within these groups are clearly beneficial to Nova Scotia’s heritage community.

49.1%

Average score of museums that did not attend a regional meeting within the past year

76.8%

Average score of museums that attended a regional meeting within the past year

### Evaluator Recruitment, Selection & Training

The call for evaluators was issued in January 2018, using the same application form used in the previous years (**Appendix 3**). 10 applications were received, primarily from individuals who had served as evaluators for the MEP in years past. Given the smaller number of organizations to be evaluated in 2018, members of the MEPWG were asked to review the applications and select their top 7 choices. Selections were reviewed and discussed, and eight applicants were chosen. Evaluation teams were arranged with three people each, ensuring that a range of skillsets would enable each team to effectively review all seven sections of the evaluation. ANSM’s Executive Director and two other evaluators with previous experience served as team leaders, and ANSM’s Manager of the Museum Evaluation Program and one other individual served as reserve evaluators who could step in if needed. Museums were provided with information about their evaluation team (**Appendix 4**) when the Site Evaluation schedule was circulated on April 20<sup>th</sup>.

Evaluators participated in an orientation day on July 4<sup>th</sup>. In addition to discussions about the evaluation process, this was a chance



Figure 2: Evaluator Orientation Day

to review museum questions and concerns raised in 2016 and 2017. For the 9 individuals that had served in past years, this was also an opportunity to hear about changes and updates to the evaluation questions, and to reconnect with their colleagues. Teams were given the list of museums to evaluate (**Appendix 5**), briefing notes on each organization (**electronic attachment**), and information about travel arrangements. Team leaders were instructed to be in touch with each of the organizations on their list to confirm their Site Evaluation dates and times. Teams were reminded of the importance of reviewing their evaluation forms prior to leaving the museums in case there were any major discrepancies in remarks or scoring. They were also encouraged to discuss the evaluations during their travels together. Teams sometimes held follow-up discussions via email to collaboratively draft general remarks and observations about the museums for inclusion in reports.

### Site Evaluation Scheduling

As in years past, the Site Evaluation schedule was set in collaboration with the organizations being evaluated. Museums were asked to submit blackout dates to ANSM by mid-March so that site evaluations would not interfere with staff vacations, fundraisers or other events, or any other considerations that would impact the organization's ability to participate in the evaluation process. Using this information, ANSM developed a schedule with evaluations taking place July 10-26<sup>th</sup>, Tuesdays through Thursdays (**Appendix 6**). As previously mentioned, Site Evaluation dates were circulated on April 20<sup>th</sup>, and team leaders reconfirmed dates and times with museums in early July.

## III. Evaluation Process

### Documentation Review

The first part of the evaluation was a Documentation Review (**electronic attachment**), which required museums to complete a form and submit supporting documents. Due May 4<sup>th</sup>, these policies, procedures, forms, and other information were reviewed to ensure that current professional standards are being followed. Several changes were made to the secure file transfer protocol (ftp) website to make the process easier for both ANSM and the organizations submitting files. Unique logins

### Association of Nova Scotia Museums Evaluation Program Submission Form

Welcome The Association of Nova Scotia Museums  
([support@ansm.ns.ca](mailto:support@ansm.ns.ca)).

Please ensure your submitted documents are titled to match the list below. Do not submit additional documents except as supplemental information for certain questions.

For any clarification, please refer to the full Documentation Review Form.

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.

#### 2018 DOCUMENT SUBMISSION CHECKLIST

##### SECTION 1: DOCUMENTATION REVIEW FORM

☐ Completed Documentation Review form

##### SECTION 2: GOVERNANCE

☐ Bylaws

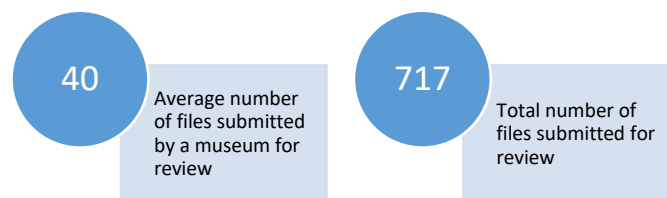
Figure 3: FTP Website Submission Page



were created for each museum, which enabled users to have more control over their submissions than in previous years by being able to review what had been submitted. Confirmation emails were also sent to both ANSM and the contributor for each upload. The main uploading page was updated to include a list of documents to submit for each section, providing museums with a checklist of required documents. This checklist (**Appendix 7**) was also posted to ANSM's website and circulated via the group email list.

ANSM monitored all communications with organizations slated for evaluation, and took a proactive approach to assisting each one prepare. In February, letters were sent to 8 boards of directors to ensure that they were adequately aware of deadlines and requirements for evaluation. Additional phone messages and emails were sent to uncommunicative organizations as the May deadline drew closer.

717 files were submitted for Documentation Review by 16 organizations. Two museums did not submit anything for Documentation Review. It was later learned that one had experienced extraordinary circumstances which resulted in a communication breakdown. This museum had registered for an orientation session but did not attend. The other museum provided no explanation as to why they did not submit anything for review, and was present at an orientation session.



All files submitted for Documentation Review were reviewed and scored by ANSM prior to the Site Evaluations. A distillation of each organization's submission was included in its Briefing Note so that evaluators were aware of what policies and procedures were in place.

### Site Evaluation

The second part of the evaluation was the Site Evaluation (**electronic attachment**), where three evaluators visited museums and spent approximately three hours completing the Site Evaluation form, making observations, taking photographs, and talking with museum workers. Evaluators documented the start and end times of the Site Evaluation for each site, so that this specific information could be included in each museum's report.



*Figure 4: Site Evaluation in Action*

In order to provide evaluators with a basic understanding of the organizations they would be evaluating, one-page briefing notes were compiled on each museum. As previously mentioned, these included an overview of the Documentation Review

submission, as well as contact information, mission statement, annual budget, facilities overview including ownership, governance structure and human resources overview, community involvement highlights, and links to the museum's online presence. Evaluators again expressed how helpful these notes are in preparing for the Site Evaluations and in understanding the museums' operating realities.

The Site Evaluation began with museums explaining their organizations, programs and activities to their evaluation team. As in 2016 and 2017, the way in which museums spent these 30 minutes differed greatly. Evaluators often left remarks on their forms about this time serving as a clear indication of the passion and dedication of a museum's board of directors and/or staff/volunteers. Museum workers were again forthright in their sharing of successes and struggles, which provided evaluators with even more valuable information about the organizations prior to the completion of the Site Evaluation. Several museums shared what improvements had been made since 2016, and how their organization had implemented recommendations from their 2016 evaluation report. It was noted that one museum was under the mistaken impression that the content of their 30 minutes of orientation time from 2016 was shared with their 2018 evaluators.

Evaluators then worked through the Site Evaluation form questions. Team leaders led a discussion of highlighted questions which required direct input from workers, and then each evaluator completed their own form. Evaluators made notes and observations, especially when they saw issues or concerns. They also took photographs for inclusion in the reports. Prior to departing, the teams discussed their findings to ensure that there were no discrepancies in their comments or scoring. When issues were discovered, the questions were reviewed and corrections or additional notes made. In some cases, evaluators chose to leave the scores as-is so the results would be reflected in the averaging of the three evaluator scores. In other cases, adjustments were made or partial points were recommended as a compromise.

### **Evaluation Report**

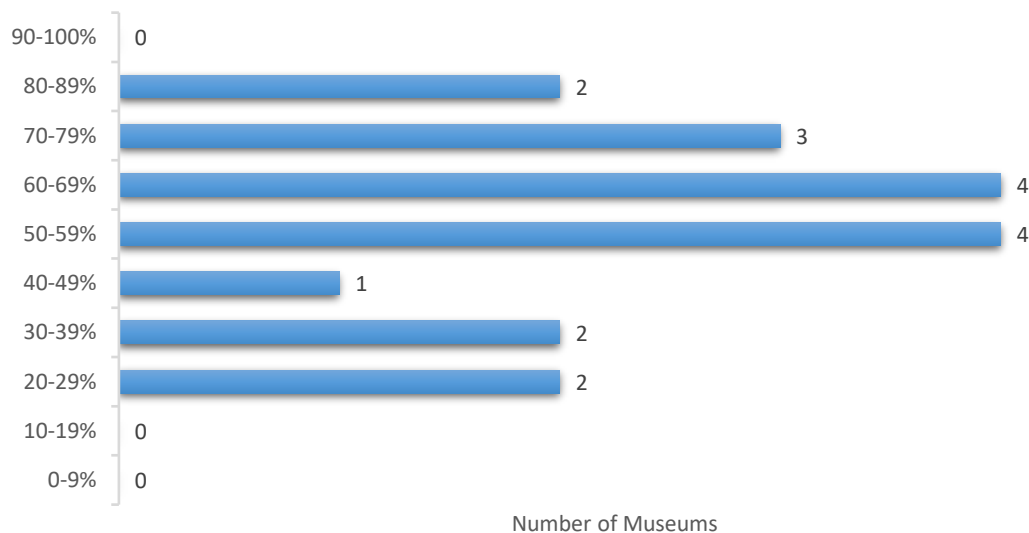
ANSM feels strongly that organizations must be given in-depth, comprehensive feedback on their evaluation results. While the new report format and content was surprising to many museums evaluated in 2016, feedback from this year demonstrates that boards of directors and workers have embraced the reports as helpful tools that can provide valuable guidance, especially during strategic planning. Several museums noted that the reports did much of the work for them.

Reports followed the same basic template as in 2016 and 2017, with some minor differences depending on whether or not the museum was new to the MEP or had been previously evaluated through the CMAP evaluation process delivered between 1995 and 2011.

Feedback from museums and evaluators resulted in several changes to the 2018 evaluation reports. An introductory message from ANSM’s Executive Director was included, which she personally signed in each report. As this was the first year in which ANSM could refer back to previous MEP results, a comparison between 2016 and 2018 results was provided. Special mention was made of any section scores that improved by more than 10%. A new section was added, entitled “How to Use this Report”, providing organizations with specific recommendations on how to review and address the evaluation findings. This addition was a recommendation from evaluators.

#### IV. Scoring Trends & Analysis

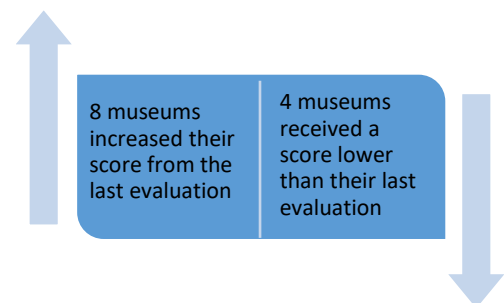
##### Museum Scoring Ranges - 2018



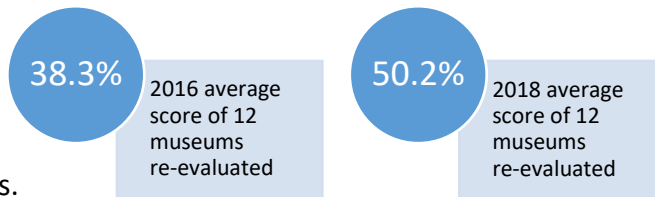
##### Results of Organizations that were Re-evaluated

It is important that the 2018 evaluation results are seen through a comparative lens. In 2016 ANSM was surprised by the variance in evaluation scores and results. The organizations evaluated this year included the 12 museums which struggled the most with the 2016 evaluation. It was hoped that improvements would be seen, but understood that for some organizations, two years would not be enough time to implement new procedures or programs that align with community needs.

ANSM was extremely pleased to see that for 8 museums evaluated in 2016, scores not only increased, but increased significantly – by at least 10%. Each of these museums spent a significant amount of time and resources to



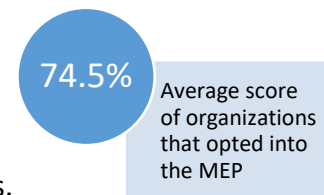
address the findings of their 2016 report, and implement appropriate changes. While some of their results still may not look impressive from a numerical standpoint, they should be commended for how seriously they took the evaluation preparations, and how many improvements they were able to make in just two years.



On the other end of the spectrum, four museums fared worse in their 2018 evaluation than their 2016 evaluation. While these scores only went down by a maximum of <7%, the results demonstrate that these organizations did not see their 2016 reports as calls to action. Each of these four museums saw marginal improvements in at least two sections of the evaluation, but the decline in other sections was enough to bring the overall score down. In some cases, this decline appears to align with updated questions and/or additional requirements incorporated into the 2018 evaluation forms. Other scoring differences are so negligible that they can be attributed to the different perspectives of evaluation teams.

### Results of Organizations that Opted into the MEP

As previously mentioned, six organizations opted to participate in the Museum Evaluation Program in 2018. Their motivations for participating in the MEP varied, but the commonality was that each of these six organizations were eager to receive feedback from their professional peers.

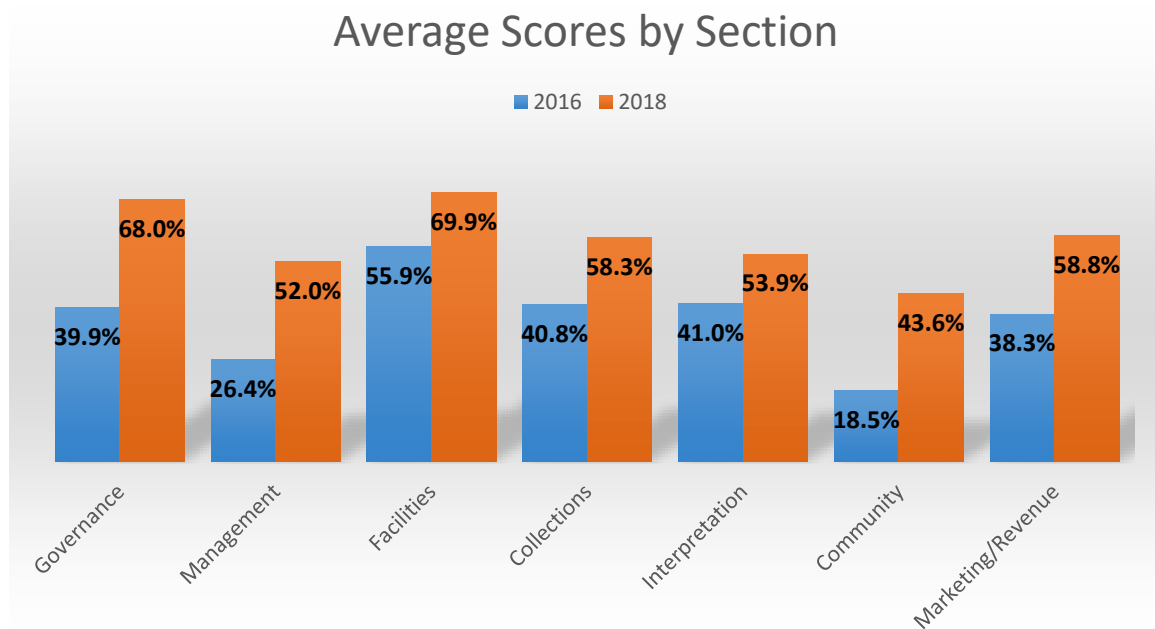


Through their discussions with other museums and with ANSM, they understood that the evaluation process would require much work, but would be an enlightening and helpful process to undergo. Several organizations expressed the hope that positive results would assist them with eligibility requirements of the Halifax Regional Municipality's Interim Community Museums Grant Program. All of these museums took the process very seriously, attended orientation sessions, sought advisory support, and actively prepared for their evaluation. The lowest scoring of these organizations debated whether or not they were ready to participate in the MEP, but decided that the benefits of the input received would far outweigh any risks associated with negative results.

### Results by Section

Reviewing the evaluation results by section reaffirms the findings of 2016 and 2017, as well as ANSM's knowledge of the Nova Scotian heritage community. While Governance results are generally positive, there is a drop in results for Management. Collections and Interpretation scores are again very comparable, suggesting that as work is done in one area, it supports the other. Marketing and Revenue Generation results demonstrate that organizations need to update practices and embrace their online efforts as integral

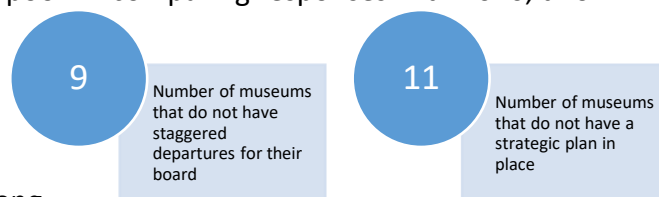
to their work instead of an extra or external element. Community continues to be the weakest area, as organizations seek to determine their role in ever-evolving communities. ANSM is encouraged by the improvement in results in both Management and Community. Having identified these as problem areas, it appears that incorporating additional discussion time in the Evaluation Orientation Sessions has paid off. Museum workers appear to be gaining a better understanding of good practices and how to incorporate community engagement into their programs and activities.



\*Note – section averages for 2016 were derived only from those museums re-evaluated in 2018.

### Governance

Museums again shared that is very difficult to attract new board members and volunteers, especially in rural areas where several organizations are all vying for support from the same limited community pool. In comparing responses with 2016, two museums have instituted new terms of office for board members that will facilitate staggered departures and improve knowledge transfer and long-term planning. Even more impressive is that four museums evaluated in 2016 now have strategic plans, and three other museums have developed basic strategic documents that are being used as the foundation of full plans. These results are encouraging, but the overall numbers demonstrate that much more governance work needs to be done. Board members shared with evaluators that they are feeling stretched and stressed and



are concerned about the sustainability of the organizations.

There is an even split between organizations that do and do not encourage and/or facilitate professional development for board members, but the overall

average scores of these museums do not follow the same divide. The 9 museums that ensure boards participate in learning opportunities have an average score of 65.4%, more than 14% higher than those organizations which do not encourage or facilitate training for board members.



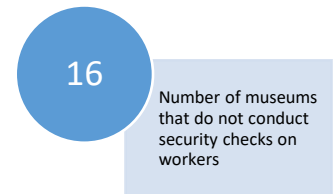
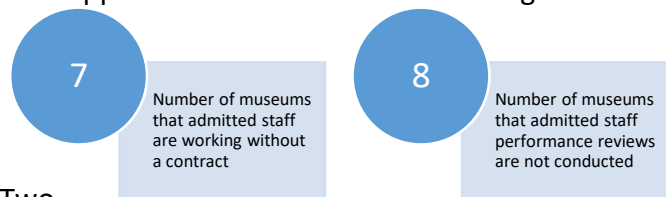
### Management

As in 2016 and 2017, there was a drop off in scores as questions shifted from Governance to Management. There still appears to be a difference in management approaches between paid staff and volunteers and summer students, but some improvements in management practices have been implemented. Two

museums that were evaluated in 2016 and admitted to staff working without contracts now ensure that all staff have contracts, and four museums that were not conducting performance reviews of staff have instituted the practice.

In consideration of the many children's and other programs included in museums' interpretive offerings, ANSM is concerned with how few organizations conduct security (criminal record and/or vulnerable sector) checks on workers.

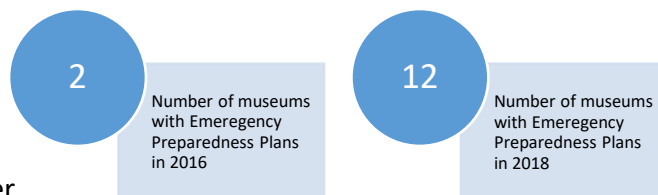
While it is understood that this can be a lengthy process to undertake, the safety of children and communities at large outweighs any inconveniences. In revisiting the 2016 evaluation results, only one museum that was re-evaluated in 2018 reported conducting these checks. In 2018, only two museums reported that security checks were conducted on workers.



### Facilities

The Facility results were the strongest of all the sections this year. For those museums that were evaluated in 2016, some key improvements were made that will serve the organizations well. Of particular note is the implementation of Emergency Preparedness Plans. In 2016, only 2 museums (of the 12 re-evaluated in 2018) had plans in place. Three others stated that they would follow the

Nova Scotia Museum's 1995 Disaster Plan in the event of an emergency. ANSM updated this question to include a checklist,



providing guidance to organizations without plans in place. By 2018, six museums were able to develop plans, 5 of the 6 organizations that opted into the MEP had plans in place, and only one museum said that it still uses the Nova Scotia Museum's Disaster Plan.

Another noteworthy improvement relates to museums operating in buildings they do not own. In 2016, only one museum (of the 12 re-evaluated in 2018) reported having a lease or management agreement with the building owner. By 2018, two museums were successful in negotiating leases, and one other museum obtained ownership of its facility. Of all the organizations evaluated in 2018, 6 have leases or management agreements, 11 own their facilities, and only one is operating without a lease in a building they do not own. These are very encouraging improvements.

1

Number of museums that are operating without a lease in buildings they do not own

A number of museums have also slowly started to improve their practices relating to chemicals on-site and WHMIS protocols. The majority of organizations evaluated in 2018 had identified hazardous materials and/or had workers who had been trained in WHMIS. Five of these organizations improved on their 2016 evaluation score for this question. Discouragingly, many museums still seem to rely on their summer students' WHMIS training, rather than ensuring that other workers receive this training.

5

Number of museums that have not identified hazardous materials or had safety training

### Collections and Access to Information

It is clear that there is much work to be done in the area of collections management, ranging from updating foundational policies and procedures, to enhancing existing documentation. The Information Integrity check remains the most memorable element of the evaluation, when evaluators randomly select artifacts and review the associated documentation. 2016 results were revisited and compared with this year's results. Marginal improvements can be seen for organizations that were re-evaluated. Two museums scored zero on these questions, and four others scored less than 50%. ANSM continues to encourage museums to work on their collections documentation. While it cannot be predicted which artifacts will be selected by evaluators, continuously working on documentation will improve the chances of positive results, and will serve the museums and their communities well.

6

Number of museums that scored less than 50% on the Information Integrity Check

Seven museums shared that they do not have a collections or acquisition team in place. Two of these museums reported having a team in place in 2016, so appear to have abandoned this good practice. One museum that did not have a team in place in 2016 has since instituted the practice. Interestingly, the

7

Number of museums that do not have an acquisitions team in place

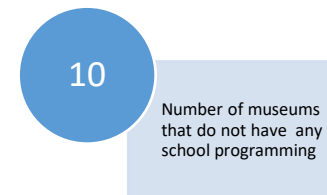
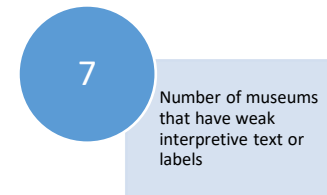
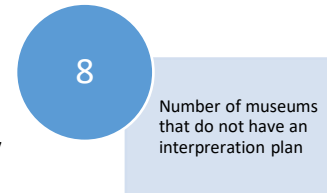
overall average score of museums that have a collections or acquisitions team in place is 17% higher than those without a team in place.

### Interpretation

As noted in previous evaluations, some museums are still in the process of evolving from traditional, static museums to institutions with dynamic programming. Of the museums evaluated in 2016, only two were able to share basic interpretation plans. One of these museums submitted a more comprehensive plan in 2018, and three others submitted newly developed plans.

Five of the six museums that opted into the MEP have plans in place, and the other's interpretation plan is currently in development. Unfortunately this still means that 8 organizations are lacking this important guiding document. During the evaluator debrief, several evaluators remarked on the poor state of interpretive text; labels that required replacing, handmade repairs or edits to text that resulted in a lack of uniformity. In reviewing these results, it was confirmed that this is an area in which many museums are struggling.

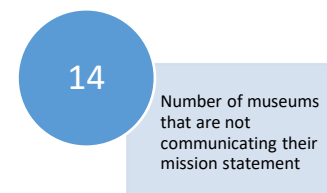
In 2016, evaluators noted that many museums responded to the question about school program elements by expressing what they would do if a school group visited the museum. This made it difficult to obtain an accurate understanding of the scope of school programming in Nova Scotian museums. As such, ANSM shifted this question from the Site Evaluation to Documentation Review, and requested that museums share examples as well. Of those museums that were evaluated in 2016, seven stated that they had some form of school programming in place. However, in 2018 when examples of this programming were sought, only one museum was able to respond affirmatively. On a positive note, one museum that had no school programming in 2016 has since developed some, and five of the six museums that opted in the MEP offer school programs.



### Community

The Community section was once again the lowest scoring area of the evaluation, although the results are not nearly as stark as they were in 2016. This can be attributed to more familiarity with the questions, and ANSM focusing extra time and attention on community engagement during the MEP orientation sessions.

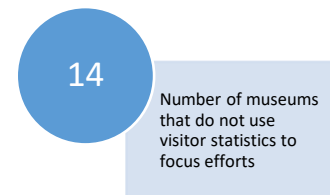
Some results of concern are in the limited ways in which organizations are sharing their missions. The first item on each organization's briefing note was its mission statement. Unfortunately, evaluators found that some workers were not able to communicate the museum's mission or purpose. One





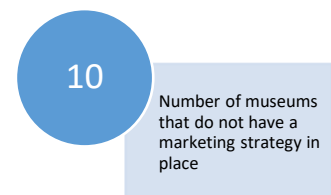
evaluator shared that he asked this directly of workers, and was surprised to find that not everyone could respond. Overall, 14 of the 18 organizations evaluated are only nominally communicating their mission statement. Interestingly, the average score of these museums was 31% lower than that of museums that communicate their mission statement in a variety of ways and using a variety of platforms.

A disconnect also remains between the collection and use of visitor statistics. In 2016 it was noted that about half of the museums evaluated were not using their visitor statistics to focus their programming or marketing efforts. Unfortunately the percentage is worse this year, with 78% of organizations admitting that they are not using their visitor statistics in meaningful ways. This is an untapped source of rich information that could greatly benefit museums as they seek to maintain relevance in their communities and make effective use of limited resources.

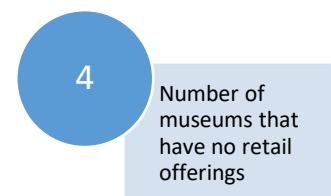


### Marketing and Revenue Generation

As noted in other sections, key guiding documents are often either missing, outdated, or are extremely basic in their content as the organization builds toward its future. In terms of marketing, 3 museums that were evaluated in 2016 and had no marketing strategy at that time have since developed one. Four of the six organizations that opted into the MEP have marketing strategies, and one other museum is actively working on one.



Previous evaluation reports made note of the variety of retail offerings in museums; from a few books and postcards on a table to full gift shops with wide-ranging products. As such, the majority of museums are offering some retail services to visitors. However, none of these museums are sharing stories about the products or artisans. This is a missed opportunity to celebrate creativity and entrepreneurship in communities, and to connect products with an organization's mission and collection.



### **Scoring Influences**

As it is the third year for ANSM to deliver the Museum Evaluation Program, there is now a general understanding of the factors that affect an organization's results.

Previous assumptions about an organization's resource level being the major (or even sole) contributing factor to evaluation success have been proven false. It is now understood that a variety of

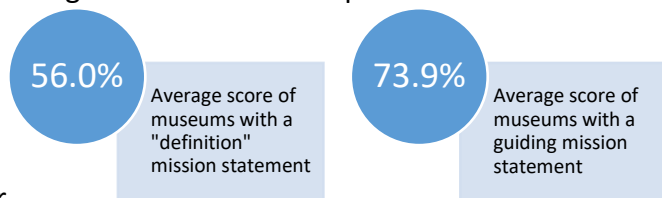
### SCORING INFLUENCES

1. Mission Statements
2. Community Engagement
3. Professional Development
4. Communications
5. Experience & Familiarity
6. Resource Levels
7. Teamwork
8. Disengagement

factors impact an organization's evaluation outcome, but that most can be traced back to organizational culture. Those museums that are inward-looking and/or attempting to maintain a status quo fare worse than those that are outward-looking and actively seeking to grow and evolve with their communities.

### Mission Statements

In Nina Simon's book The Art of Relevance, she warns that "institutions with clouded or contested missions are like ships full of mutinous factions. If [people] disagree about what the mission means or how it relates to community relevance, they'll never be clear about what's worth pursuing or letting go." Simon employs another marine analogy to organizations lacking clear missions, calling them rudderless ships. These are bold statements, but align with evaluation findings. ANSM often has conversations with museums that are struggling to be relevant and figure out a new way forward for the organization. Most of these organizations have been operating with the same mission statement for decades. Only four of the organizations evaluated have actual mission statements by current standards. The remaining 14 are variations of the International Council of Museums' definition of a museum. One museum did not submit its mission statement, nor could it be found online or in previous evaluation records. Considering these results, it is no wonder that so few museums and workers are able to effectively communicate their organization's mission.



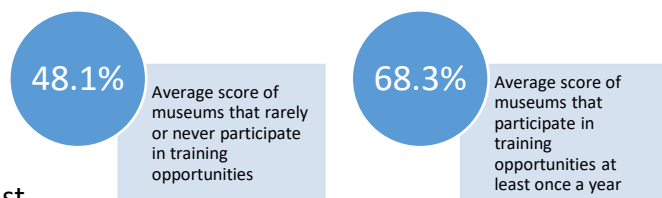
### Community Engagement

The 2016 evaluation report stated that there appeared to be a disconnect between *what* the museums were doing and *why* they were doing it. While this section continues to be the lowest-scoring section of the evaluation, ANSM is very encouraged by the improvements in understanding and application. Overall, museums were able to share far more examples of activities and programs that meet community engagement goals than were submitted in 2016. As museums engage in partnerships and become active members of their communities, they are reaping benefits in all areas of their operation. They are starting to think of themselves beyond traditional notions of what a museum is or does.



### Professional Development

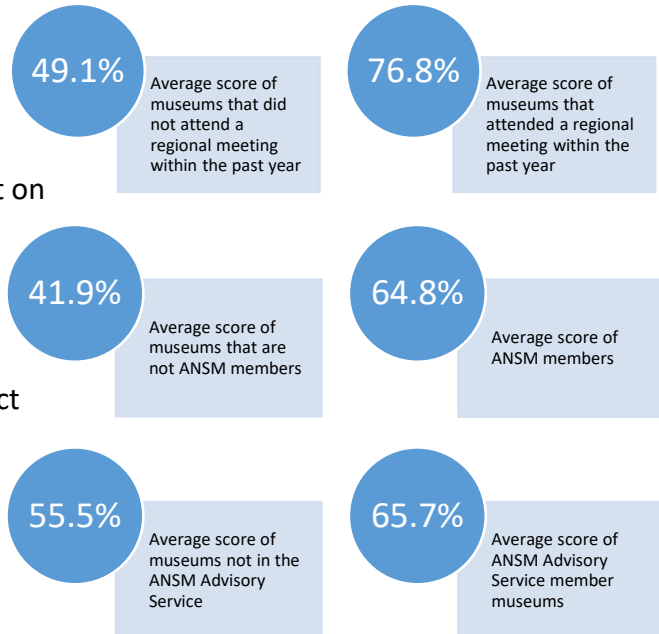
During the Evaluation Orientation sessions, attendees were reminded of the importance of understanding that museums are educational institutions, and that must



include embracing internal education through training and development of workers. As expected, the organizations that encourage workers to participate in learning opportunities achieved far better results on their evaluation than those museums which rarely or never participate in training. Aside from one question which asks if any workers have museological training, the questions relating to professional development are flexible and meant to fit an organization's diverse activities and programs. From First Aid to Food Handling, these questions seek to ensure that workers are given the resources they need to accomplish their given tasks in safe and responsible ways.

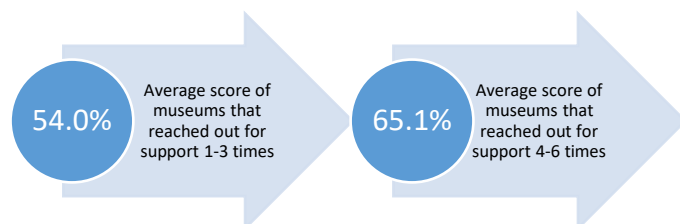
In a cross-over between community and professional development, when museums are active members of Nova Scotia's heritage community, this has a positive impact on their evaluation results. During casual learning opportunities such as regional groups, museum workers are able to build relationships, share ideas, and conduct joint advocacy work. Organizations that are members of ANSM also fared better than those that are not, and members of ANSM's Advisory Service scored even higher.

It is worth noting that one museum which was almost entirely disengaged in the evaluation process has skewed these results, and if it were not included, Advisory Service museums would have scored 20% higher than non-Advisory Service sites, and 10% higher than general ANSM members.



### Communications

As in 2016 and 2017, the organizations that engaged in the evaluation preparation process and proactively sought assistance and guidance experienced better results than

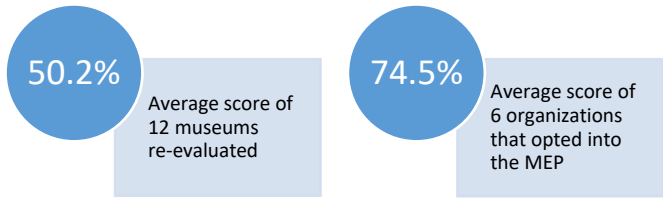


those that did not regularly communicate with ANSM. In response to this trend, ANSM was more proactive in reaching out to organizations being evaluated. Generally speaking, organizations that opted into the MEP were in contact with ANSM more than those museums that were being re-evaluated.

### Experience & Familiarity

As previously noted, some impressive results were seen in those museums that were re-evaluated. Overall scores improved from between 10 and 52%, and five

museums that were re-evaluated saw scoring improvements in all seven sections of the evaluation. First and foremost these results are a testament to the hard work and dedication of the individuals running these museums. They also speak to the fact that museums are gaining familiarity with the MEP. Whereas in 2016 almost half of the museums' key staff or volunteers had never been through an evaluation before, this year the vast majority of workers had experience with the MEP. They knew what to expect, and felt more comfortable with the questions and process and evaluation report. This comfort level is reflected in the feedback received from museums. For the six organizations that opted into the MEP this year, the evaluation was an opportunity to really review and analyze their operations, and gain feedback from professional peers. This motivation to learn and improve was a driving factor in their participation and is reflected in their engagement throughout the process and impressive results.



### Resource Level

Seven of the museums evaluated this year have at least one paid staff person, while the remaining 11 are operated by volunteers. The two lowest scoring museums are

operated by volunteers, but the only museum to score in the 30<sup>th</sup> percentile has paid staff. Conversely, of the two highest scoring museums, both scoring in the mid 80<sup>th</sup> percentile, one is operated by volunteers and the other is operated by paid staff. As mentioned in the preamble to this section and noted on other influences, the organizational culture and approach to the preparation work have a far greater impact on the evaluation outcome than a museum's budget or personnel structure.



### Teamwork

Those organizations that developed teams or committees or otherwise worked collaboratively to prepare for the evaluation experienced better results

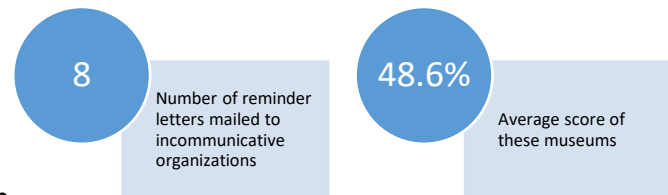
than the ones that relied on one individual. Through conversations with museums and evaluators, ANSM learned which organizations took which approach. As expected, when the burden of preparing for evaluation was shared, organizations were able to review and update more policies and procedures, gather more files for Documentation Review



submission, and share more examples of how the museum meets its community's needs. This is also proven in Orientation Session attendance as previously mentioned. When more than one person was receiving information, through orientation and through the group email support, organizations were better equipped to use the information to their advantage.

### Disengagement

Unfortunately, this year's evaluation again saw some organizations decline to attend an Orientation Session, or disengage from the process after the Orientation



Sessions, or decline to communicate at all until the Documentation Review deadline arrived and Site Evaluation dates needed to be confirmed. In February, ANSM mailed a reminder letter (**Appendix 8**) to eight organizations that were not responding to messages. Three organizations contacted ANSM upon receipt of the letter, one of which later dropped out of the MEP. Another museum that received a letter dropped out of the program in the Spring, prior to the Documentation Review deadline. It appears that some organizations are still unclear on the value of participating in the MEP and how it can help their museum move forward. Several organizations either asked why they should dedicate resources to preparation efforts, what the consequences were for a poor result, or what the benefits were for a positive result.

## V. Feedback

### **Evaluator Debrief**

A debrief teleconference was held for evaluators on August 7<sup>th</sup>. This idea was suggested by evaluators in 2017 and has become an important element of evaluators' participation in the MEP. Evaluators are on the front lines of this program delivery, and are asked questions and given feedback by museum workers. They have consistently demonstrated a keen understanding of the process and how it can be improved for all involved. From clarifying the wording of questions, to ensuring that each Site Evaluation form includes documenting the start and end times of the evaluation, evaluators have shared their ideas and provided the MEPWG and ANSM with very valuable input.

As part of the debrief, evaluators were asked if they had general thoughts or observations to share for inclusion in this report. The following was received:

*I have been an evaluator with ANSM for the last three summers and have come away with a great appreciation of the challenges facing community and branch museums through-out Nova Scotia. Shrinking budgets, aging buildings, reduced staffing and visitation, as well as board issues can complicate a museum's attempt to operate as*

*professionally as desired. I feel that the evaluation process is a proactive way to help these museums in a practical way by focussing on strengths and weaknesses. On a personal level, I enjoyed the team approach to the evaluation process as I missed that interaction since my retirement from Parks Canada.*

*I have been a Museum Evaluation Program evaluator for ANSM for the past three summers and this is what impresses me the most:*

- *it is well organized and both the evaluators and the museums being evaluated receive clear communication of what is being evaluated, how it is evaluated and why/how good museum practice benefits everyone*
- *the evaluators and the sites are asked for feedback each year on ways to improve wording, communication, what works well and what could be improved. ANSM responds to all feedback from both sites and evaluators*
- *all evaluation teams consist of 3 members who each bring different areas of expertise in museum practice and come from different museum and/or museum support organization experience...**Why is this impressive?***
  - *the evaluated sites receive brief bios of “their” evaluation team in advance which both allows them to know that they will receive useful (to them) feedback from knowledgeable colleagues and an opportunity to request a change in advance if a team member is felt to have an unforeseen conflict of interest*
  - *working with a team provides excellent professional development for the evaluators who review each other’s completed individual evaluations and discuss what was seen/heard (or missed) and results in interesting and useful conversations over meals and while travelling to sites about trends, examples of sector challenges and good practice*
  - *each site sees all 3 scores, by question, in their site report, in addition to specific written comments which documents the openness of the evaluation process even when one evaluator may not have “seen” something in the same way as other team members. This is done without identifying which team member assigned which score.*

*I have participated, in another province, as a site staff of an evaluated museum, as a museum association staff with a role in supporting community museums who will be evaluated and, as a Ministry Standard evaluator during a period of Standards Review. I am impressed with ANSM by comparison.*

### **Evaluation Report Responses**

An important element of the MEP is the ability for museums to review and give feedback on their reports. ANSM views evaluation reports as being in draft form until the deadline for feedback passes, in case any scores or remarks require adjustment. October 5<sup>th</sup> was the deadline for feedback, and 13 museums (72.2%) responded in some capacity. Nine museums requested a pdf version so that they could easily share the

report with the entire board of directors. Six museums required slight adjustments to their scores and/or reports. One museum that had not participated in the 2016 evaluation phoned to say that they were disheartened by the results and were concerned that the evaluation did not fit their small organization.

Following are remarks received by email, separated into feedback from museums and feedback from evaluators. Names and museum affiliations have been removed to protect the privacy of the individuals and organizations.

*Thanks so much – cannot wait to share our mark with our board – we have worked so hard, but it will be very worthwhile to find out where our weak points were so we can improve our score in the future!!*

*Thank you for doing such a great job coordinating and keeping us informed.*

*To say that our [society] is happy with our mark, is an understatement! Although the majority of our board members were involved and worked extremely hard, we knew there were requirements we just could not do – but we did give it our best! Thank you so much to all your staff for the huge amount of work you do to support our museums!*

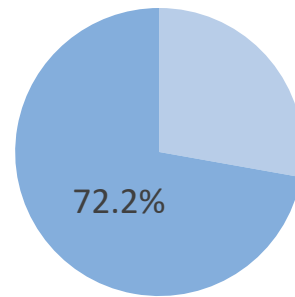
*We received our evaluation report yesterday, thank you, we were quite excited.*

*Our Chairperson has just reviewed the results of our summer evaluation. We are pleased that we have improved sufficiently to pass. We also note that there have been suggestions put as to how we can do even better next time. These suggestions are, indeed, helpful. We also note that we have an opportunity to address any concerns or questions we may have by early October. Thank you for giving us a second chance.*

*I received the Evaluation report in the mail as promised, thank so very much for investing the time and effort on my behalf. I wasn't surprised by anything I saw, and was encouraged we performed as well as we did. I am encouraged that despite being a stranger in a strange land, I am not lost entirely to my museum community "on the outside" and confident you'll see improvements next time around. Thanks again, for all of your hard work on our behalf; please know it is very deeply appreciated.*

*Overall, we found the process very informative and useful. Especially useful was the level of reflection the evaluation process encouraged us to bring to all aspects of what we do. The exercise also prompted us to make improvements to a number of our practices and allowed us to see more clearly improvements we would like to make in the future. We are very grateful for the opportunity that ANSM provided, and especially for its guidance*

Evaluation Report  
Response Rate



*and support throughout the evaluation process, to strengthen our organization and tighten up a number of our operations.*

*Having taken the evaluation process quite seriously and appreciating what we might gain by doing so, we had already anticipated much of what was contained in our report. Even before we received it, we had begun to incorporate what we had learned into our planning for the future. Our Board of Directors is highly encouraged that the evaluation report confirms that we have been and are moving in the right directions.*

*We certainly welcomed the opportunity to start our site visit by showcasing some features of what we do that might not be evident during a brief visit. We also took that opportunity to answer questions that we anticipated the team might have. A great deal of the 45 minute, sit-down, question-and-answer session, however, it seems to us, could much more efficiently have been dealt with through a written questionnaire. The majority of the questions were looking for simple answers to factual questions such as “Do you conduct a Board orientation?”, etc. with the site team simply ticking answer boxes. If much of this could be sent ahead of time as a written questionnaire that was returned to the site visit team before their visit, the 45 minutes could perhaps be more productively spent. Face-to-face questions could then cover further questions arising from answers to the questionnaire. Alternatively, or in addition, the question session could be placed after the team has a chance to tour the site on its own, and the session could be devoted to asking questions raised by both the tour and the questionnaire. Had the site visit been organized such that the team conducted its face-to-face interview with our museum representatives after its tour, and then asked questions arising out that tour and our answers to the site – visit questionnaire, a number of questions that appear in our report might have been answered.*

*It is clear that many of the requirements of Museums Nova Scotia can be quite time consuming for an organization run 90% by volunteers. A great deal more of the requirements could be addressed with sufficient funding from Museums Nova Scotia. Existing funding covers at the most 10% of our costs. Volunteers in many cases are at their limit. It is time for Museums Nova Scotia to step up to the plate and assist the smaller museums in Nova Scotia with sufficient funding to operate to the standard they have set.*

[A response was sent to clarify the Nova Scotia Museum and Association of Nova Scotia Museums’ roles and responsibilities]



## VI. Moving Forward

The evaluation report in 2016 included a list of recommendations, and the report in 2017 outlined considerations. In essence, the question to be asked is, how does Nova Scotia's museum community move forward? The answers differ for each stakeholder group. ANSM is gaining crucial insights into the specific needs and realities of museums. Museums are gaining a better understanding of current museological standards and how they can apply them to their community service efforts. They are seeing the usefulness of their evaluation reports as they tackle strategic planning. The Department of Communities, Culture and Heritage (CCH) is gaining a better understanding of successes, struggles, and community impact of museums that are financially supported through the Government of Nova Scotia's Community Museum Assistance Program (CMAP).

### MOVING FORWARD

1. Implementation of 4-year evaluation cycle
2. Respond to museum needs
3. Review & refine evaluation
4. Strengthen partnerships
5. Development of Accreditation Program

#### 1. Implementation of 4-year evaluation cycle

On September 20<sup>th</sup>, 2018, ANSM announced the new 4-year schedule for the MEP. The rotation includes museums receiving funding through CMAP, the 28 Nova Scotia Museum sites, as well as other organizations that have opted into the MEP. A maximum of 33 museums will be evaluated in a given year, and the current schedule (**Appendix 9**) will allow another 27 organizations to opt into the MEP before this cap will be reached. Museums will now be able to anticipate their next evaluation date and incorporate preparations into job descriptions, work plans, and strategic plans.

#### 2. Respond to museum needs

Having three years of evaluation results has provided ANSM with rich information about the current needs and realities of museums. ANSM has been incorporating this information into its Museum Studies Program workshops, annual conference/symposium, and through special training with partner organizations such as the Canadian Conservation Institute. ANSM will continue to seek opportunities to address evaluation findings and work with museums to fulfill the vision of all museums in Nova Scotia being valued by Nova Scotians, being sustainable, and operating according to established standards of excellence. This rich information is also very valuable to CCH, and can be used when funding and support programs are being reviewed as a means of confirming relevancy.

#### 3. Review & refine evaluation

ANSM will continue to work with the MEPWG to review and refine the evaluation process and questions. Participating organizations and evaluators are encouraged to share their

ideas for improvements, and to inform ANSM if they find questions to be confusing or unclear. All issues that are brought forward are taken to the Working Group for discussion and consideration. The process will gradually shift and evolve as the expectations and standards around museum operations shift and evolve.

4. Strengthen partnerships

Two notable opportunities exist for CCH to strengthen its partnership with ANSM and its relationship with organizations receiving CMAP funding. At the Orientation Sessions and throughout the evaluation process, CMAP museums asked about the impact of their evaluation score on their funding level, and are still harbouring the concerns noted in the 2016 report, “that adjustments would be made with little or no notification to the museums.” If a CCH representative were present at the Orientation Sessions, these concerns could be addressed directly. It would also enable CCH to build stronger relationships with the organizations it funds. Another opportunity to strengthen partnerships is by participating in the Museum Evaluation Program Working Group. When the group was established, two CCH representatives were included and their perspectives and knowledge were very valuable assets. As mentioned previously, a standing offer has been given to the CMAP Program Officer to participate in the MEPWG. Having CCH rejoin this group would be a way to gain more understanding of the MEP which it funds, as well as the museums it funds, and to ensure that its perspectives and priorities are being incorporated into the Museum Evaluation Program.

5. Development of Accreditation Program

When ANSM took on the MEP, it was agreed that the evaluation process should continue to evolve, eventually becoming an accreditation program. Research has been conducted on comparable programs, and ANSM regularly communicates with these program coordinators to learn from their experiences. The MEPWG is of great assistance to this research and development process. To date, the benefits statements, appeal process, and timeline have been approved, and the application form, eligibility requirements, and program guide are in draft. A graphic designer has been engaged to develop branding. It is anticipated that the program will be ready to launch in Autumn 2019.

## VII. Appendices

## Appendix 1. Museum Evaluation Program Working Group Terms of Reference

### Terms of Reference

#### Museum Evaluation Program Working Group

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"><li>1. Review and update evaluation criteria</li><li>2. On-site evaluation process</li><li>3. Documentation Review process</li><li>4. Development of accreditation process</li><li>5. The overall participant experience, at all levels and stages, within the scope of the program</li><li>6. Evaluator criteria, selection, and training</li><li>7. Review of evaluation score grievances</li></ol> <p>Working group members will be expected to:</p> <ol style="list-style-type: none"><li>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.</li><li>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.</li></ol> <p>As this is a working group 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:	The MEP Working Group 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>The Working Group will include participants of MEP, representing a variety of museum types. Individuals will be selected based on:</p> <ol style="list-style-type: none"> <li>1. Knowledge of and experience with museum evaluations</li> <li>2. Regional diversity</li> <li>3. Size and operating structure of museum</li> </ol> <p>ANSM &amp; CCH shall have two members each on the Working Group, but only one vote each.</p> <p>The Working Group shall appoint a chairperson and a secretary. The chair will be responsible to ensure meetings are organized and held in timely fashion, committee goals realized, 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 Working Group may recruit specific expertise to advise it or address specific situations, as required. Any such individuals are not formal members of the Working Group and will not participate in final decision making.</p>
Meetings:	<p>The Working Group will meet 3-4 times per year depending on the program timeline. Meetings may be held in person, by teleconference, or virtually, and it is the responsibility of the chair to call and organize them. Members are expected to:</p> <ol style="list-style-type: none"> <li>1. Act collectively as a group and not in the interests of a specific region, board or organization.</li> <li>2. Adhere to all ANSM policies and practices including confidentiality and privacy.</li> <li>3. Respect decisions made by majority vote.</li> </ol>
Commitment:	<p>Members serve for a term of 2 years and may serve up to 2 consecutive terms and should expect 1-3hrs/month of work.</p> <p>To ensure continuity the expiry of terms is staggered so that no more than 66% of the members leave in the same year.</p>
Formal Reporting:	<p>The Working Group liaises with the ANSM Executive 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</p>

	projects and initiatives, often inter-related, are carefully aligned and in accordance with the organization's strategic plan.
Review & Evaluation:	1. The Terms of Reference shall be updated as required.
Endorsed by:	Anita Price, ANSM Executive Director

## Appendix 2. Museum Evaluation Program Timeline for 2018 Evaluations



### **Museum Evaluation Program Timeline for 2018 Evaluations**

January 2018	Applications for Evaluators opens
February 12, 2018	Deadline for Evaluator applications (midnight)
October – May	Evaluation preparation support
May 4, 2018	Documentation Review submission deadline
July 4, 2018	Evaluator Training
July 9 - 27, 2018	Site Evaluations
Early September 2018	Evaluation Reports to Sites
October 4, 2018	Deadline for museums to respond to reports
November 2018	Report to Communities, Culture, and Heritage



## 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 museums in Nova Scotia.**

**Evaluator commitment includes three weeks of volunteer time, up to 3 days each week, plus one day of orientation. Some schedules will include overnight travel.**

**Please forward all applications to: Anita Price, [director@ansm.ns.ca](mailto:director@ansm.ns.ca)**

### A. Contact Information

Name	
Organization	
Street Address	
City, Province, Postal Code	
Daytime Phone	
E-Mail Address	
Available July 9-27 2018	<input type="checkbox"/> Yes <input type="checkbox"/> No

Note: If possible please include a current résumé.

### B. With which region in Nova Scotia would you most identify:

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

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

**Position:** ☐ Staff ☐ Volunteer ☐ Board

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

E. Interest

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



F. Availability

**1. Do you anticipate any changes in your residence or work commitment(s) in the next year that would affect your volunteer contribution? If yes, please explain.**

**2. Evaluation team work can include long work days on your feet, long distance driving, and overnight stays. Are you comfortable with these aspects of the work?**

☐ Yes

☐ No

**Do you have a valid Nova Scotia driver's license?**

☐ Yes

☐ No

G. Special Skills or Qualifications

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

**Have you been involved previously with any museum evaluation programs such as CMAP, CMOG, or the Recognized Museum Program?**

**If yes, please explain:**

**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 so, 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  
☐ 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:

Language Skills:

☐ English

☐ French

☐ Gaelic

☐ Mi'kmaq

☐ Other:



## Evaluator Biographies 2018

**Andrea Arbic:** Andrea Arbic has a degree in archaeology and an MA in Museum Studies. She worked with LORD Cultural Resources for nine years before forming her own consulting firm in 2001, which provides services to the museum/heritage and cultural sector. Andrea's work includes strategic planning, business planning, feasibility studies, organization development, programming planning, evaluation, and community consultations.

**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 has been an evaluator for the Museum Evaluation Program since 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 has been an evaluator for the Museum Evaluation Program since 2016.

**Robert Frame:** Robert Frame is a museum and heritage specialist with over four decades of service to a variety of heritage interests. Specializing in interpretive planning and management and development, his work has included the restoration of heritage sites and buildings, and senior management responsibilities within the Nova Scotia Museum. Robert has played leading roles in heritage tourism projects, in overseeing museum operations, and the development of CMAP. For the past 17 years Robert has been an independent museum consultant in Atlantic Canada.

**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 has been an evaluator for the Museum Evaluation Program since 2016.

**Karin Kierstead:** Karin Kierstead is ANSM's Museum Evaluation Program Manager. Her work with ANSM has largely focused on artifact digitization/enrichment, online collections, database management, and project planning/management. Karin teaches the Museums 101 and Collections Management workshops, part of ANSM's Museum Studies Program. In her spare time she is an archaeological conservator. Her 15+ years of museum experience has spanned four provinces. Karin was an evaluator for the Museum Evaluation Program in 2016.

**Valerie Lenethen:** Valerie Lenethen worked in collections management with the Nova Scotia Museum for over 30 years. She spent 2 years at CHIN as a Museum Consultant. Valerie served as a Team Leader for the CMAP evaluations almost every year from 1995 to 2011. She was an evaluator for the Museum Evaluation Program in 2016.

**John McIntyre:** John McIntyre is a member of the Parrsborough Shore Historical Society, which owns and operates Ottawa House by the Sea. He has extensive experience working at museums in Ontario and is currently in the midst of restoring a historic house in Parrsboro to its original appearance. John was an evaluator for the Museum Evaluation Program in 2016.

**Marven Moore:** Marven Moore is a self-employed heritage consultant and researcher and has extensive experience working for the Prince Edward Island Heritage Foundation and the Nova Scotia Museum. He delivers presentations on the marine history of Atlantic Canada to a broad range of audiences and provides curatorial advice to maritime museums. Marven was an evaluator for the Museum Evaluation Program in 2016.

**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 has been an evaluator for the Museum Evaluation Program since 2016.

**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 has been an evaluator for the Museum Evaluation Program since 2016.



**Museum Evaluation Program**  
Evaluation Teams & Site List  
2018

	<b>Evaluators</b>	<b>Sites Evaluating</b>
<b>Team 1</b>	<p><b>Week 1:</b> Anita Price, Bob Frame, and Andrea Arbic</p> <p><b>Week 2:</b> Anita Price, Bob Frame, and Andrea Arbic</p> <p><b>Week 3:</b> Anita Price, John McIntyre, Cathy Blackburn, and Virginia Stephen</p>	<p>Whitman House Museum</p> <p>Carmichael Stewart House</p> <p>Inverness Miners Museum</p> <p>Amos Seaman Museum</p> <p>Springhill Miners Museum</p> <p>Hooked Rug Museum of NA</p> <p>SS Atlantic Heritage</p>
<b>Team 2</b>	<p><b>Weeks 1-2:</b> Cathy Blackburn, Denise Hansen, and John McIntyre</p>	<p>Archelaus Smith Museum</p> <p>Cape Sable Historical Society</p> <p>Little School Museum</p> <p>Isle Madame</p> <p>Nicholas Denys Museum</p>
<b>Team 3</b>	<p><b>Week 2:</b> Marven Moore, Joe Ballard, and Virginia Stephen</p> <p><b>Week 3:</b> Marven Moore, Joe Ballard, Valerie Lenethan, and Karin Kierstead</p>	<p>Shearwater Aviation Museum</p> <p>James House Museum</p> <p>Tupperville Schoolhouse Museum</p> <p>Canning Heritage Centre</p> <p>Urban Farm Museum</p> <p>NS Sport Hall of Fame</p>

## Appendix 6. Site Evaluation Schedule



### Museum Evaluation Program

#### Site Evaluation Schedule

2018

	<b>Morning</b>	<b>Afternoon</b>
<b>July 10<sup>th</sup></b>		Whitman House Museum Little School House Museum
<b>July 11<sup>th</sup></b>	Carmichael-Stewart House Museum Archelaus Smith Museum	Cape Sable Historical Society
<b>July 17<sup>th</sup></b>		Inverness Miners Museum Isle Madame Historical Society
<b>July 18<sup>th</sup></b>	Nicolas Denys Museum Nova Scotia Sport Hall of Fame	
<b>July 24<sup>th</sup></b>		Amos Seaman Museum Tupperville School Museum
<b>July 25<sup>th</sup></b>	Springhill Miners Museum James House Museum	Canning Heritage Centre
<b>July 26<sup>th</sup></b>	SS Atlantic Heritage Park	Hooked Rug Museum of North America Urban Farm Museum Society

## DOCUMENTATION REVIEW – 2018 DOCUMENT SUBMISSION CHECKLIST

- Please ensure your submitted documents are titled to match the list below
- Do not submit additional documents *except as supplemental information for certain questions...see below.*
- For any clarification, please refer to the full Documentation Review Form

### DOCUMENTATION REVIEW FORM

Submitted ✓	
	1. <b>Completed</b> Documentation Review form

### GOVERNANCE

Submitted ✓	
	1. Bylaws
	2. Mission Statement and/or Statement of Purpose
	3. Organizational Chart
	4. Code of Ethics and/or minutes from board meeting where Code of Ethics was adopted
	5. Board of Directors - Board manual and any committee Terms of Reference and job descriptions
	6. Strategic Plan
	7. Board minutes – showing when policies were last reviewed or schedule of policy review
	8. Board minutes – from most recent meeting when Board (or organization) last evaluated its own performance related to Strategic Plan and/or copy of Board's evaluation form

### MANAGEMENT

Submitted ✓	
	1. Insurance Policy
	2. Human Resources Policy
	3. Job Descriptions
	4. Staff Orientation Materials
	5. Performance Review forms
	6. Exit Interview forms
	7. Volunteer Policy & Application form
	8. Work Plans



## FACILITY

Submitted ✓	
	1. Emergency Preparedness Plan
	2. Facility Management Plan

## COLLECTION & ACCESS TO INFORMATION

Submitted ✓	
	1. Care & Handling Guidelines
	2. Catalogue Worksheet
	3. Collections/Acquisition Committee Terms of Reference
	4. Collections Management Policy
	5. Collections Management Procedures Manual
	6. Condition Report
	7. Incident Report

## INTERPRETATION

Submitted ✓	
	1. Interpretation Plan
	2. Exhibition Policy

## COMMUNITY

Submitted ✓	
	1. Membership documentation for professional affiliations
	2. Examples of community activities

## MARKETING & REVENUE GENERATION

Submitted ✓	
	1. Marketing Strategy
	2. Media releases
	3. Newspaper or other published articles
	4. Fundraising Plan
	5. Annual budget
	6. List of Links to Online Presence (Website, Facebook, Instagram, Etc.)

## SUPPLEMENTAL INFORMATION (optional):

Submitted ✓	
	Q. 140 Additional explanation of recent public programming examples
	Q. 141 Additional explanation of recent school programming examples
	Q. 156 Visual examples of promoting other sites



February 12, 2018

Dear \_\_\_\_\_,

The 2018 Museum Evaluation Program work continues, and we have noticed that you have not been in touch about evaluation preparations and we are not sure whether our group e-mails or phone calls are reaching you and helping you as you prepare. We want to make sure that you are feeling confident in your preparations, and remind you that we are here to answer any questions that may arise during the process. We also wanted to update you on progress and remind you of some key deadlines.

**There are three documents that you will want to download, each of which can be found by clicking [here](#).** The first part of the evaluation is the ***Documentation Review***, which is due **May 4<sup>th</sup> 2018**. The ***Site Evaluation Form*** will be used by evaluators for the **on-site visit in July**, and the ***Scoring Matrix*** outlines the value of each question so that you can prioritize preparation work.

**The Document Review online submission is due May 4<sup>th</sup>**, which only leaves 12 more weeks to prepare for this portion of the 2018 evaluation program. As we explained during the orientation sessions, this is not a self-assessment, but a chance for evaluators to review your key policies, procedures, and other documentation. It will also enable us to provide evaluators with briefing notes about your museum – a cheat sheet for them to refer to as they conduct the site evaluation. In order to streamline this process, we are updating our online presence so that **you will be able to start submitting this information securely via our website beginning in late March**. We will send out a group e-mail with instructions and reminding you of this once we know the site is ready.

Since the evaluation documents were released last fall we have been actively assisting many museums with their preparations. Requests for assistance are taking many forms; people are asking questions about specific aspects of the site evaluation, seeking feedback on existing policies, and some are even getting help from local librarians and other community resources, with **organizing and scanning their handwritten documents in preparation for submission**. We are tracking all of our communications in order to identify any problem areas in the evaluation,

because, over the past two years, we have noticed that there is a correlation between active assistance and evaluation scores, and most importantly, because **we want your success as a well-managed museum** that gets the best possible scores when it is evaluated in May (Documentation Review) and July (site evaluation). This is also an opportunity for your site to improve your score, as **ANSM lobbied for your site's re-evaluation prior to any changes being made to CMAP**.

**Site Evaluations will take place between July 10<sup>th</sup> and 26<sup>th</sup>** (Tues-Thurs of each week). If you have any special events, staff holidays, or other activities/issues during this time that would impact on your site evaluation date please let me know. Last year we were able to accommodate all blackout dates, but we've got to get this info early so it can be worked into the schedule. **Your deadline to submit blackout dates is March 16<sup>th</sup>**.

As a reminder, there are 21 museums being evaluated this year. As evaluation time gets closer, queries are increasing in depth and frequency, and response time may be slower as a result. We strongly urge you to reach out with any questions you have, as you have them (don't save them up!). We look forward to hearing from you [support@ansm.ns.ca] over the coming weeks.

Cathy Blackburn

Association of Nova Scotia Museums

## Appendix 9. Evaluation Cycle Announcement



1113 MARGINAL RD. HALIFAX NS B3H 4P7 / PH 902-423-4677 1-800-355-6873 / FX 902-422-0881 / WWW.ANSM.NS.CA

### **Museum Evaluation Program 2019-2022**

For more than 20 years, many museums in Nova Scotia have participated in an evaluation process through the Community Museum Assistance Program (CMAP). CMAP is a Government of Nova Scotia supported program currently delivered through the Department of Communities, Culture and Heritage.

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 complement to its commitment to professional best practices, and in partnership with the provincial government, ANSM entered into an agreement to undertake the delivery of museum evaluations and implemented a revised evaluation program in 2016. Since its launch, 99 museums have participated in the program. ANSM has continuously engaged with a working group and sought input from participating museums to build and improve the evaluation process.

**ANSM is now pleased to announce the launch of the Museum Evaluation Program's 4-year cycle:**

#### **Year 1 (2019)**

Admiral Digby Museum  
Annapolis Heritage Society  
Annapolis Valley Macdonald Museum  
Atlantic Canada Aviation Museum  
Avon River Heritage Society  
Charles Macdonald Concrete House  
Cumberland County Museum and Archives  
DesBrisay Museum  
Église Sainte-Marie Church Museum  
Islands Historical Society  
Jost Heritage House  
Little White Schoolhouse Museum  
MacDonald House Museum  
Malagash Salt Mines Museum

Margaree Salmon Museum  
Milton Blacksmith Shop Museum  
Musquodoboit Harbour Railway Museum  
North Queens Heritage House  
Northumberland Fisheries Museum  
Old Court House Museum  
Orangedale Railway Museum  
Queens County Museum  
Port Hastings Museum & Archives  
Randall House Museum  
Sydney Mines Heritage Museum  
Wallace and Area Museum  
West Hants Historical Society  
Whitney Pier Historical Museum

## Year 2 (2020)

Age of Sail Heritage Centre  
Antigonish Heritage Museum  
Argyle Township Court House & Gaol  
The Army Museum  
Cape Breton Miners Museum  
Cape Breton Centre for Heritage & Science  
Chestico Museum & Archives  
Colchester Historeum  
Cole Harbour Heritage Farm Museum  
Dartmouth Heritage Museum  
Fort Point Museum  
Fultz House Museum  
Kings County Museum  
LaHave Islands Marine Museum

Mahone Bay Museum  
Margaret Fawcett Norrie Heritage Centre  
McCulloch Genealogy Centre  
Memory Lane Heritage Village  
Musée des Acadiens des Pubnicos et Centre de Recherche  
North Highlands Community Museum  
Ottawa House Museum by-the-Sea Museum  
Parkdale-Maplewood Community Museum  
Shelburne County Museum  
Sydney & Louisburg Railway Museum  
Les Trois Pignons Centre Culturel  
Yarmouth County Museum and Archives

## Year 3 (2021)

Baile nan Gàidheal (Highland Village)  
Balmoral Grist Mill  
Barrington Woolen Mill  
Black Loyalist Heritage Centre  
Cossit House  
Dory Shop Museum  
Firefighters' Museum of Nova Scotia  
Fisheries Museum of the Atlantic  
Fisherman's Life Museum  
Fundy Geological Museum  
Haliburton House  
Lawrence House  
Maritime Museum of the Atlantic  
McCulloch House  
Museum of Industry

Museum of Natural History  
North Hills Museum  
Nova Scotia Museum Storage Facilities  
Old Meeting House  
Perkins House  
Ross Farm Museum  
Ross-Thomson House  
Shand House  
Sherbrooke Village  
Sutherland Steam Mill  
Uniacke Estate Museum Park  
Le Village Historique Acadien de la Nouvelle-Écosse  
Wile Carding Mill

## Year 4 (2022)

Amos Seaman School Museum  
Archelaus Smith Museum  
Canning Heritage Centre  
Cape Sable Historical Society

Carmichael-Stewart House Museum  
Hooked Rug Museum of North America  
Inverness Miners' Museum  
Isle Madame Historical Society

James House Museum  
Little School Museum  
Nicolas Denys Museum  
Nova Scotia Sport Hall of Fame  
Shearwater Aviation Museum

SS Atlantic Heritage Park  
Tupperville School Museum  
Urban Farm Museum Society  
Whitman House Museum

ANSM is committed to providing strong support and working with museums as they prepare for evaluations. Orientation sessions will take place in October of each year, and a resource person will be available throughout the winter/spring months to provide regular updates, tips, resources, and reminders of deadlines. Participation in an orientation session is mandatory for museums that are part of CMAP and/or the Halifax Regional Municipality's Community Museums Grants Program. All museums scheduled for the upcoming evaluation cycle are encouraged to send at least two representatives to orientation (ideally a lead staff member and board member). Representatives are welcome to attend any session that works with their schedules. Registration is required and a minimal fee includes lunch and breaks. More information, including how to register, can be found on [ANSM's website](#).

Museum organizations that are interested in participating in the program can contact the Evaluation Program Manager for more information. A limited number of places are reserved for new participants, and are available on a first-come first-served basis.

The Museum Evaluation Program will be evolving into the Accreditation Program. The program will provide museums with a means to be transparent and accountable in their community and to other stakeholders. Museums that excel in the evaluation process and meet the other necessary program requirements will receive the designation of Accredited Museum.