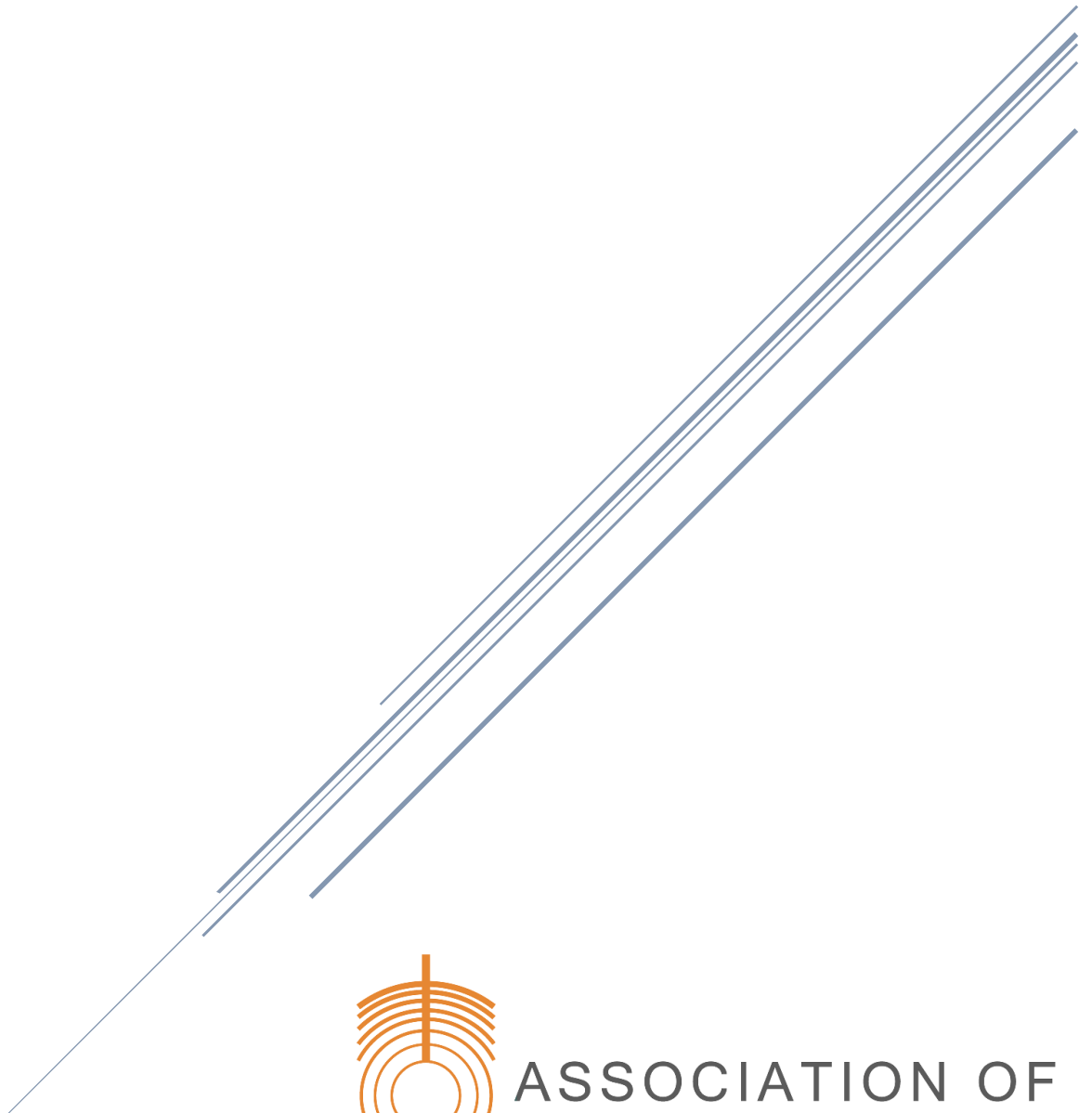


# ANNUAL REPORT

Museum Evaluation Program

**2019**



ASSOCIATION OF  
NOVA SCOTIA  
MUSEUMS

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## I. Executive Summary

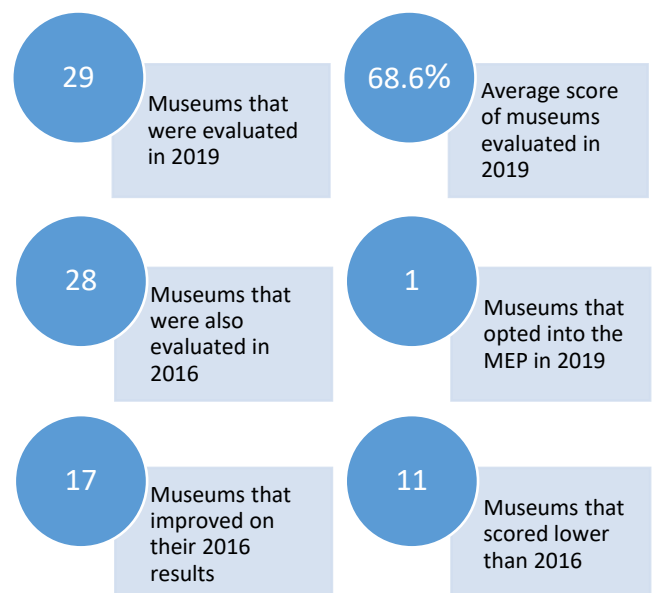
The Association of Nova Scotia Museums (ANSM) is a non-profit organization which supports museums in Nova Scotia. Part of its mandate is “to encourage the development of best practices in Nova Scotia’s museums”. In complement to its commitment to this, ANSM undertook the delivery of a revised evaluation program in 2016. ANSM is a partner of the Government of Nova Scotia in the development, delivery and reporting of the Museum Evaluation Program (MEP). ANSM has also established a Museum Evaluation Program Working Group (MEPWG) of museum professionals who provide guidance on the program’s development and delivery. There are currently 101 museums participating in the program.

The Museum Evaluation Program includes:

- MEP Working Group
- Evaluation orientation sessions
- Guidance and support for participating museums
- Documentation Review
- Site Evaluation
- Evaluation reports for participating museums
- Application and review process for selecting evaluators
- Evaluator training and resources
- Accreditation

2019 was Year 1 of the Museum Evaluation Program’s 4-year cycle. The majority of museums slated for Year 1 were evaluated in 2016, enabling an assessment of improvements and changes since the previous evaluation. ANSM again promoted the MEP to museums which had not previously been evaluated. Two such museums attended orientation sessions; one opted into the MEP immediately and the other has chosen to wait to participate until 2022.

29 museums participated in the two-part evaluation process (Documentation Review and Site Evaluation). Two museums did not submit anything for Documentation Review, which impeded ANSM’s ability to properly



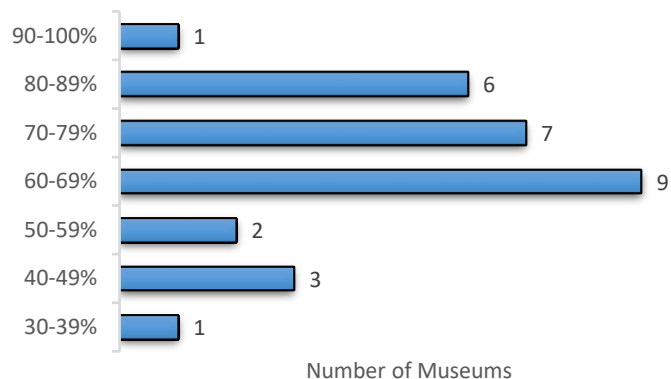
assess and provide feedback on these museums' standards of practice. This also skewed the average scores of the seven sections of the evaluation, as well as the overall scoring average.

Comprehensive reports were provided to each museum, providing them with external, professional input on evaluation results

and how to facilitate improvements. As in 2018, many museums demonstrated that their 2016 evaluation report played a key role in preparing for this evaluation. Those that used their 2016 reports and had been working cooperatively and long-term to prepare for the evaluation, saw marked improvements in many areas.

This report outlines the methodology of the MEP, analyzes trends in scoring and results, shares feedback from participants (museums and evaluators), and offers some suggestions of actions that can be taken to address feedback and findings shared in this report. Supporting documents are provided as appendices.

### Museum Scoring Ranges - 2019



## II. Preparation Work

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*Museums can sometimes get bogged down by the day to day operations. The MEP provides museums with the tools they need to keep moving forward.*  
~MEP Evaluator

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### Museum Evaluation Program Working Group

The MEPWG ([terms of reference available online](#)) continues to be an integral element of the MEP. Responsible for addressing feedback from participants, reviewing and revising evaluation questions and the overall MEP, and developing the new Accreditation component, the 10 members consistently display a level of commitment, interest and engagement that is second to none. The group usually meets 4-6 times a year, although this year held 7 meetings in order to prepare for the launch of Accreditation. Discussions are lively and thoughtful, and always consider the impact of program elements and/or proposed changes. The 10 members represent museums of all sizes and operating

structures, evaluators, and government employees responsible for museums and heritage issues. A standing invitation to join the MEPWG has been offered to the program officer for the Community Museums Assistance Program.

Current MEPWG members:

- Oralea O’Byrne (Chair), Age of Sail Heritage Centre/ANSM Board of Directors
- Lyne Allain, Mahone Bay Museum
- Cathy Blackburn, 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

Two MEPWG members have now met their full terms of service in accordance with the group’s Terms of Reference, and applications have been opened for new members to join in January 2020.

### Evaluation Timeline

As in years past, ANSM developed a timeline (**Appendix 1**) that included all key dates and deliverables of the MEP. Available on ANSM’s website, the timeline is a project management tool for ANSM, planning tool for participating museums and (potential) evaluators, and awareness tool for stakeholders and museums contemplating opting into the program. The timeline was shared during orientation, and reminders about key dates circulated throughout the year.

### Evaluation Orientation Sessions

Museums slated for evaluation were notified directly, and encouraged to send multiple representatives to one of four orientation sessions which took place in October 2018. Locations were selected in relation to museum locations, minimizing travel time for attendees.

As with previous evaluations, results from this year demonstrate that orientation sessions have a direct impact on evaluation results, and having multiple representatives from a museum attend orientation means even

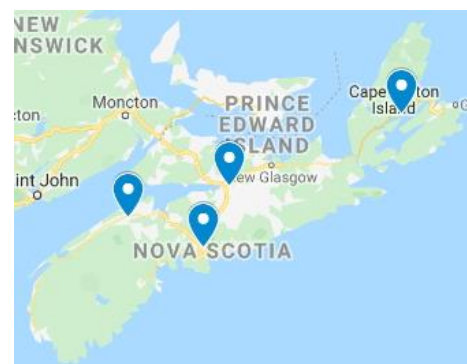


Figure 1: Evaluation Orientation Sessions

greater results. Multiple reminders and contact attempts were made with museums that did not register for orientation. These communications were all tracked throughout the course of the year.

Overall, 53 individuals representing 27 museums participated in orientation. 38 individuals had not attended an MEP orientation session in 2016 and 17 individuals were not involved in their museum's 2016 evaluation in any capacity.

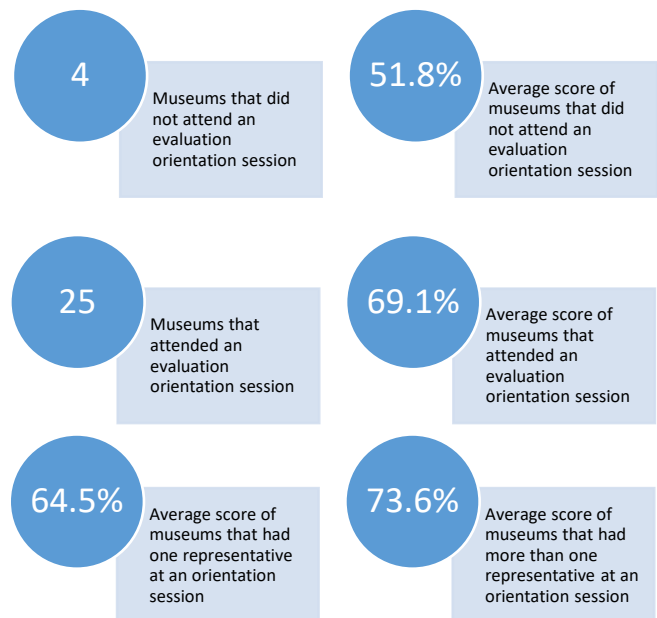
Baddeck – 12 attendees from 6 museums

Bedford – 9 attendees from 5 museums

Berwick – 16 attendees from 9 museums

Truro – 15 attendees from 7 museums

25 of the 29 museums evaluated in 2019 attended an orientation session. Of the four that did not attend, one did not respond to communication attempts, one declined due to the scheduling, and two cancelled their registration the day before the session. Two other museums attended orientation; one seeking to learn more about the MEP as the board debated opting into the program, and the other being proactive as they are slated for evaluation in 2020. Of those that did not attend, all four saw decreases in their scores when compared to 2016 results.



With one exception, all museums evaluated in 2019 were also evaluated in 2016. As such, the orientation session agenda was adjusted from previous years. The morning provided a reminder of the program and process, but focused mostly on changes to questions and requirements. The afternoon followed the same format as 2018 – primers on good management and community engagement practices. A question period at the end allowed museums to dig deeper into subjects and address issues not covered during orientation, and museums were encouraged to reach out with additional questions as they prepared for evaluation.

### Support for Museums

The established practice of “Q&A” emails continues, as museums consistently express this is the most helpful support mechanism as they prepare for their evaluation. Again, the sign-in sheets from orientation sessions were used to build the initial list, and

museums were encouraged to share messages with others in their organization. Each email invited people to subscribe if the message had been forwarded to them, or unsubscribe if they were no longer interested in receiving MEP information. 82 individuals subscribed. Questions submitted from museums to the Manager of the MEP were shared via this email group, and also tracked separately. This email support did experience a problem when numerous participants reported not receiving messages or messages being flagged as spam in early Spring 2019. The mailing list was transferred to MailChimp.com and those museums which were having issues reported that this shift corrected the issues. Q&A messages were derived from questions submitted to the Manager of the MEP, which were shared anonymously with all museums in the group so that they could see both the question and response. Links to helpful resources were often included. This methodology ensured that all participants in the MEP received the same information at the same time. 22 Q&A emails were circulated from October 2018 through June 2019.

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*Sharing of Questions and Answers has been very helpful...thanks!!*  
*~Museum Worker*

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In addition to Q&A email messages, numerous resources, updates and information were provided via the [ANSM website](#), [Facebook page](#), and [blog](#). ANSM staff also provided face-to-face updates and information at regional heritage group meetings in Fall 2018 and Spring 2019.



In the case of face-to-face meetings, as well as orientation sessions, numerous museums expressed concerns about how the evaluation would impact their CMAP funding, what grants were available to assist with evaluation preparation efforts, and communications with government staff. ANSM encouraged museums to direct these questions to the appropriate department and/or staff person. Regardless of how often it is communicated, there are still some museums which are confused by the relationship between ANSM and government.

### **Evaluator Recruitment, Selection & Training**

Evaluator applications were opened in January 2019, with a slightly updated application form ([available online](#)). 11 applications were received, 9 of which were from individuals who had previously served as evaluators. The MEPWG reviewed the applications and selected 10 to serve as evaluators. Two individuals who had previously evaluated with the MEP were recruited to serve as “spares”, ie they would be included in

communications and training but would only be called upon to evaluate in the event that another evaluator experienced a last minute issue that prevented them from fulfilling their commitment. This year, the spares were not required.

Evaluator skillsets and backgrounds were mapped out and four teams of three people were established. Each team had varied skills which would collectively speak to all seven areas of the evaluation. ANSM's Executive Director and MEP Manager served as team leaders, along with two individuals who have worked with ANSM on the MEP since 2016. Museums were provided with brief biographies of their evaluation team (**Appendix 2**) when the site evaluation schedule was released on March 20<sup>th</sup>.

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*I appreciated the diverse background and experience of our team members. This makes for a much fairer and more comprehensive evaluation than there would be if only one person were charged with this task.*

*~MEP Evaluator*

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An orientation day was held for evaluators on July 3<sup>rd</sup>, which provided an opportunity to review the process, address changes since 2018, and answer questions and concerns. Evaluators were also given time to coordinate within their own team, and were provided with information on each of the museums they would be visiting, including the site evaluation schedule (**Appendix 3**) and briefing notes. ANSM also provided each team with virtual files and information using Google Drive, so that evaluators had access to information during evaluations. This facilitated the sharing of far more information than in previous years, and was noted as very helpful by the evaluators. Team leaders were instructed to be in communication with their assigned museums to confirm arrival dates and times, to be consciousness about reviewing and confirming consistency in scoring and assessment of each site, and to share general observations that could be included in the evaluation reports.

### **Site Evaluation Scheduling**

Museums submitted blackout dates for the site evaluation by March 15<sup>th</sup>, so that ANSM could develop a schedule that would not conflict with staff vacations, fundraisers, group tours, or other activities. Evaluators were also asked to submit any real or perceived conflicts of interest with the museums being evaluated. All conflicts were accommodated, and site evaluations were set for Tuesdays-Thursdays, July 9-25<sup>th</sup>. Due to the travel routes and scheduling, one evaluation team was only required for two of the three weeks. As previously noted, the schedule was circulated to museums on March 20<sup>th</sup>, and team leaders confirmed the schedule with museums in early July.

### III. Evaluation Process

*This year we visited community museums housed in a former school, church, courthouse, railway station, historic houses and a family farm. All of these in once thriving communities that now face an uncertain future due to out migration, the consequence of circumstances beyond their control. These museums play an integral role in preserving and sharing their community's history. Most importantly they foster a sense of place for current residents, those that have 'gone down the road', and those who are new arrivals. In former times the local school, church or railway station were central to the life of the community, today these community museums have assumed this role and deserve support. In a related matter, I was impressed by the quality and number of young summer students we met, and are bringing their enthusiasm and contemporary skill set to the community museums. What a tremendous investment having young people from the community sharing their knowledge of their community to museum visitors, recording their community's history and preserving its heritage through artifacts and buildings. In a sector heavily reliant on volunteers, usually retired, it is heartening to see some younger members of the community being given the opportunity to contribute to the museum while earning money to further their education.*

*~MEP Evaluator*

#### Documentation Review

The first half of the evaluation is a Documentation Review, wherein museums complete a questionnaire and submit it along with supporting documents via a secure file transfer protocol (ftp) website. The deadline for this information to be submitted was May 3<sup>rd</sup>. While required documents are clearly outlined in the Documentation Review form itself, an additional resource outlining the requirements was developed and circulated.

One of the ideas to make the Documentation Review process easier was to provide museums with the ability to access and build on previous evaluation submissions. This was tested in 2019. Each museum was provided a unique login, enabling them to easily access and review the files submitted in 2016 in their folder. Museums were encouraged to review and remove anything that was no longer relevant and to upload new or updated files and documents. Some museums responded very positively to these instructions and appreciated the ability to simply update their 2016 submission. Other museums did not review the files already

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

Welcome Spectacle Group (acoredadmin).  
Please ensure your submitted documents are titled to match the list below.  
Do not submit additional documents unless they are in support of specific questions requiring examples or extra information. Make note of this on your form so the connections are clear.  
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.  
If you wish to review previously submitted files, [click here](#).  
It is the responsibility of the museum to ensure that all files are submitted prior to the submission deadline.

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2019 DOCUMENT SUBMISSION

File 1 of 1:  No file chosen

[Add another file?](#)

Additional Notes:

Let us know if you have a comment:

[File Upload](#) - [Files](#) - [Admin](#) - [Logout](#) - [Admin](#) - © 2019

Figure 2: FIP Website Submission Page

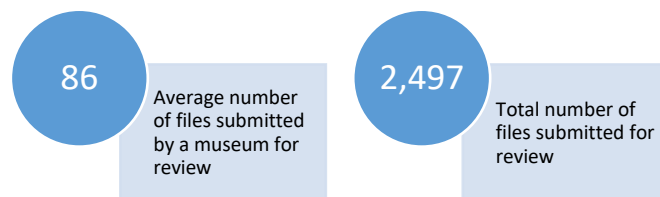
contained in their folder, and simply added new files to the folder. This resulted in a far greater workload in reviewing submitted files than was intended or necessary. In the future, ANSM will revert to the earlier practice of museums being required to upload an entirely new Documentation Review submission as part of the evaluation. Previous files will not be kept in the museums' folders.

On January 21<sup>st</sup>, the ftp website was opened for submissions. One trend this year was that museums tended to upload in multiple sessions rather than a single session as they have done in years past. Upon completing an upload, museums received a confirmation email. A copy of these emails was also sent to ANSM, enabling the monitoring of the ftp website and upload activity.

As the May 3<sup>rd</sup> deadline approached, ANSM reached out to museums that had not been asking questions or uploaded any files. In one case, the MEPWG determined that a letter should be sent to one museum's board of directors after repeated messages went unanswered. On April 17<sup>th</sup>, an online training session on how to use the ftp website was delivered. Ten individuals from seven museums participated.

27 museums submitted 2,497 files for Documentation Review. Of the two that did not submit anything for review, both had successfully submitted files in 2016 and so some

information could be gleaned from those files. One museum submitted a completed Site Evaluation form instead of the Documentation Review form. The other museum had not responded to repeated messages and as such received the aforementioned letter from ANSM and the MEPWG.



From May through July, ANSM reviewed and scored all files submitted for Documentation Review. A distillation of each organization's submission was noted in the museum's Briefing Note, enabling evaluators to understand policies, procedures, and practices used within the museums' operations.

### Site Evaluation

The second part of the evaluation was the Site Evaluation. As previously noted, four teams of three volunteer evaluators were developed and tasked with visiting certain museums. Depending on the size of the museum, evaluation teams spent approximately three hours on-site, completing the Site Evaluation form, making notes and capturing photographs to document their findings. Evaluators documented the amount of time required to complete the Site Evaluation; key information for the museum's evaluation report and for ANSM's future evaluation planning and scheduling.

As previously noted, evaluators were provided with physical and electronic copies of briefing notes on each museum under their purview. These included the museum's contact information, mission statement, overview of Documentation Review submission, annual budget, facilities information (including ownership information), human resources information, community engagement highlights, and links to online presence. Evaluators continue to note the invaluable nature of these resources.

The first 30 minutes of the Site Evaluation are earmarked for the museum to provide its own orientation to the evaluation team, explaining highlights of the museum's operation. While the use of this time varied between museums, this year, there were a number of common trends. In particular, every evaluation team reported that many of the museums they visited took great pride in demonstrating how the museum used its 2016 evaluation results and report to make plans and implement positive changes. These positive changes were very clear and demonstrable.

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*We were really impressed this year that some sites valued their previous feedback in their site report and used this to prepare for this year's evaluation. One had also used their feedback as evidence for a funding application – of repairs and equipment that were needed. This was successful. This also makes us feel gratified that we are being helpful to museums.*

*~MEP Evaluator*

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The evaluation team then completed the Site Evaluation form, making notes and taking photographs as required. Highlighted questions were addressed in a discussion time with museum representatives, led by the evaluation team leader. Upon completion of the Site Evaluation form, the team reviewed their findings to ensure there was consistency in scoring and notes. When discrepancies occurred, the team made a determination to either adjust the score, or leave responses as they were to allow for the averaging of the score to reflect the mid-range reality of the situation.

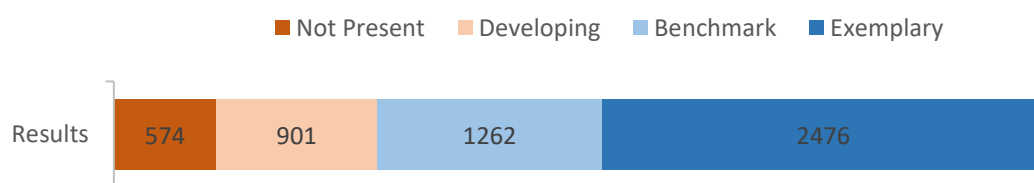


*Figure 3: Site Evaluation in Action*

### **Evaluation Report**

There appear to be two mindsets relating to the evaluation reports; those that view and use them as a planning tool, and those that do not put them to use within the organization. ANSM staff and evaluators heard from numerous museums about how they used their 2016 report to prepare for this year's evaluation. Many museums had their 2016 reports in hand for their site evaluation, and walked evaluators through

those findings and how the museum addressed the issues that were noted. As in all areas of the MEP, feedback from museums and evaluators enabled ANSM to adjust the basic report template and provide better information to the receiving museums. While the education system has instilled a comfort with an understanding of a grading system, it is understood that this can sometimes be a barrier in understanding evaluation results. As such, ANSM is investigating methods of moving away from numerical, percentage-based results and focusing more on the information. As such, a new graph was added that demonstrated where a museum's operations fell on a spectrum. The following graph is a collective version of these individual graphs, breaking down the number of questions which museums were unable to answer and for which they received no points (not present), questions which the museums could partially answer (developing), questions which the museums could demonstrate strong responses while still having opportunities for improvements (benchmark), and questions which the museums could easily answer and for which they received full marks (exemplary).

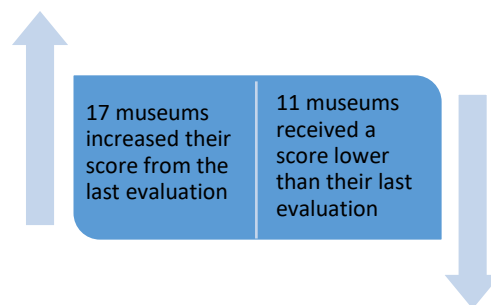


This overall graph effectively demonstrates that by and large, Nova Scotia's museums are effectively serving their communities and operating by established standards of professional practice. Many are excelling in these regards. Individually, they each have some areas that can be improved, but as evaluators heard during site visits, the boards of directors, staff, and volunteers are very aware of issues and are working hard to address them.

## IV. Scoring Trends & Analysis

### Results of Organizations that were Re-evaluated

As was noted in the 2018 report, it was hoped that museums which were being re-evaluated would see an increase in their section and overall scores. This year, 28 of the 29 participating museums were evaluated in 2016. Scoring increases ranged from 0.5% to an impressive 29%. In almost all of these cases, museum representatives said that they took a multi-year approach to preparing for the evaluation, delegating various tasks to the board,

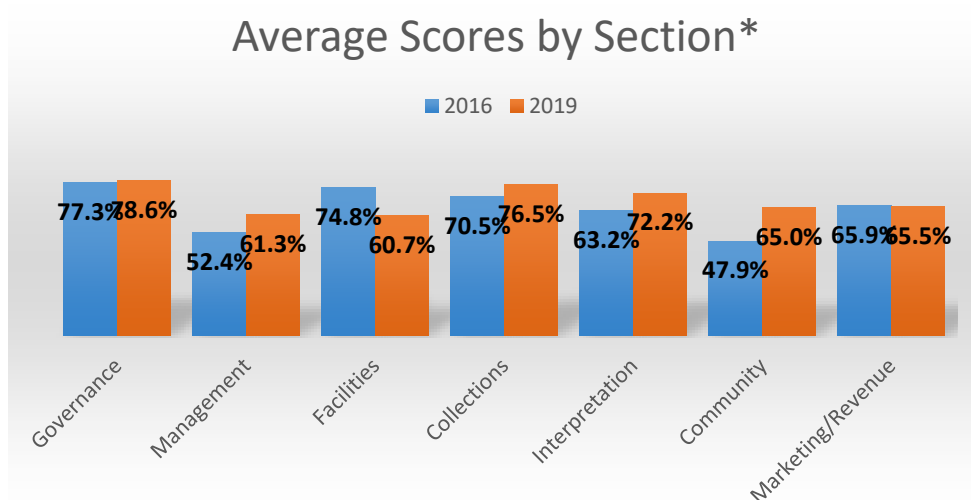


committees/teams, staff and/or volunteers. For those that saw decreases in their scores, personnel and facility challenges were often major contributing factors. Some messages received by ANSM specifically noted difficulties due to the loss of a key team member, aging volunteers, board expectations for staff to do all of the evaluation preparatory work, and the need for grants and other funding to address known issues.

### Results by Section

Section results were very comparable to previous years, and continue to affirm and enhance ANSM's understanding of Nova Scotia's museums. Governance results remain strong and Management results remain weak. Encouragingly though, improvements are being seen in management practices. Marketing and Revenue Generation remains fairly stagnant, but other sections show marked improvements. The surprise in this year's results is the 14.1% drop in the Facility section when compared to the 2016 results. As noted last year, it appears that spending additional time on Management and during the MEP Orientation Sessions is prudent.

\*Note – section averages for 2016 were derived only from those museums re-evaluated in 2019.



Previous reports have identified specific issues of concern. Rather than focusing solely on problem areas, the following section of the report will identify the top five successes of each section as well as the top five struggles - areas needing improvement. In some cases, there is an event split in results, meaning that an area of excellence is also an area needing improvement.

### Governance

Nominal improvements to Governance practices have been made since 2016. Museums are still expressing difficulties in attracting new board members and knowledge transfer from outgoing members. In reviewing the areas of excellence and struggles, and

comparing these with the Management section, it appears that foundational work in policy development and guiding statements was completed, but is not being reviewed on a regular basis. This is especially noticeable in mission statements. Many statements are still 'definition statements' rather than guiding statements, and as noted in last year's report, are not providing the guidance that they could or should be providing. In numerous cases, the board of directors and museum appear to be in good policy and procedural form, but the implementation of these policies and procedures is lacking. An example of this is performance reviews for the lead worker, a responsibility of the board. While in the Management section, staff performance reviews is an area of excellence, these are carried out by the Curator, Manager or Director (ie the lead staff person) of the museum rather than the board of directors. Lead workers in museums need to insist on performance reviews, and boards need to be more proactive in ensuring this essential practice is carried out.

### Community

Museums have made great strides in their community engagement efforts over the past few years. In some cases this is due to an increased understanding of the scope of the subject, and recognizing longstanding partnerships and activities as community initiatives. In other cases, museums are sending workers to workshops and the community primer in the MEP orientation sessions. Museums are increasingly embracing their role as community service organizations rather than community memory hubs, and are experiencing renewal and growth as a result. Interestingly, there are a few examples of division in community efforts, where one

### Governance Excellence:

- Mission statements
- Ethics guidelines adopted
- Governing documents acknowledging operation on behalf of society
- Clear responsibility outlined for policy and financial decisions
- Job description for President of the Board of Directors

### Governance Struggles:

- Board self-assessments that relate to strategic plan objectives
- Performance reviews for lead worker
- Meeting minutes
- Communication of mission or statement of purpose
- Strategic plans

### Community Excellence:

- Advocating for positive change and/or championing causes important to the community
- Familiarizing local businesses with museum activities
- Hosting or partnering on community events without an expectation of financial gain
- Seeking and/or encouraging community input
- Participation in long-term planning meetings/exercises with the community

group of museums is excelling and another is really struggling. Seeking and/or encouraging community input is one such area, where some museums have successfully implemented practices to garner real and valuable input from community members, while others express a desire for input but are not sure how to proactively gather it. There are also some areas in which many museums are struggling. There is a real lack in joint ventures among museums; in marketing, fundraising, and exhibit development and delivery.

### Management

As previously noted and experienced in other evaluation years, Management continues to be one of the lowest scoring sections of the evaluation. In analyzing the results however, several of the areas requiring improvement are actually responsibilities of the board of directors rather than the lead worker, such as creating a professional development plan for the organization. Seeking professionally trained employees and conducting security checks are also usually board responsibilities. In terms of management struggles, volunteers continue to be a key issue for museums. ANSM regularly hears about difficulties in recruitment, and concerns about formalizing roles. However, experts in volunteer management suggest that having an organized volunteer program will actually improve recruitment rates. Developing job descriptions for key roles will give potential volunteers a better understanding of their tasks and role within the organization. ANSM also continues to promote goal reviews as a good practice and one that should not be seen as judgmental or off-putting for volunteers. Rather it is an opportunity to gather feedback from people who are delivering programs, talking with visitors, and doing myriad other tasks in the organization.

### Community Struggles:

- Joint exhibits and/or borrowing or lending artifacts
- Regional heritage group participation
- Joint marketing/fundraising initiatives
- Participation in long-term planning meetings/exercises with the community
- Seeking and/or encouraging community input

### Management Excellence:

- Keeping sensitive records secure, with limited access
- Regular insurance assessments
- Use of accounting software
- Providing workers with necessary equipment and resources
- Staff performance reviews

### Management Struggles:

- Goal reviews for volunteers
- Job descriptions for key volunteer positions
- Security checks for workers
- Museologically-trained workers
- Professional development plan for workers

### Facility

Surprisingly, the Facility section results saw a significant decrease in score when compared to the 2016 results. This can be attributed to a couple things. First, ANSM has gained a better understanding of the scope of organizations being evaluated. In 2016, not every building under the aegis of a museum was evaluated because it was not known they were part of the organization. Storage sheds are common and were included in this year's evaluation, which unfortunately lowered the average scores. Another issue is deteriorating infrastructure, which was expressed as a major concern by many museums during this year's evaluation. In terms of excellence, simple safety procedures are at the top of the list. Struggles highlight major issues that require working with outside parties, such as obtaining a lease or management agreement for use of the property, and developing supports for visitors. While programs are in place to assist with the latter, museums are only beginning to take advantage of them.

#### Facility Excellence:

- Up-to-date First Aid kits
- Emergency phone numbers posted by telephones
- Copies of OH&S Act and Regulations on site
- Clearly identified exits
- Public and non-public areas clearly distinguished

#### Facility Struggles:

- Leases or management agreements with property owner
- First Aid training for workers
- Support for visitors with visual or hearing impairments
- Facility management plans
- Access for individuals with mobility issues or physical disabilities

### Collections and Access to Information

Analysis of the Collections results demonstrates that some basic collections care practices are in place within almost every museum. Improvements have been made to policies and procedures, although procedures are still often lacking in detail. The struggles in this section highlight the lack of space in museums; for storage and for collections work. Many museums noted that they had to use one space for multiple purposes. Museums also need to be more firm about acquiring new objects, ensuring that a committee reviews potential donations and makes decisions which are answerable and transparent and align with ethical, professional standards of practice. The lack of space and resources coupled

#### Collections Excellence:

- Restricting food to designated areas
- Incident reporting
- Storing collection records in one area
- Organized research information
- Designated research areas

with active collecting means that collections rationalization projects will be required in the very near future. For those with archival collections, they admitted that adhering to the Rules for Archival Description and the Council of Nova Scotia Archives' Cooperative Acquisition Strategy is difficult.

### Interpretation

As seen in previous years, the shift from static to dynamic interpretation is still underway. Regardless of methods used, museums are ensuring that interpretation ties in with their mission (although this will require review as more museums shift away from definition statements to true mission statements), and programming includes ties to artifacts in the collection. Museums are also improving the relevance of exhibits, tying in with local stories or commemorative events. This is an excellent step towards developing dynamic interpretation. Evaluators again commented on the passion, dedication and interest of workers. The people behind the museums of Nova Scotia are a major asset to say the least. The areas in which museums are struggling with interpretation are all significant issues that cannot be solved quickly or easily, but that all tie directly to the interpretation plan. Once a plan is developed, it will in theory incorporate and address the other areas in which museums are struggling – temporary exhibits, school programs, active elements in exhibits, and supporting tools for implementing the plan such as tour transcripts. In some cases museums may not wish to develop this plan on their own given its large scope, but may instead desire and require project funding for an external contractor to carry out the work. In terms of school programs, ANSM is currently in the planning stages of project development to assist museums with collections-based online school programs.

### Collections Struggles:

- Terms of Reference for collections committee
- Condition reporting
- Storage areas exclusive for collections
- Isolating incoming acquisitions
- Following archival standards

### Interpretation Excellence:

- Interpretive offerings reflecting the mission statement
- Long-term exhibits reflecting the mission statement
- Exhibits addressing matters of importance to the community
- Programming linked to the collection
- Courteous, engaging and knowledgeable workers

### Interpretation Struggles:

- Temporary exhibits
- Interpretation plans
- School programs
- Outlines of interpretive offerings
- Active elements in exhibits

### Marketing and Revenue Generation

Basic marketing practices are well established in Nova Scotia's museums. Brochures, rack cards, and maintaining records of marketing initiatives are carried out by virtually every institution. There is also an increase in branding which enables museums to promote themselves in more memorable and effective ways. For those with a gift shop or other retail offerings, the same can be said as was said about interpretation. Clear ties exist between retail items and the museum's mission. The struggles with Marketing tend to be similar to Interpretation; major plans and initiatives rather than simple issues to address. Museums are still lacking in detailed marketing and fundraising strategies. A key information piece for these documents would be analyzing visitor statistics and using that information to determine priorities, another practice that is not currently underway in most museums. In terms of financial management, many museums have said that engaging an outside auditor to handle financial reporting is cost-prohibitive. One easy issue to remedy would be to see the retail area as having interpretive potential, and developing simple tags or signs to share the stories of local artists, products, and how revenue is used to further the museum's efforts.

#### Marketing Excellence:

- Brochures and rack cards
- Maintaining records of media activities
- Retail offerings linked to mandate
- Logos and branding
- Neat and easily accessible retail areas

#### Marketing Struggles:

- Using visitor statistics to focus marketing efforts
- Engaging independent source for year-end financial reports
- Telling the story of retail products and/or artisans
- Marketing strategy
- Fundraising plan

### **Scoring Influences**

As noted last year, the factors that influence museums' evaluation results tend to relate to the corporate or organizational culture of the museum. Museums that are outward-looking and see themselves as an active community service that is ever changing tend to fare better in evaluation than those that do not.

When boards revisit their mission and vision statements regularly, embrace professional development as a core activity, establish mechanisms for the community to

#### SCORING INFLUENCES

1. Mission Statements
2. Engagement
3. Communications
4. Resource Levels
5. Teamwork

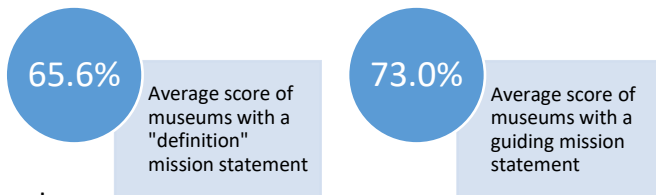
be actively engaged with the museum, and work as a team, they set themselves up for success. When one individual is expected to do the majority of the work, or museums try to work in isolation rather than with the community (including their professional community), these realities ring loud and true in their evaluation results.

### Mission Statements

The quotation shared in last year's report is still very relevant.

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." ANSM has been actively encouraging museums to revisit their mission statements to ensure that they provide guidance rather than a general definition. There is still a correlation between mission statements and evaluation score, but it will be interesting to see if or how this changes as more museums adopt true mission statements.

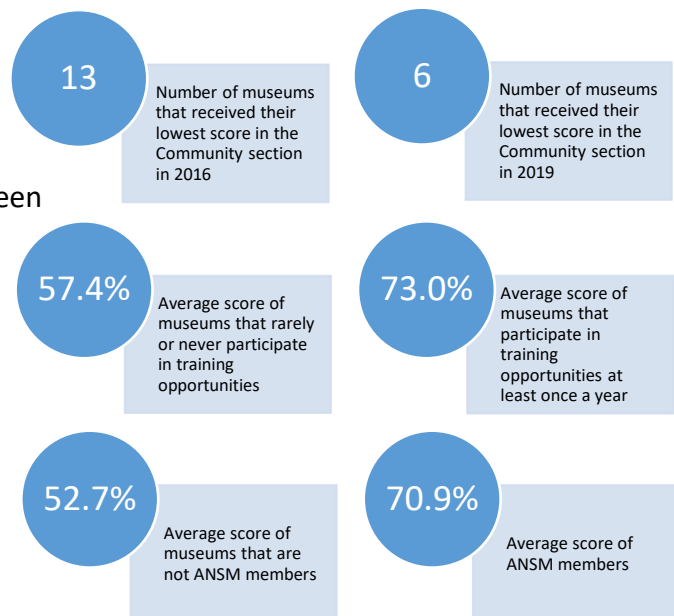


### Engagement

Since ANSM first launched the MEP, results have consistently shown that museums struggle with community engagement. In response to this, a primer on the subject has been integrated into

the MEP orientation sessions, and ANSM has encouraged museums to attend relevant learning opportunities whenever possible. It appears that these efforts are paying off, as results are drastically improving and museums are benefiting from this shift in their operations. Engagement with the

museum's professional community is also still a marker for success in evaluation. The sharing and networking facilitated through the regional networks is undeniable when the results are compared between those who participate in group meetings and those that do not. Similarly, ANSM members continue to fare better than non-members. These results are strikingly similar when comparing museums that make professional development a priority with those that do not. One comment received from numerous



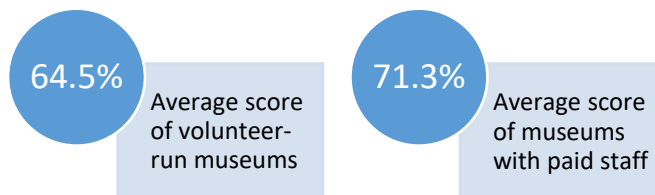
evaluators this year, was how many museums had embraced the evaluation progress and process, and had used their 2016 report to help prepare for the 2019 evaluation.

### Resource Level

There continues to be a slight difference in the results of volunteer-run and staffed museums. Several museums

experienced changes in this regard in

2019, losing key staff or volunteers during the evaluation process. As in years past, some of the highest scores were received by entirely volunteer-run museums, and some of the lowest scores were received by museums with paid staff. Considering the common concerns about workers aging and/or burning out, and difficulties in recruiting new volunteers, human resource retention and support is a growing area of concern.

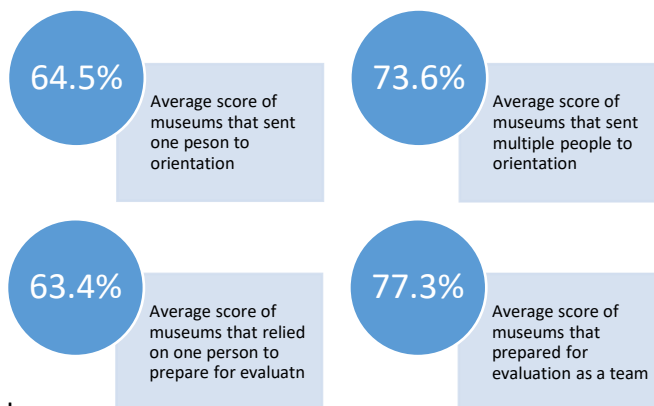


### Teamwork

ANSM encouraged museums to take a team approach to the evaluation, from sending multiple people to orientation, to sharing support Q&A emails (and having multiple people subscribe to this email group), to working collectively on the various preparations required. Some museums took this to heart. Approaches

varied, but included dividing tasks among board members, setting time in each board meeting to address one or two tasks, and establishing an evaluation committee.

Unfortunately some boards simply assigned the work to the lead staff person, in addition to their usual responsibilities. This was a real burden for those individuals and ANSM heard several stories of the frustration and stress experienced from this lack of support.



## V. Feedback

### **Evaluator Debrief**

A key element of evaluator engagement is the opportunity to review and discuss the evaluation experience, trends noticed during site visits, and share ideas on how to improve the program. This year the debrief took place on August 13<sup>th</sup> as a virtual meeting. Evaluators agreed that interpretation and in particular, good labels, is still very much an issue for museums, and recommended that ANSM provide more guidance in

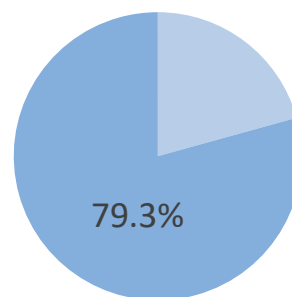
these areas. Evaluators also requested that more time be budgeted for the teams to discuss their on-site experiences and distill that information into stronger feedback for the museum.

In addition to the virtual debrief, an online survey was circulated so that evaluators could provide input in written format. This was especially helpful as not all evaluators were available for the debrief meeting. The survey rated the evaluators' satisfaction level with their MEP experience, what resources they found helpful, what issues they encountered, whether their team had a good mix of skills, whether they would be interested in serving as an evaluator again in the future, and how ANSM can improve the MEP. They were also asked to share their perceptions of the value of the MEP.

### Evaluation Report Responses

Reports were released on September 6<sup>th</sup> and the deadline to respond to them was October 4<sup>th</sup>. As noted in previous reports, ANSM views the evaluation reports as draft documents until the deadline for feedback has passed and all noted concerns have been addressed. 23 museums responded in some capacity, either by phone, email, or letter mail. 8 reports required slight adjustments. Only 15 museums requested a pdf version of their report.

Evaluation Report  
Response Rate



In addition to email and phone response, ANSM developed and circulated a post-evaluation survey to gain more feedback from participants. 11 individuals responded. Circulated shortly after reports were released, the survey garnered far more negative feedback than email or phone conversations. The initial respondents also gave negative ratings to support mechanisms which had not yet been delivered, which puts the validity of the survey results into question. In some cases, it seems that the anonymity provided through the survey emboldened respondents to express criticisms and frustrations, some of which were unrelated to the MEP. In other cases, bullet-style responses were unclear and the anonymous nature prohibits ANSM from following up with respondents to clarify meaning, greatly limiting ANSM's ability to address issues. In the future, this survey will be circulated after the deadline for responding to reports and will not be anonymous. Responses to questions about the value and challenges of the MEP have been shared through this report as highlighted quotes.

When asked about the support mechanisms and helpful resources, and how these can be improved, museums agreed that online materials such as downloadable forms and templates, and Q&A emails were very helpful. They also requested an expansion of online offerings and in particular, information about how to improve interpretation.

When asked how the Documentation Review and Site Evaluation processes could be improved, some museums felt that the process was clear and transparent and effective. Others expressed frustration over the amount of work required and felt that important elements were missing, such as capturing visitor impressions and feedback. The ability to respond to reports was noted as a much-appreciated step in the process.

When asked if they had any other thoughts to share about the MEP, museums again had mixed remarks, ranging from appreciation to frustration. In several cases, disappointment over evaluation results was clear. An unfortunate trend this year was the reaction to one evaluation team's remarks and reports. With two exceptions, those museums which were displeased with their results and reports were all evaluated by the same team. Several of these museums used the same language in describing the evaluation findings: discouraging and disheartening. This trend was surprising and extremely unfortunate, and is being taken very seriously by the MEPWG and ANSM. The experience has already resulted in some changes for the next round of evaluations:

1. ANSM updated the orientation session content around governance and management issues.
2. ANSM updated the evaluator application form to better capture applicants' motivations and mindsets relating to evaluating museums.
3. ANSM has asked museums for input on the structure and content of reports so that the template can be updated to better serve the needs of museums.
4. ANSM plans to update boilerplate responses so they are reframed in a more positive and helpful light.

## VI. Moving Forward

While some of the feedback on this year's process was initially discouraging, it can also be seen as proof that museums are embracing the MEP as their program and see its value to their organizations. They are invested in it and want to see it evolve and grow in strength, efficiency, and effectiveness. It is within that framework that we ask the question, how does Nova Scotia's museum community move forward?

### MOVING FORWARD

1. Improve continuity
2. Improve flexibility
3. Respond to museum needs and concerns
4. Strengthen partnerships
5. Accreditation

### 1. Improve continuity

A recommendation received from both evaluators and museums is to improve the continuity between museums' evaluations. While the value of different perspectives and feedback is understood, some museums feel that there is a significant disconnect from one evaluation to the next. Similarly, evaluators who returned to museums they evaluated in 2016 felt that they were able to acknowledge improvements and provide even better feedback because of the increased level of familiarity with the site. While it is not feasible to send an entire team back to a museum due to scheduling complexities and evaluators being volunteers, ANSM will develop teams and travel routes with a goal of sending an evaluator back to a museum for its next evaluation. In addition to this, evaluation teams will be provided with a copy of the museum's previous evaluation report so that they can have a better understanding of how the museum has changed in the past four years.

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*Our Society has always felt that not having any returning evaluators was a definite drawback. Having three new evaluators every cycle is very disappointing because if a lot of work has been done, it may not be evident to the committee.*

*~Museum Worker*

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### 2. Improve flexibility

Last year it was noted that ANSM, through the MEPWG, must continue to review and refine the evaluation process and questions. This year's experiences reinforced this need, but especially through the lens of improving flexibility. Museums, evaluators, and ANSM staff all commented on the need to better incorporate museum realities and goals into the evaluation process. The current evaluation is a combination of audit and true evaluation, and the ability to speak to how well a museum is accomplishing its mission is often limiting. In many cases, this is in part due to the definition-style mission statements used by museums. In other cases however, museums are accomplishing great things and exceling in their mission, and this is not always reflected through the evaluation process. ANSM plans to work with a Governance expert to assist in the re-working of that section to address this issue. Training for evaluators will also include more time discussing the accommodation of museum and community realities.

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*We believe that future evaluation cycles would benefit from taking context from each site's unique challenges and advantages, and assist these institutions in improving what they do, while allowing for what they cannot reasonably accomplish, given those circumstances.*

*~Museum Worker*

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3. Respond to museum needs

Also noted in last year's report, the MEP provides ANSM and CCH with rich information about the current realities facing Nova Scotia's museums. ANSM has been incorporating this information into its strategic plan, Museum Studies Program courses, Advisory Service membership program, and the MEP itself. Special learning opportunities through partnerships and promotion of other organizations also play a role in ANSM's response to museums needs identified through the MEP.

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*Our organization went through some major changes this year and the evaluation staff was helpful, understanding and supportive, thank you.*

*~Museum Worker*

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4. Strengthen partnerships

These remarks are identical to those in the 2018 evaluation report, as this year has proven that the concerns are still present and methods to address still valid. 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. 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.

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*What other uses beyond self improvement will this information be used, for instance: will it be passed on to assorted levels of government to be used as leverage to either support or unsupport a museum? What financial impact will this have on our funding opportunities?*

*~Museum Worker*

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5. Accreditation

To date, the MEP has been an internal program, enabling museums to assess their operations and identify methods and areas of improvement. On October 29<sup>th</sup>, 2019, ANSM opened the application process for Accreditation. Accreditation will serve as the public side of the MEP, facilitating the acknowledgement of excellence in museum practices. Museums are eligible to apply in the year in which they are evaluated, and an Accreditation Panel derived from the MEPWG will adjudicate applications. The first museums to be accredited will be announced in Spring 2020.

## VII. Appendices

### Appendix 1. Museum Evaluation Program Timeline for 2019 Evaluations



### **Museum Evaluation Program Timeline for 2019 Evaluations**

October 2018	Evaluation Orientation Workshops
January 7, 2019	Applications for Evaluators opens
February 15, 2019	Deadline for Evaluator applications (midnight)
October 2018 – May 2019	Evaluation preparation support
March 15, 2019	Deadline for museums to submit blackout dates for site evaluations
April 5, 2019	Site Evaluation schedule released
May 3, 2019	Deadline for Documentation Review submissions (midnight)
July 3, 2019	Evaluator Training
July 9 - 25, 2019	Site Evaluations
September 6, 2019	Evaluation Reports to Sites
October 4, 2019	Deadline for museums to respond to reports
November 2019	Report to Communities, Culture, and Heritage



## Evaluator Bios 2019

**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 past-president of Heritage Trust of Nova Scotia and a former president of the Colchester Historical Society. He has authored two books on Nova Scotia's architectural and cultural heritage. 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.

**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, being a historic storyteller for a graphic recording program at nursing homes, and working with Meals on Wheels. 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 and 2018.

**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 and 2018.

**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 and 2018.

**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 and 2018.

**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.

**Lynn-Marie Richard:** Lynn-Marie Richard retired from the Maritime Museum of the Atlantic two years ago. She spent her thirty years at the museum doing research and working with the collection. She conducted several oral history projects on topics like CSS ACADIA and rowing in Halifax and helped produce exhibits on cables ships, the Marblehead-to-Halifax Race and was also involved with volunteer projects like the Ship Modeler's Guild. While employed at the museum Lynn-Marie was a team leader for approximately six CMAP evaluations.

**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 brings deep experience in leadership, administration, governance, curatorial practice and, most of all, education and programming. 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.

**Joanne Stevenson:** Joanne Stevenson is the Senior Heritage Interpreter at Uniacke Estate Museum Park and has worked and volunteered at various museums in Nova Scotia, Ontario and Alberta. Her current role includes working with the Site Manager to lead the interpretation team in providing tours, public and school programming, special events, operating the tea room/gift shop, and managing the museum's social media presence. Joanne was an evaluator for the Museum Evaluation Program in 2016.

**Barb Thompson:** Barb Thompson is a recently retired museum manager and curator with 18 years of experience working in the communities of Amherst and Bridgewater, Nova Scotia. Barb has also been a volunteer, board member, and consultant in the heritage field during her career as well as a researcher into local women's history.

### Appendix 3. Evaluation Schedule & Team Information



#### Site Evaluation 2019 Schedule & Team Information

##### Team #1:

Anita Price – team lead

Joe Ballard

Lynn-Marie Richard

Week #1	July 9	July 10	July 11
		AM – Jost House	
	PM – Sydney Mines Heritage Museum	PM – Whitney Pier Historical Museum	
Week #2	July 16	July 17	July 18
		AM – Malagash Salt Mine Museum	
	PM – Cumberland County Museum	PM – Wallace & Area Museum	
Week #3	July 23	July 24	July 25
	AM – Annapolis Valley Macdonald Museum	AM – Annapolis Heritage Society	AM – North Queens Heritage House

##### Team #2:

Karin Kierstead – team lead

Denise Hansen

John McIntyre

Week #1	July 9	July 10	July 11
	AM – Africville Museum	AM – Avon River Heritage Museum	
		PM – West Hants Historical Museum	
Week #2	July 16	July 17	July 18
		AM – Randall House	
	PM – Musquodoboit Harbour Railway Museum	PM – Charles Macdonald Concrete House	
Week #3	July 23	July 24	July 25
		AM – Northumberland Fisheries Museum	

	PM – Port Hastings Historical Society		
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**Team #3:**

Cathy Blackburn – team lead

Valerie Lenethen

Joanne Stevenson

Week #2	July 16	July 17	July 18
		AM – Milton Blacksmith Shop	
	PM – Desbrisay Museum	PM – Queens County Museum	
Week #3	July 23	July 24	July 25
	AM – Atlantic Canada Aviation Museum	AM – Little White Schoolhouse Museum	

**Team #4:**

Virginia Stephen – team lead

Marven Moore

Barb Thompson

Week #1	July 9	July 10	July 11
		AM – Old Court House Museum	
Week #2	July 16	July 17	July 18
		AM – Margaree Salmon Museum	
	PM – Orangedale Railway Museum	PM – MacDonald House Museum	
Week #3	July 23	July 24	July 25
		AM – Islands Museum	
	PM – Musée Eglise Ste Marie	PM – Admiral Digby Museum	