

Checklist - Year 3

Please note: The purpose of this document is simply to act as a tool to track your progress as you work through each section, therefore the questions in each pillar have not been written out in full in the checklists below. Please refer to each section's corresponding SimpleSurvey form to view the question in its entirety.

Financial Stability	Management
Needs Assessments - Due February 13, 2026	
<input type="checkbox"/> 1. Consider the stability of the museum's funding. <input type="checkbox"/> 2. What is the museum's top financial-related goal for the next four years?	<input type="checkbox"/> 1. Consider the museum's orientation materials. <input type="checkbox"/> 2. Consider the extent of museological knowledge, standards, and practices within the museum. <input type="checkbox"/> 3. Consider the museum's volunteer program. <input type="checkbox"/> 4. Consider the museum's retention and recruitment plans. <input type="checkbox"/> 5. What is the museum's top management-related goal for the next four years?
Submissions for Peer Coaching - Due May 8, 2026	
<p>Using the following list, note the museum's funding sources by the percentage they represent of the entire budget. In the Comments section, note which area the museum views as its strongest, and which it views as its weakest.</p> <p> <input type="checkbox"/> Funding percentages submitted <input type="checkbox"/> Comments submitted </p>	<p>Work plans, both organizational and individual, are used to implement strategic goals. Provide a brief explanation about how work plans are based on realistic timelines and workloads, including available resources and training.</p> <p> <input type="checkbox"/> Brief explanation submitted </p> <p>Submit a recent plan, template, or document used to support the work planning process.</p> <p> <input type="checkbox"/> Document submitted </p>

Standards Questions - Due September 18, 2026

Financial Management Practices include the following elements. Select one element of your practices that you would like feedback on, and leave any specific requests in the comments section.

- ☐ Multi-year budget and cash flow analysis and projections
- ☐ Short and long term goals
- ☐ Fundraising activities/events outline
- ☐ Emergency and/or reserve funds
- ☐ Individual/committee(s) responsible for tasks (e.g., treasurer, bookkeeper, cheque signing authority)
- ☐ Reporting methods (who/what/when/where/why/how information is shared)
- ☐ Audit process (financial review by independent or outside source)

- ☐ Financial Management file submitted

Human Resources Policies and Procedures include the following elements. Select one element of your policies and/or procedures that you would like feedback on, and leave any specific requests in the comments section.

- ☐ Recruitment and fair hiring (including equity, diversity, inclusion and accessibility goals)
- ☐ Contracts for all staff (including hours of work, compensation, benefits, intellectual property, vacation and leave, etc.) **(submit template only)**
- ☐ Code of Conduct (including conflict of interest)
- ☐ Job descriptions for staff and key volunteer positions
- ☐ Work plan documents (including professional development)
- ☐ Health, Safety and Security (discrimination, harassment, grievances, injury on duty, right to refuse, security procedures, work alone procedures, accommodations for accessibility, public health, states of emergency, criminal record and/or vulnerable sector checks, secure file storage, etc.)
- ☐ Training and professional development
- ☐ Probation and performance management (staff and volunteers)
- ☐ Succession planning
- ☐ Dismissal and exit interviews (staff and volunteers) **(submit template only)**

- ☐ HR policy and/or procedures submitted

Training - Due November 1, 2026

☐ Financial Stability webinar - watched live OR submitted feedback after watching the recording

☐ Management webinar - watched live OR submitted feedback after watching the recording