

Needs Analysis

Financial Stability and Management



21 April 2026

BACKGROUND

In October 2023, the Association of Nova Scotia Museums (ANSM) introduced the TRACK program during the four regional heritage group meetings. As a required component for eligibility in the Community Museums Assistance Program (CMAP)—and also adopted by the Nova Scotia Museum—TRACK has become a key piece of capacity-building for museums in Nova Scotia. The program’s two years generated strong engagement across the sector, with participant feedback helping ANSM refine and strengthen its approach.

In Fall 2025, ANSM staff launched the program’s third year, focusing on the Financial Stability and Management pillars. Orientation sessions were delivered at regional heritage group meetings, with an additional virtual session on November 19th. The session focused mainly on the assessment elements of TRACK. 87 people participated live, with an additional 7 requesting the virtual session recording. The recording was circulated to the TRACK email list and has been viewed 21 times.

99 Needs Assessments were submitted by the February 13th deadline. An additional three Needs assessments were received; one from a museum that sent it after the deadline, and two from museums that had not registered for TRACK. Museums were encouraged to treat the Needs Assessment as an opportunity to vote for their preferred training offerings, and the feedback was used to plan the year’s training sessions.

SCOPE OF NEEDS ANALYSIS

The Needs Assessments asked museums to review their current practices, highlight areas where additional training would be beneficial, and reflect on their achievements. The insights gathered were used to shape the annual training plan and to identify participants for Knowledge-Sharing initiatives.

The Financial Stability part of the Needs Assessment asked: To what extent is the museum’s governing body ensuring the organization’s financial stability? Museums were asked to consider the stability of their various income sources, as well their financial goals for the coming years.

The Management Needs Assessment asked: To what extent is the museum translating strategic goals and plans into action, and providing care and support for its human resources? Museums

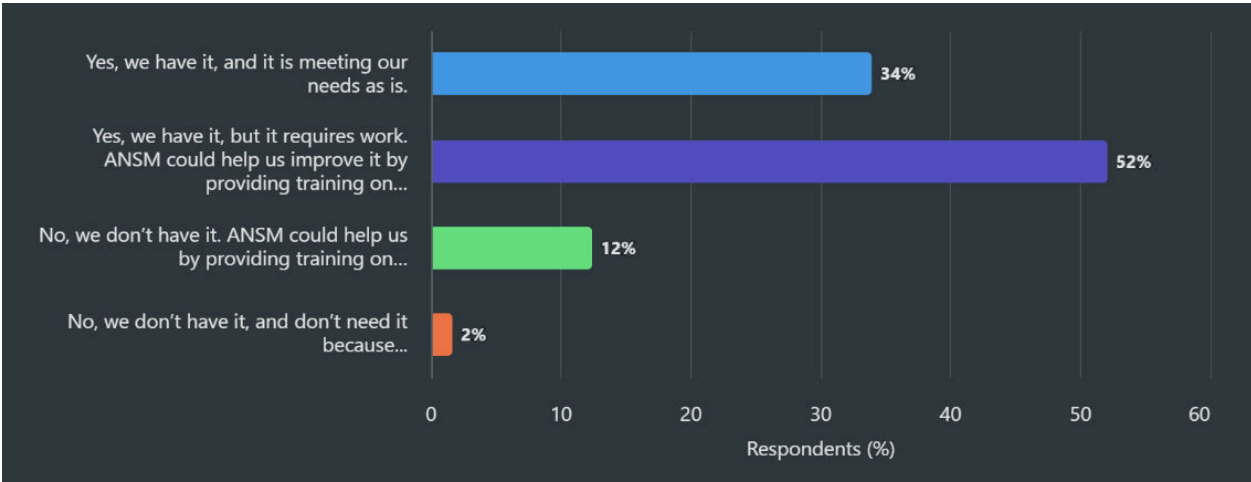
were asked to consider their orientation materials, museological knowledge and practices, volunteer program, and retention/recruitment plans. The final question asked about the museum’s management goals for the coming years.

NEEDS ASSESSMENT RESPONSES

Financial Stability

Each element of assessment this year seeks to answer to what extent the museum’s governing body is ensuring the organization’s financial stability.

1. Consider the stability of the museum’s funding.



The highest training priorities for museums in this area are fundraising, operating funding stabilization, and investments/endowments.

The follow-up question of the Financial Stability Needs Assessment asked museums to share their top finance-related goals for the next four years. The top priorities are:

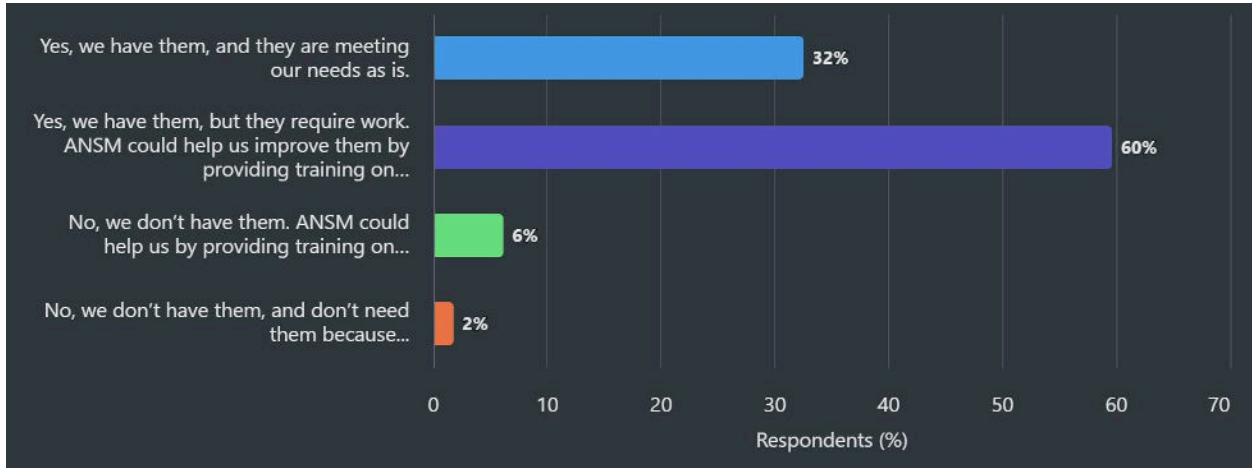
1. Fundraising and Increasing Revenue
2. Operating Funding Stabilization and Increases
3. Diversifying Revenue Streams
4. Exploring Investment and Endowment Options
5. Expanding Staffing

Management

The Management section focuses on the extent to which the museum is translating strategic

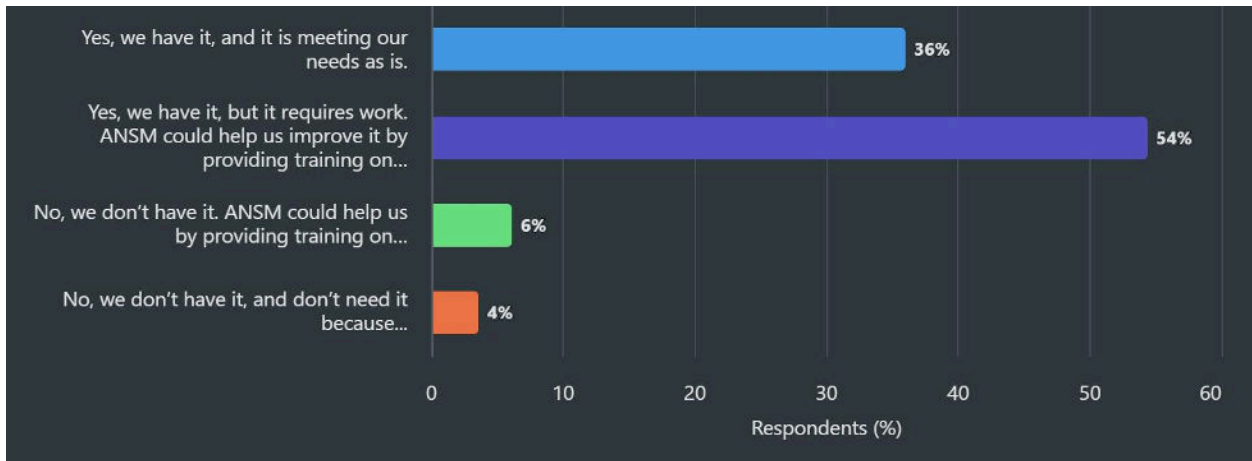
goals and plans into action, and providing care and support for its human resources.

1. Consider the museum’s orientation materials.



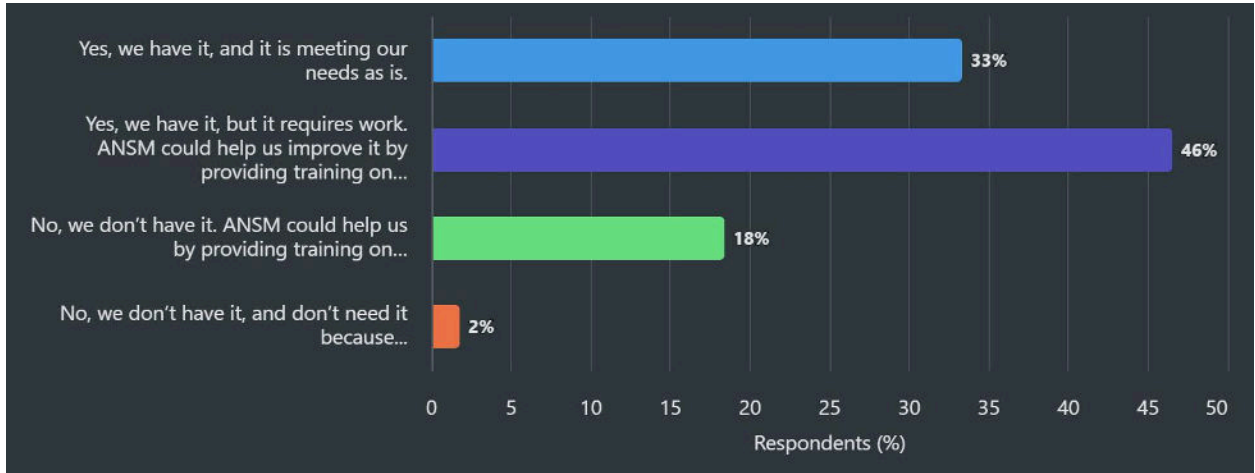
The highest training priorities are updating documents and processes, setting up a shared folder, and connecting with groups who have not historically engaged with the museum.

2. Consider the extent of museological knowledge, standards, and practices within the museum.



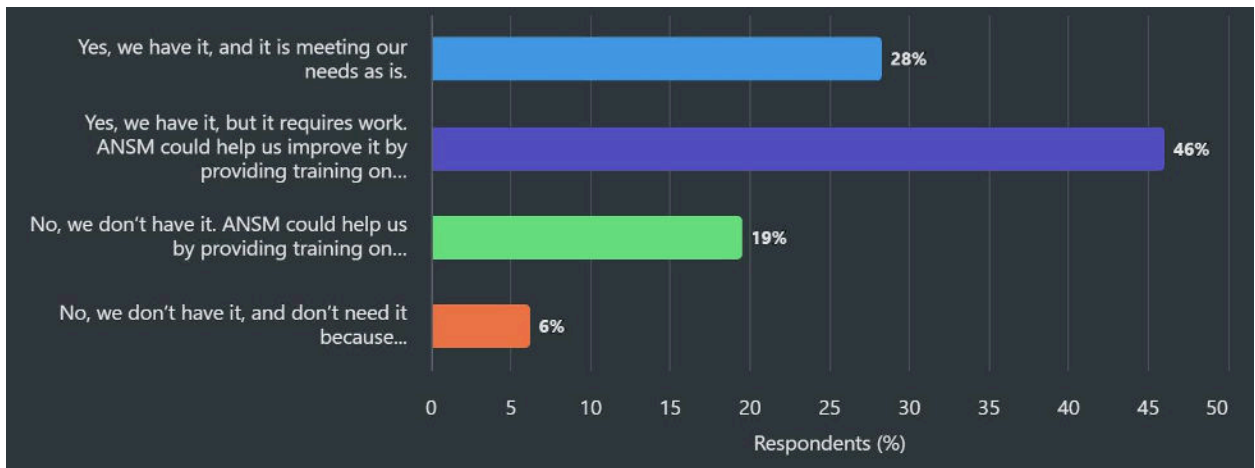
The top three training requests in this area are for museological training in general, connecting with groups who have not historically engaged with the museum, and board engagement.

3. Consider the museum’s volunteer program.



The top three requests around volunteerism are for training on recruitment, marketing, and updating documents.

4. Consider the museum's retention and recruitment plans.



Training priorities for this question include succession planning, volunteer recruitment, and hiring processes.

The final question asked museums to share their top management-related goal for the next four years. The top priorities are:

1. Volunteer Recruitment/Recognition
2. Succession Planning
3. Fundraising
4. Expanding Staffing
5. Stable Staffing & Improved Hiring Practices

NEXT STEPS - TRAINING OPPORTUNITIES

The overarching theme of training requests this year is stability - in funding, human resources, and operations.

1. Heritage Group Meetings

ANSM staff are attending the Spring regional heritage group meetings and providing an update on TRACK, promoting the Tuesdays on TRACK webinar series, and answering questions from participants.

While there is usually a training session during regional meetings, this year it was decided to do a virtual session with the Canadian Museums Association's Senior Manager of Advocacy, Dnyanesh Kamat. Titled "Building the Case: How Museums Can Measure and Communicate Their Impact", the session will explore the fact that museums are essential to their communities — but making that case to funders, elected officials, and the public requires more than good stories. This session explores how museums can build an evidence base for advocacy by measuring their economic, social, and community impact. Drawing on frameworks developed at the federal level and real data from Nova Scotia museums participating as case studies, the facilitator will walk through practical approaches to collecting and presenting impact data — from operating expenditures and visitor spending, to volunteerism, educational programming, and community partnerships. Participants will leave with a clearer sense of what to measure, how to gather the data, and how to translate it into a compelling case for support.

Information for case studies is currently being gathered, after which the session will be scheduled.

2. Tuesdays on TRACK Webinar Series

May 19 - Charles MacKenzie (Company House Consulting) and Adam Langer (Langer Public Affairs) will launch the webinar series with "Wearing Another Hat: Fundraising in Museums". This practical and encouraging session is designed for museum professionals who are finding themselves fundraising "off the side of their desk." Through real-life examples and low-lift strategies, the session will help reframe fundraising as a natural extension of a museum's purpose and public service role. Participants will learn how to

make the most of the time and tools they already have, build donor relationships in an authentic and comfortable way, and identify funding opportunities that align with their organization's scale and strengths.

June 16 - Tammy Bradford of the Creston Museum will tackle succession planning through her webinar, entitled "Passing the Torch (Without Burning Anything Down)". She invites participants to imagine the following - Your museum has a minuscule staff. Your beloved long-term CEO has been there for so long they're almost an institution themselves...and now they're leaving. How will you ever find someone to replace them? What if your museum is never the same again? Don't panic. You got this. Succession planning can be scary and overwhelming, but it's also something we all do, all the time. This webinar will walk you through the practical, day-to-day strategies the Creston Museum is implementing to manage the upcoming succession of their own beloved long-term CEO. You *can* pass that torch – without burning anything down.

July 14 - Sharon Murray of the Council of Nova Scotia Archives will facilitate "Digital Records Management using Google for Non-Profits". This webinar introduces Google Workspace for Non-Profits and Shared Drives as practical tools for improving file-sharing, accountability, and continuity within heritage organizations. Participants will learn how to set up a free non-profit Workspace account, manage access and administrative roles, and organize Shared Drives using good records management principles and practices. She will also touch on strategies for maintaining consistency and continuity in record-keeping practices, as well as considerations for the long-term preservation of an organization's digital records (their would-be fonds!). Designed for community museums and archives, this session offers a practical, "records-management-lite" approach to building sustainable systems using free digital tools.

August 11 - Rosemary Wagner of the Canadian Federation of Friends of Museums will explore volunteerism in museums. This session focuses on contemporary trends in museum volunteering and provides practical guidance and usable tip-sheets on revitalizing your small museum volunteer program. It will review how to engage the NextGen, families, inter-generational and corporate volunteering into your site's daily operations. In addition, it will include information on how to consider succession planning for your museum Board of Directors by implementing a Director-In-Training program.

3. Knowledge-Sharing

ANSM staff are researching and reviewing a wide variety of resources to identify helpful links for sharing in TRACK reports, and potential templates and samples for sharing. Over the winter, three more interviews have been recorded and [added to YouTube](#), highlighting collaborative exhibit development, a school-age summer camp, and volunteer revitalization. Two blog posts were also shared, showcasing the revival of traditional crafts and how to host a kids day at the museum. More Knowledge-Sharing interviews and blog posts are in the works as an ongoing element of TRACK.

FINAL THOUGHTS

TRACK continues to demonstrate a remarkable level of participation and engagement from museums across the province. The openness and thoughtfulness reflected in Needs Assessment responses speak to a sector that is deeply committed to learning, adaptation, and growth. By reducing barriers to training and building on existing gatherings such as regional meetings and conferences, TRACK has positioned itself as an increasingly vital and accessible support.

In the context of significant provincial budget reductions, the pillars being explored this year make the importance of TRACK even more pronounced. As museums face heightened financial pressures, exploring financial stability and management practices seems serendipitous. Programs like TRACK, that strengthen capacity, foster collaboration, and provide practical, cost-effective training are not simply beneficial—they are essential. TRACK offers a strategic, sector-wide approach to sustaining museum operations and community impact during a period of uncertainty, and its continued support will be critical to the resilience and future of Nova Scotia's museum community.