

## **Needs Assessment template - Financial Stability & Management**

## Financial Stability

*To what extent is the museum's governing body ensuring the organization's financial stability?*

**Consider the stability of the museum's funding.**

*As part of your analysis, some questions to consider are...*

- *Does the budget align with the museum's stated vision, purpose, and mandate?*
- *Does the museum receive core, ongoing operational funding?*
- *Does the museum have restricted and unrestricted reserve funds in the event of an emergency?*
- *Does the museum have an endowment fund and/or investments?*
- *Is the board transparent about the museum's financial needs?*

**Please note:** *It is not necessary to answer each of the above prompts individually, rather to consider their relevance when formulating a response to the question above.*

- Yes, we have it, and it is meeting our needs as is.
- Yes, we have it, but it requires work. ANSM could help us improve it by providing training on...
- No, we don't have it. ANSM could help us by providing training on...
- No, we don't have it, and don't need it because...

**Comments (Limit: 500 characters):**

**What is the museum's top financial-related goal for the next four years? (i.e., stabilization, diversification, increasing revenue generation, etc.) (Limit: 500 characters)**

## Management

*To what extent is the museum translating strategic goals and plans into action, and providing care and support for its human resources?*

### Consider the museum's orientation materials.

*As part of your analysis, some questions to consider are...*

- *Do they include information about professional standards, a purpose statement, an organizational chart, a strategic plan, policies and procedures, job descriptions, building use, and security?*
- *Are they in an online folder for easy, shared access?*
- *Are there opportunities for follow-up conversations after initial orientation?*
- *Does the museum regularly offer resources or opportunities for workers to deepen their understanding of Equity, Diversity, Inclusion and Accessibility (EDIA) and their community?*
- *Are all museum workers encouraged to spend time in the exhibit/public spaces?*

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- Yes, we have them, but they require work. ANSM could help us improve them by providing training on...
- No, we don't have them. ANSM could help us by providing training on...
- No, we don't have them, and don't need them because...

**Comments (Limit: 500 characters):**

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

*As part of your analysis, some questions to consider are...*

- *Are museum workers aware of and encouraged to connect with the broader museum community (local, provincial, and national)?*
- *Do museum workers regularly participate in training opportunities, and update museum practices on an ongoing basis?*
- *Are museum workers encouraged to participate in inclusivity, cultural sensitivity, or similar training to strengthen their ability to build relationships with equity-deserving groups?*
- *How is newly acquired knowledge shared among the organization?*

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- No, we don't have it, and don't need it because...

**Comments (Limit: 500 characters):**

**Consider the museum's volunteer program.**

*As part of your analysis, some questions to consider are...*

- *Is the museum undertaking diverse and inclusive recruitment, advertisement, application, training, goal setting and review, timelines, and recognition?*
- *Are volunteers matched with tasks and projects that will provide them with personal fulfillment and growth?*
- *Are specific volunteer opportunities made available and adapted as necessary for members of the community with differing abilities?*

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- No, we don't have it, and don't need it because...

**Comments (Limit: 500 characters):**

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

*As part of your analysis, some questions to consider are...*

- *Does the museum have adequate resources, benefits and support for museum workers?*
- *Are recruitment methods inclusive, such as asking outside individuals to serve on the hiring committee, providing candidates with questions in advance, and considering lived experiences?*
- *Are training and development plans tailored to the realities of the community and workforce?*
- *Are succession plans in place and being used?*

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- No, we don't have them. ANSM could help us by providing training on...
- No, we don't have them, and don't need them because...

**Comments (Limit: 500 characters):**

**What is the museum's top management-related goal for the next four years?  
(Limit: 500 characters)**