



**Fort Myers Beach Joint Session
Town Council w/CELCAB**

Museum Assessment Program Peer Review Visit - Governance

**Town Hall Council Chambers
2731 Oak Street
Fort Myers Beach, FL 33931**

Agenda

Wednesday, September 18, 2024

9:00 AM

ORDER OF BUSINESS

- I. CALL TO ORDER**
- II. PLEDGE OF ALLEGIANCE**
- III. ROLL CALL**
- IV. PUBLIC COMMENT**
- V. ITEMS FOR DISCUSSION**
 - A. Defining roles and responsibilities of staff, CELCAB, and Town Council
 - B. Mound House's Current Role
 - C. Mound House's Future Role
- VI. ADJOURNMENT**

NOTE: THIS MEETING IS STREAMED LIVE ON YOUTUBE.

IF A PERSON DECIDES TO APPEAL A DECISION MADE BY THE COUNCIL IN ANY MATTER CONSIDERED AT THIS MEETING/HEARING, SUCH PERSONS MAY NEED TO ENSURE THAT A VERBATIM RECORD OF THE PROCEEDING IS MADE, TO INCLUDE THE TESTIMONY AND EVIDENCE UPON WHICH ANY SUCH APPEAL IS TO BE BASED.



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In accordance with the Americans with Disabilities Act (ADA), persons needing a special accommodation to participate in the Board's proceedings should contact the Town Clerk's Office not later than three days prior to the proceedings.

An Introduction to the Organizational MAP Workbook

Based on feedback from previous MAP participants, we have overhauled and redesigned our Organizational MAP Workbook so that it is a fillable PDF document with easy-to-use check boxes and wayfinding (among other exciting enhancements)! This is slightly different from what the other assessment types use, as they're filling it out as a Word Document.

We thought it might be helpful to provide a few tips and pointers as you get started on your Workbook:

- To select an option on multiple choice or yes/no questions, just simply click the box.
- For questions that require you to type in a response, you can type your text directly into the response box and should be able to enter in as much text as you need. If you have longer text than what the box shows, a scroll bar will appear on the right-hand side of the text box. If you want to return to your text box and be able to scroll, click the small black box in the right-hand corner of your text box. This will have your scroll bar reappear for that particular response.
- On page 24 you will see and complete Activity #3: Board Profile Activity. The chart provided in the Workbook is to be used as a visual example of what the chart looks like. You will download O-Board Profile Activity Worksheet from the MAP Portal Library to complete the profile component of the activity. This worksheet(s) should be saved with your workbook.
- Similar to advice provided for other assessments, it may be easier to have specific team members type their initials or use another method to track who has what responses, and then maintain a master copy where all responses are combined together.

As always, if you have any questions as you're completing your workbook, please get in touch with your Program Officer!

Organizational Assessment Workbook



American
Alliance of
Museums



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SERVICES

The American Alliance of Museums' Museum Assessment Program is supported through a cooperative agreement with the Institute of Museum and Library Services.

The Museum Assessment Program is a confidential, peer consultation and self-analysis tool that helps museums strengthen operations, plan for the future, and meet and benchmark against standards. MAP is one component Continuum of Excellence, which also includes the Pledge of Excellence, Core Documents Verification, Accreditation, STEPs, and other field-wide standards-based programs. Over 5000 museums have participated in MAP since its inception in 1981.

Museums that are accepted into the MAP program are publicly listed and recognized by AAM and IMLS. Information and materials submitted by the museum, the site visit report, and other assessment results are not made public. <http://www.aam-us.org/resources/assessment-programs/MAP>



The American Alliance of Museums has been bringing museums together since 1906, helping to develop standards and best practices, gathering and sharing knowledge, and providing advocacy on issues of concern to the entire museum community. Representing more than 35,000 individual museum professionals and volunteers, institutions, and corporate partners serving the museum field, the Alliance stands for the broad scope of the museum community. For more information, visit www.aam-us.org



The Institute of Museum and Library Services is the primary source of federal support for the nation's 122,000 libraries and 17,500 museums. The Institute's mission is to create strong libraries and museums that connect people to information and ideas. The Institute works at the national level and in coordination with state and local organizations to sustain heritage, culture, and knowledge; enhance learning and innovation; and support professional development. To learn more about the Institute, please visit: <http://www.imls.gov>.

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Introduction to the Organizational Assessment

Congratulations! By enrolling in the Organizational MAP you have taken the first step in helping your museum have a solid foundation to build on for long-term health and impact. We hope this workbook will help you look at your operations from the perspective of how well activities, resources, and mission align with each other, and with professional ethics, practices, and standards.

MAP assessments are organized around the standards that the field as a whole has agreed are things that all good museums should do. This assessment assists museums define key areas of operations or functions that need to be strengthened and places a significant emphasis on:

- Thinking, acting, and planning strategically
- Organizational alignment and capacity
- Leadership and organizational structure
- Risk management
- Organizational culture

Like all MAP assessments, this one is grounded in AAM's Core Standards, includes diversity, equity, access, and inclusion (DEAI) issues, and helps museums look at both functional and strategic aspects of their operations.

Purpose of the Workbook

The MAP Workbook consists of questions, discussions, and team activities. Some activities will include articles to read, simulations, or involvement of a cross-section of your staff. Self-assessment enables staff and members of the governing authority to step back from the day-to-day work of the museum and take an in-depth view of its mission, goals, and programs. The workbook and activities are designed to help you see the institution systemically. Your responses in the workbook build a profile of your institution and help you evaluate current strengths and weaknesses at your institution. The completed workbook and activity summaries are important institutional records and valuable planning documents. They serve as a baseline against which to measure institutional progress. Part One of the workbook informs your peer reviewer prior to the visit. Do not write to impress – write with candor to guide and inform them and you will get more out of the assessment experience.

Using the MAP Workbook Questions to Meet the Museum's Needs

Though all questions and checklist components may not apply to your institution, they can serve as a guide to the variety of practices found in museums, practices you might consider as you review your policies and procedures. Viewed in this way, they are tools to be used in your planning process.

While some questions address legal issues such as safety and accessibility that are of concern to all museums, the relevancy of each question and each checklist component is dependent on the individual museum's operations. Every institution is unique and we want the self-assessment experience to be a valuable one for you. Interpret this document in light of your own needs, resources, and stage of growth. Feel free to tweak any questions to better fit the museum type or situation.

We do not expect you to have all the answers. It is okay to type “not applicable” or “not currently available” as answers to questions. Use the questions, however, to think about areas that you may want to focus on—now and in the future. You are not being judged during this process. The MAP Workbook is a teaching tool for you, a chance for you to see how museum practices translate into policy and for your peer reviewer to get a quick snapshot of the museum in its current state.

Each Workbook section lists which Core Standards guide the content for that section. To find out more about museum standards and professional practices that are at the heart of these questions and activities, review the Standards section on the AAM website.

MAP Goals Review

You and your MAP Team should take the time to review your application and the goals that you had set when beginning this process. It is important to note whether or not your priorities and objectives have changed and, if so, what this means for the direction of your MAP assessment. You should also keep in mind that your priorities and objectives may shift again as you work with your peer reviewer to clarify, hone or revise them. Below is a list of common objectives for participation in the Organizational Assessment.

Common Objectives

Increase staff and/or governing authority's knowledge about

- The respective roles and responsibilities of governing authority and staff
- museum standards and best practices
- resources available to help the museum

Improve alignment of

- operations to mission
- resources to mission
- organizational structure to mission

Improve the museum's ability to

- develop a mission statement or refine the existing mission statement
- develop an institutional plan
- develop/review/revise policies and procedures
- assess facilities management needs
- manage risk
- manage renovation, expansion or the construction of a new facility
- improve financial sustainability
- care for collections
- engage the community
- use technology to meet the museum's needs
- Prepare for accreditation or reaccreditation

The MAP Team

Broad-based participation can foster an atmosphere of dialogue, planning, and cooperative decision-making that continues after the MAP process is completed. To most effectively accomplish this, we recommend that you form a MAP Team. This team is responsible for:

- Overseeing completion of the assessment and ensuring all deadlines/MAP obligations are met;
- Establishing and monitoring a timeline for completion of the MAP Workbook;
- Signing the face sheet when submitting the MAP Workbook
- Scheduling the MAP Peer Reviewer site visit;
- Evaluating the Peer Reviewer's performance;
- Ensuring that the museum begins the process of planning and implementation after completing the MAP assessment.

Who from the museum should be on this team? We suggest selecting individuals who have:

- **Knowledge** about how things really work or don't work at the museum, about what resources are available, about how to get things done;
- **Authority** to make decisions about policies or procedures;
- **Responsibility** for implementing decisions arising from the assessment and subsequent planning.

The MAP Team for the Organizational Assessment must include your Executive Director/CEO (person in charge of the museum operations). It should also include representatives of your governing authority and a cross-section of staff. Those staff members who work directly with the public have valuable information to contribute and may be the ones actually implementing changes you make in your operations.

Consider who should be the team leader: it may be the director, or it may be another staff member with the skills to lead a team. The team leader should have the authority to communicate that the assessment is a priority to his/her co-workers and to set deadlines for the team to keep on track with the workbook deadlines. The team leader should also be the primary point of contact with the Alliance. ***If you have not already formed your MAP Team, take time to do so now.***

Involving the Entire Institution

Long-lasting results from the assessment are achieved when commitment is sought from the entire institution. You will want to prepare your institution for the assessment and apprise them of progress periodically.

We suggest:

- As you begin the assessment orient **governing authority and staff** on the **assessment process**: introduce members of the MAP Team, explain how each phase of the assessment is conducted, how the results will be implemented, and what benefits you expect from the assessment;
- Each MAP Workbook activity lists recommended participants, and the MAP Team is encouraged to expand involvement whenever appropriate. As the MAP Team works through the MAP process, involve additional members of the governing authority, community, and staff at appropriate points. Invite their answers to the workbook questions and participation in the workbook activities. Provide information about the site visit: the peer reviewer's name and experience, the visit date, and the schedule for meeting with staff, community leaders, and governing authority;

Upon receipt of the assessment report, **share and discuss the report findings** with full governing authority and staff. You may want to distribute copies of the report itself or circulate a summary of the major points. Explain how the museum plans to use the results. If applicable, update the community members who participated in the self-assessment process and discuss possible areas of collaboration

Completing the Workbook

Terminology

Museums often use different terminology to describe procedures, programs, and conditions. To help you decide how to respond to specific sections or questions and to lay the basis for clear communication and productive discussions, there is a glossary at the end of the workbook.

Completing the Workbook

The completed self-assessment materials are confidential, and outside of the museum's MAP Team, are seen only by your Peer Reviewer and the MAP staff.

To make the workbook as effective as possible:

- Answer the questions with total candor and in the manner most useful and relevant to the museum;
- Encourage participants to be reflective and thoughtful—to think about what it is they do, why and how they do it, and how well it works;
- Change the wording as needed to make it more pertinent to the museum's discipline. If necessary, answer "not applicable" with an explanation.
- Remember that there are no right or wrong answers and that you will not be judged or graded on your responses.
- Handwritten workbooks are not accepted.

Sections of the workbook may be distributed among departments or staff for completion, so that each area of the museum has an opportunity to review its own operations.

Module 2 in the MAP Portal offers suggestions and strategies for tackling the Workbook and assembling a great MAP Team.

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Part One:

Laying the Groundwork for Success

Section One: About Our Museum

Mission and Planning • Public Trust and Accountability

Description: This section includes gathering baseline information about your museum, focusing on its mission and planning and two activities.

Introduction: Gathering more information about your museum will help create a holistic overview for your MAP team and your MAP Peer Reviewer. This information may also be useful as a baseline for comparison in the future.

Purpose: You will begin working together as a team, gathering more institutional information about potential strengths and weaknesses, and assess the museum's development as an institution.

Directions: Decide as a team how you'd like to approach this section. The questions can be approached together as a group or divided up amongst your team members.

Related Standards:

- The museum has a clear understanding of its mission and communicates why it exists and who benefits as a result of its efforts.
- All aspects of the museum's operations are integrated and focused on meeting its mission.
- The museum's governing authority and staff think and act strategically to acquire, develop, and allocate resources to advance the mission of the museum.
- The museum engages in ongoing and reflective institutional planning that includes involvement of its audiences and community.
- The museum establishes measures of success and uses them to evaluate and adjust its activities.
- The museum asserts its public service role and places education at the center of that role.
- The museum is committed to public accountability and is transparent in its mission and its operations.

A. Mission

1. Does the museum have a written mission statement formally adopted by the governing authority?

Yes
No

a. If yes: Date adopted:

Date last reviewed:

b. Include your mission statement here:

c. If no: Describe the museum's purpose, its reason for existence, and a description of who it serves, and then proceed to question #4.

2. How is the mission (and its revisions) communicated to the governing authority and staff, as well as to the museum's audiences and community? Check all that apply.
 - Board manual/orientation
 - Brochure/rack card
 - Newsletter
 - Press release
 - Staff bulletin board/internet
 - Staff manual/orientation
 - Website
 - Other:
3. How do the goals of the museum's programs and operations relate to the museum's purpose?
4. How does the museum's collection relate to its mission/purpose?

Further Reading and Additional Mission Resources:

- AAM Core Document and Required Elements: [Mission Statement](#)
- AAM Core Document and Required Elements: [Strategic Institutional Plan](#)
- AAM Core Standards: [Mission and Planning](#)
- BoardSource, [Tips for Developing a Mission Statement](#)
- Colleen Dilenschneider, *Know Your Own Bone*, ["Cultural Organizations Highlighting Mission Outperform Those Marketing as Attractions"](#)
- Mission Matters: Relevance and Museums in the 21st Century by Gail Anderson

“A clearly delineated mission statement guides museum activities and decisions by describing the purpose of a museum—its reason for existence. It defines the museum’s unique identity and purpose, and provides a distinct focus for the institution. A mission statement articulates the museum’s understanding of its role and responsibility to the public and its collections, and reflects the environment in which it exists. Activities of the museum should support, directly or indirectly, the mission.”

American Alliance of Museums. (2008). *National Standards & Best Practices for U.S. Museums* (p. 34)
Washington: American Association of Museums.

Activity One: Mission Activity

Purpose

To demonstrate how well staff and governing authority know the museum’s mission. A museum’s mission is its yardstick for accountability. What a museum does is measured against its mission. As the Code of Ethics for Museums (2000) states: “Loyalty to the mission of the museum and to the public it serves is the essence of museum work, whether volunteer or paid.” Each person must know the mission in order to be loyal to it. Ideally, the mission is consulted every time action is taken or a decision is made.

Materials Needed

- Notepads and pens or pencils
- Copies of your mission statement or your answer from question #1 of this MAP Workbook.
- Copies of the attached excerpt, “Characteristics of an Effective Museum Mission Statement”

Suggested Participants

The MAP Team to gather and summarize information from a range of different level staff and members of the governing authority who are not already on the team. Assign one member of this team as the note taker. They will also write a one-page summary of the activity findings and discussions

Directions:

- **Before the Meeting:** Read the “Characteristics of an Effective Mission Statement” excerpt. Share copies of your mission statement or your answer to question #1 with MAP Team members.
- **During the Meeting:** Complete the four parts of this activity. Select someone to record the responses and write a one-page summary of your discussion and conclusions.

Part I—Staff

If you do not have a written mission statement: Have MAP Team members walk through the museum and ask staff to describe in their own words the museum’s purpose, its reason for existence, and whom it serves. Record their responses. Convene the MAP Team to discuss the responses. How closely do their words align with your answer to question #1 of this MAP Workbook?

If you have a long-standing, recently approved, or recently revised mission statement: Have MAP Team members walk through the museum and ask staff to paraphrase the mission statement. Do they know where to find a written copy? Ask how they see their jobs reflected in the statement. How does what they do help fulfill the mission? Record all responses. Have the MAP Team meet to discuss the responses, e.g., how consistent are the paraphrases with the written mission statement?

Part II—Governing Authority

If you have a governing authority that can be involved in this activity, ask them the same questions you used in Part I. Then have the MAP Team meet to discuss the responses as above.

Part III—The Effective Mission Statement

Convene a group of staff and members of the governing authority to compare your mission statement with the “Characteristics of an Effective Mission Statement” excerpt included below. This group could be your MAP Team, or a combination of team members and other participants. Have each person compare the mission statement to the characteristics. Have the group discuss similarities and differences, and how the mission statement is being used as a management and governance tool.

Excerpt: “Characteristics of an Effective Mission Statement”

Adapted from *Museum Mission Statements: Building a Distinct Identity*, Gail Anderson, ed., (American Alliance of Museums, 1998), p.13:

An effective mission statement reflects the strategic thinking of the organization’s leader to define an appropriate role for the institution. The mission statement reveals the organization’s understanding of the environment in which it exists, the relevance and appropriateness of the role it has selected for itself, and its relationships to its constituencies and communities. A well-crafted mission statement is a key governance and management tool.

A good mission conveys:

- How the organization uniquely relates to the various facets of its public and communities
- How it enhances the well-being of others and improves the quality of life
- Who benefits from the result of its work
- What service it provides

Part IV – Discussion and Summary

With regard to Parts I and II, discuss the following issues:

- Are you effectively communicating your mission internally?
- Do staff and governing authority have consistent views of mission, or do they vary widely? What are the implications?
- How might you improve internal communication if you are not satisfied with how familiar staff and governing authority are with the mission?
- If your museum did not have a building, would you still carry out a mission?

With regard to Part II, address the following issues:

- Does your mission statement demonstrate these characteristics? If not, is this a problem, or is it meeting your needs at this time?
- What might make your mission statement more effective?
- How would you go about incorporating the characteristics into your mission statement?

Include your summary of activity findings and discussions here:

B. Vision and Core Values

5. Does your museum have a vision statement? Yes No
- a. If yes: Date adopted: Date last reviewed:
- b. Include your vision statement here:
-
6. Has your museum defined core values that guide your museum? Yes No
- a. If yes: Date adopted: Date last reviewed:
- b. Include your core values here:

C. Institutional Planning

7. What is the current status of your museum's institutional planning process (e.g., institutional plan, strategic plan, long-range plan)? If the museum does not have a plan, proceed to question 10.
- Preparing to start a new planning process
 - Working on a new plan (expected date of completion:)
 - Just completed a new plan that is not yet approved
 - Engaged in a regular review of current plan
 - No current planning activities (i.e., only implementing existing plan)
8. Is the plan approved by the governing authority? Yes No
- a. If yes: date approved:
9. Who is included in the museum's planning process? Check all that apply.
- Front line staff
 - Management staff
 - Members of advisory groups
 - Members of community groups
 - Members of the governing authority
 - Partner institutions or organizations (e.g., schools, libraries, and universities)
 - Representatives of local government
 - Representatives of member or friends' groups
 - Senior staff
 - Other:

10. Is the museum measuring if it is fulfilling its mission and meeting the goals or objectives it sets forth? Yes No

a. If yes, explain how data is collected and analyzed:

11. Does your institution have any written policies or plans that address (please see glossary for clarification of terms, if needed):

Diversity	Yes	No
Equity	Yes	No
Accessibility	Yes	No
Inclusion	Yes	No

12. Does your institutional/strategic plan include a technology plan?

No, our technology planning is ad hoc or reactive

Yes, it is proactive and covers all aspects of our technology needs

Yes, it is proactive but doesn't cover all aspects of our technology needs

Yes, but it is reactive and only acknowledges that we need technology to support our initiatives

Team Discussion Questions:

13. What aspects of your institution's mission and planning are working well?

14. What are your institution's major concerns, if any, regarding your museum's mission and institutional planning?

Activity Two: Organizational Life Cycles Activity

Introduction to organizational life cycles: Institutions tend to experience stages of organizational development as they move from being a newly founded organization towards a mature and sustainable institution. Each stage has typical characteristics, challenges and opportunities.

Purpose: Participants will discuss life cycle stages for key museum functions and for the institution overall. Discussing the components of each stage can help the institution have realistic expectations for their current stage of development and plan strategically for the future.

Materials needed: “Nonprofit Lifecycle Matrix” Article

MAP Portal Resource Library article pdf: “Nonprofit Lifecycle Matrix”

Suggested participants: MAP team members and if you have a governing authority that can be involved in this activity, try to include at least three members of the governing authority.

Directions:

- **Before the meeting:** Share the above pdf with each participant and ask that they read it before your group meeting and be prepared to discuss the questions below.
- **During the meeting:** Before discussing these, select someone to record responses and summarize your discussion and conclusions.

Discussion Questions:

- Which Life Cycle Stage do you think best reflects your institution right now? Why?
 - Grass roots/Invention –
 - Start-up/Incubation –
 - Adolescent/Growing –
 - Mature/Sustainability –
 - Stagnation & Renewal –
 - Decline/Shut-Down –
- Describe if there is agreement about this within the group or if there are a variety of responses and opinions.
- Do group members think your institution’s departments and functions are all at the same stage, or are some in different stages of development?

	Grass Roots	Start-Up	Adolescent	Mature	Stagnant	Decline
Programs						
Leadership						
Staffing						
Governance						
Operations						
Finances						
Marketing						
Community Awareness						

- When do group members think the institution is likely to transition to the next stage? Why?

- Are there any potential challenges or issues related to your institution’s life cycle stage that you might need to anticipate and plan for?

Additional summary of discussion and conclusions:

Section Two: Governance

Public Trust and Accountability • Leadership and Organizational Structure

Description: This section includes gathering information about your museum's governance, leadership and organizational structure and one activity.

Introduction: Now that you have gathered baseline information about your institution's mission and planning, it's important to gather information about your organization's governance and examine its functions. This will help your MAP Team and Peer Reviewer get a better sense of your governing authority's responsibilities, makeup and overall operation.

Purpose: You will continue working together as a team, gathering information about your museum and its governance.

Directions: Decide as a team how you'd like to address the questions in this section. They can be approached together as a group or divided amongst your team members.

Please note that many museums have varying governance structures, so please answer the questions as they apply to your museum's specific governance structure.

Related Standards:

- The governance, staff and volunteer structures and processes effectively advance the museum's mission.
- The governing authority, staff and volunteers have a clear and shared understanding of their roles and responsibilities.
- The governing authority, staff, and volunteers legally, ethically, and effectively carry out their responsibilities.
- The composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals.
- There is a clear and formal division of responsibilities between the governing authority and any group that supports the museum, whether separately incorporated or operating within the museum or its parent organization.
- The museum is committed to public accountability and is transparent in its mission and its operations.
- The museum complies with local, state and federal laws, codes and regulations applicable to its facilities, operations, and administration.
- The governing authority, staff and volunteers legally, ethically and effectively carry out their responsibilities.

A. Governing Authority

15. Who is legally responsible for the finances and policy of the museum?

Board of trustees of the museum

Other governing authority (specify: _____)

Associated non-governing authority:

Parent institution (university, government, etc.)

Other:

16. Describe the structure of the museum's governing authority.

For a board of trustees or the equivalent, give size, committee structure, etc. If the museum is part of a larger governing structure (for example, a college or university, or municipal, county, state, or federal government) explain the reporting structure between the president or director of the museum, the board, the overseeing agency, and the staff, and the process for approving policy.

17. How are board members found and recruited?

18. Who elects board members, and who elects officers of the board?

19. Are there limits on the numbers of terms members of the governing body can serve?

Yes No N/A

a. If yes, describe:

b. If no, why are there no limits?

20. Explain how new perspectives, ideas and concepts are brought to bear on governance issues and to ensure adequate representation of new or varied ideas?

21. What is the tenure of the longest serving member of the governing authority?

22. Does the museum have a formal process for orientation and training for members of its governing authority?

Yes No N/A

a. If yes, what is included in the board/governing authority's orientation and training?

Board manual

Briefing on the scope of collections and tour of collections

Budget/finance

Committees

Educational programming

Ethical responsibilities of the board regarding collections

Fundraising

Legal responsibility of the board regarding collections

Overall governing policies (ex. collections management policy, code of ethics, etc.)

Strategic planning

Other:

23. If the museum doesn't have orientation and training for members of its governing authority, how does the governing authority learn about its roles and responsibilities?

24. What is the relationship between the governing authority and museum staff?

25. Does the museum have a formal process of board evaluation?

Yes No N/A

26. Is there an up-to-date job description for board members?

Yes No N/A

27. Does the museum have a board book/manual?

Yes No N/A

28. How does the diversity of the governing authority effectively represent the interests of the museum's community and audiences?

29. Has the museum established any goals regarding board diversity?

30. Indicate which of the following is expected from members of the governing authority (check all that apply):

- Donation of professional services
- Financial support (personal donation)
- Fundraising
- Political influence
- Service on board committees
- Technical expertise (e.g., legal, financial, nonprofit management)
- Other:

31. What committees does your institution have? Are they all active? Include who serves on the committees, their designated size and purpose.

32. What percent of the board makes annual financial contributions?

33. Which of the following governing responsibilities does the governing authority have for the museum? Check all that apply.

- | | |
|---|--|
| Approving and ensuring compliance with the institution's ethical standards | Ensuring that the museum's programs and services are consistent with its mission |
| Approving decisions regarding what will be added to (accessioned) or removed from (deaccessioned) the collections | Establishing an appropriate level of care for the institution's buildings, grounds, and facilities |
| Approving exhibitions and programs | Fundraising |
| Approving personnel policies | Institutional planning |
| Approving the institution's budget | Monitoring reserve funds and endowments, setting investment policy and strategy |
| Approving the institution's strategic planning document | Participate in the day-to-day activities of the museum |
| Approving the museum's policies regarding collections | Selecting the director |
| Controlling access to a significant source of the institution's revenue | Serve as ambassadors, advocates, and community representatives in order to enhance the institution's public standing |
| Determining the director's compensation | Supporting the director and evaluating their performance |
| Developing, reviewing, and modifying the institution's governing documents | Other: |

Team Discussion Questions:

34. What new skills, knowledge, or perspectives would you like to see added to the governing authority?
35. What are your greatest concerns regarding governance?

Further Reading and Additional Governance Resources:

- AAM Core Standards: [Leadership and Organization Structure](#)
- AAM Core Standards: [Public Trust and Accountability](#)
- American Alliance of Museums and BoardSource, [Stand for Your Mission, The Power of Board Advocacy: A Discussion Guide for Museum Trustees](#)
- American Alliance of Museums, [Museum Board Leadership 2017: A National Report](#)
- [Facing Change: Insights from the American Alliance of Museums' Diversity, Equity, Accessibility, and Inclusion Working Group](#)
- Josephine Ramirez, *Medium*, ["If Your Board Looked Like Your Community"](#)
- [Museum Trustee Association](#)

Activity Three: Board Profile Activity

Purpose: To help you assess and document the composition of your governing authority to your institution. Ultimate responsibility for the institution rests in its governing authority. This requires a governing authority that is adequately equipped, skilled, and informed. Your governing authority should be diverse and represent its community.

If you have a nonprofit board of trustee governance structure, having a profile can assist you in planning for board recruitment and developing the board needed to advance the museum's mission.

If you are part of a larger parent organization structure, like a college or university, and do not have a board of trustee governance structure, this profile activity can be applied to an advisory board. And, you can adjust it to create a profile that includes your institution's unique structure. The goal of this activity is to gather enough information to generate a robust discussion. It is not necessary to collect perfect data.

If you have questions, please contact the MAP Office.

Note: This activity can be used to help answer questions in the Governance section of the workbook.

Materials Needed:

- Internet access and demographic information on your community (examples of sources for gathering demographic information is included in Part I of the activity below)
- Copies of the board profile worksheet (this is available in the MAP Portal Library)
- Copies of your strategic institutional plan (if you don't have one, use your institution's main planning document)
- Map of the region

Suggested Participants

Members of the MAP Team, and as appropriate: the director of the museum, other staff with relevant knowledge of the board, chair/president of the board, chair of the nominating committee, chair of your advisory board, and/or as many governing authority members as possible to participate.

Directions:

- Before the meeting: Share copies of the materials needed with MAP Team members and other participants in the activity.
- During the meeting: Complete the first three parts of this activity and select someone to record responses and summarize your discussion and conclusions in the final section of the activity.

Part I – Demographics of your Community

Summarize the demographics of your community. If possible, include figures on age, average family size, income, ethnic and racial diversity, and educational level.

You can use sites such as these to find your data:

- Census figures: <https://www.census.gov/quickfacts/fact/table/US/PST045218>
- Eligibility for Supplemental Nutrition Assistance Program (SNAP). Census Bureau provides 2010 data by state, county, and/or school districts <https://www.census.gov/programs-surveys/saipe/guidance/model-input-data/snap.html>
- Small area income and poverty estimates <https://www.census.gov/programs-surveys/saipe/data.html>
- Population, housing, area and density comparisons
- <https://www.census.gov/programs-surveys/popest/data/tables.html>
- Data of local area unemployment in last 6-12 months <http://www.bls.gov/lau/>
- Comprehensive profiles of U.S. cities including house values, race, crime, schools and religions <http://www.city-data.com/>

Possible Regional Sources:

Chamber of Commerce	Local University or College	Council on Aging
City Hall	County/State Agencies	Local School District

Include the summary for the data you collected here. You can adjust the categories as needed.

- Age:
- Gender:
- Education:
- Employment:
- Income:
- National origins and languages spoken at home:
- Poverty:
- Race and ethnicity:
- Household relationships (married, single, children etc.):
- Any other demographic categories the MAP Team wants to explore:

Part II – Board Profile

Complete the board profile worksheet. Modify the form as needed to fit the characteristics of the museum. For example, substitute the names of your actual board committees. Or, change the giving levels under “contributions” to correspond to the norms for your board or governing authority. You can select multiple options per governing authority/board member as they apply. To see a sample of a Board Profile Activity, please download O-Sample Board Profile Activity Worksheet from the MAP Portal.

This profile is a useful tool for your board to use in setting recruitment goals and evaluating the performance of your governing authority.

Part III – Comparison

Compare your community data with the completed board profile and your major goals for institutional planning. Discuss the following:

- Compare the governing authority/board demographics to those of your geographic community: does your governing authority/board reflect those demographics? If they do not, what are possible reasons for any gaps? Could any gaps between your demographics and your community’s demographics create potential challenges, barriers, or even miscommunications?
- How do the expertise and professional skills of your board align with what you need to achieve your current goals and strategic plans?
- Does this analysis suggest any goals for recruitment of new members of your governing authority?

Part IV – Summary

Attach copies of the board profile worksheet to your completed workbook.

Include your summary of the activity findings and discussion conclusions here:

Board Profile Activity Worksheet

Current Board Members																		Nominees					
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	A	B	C	D	E
Area of expertise/professional skills																							
Academic	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Performing/Creative Arts	☒	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Business/Corporate	☐	☐	☒	☐	☒	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Collections-related	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Community Leader	☒	☒	☒	☐	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Education	☒	☒	☒	☒	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Executive Director	☐	☒	☒	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Finance:	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Accounting	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Banking & Trust	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Investments	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Philanthropy/Foundation Rep.	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Fund Raising	☒	☐	☒	☐	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
General Management	☐	☒	☒	☐	☒	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Government Representative	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Legal	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Human Resources	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Marketing	☐	☐	☒	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Membership	☒	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Museum	☒	☐	☒	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Public Relations	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Real Estate/Facilities	☐	☐	☒	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Recruiting	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Strategic Planning	☒	☐	☒	☐	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Special Programs Focus	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other factors relevant to the museum	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

[illegible]

Board Profile Activity Worksheet continued

Current Board Members																		Nominees					
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	A	B	C	D	E
Geographic Location																							
City	☐	☒	☒	☐	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Suburbs	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Rural	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
State (enter abbr.) FL	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Country (enter abbr.) USA	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Value of Contributions In-kind (I), Cash (\$), Collections (C)																							
>\$10K	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
\$5-9.9K	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
\$2-4.9K	☒	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
\$1-1.9K	☐	☒	☒	☒	☐	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Length of Board Service 20+	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
> 10 yrs.	☐	☐	☒	☒	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
5-10 yrs.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
2-4 yrs.	☐	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
< 2 yrs.	☐	☒	☐	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Attendance at Board Meetings	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
75-100%	☒	☐	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
50-74%	☐	☐	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
25-49%	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
< 24%	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Section Three:

Administration and Finance

Leadership and Organizational Structure • Financial Stability • Facilities and Risk Management

Description: This section includes gathering information and examining your museum's administration and finance operations.

Introduction: Gathering information about your museum's administration and finance will help shed light on your museum's broad operations for your MAP Team and MAP Peer Reviewer. This section can also be used as a benchmark as you progress through the MAP process and in the future after MAP.

Purpose: Working together as a team, you will continue gathering data about your museum and examining its operations from an administration and finance perspective.

Directions: As you have done in the previous two sections, decide as a team how you'd like to address the questions in this section. They can be approached together as a group or divided amongst your team members.

Related Standards:

- The governance, staff and volunteer structures and processes effectively advance the museum's mission.
- The governing authority, staff and volunteers have a clear and shared understanding of their roles and responsibilities.
- The governing authority, staff, and volunteers legally, ethically, and effectively carry out their responsibilities.
- The composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals.
- The museum legally, ethically, and responsibly acquires, manages, and allocates its financial resources in a way that advances its mission.
- The museum operates in a fiscally responsible manner that promotes its long-term sustainability.
- The museum allocates its space and uses its facilities to meet the needs of the collections, audience, and staff.
- The museum has appropriate measures to ensure the safety and security of people, its collections and/or objects, and the facilities it owns or uses.
- The museum has an effective program for the care and long-term maintenance of its facilities.

- The museum is clean and well-maintained, and provides for the visitors' needs.
- The museum takes appropriate measures to protect itself against potential risk and loss.

A. Staffing and Professional Development

36. Does your institution have an Executive Director?

a. If yes, please indicate: Full-time Part-time

b. If no, who manages the daily operations of the institution? Please list their title and a brief description of their roles and responsibilities?

37. Indicate what kind of staff your institution has. Check all that apply.

Paid Staff – How many

Unpaid Staff – How many

Volunteers – How many

Interns – How many

38. Does the museum have written job descriptions for paid staff?

Yes No

a. If yes, who writes and approves all job descriptions?

39. Who decides the exemption status of all paid positions?

40. Does the museum have written job descriptions for unpaid staff?

Yes No

a. If yes, who writes and approves all job descriptions?

41. What training and development opportunities does the museum provide for staff? Check all that apply.

Attendance at workshops/seminars/short courses

Local

Non-local

Paid time

Lodging

Travel

Registration

Computer skills training

Customer service training

Education & interpretation practices

Educator training

Field trips to other organizations

Flex time to accommodate course schedules
 Graphic design
 Guided tours/interpretation
 In-house training on:
 Cleaning objects
 Collections inventory
 Databases
 Documenting objects
 Handling objects
 Installing objects
 Journal subscriptions
 Preparing specimens
 Presentation skills
 Professional memberships
 Relevant legal issues
 Other:
 Sabbaticals
 Supervisory training
 Support for attending professional meetings
 Local
 Non-local
 Paid time
 Lodging
 Travel
 Registration
 Support for participation in community service organizations
 Webinars
 Other:

42. What additional skills, knowledge, or perspectives would you like to see added to the staff?

43. Does your institution budget for professional development? Yes No

44. Please share what professional opportunities have been taken by staff in the last three years.

45. If training and development opportunities are not offered, briefly explain why.

46. Has the museum established any goals regarding staff diversity? Yes No

Team Discussion Questions:

47. How does the diversity of staff effectively represent the interests of the museum's community and audiences?
48. What additional skills, knowledge, or perspectives are needed in the institution's staff?
49. Describe any other staffing challenges, and how the institution is addressing them.
50. What are your greatest concerns regarding staffing?

B. Human Resources

51. Do you have a staff member dedicated to roles and responsibilities for human resources?
 Yes No
 - a. If yes, who?
 - b. If no, share how these roles and responsibilities are taken care of?
52. Does the museum have a written personnel policy for staff? Yes No
53. Do you have an employee handbook? Yes No
 - a. If yes, date last reviewed
 - b. If yes, date last updated

- 54.** Below are legal issues that employers need to consider. Check those which your institution currently has plans and policies in place for.
- Policy and description of pay practices such as a compensation philosophy and program that are in compliance with the Fair Labor Standards Act
 - Description of leave practices including policies for administering Family Medical Leave if applicable
 - Code of ethics describing staff and volunteer conduct including whistle blower protection for reporting financial/ethic/conflict-of-interest concerns/violations
 - Procedure for reporting and handling claims of harassment and discrimination in adherence to the Civil Rights Act, Title VII and other applicable laws
 - Description of benefit programs, policies and administration of such programs in compliance with related federal laws
 - Description of recruitment practices and procedures in adherence to Civil Rights Act, Title VII and other applicable laws
 - Workplace safety policies and procedures including process for reporting workplace injuries
 - Description of performance management practices including performance evaluations and corrective actions
- 55.** If all have not been checked, explain why.
- 56.** In addition to the topics above, does your institution have written policies that describe any of the following topics? Check all that apply.
- Definition of types of employment: full-time, part-time, exempt and non-exempt, temporary, volunteer
 - Dress code
 - Grievance and appeals procedure
 - Job descriptions
 - Mission statement, history of organization
 - Professional development practices
 - Safety and emergency procedures
 - Statement describing workplace culture and/or core values of institution
 - Statement regarding staff collecting
 - Statements on use of controlled substances
 - Travel policy
 - Other:

57. Does the museum have a formal procedure for evaluation of all staff?

Yes No Some staff

a. If you chose some staff, please explain who receives evaluation and who does not. For those that do not, explain why.

58. Do written performance evaluations of employees take place annually? Yes No

a. If no, explain why performance reviews do not occur annually, and how and when performance evaluations do occur.

59. Has the museum done an assessment/inspection on their own to verify ADA compliance?

Yes No

Team Discussion Question:

60. What are your greatest concerns about human resources?

C. Volunteers and Internships

61. Does your institution use volunteers? If no, proceed to question 71. Yes No

62. How are volunteers recruited?

63. Who in the organization is responsible for recruiting of volunteers and/or training?

64. How are museum volunteers trained? Check all that apply.

Volunteer manual

Live training

Other:

65. Does the museum include members of the governing authority in its self-reported number of volunteers? Yes No

66. Does your institution have a formal docent/guides group or program? Yes No

a. If yes, describe the structure and members.

67. Are you satisfied with the quality and quantity of volunteers your institution currently has? If not, why?

68. How are volunteers recognized?

69. Does your institution offer internships? Yes No

a. Note below how interns are compensated:

Paid hourly

Stipend for duration

College credit

Unpaid

Other:

Team Discussion Question:

70. Describe the relationships and interactions between staff and volunteers. Are they generally positive or is there room for improvement?

D. Ethics in Museums

71. Do any members of the staff collect in the same areas as the museum? Yes No

a. If yes, describe the system of checks and balances that prevents conflicts of interest between staff and the museum.

72. What is the current status of the museum's code of ethics?

Preparing to start new planning process

Working on a new code (expected date of completion: _____)

Just completed a new code that is not yet approved

Engaged in a regular review of current code of ethics

No current code of ethics

*If the museum does not have a code of ethics, proceed to question 76.***73. If there is no code of ethics, explain how your institution handles and shares ethics guidelines with staff, board and volunteers.****74. Is the code of ethics approved by the governing authority?** Yes No N/A

a. If yes, date approved:

E. Membership and Affiliate Organizations**75. Does the museum have:**

A membership program

An annual pass program

An affiliate "friends" organization

a. If yes, what is the number of members?

b. If yes, what is the number of annual passes sold in the last year?

c. If yes, what is the number of "friends"?

d. If there is a membership program, what is the cost of membership?

e. If there is a membership program, do you offer different types of membership or membership levels? Yes No

f. If yes, describe them:

76. What benefits are members offered? Check all that apply.

- Advanced notice of special events
- Discount at museum store
- Early registration for programs
- Free admission passes for guests
- Gala/special event tables
- Free parking
- Free publications
- Free/reduced admission
- Members-only openings
- Museum reciprocal program
- Discount on facilities rental
- Special members-only programs
- Use of library
- VIP behind-the-scenes tours
- Other:

77. What type of electronic communications does the museum use to communicate with your audience(s) and members? Check all that apply.

- Blog
- E-mail
- E-newsletter
- Facebook
- Flickr
- FourSquare
- Instagram
- Texting
- Twitter
- Website
- Wiki
- We don't use electronic communications
- Other:

78. If the museum has an affiliate group, what is the name of the program and how many members are there?

79. Does the affiliate group contribute financially to the organization? Yes No
80. What is the affiliate group's purpose or mission? What are its core activities?

81. Are they a separate incorporated organization? Yes No

F. Finance

82. List the museum's top funding needs in order of priority.
83. Who determined the above priorities and when?
84. Are these needs reflected in your strategic or long-range planning? Why or why not?

85. Summarize the museum's financial position over the past two years. Complete the following charts for the current fiscal year and most recently completed fiscal year; please begin with the current fiscal year in the chart, followed by the previous year in the second chart. Specify beginning and end dates of each fiscal year.

Current fiscal year	Current fiscal year budget figures	Fiscal year actual figures
Total operating income (excluding noncash contributions)		
Total operating expenses		
Net surplus (deficit)		
Nonoperating income		
Nonoperating expenditures		
Estimated market value of any institutional endowment(s)		

Previous fiscal year	Current fiscal year budget figures	Fiscal year actual figures
Total operating income (excluding noncash contributions)		
Total operating expenses		
Net surplus (deficit)		
Nonoperating income		
Nonoperating expenditures		
Estimated market value of any institutional endowment(s)		

- 86.** Explain any major changes, trends or variations in the figures above. Comment on any persistent or growing deficits or surpluses and explain what the museum is doing to address the issue.
- 87.** If the museum ran a deficit in the last fiscal year, please select the nature of the deficit.
- Planned/strategic
 - Involuntary
 - No deficit
 - Not applicable
- 88.** Who is involved in developing the museum's budget? Check all that apply.
- Full Board or Governing Authority Group
 - Executive Committee
 - Finance Committee
 - Other (board related):
 - Director/CEO
 - Director of Finance/CFO or equivalent
 - Department heads
 - Additional staff:
- 89.** Describe how the annual budget is developed and approved.
- 90.** Does the museum submit a 990? Yes No
- a. If no, explain why the museum does not submit a 990, and what, if anything, is submitted in place of it (to convey similar information).

91. Does the museum conduct an annual audit? Yes No

a. If no, what steps does the museum take to ensure the proper financial controls are in place?

92. Indicate the relative percentage of each source of the museum's annual income. Mark each source as stable or unstable, according to your assessment of whether you can depend on it not to decrease over the next few years.

Source	Percent	Stable	Unstable
Endowment income			
Contributions (annual fund)			
Contributions (special fundraising events)			
Contributions other:			
Grants (government)			
Grants (private foundation)			
Government support (appropriation or line item)			
Parent or friends organizational support			
Membership dues			
Sponsorships			
Store sales			
Space rental			
Special events			
Food service			
Admissions			
Program registration			
Other:			
Total percent stable income			
Total percent unstable income			
Total	100%		

93. Describe additional support, including noncash contributions and in-kind services. Please indicate who provides these resources.

94. What critical capital needs face the museum today? Check all that apply, estimate costs, and prioritize. (Cost estimates can be ballpark figures)

Capital project	Approximate cost	Priority rank
Endowment income		
Building addition/renovation		
Exhibit space		
Collections storage		
Visitor amenities		
Other:		
Construction of new exhibits		
Repairs to exterior of existing structure(s)		
HVAC: heating, ventilation & air conditioning systems		
Fire suppression		
Security upgrades		
Computer equipment		
Other equipment:		
Technology infrastructure		
Other:		
Program registration		
Other:		
Total outstanding capital needs:		

95. Does the museum have any collections-related endowment or restricted funds?

Yes No

a. If yes, briefly describe the endowments or restricted funds.

96. Does the museum have any other endowment or restricted funds? Yes No

a. If yes, briefly describe the endowments or restricted funds.

97. How has the governing authority at your institution chosen to account* for its collections (choose one):

Formally adopted the policy of capitalizing its collections as assets, and recognizing all contributions to the collections as revenues or gains

Formally adopted the policy of not recognizing its collections as assets

Has yet to formally adopt either policy

**Please note: Current museum standards and professional practices does not consider the capitalizing of an institution's collections as assets a best practice.*

98. How are funds from the deaccession of collections used? How are they tracked and accounted for?

99. Are the above answers in alignment with your code of ethics and collections management policy deaccession statements?

Yes No Do not currently have these documents

100. Does the museum charge an admission fee? Yes No

a. If yes, what is the admission fee?

101. Have your institution's admission fees been raised or lowered in the last five years?

Yes No N/A

a. If yes, what is the percent increase or decrease?

102. Are there any provisions for free or reduced admissions for any audience segment at any time? Yes No N/A

a. If yes, explain:

103. Does the museum engage in fundraising and development efforts? Yes No

a. If yes, describe:

104. Does your museum have a gift shop? Yes No

a. If yes, do the items in your shop reflect the institution's mission?

Yes No Somewhat

105. Does the institution have a written finance policy and procedures document approved by your governing authority? Yes No

Team Discussion Questions:

106. What financial challenges does the museum face? How are they being addressed?

107. What are your greatest concerns regarding the museum's finances?

G. Safety and Security

108. Is the museum current on all fire and health/safety inspections? Yes No

109. If the museum is not current on all fire and health/safety inspections explain the deficiencies and what is being done to address them?

110. What health and safety training are provided to staff and volunteers? Check all that apply.

- Active Threat/ALICE training
- Automated External Defibrillator (AED)
- CPR
- Emergency/disaster preparedness and recovery
- First aid
- Handling of toxic substances
- Hazards Communication Act/Material Safety Data Sheets
- Personal safety
- Use of fire extinguishers
- Other:

111. Which of the following security measures are used in the museum's facilities? Check all that apply.

- Alarms on cases/specific objects
- Automated alarm system
- Bag check for staff upon entry
- Bag check for staff upon exit
- Bag check for visitors upon entry
- Bag check for visitors upon exit
- Central monitoring of alarms within the building
- Closed-circuit television surveillance
- Door and window contacts
- Fencing of grounds
- Gates to grounds
- Glass breakage detection
- Historic buildings/properties accessible only via guided tours
- ID badges
- Monitoring of fire and security alarms at an off-site location
- Motion detectors
- Patrol of premises by security personnel when closed to public
- Patrol of premises by security personnel when open to public
- Proprietary keyway
- Security personnel in galleries
- Security personnel stationed at entrances and exits during open hours
- Sign-in/sign-out sheets
- Staff supervision of researchers
- Videotaped surveillance
- Written building access procedures
- Written key control procedures
- Other:

112. Does the museum have written security instructions, plans, or policies, including responsibility for keys, opening and closing the building, access policies, etc.?

Yes No

a. If yes, summarize and explain how these policies are communicated to staff.

113. If the museum has security staff, describe how they are screened, trained and supervised.

114. Does the museum rent the facilities for special events? Yes No

a. If yes, explain which spaces are used, and how the museum safeguards the collections.

Team Discussion Question:

115. What are your major concerns related to security?

Further Reading and Resources Related to Administration & Finance:

- AAM Core Document and Required Elements: [Institutional Code of Ethics](#)
- AAM Core Standards: [Leadership and Organizational Structure](#)
- AAM Core Standards: [Financial Stability](#)
- More AAM articles related to [Diversity, Equity, Accessibility, and Inclusion](#)
- More AAM articles related to [Financial Sustainability](#)
- More AAM articles related to [Leadership](#)
- *Museum Administration 2.0* by Hugh H. Genoways and Lynne M. Ireland, edited by Cinnamon Catlin-Legutko

Section Four: Collections Stewardship

Characteristics of Collections Stewardship

Description: This section includes gathering information and answering questions about your museum's collections stewardship and one activity

Introduction: After looking at different facets of your museum's administration, it's time to explore and examine your collections stewardship practices at your museum. The information collected in this section will serve as a benchmark for your museum going forward and will provide an overview for the MAP Team and MAP Peer Reviewer.

Purpose: This section will have you look at your museum's collections stewardship functions.

Directions: As you've done in previous sections, decide as a team how you would like to address the questions in this section. They can be approached together as a group or divided amongst your team members.

Please keep in mind that when working through this workbook and considering your institution's collections, it is important to note that arboreta, botanic gardens and public gardens have living plants and specimens under their care; other types of museums (such as zoos, aquaria, sculpture gardens, historic sites and nature centers) often do as well. Living populations have different and more specialized needs regarding their care and welfare; the acquisition, transfer and disposition of certain plants (e.g., rare, threatened or endangered) are governed by local, state, federal and international laws, regulations and conventions. For institutions with living collections – answer the following questions which addresses collections as objects as if they were referring to your animals, plants, or outdoor environments. Please call the MAP staff if you have any questions.

Related Standards:

- The museum owns, exhibits, or uses collections that are appropriate to its mission.
- The museum legally, ethically, and effectively manages, documents, cares for, and uses the collections.
- The museum's collections-related research is conducted according to appropriate scholarly standards.
- The museum strategically plans for the use and development of its collections.
- Guided by its mission, the museum provides public access to its collections while ensuring their preservation.
- The museum is a good steward of its resources held in the public trust.
- The museum demonstrates a commitment to providing the public with physical and intellectual access to the museum and its resources.

- The museum complies with local, state and federal laws, codes and regulations applicable to its facilities, operations, and administration.

A. Collections Management

116. Is the museum a collecting institution? Yes No

If your museum is a non-collecting institution, proceed to question number 121.

117. Estimate the following percentages for the museum's collections.

Accessioned: %

Have documented title: %

Catalogued: %

Inventoried (within the last 10 years): %

Visually documented: %

In need of conservation: %

Received conservation treatment in the last five years: %

Available online: %

118. Are the collections owned by the museum? Yes No

119. If the museum does not own the collection, explain who owns the collections and the legal nature of the arrangement under which the museum holds and cares for them.

120. Does the museum have different types of collections? Check all that apply.

- Archival
- Digital
- Hands-on/education (non-accessioned)
- Library
- Living
- Permanent/accessioned
- Research
- Other:

121. What is the current status of the museum's collections management policy?

Preparing to start new policy

Working on a new collections management policy (expected date of completion:)

Just completed a new policy that is not yet approved

Engaged in a regular review of current policy

No current collections management policy

122. If there is no collections management policy, explain how your institution knows how to handle collections related planning and decision making.

If the museum does not have a collections management policy, proceed to question 124.

123. If the museum has a collections management policy, has it been formally adopted by the governing authority? Yes No

a. If yes, date last updated and/or date of approval:

b. If no, how are staff and board members guided in the care and management of the collection?

B. Documentation

124. What records or information does the museum keep? Check all that apply.

Accession

Acquisition source/donor file

Audit

Catalog (by number)

Catalog (by subject)

Condition report

Conservation

Deaccession/disposal

Exhibition

Facilities report
 Fumigation/infestation
 Insurance loss/damage
 Location/inventory
 Object use/exhibition history
 Outgoing loan
 Photo reproduction rights
 Photographic/graphic file
 Provenance
 Preservation/care
 Research file
 Temporary custody/deposit
 Transfer of title
 Other (specify):

- 125.** Does the museum have a collections management system? Describe any systems currently used (manual and/or computerized) and check below to indicate who has access to these records.

Collections staff
 Exhibit/education staff
 Interns
 Museum visitors
 On-line access
 Researchers
 Volunteers
 Trustees
 Other (specify):

- 126.** How does the museum manage the backup of the museum's electronic information? Check all that apply.

We do not backup our data
 We backup to optical disc – DVDs, CDs, etc.
 We backup to tape
 We backup to redundant hard drives
 We backup to online storage
 We backup all data
 We backup essential data
 Other:

127. What data does the museum back up? List all relevant systems and/or departments.

128. Is a duplicate set of collections records stored securely off-site? Yes No

C. Acquisitions and Accessioning

129. Which of the following resource issues does the museum assess when considering potential acquisitions? Check all that apply.

- Associated care/conservation costs
- Available appropriate storage/exhibition space
- Endowment needed for future care
- Insurance
- Security requirements
- Staff and time needed to process the acquisition
- Other:

130. What is the decision-making process for accepting material into the collections? What records of the process are kept? By whom, where are they kept, and who has access to them?

D. Inventory and Loans

131. Does the museum have a formal process and schedule for inventorying the collection?

Yes No

a. If yes, how often is the inventory done?

b. Date of the last completed inventory:

132. Does the museum borrow collections from other institutions? Yes No

a. If yes, how does your institution use the collections that it borrows?

133. Does the museum have formal loan agreements for outgoing materials lent to other entities?

Yes No

134. Does the museum have formal loan agreements for all incoming materials held in temporary custody? Yes No

a. If no, explain what documentation is used to track material held in custody.

135. Does the museum have insurance coverage on all loans, incoming and outgoing?

Yes No

a. If yes, when was it last updated?

E. Care and Conservation

136. Does your institution have a conservation plan? Yes No

137. Which of the following methods are used to protect material in storage and on exhibit?

- Acid-free materials
- Appropriate light levels
- Closed storage cases
- Humidity control within cases
- Humidity monitoring
- Integrated pest management
- Scheduled housekeeping/cleaning
- Temperature control
- Temperature monitoring
- Training programs on handling
- U/V filters
- Written handling procedures
- Other:

138. Has the collection been surveyed to determine the condition of the objects? Yes No

Team Discussion Question:

139. What changes would you most like to make in the area of collections development or care?

F. Deaccession and Disposal

- 140.** Does the museum deaccession collections? If your museum does not deaccession collections, go to the Facilities Section. Yes No
- 141.** What are the museum's procedures for deaccessioning material? Specifically, explain the following:
- a. What criteria are used?
 - b. What level of approval is needed?
 - c. What records are made and retained?
 - d. Who is responsible for these steps?
- 142.** What role does your governing authority play in deaccessioning?
- 143.** How does your institution dispose of deaccessioned items?
- 144.** What, by policy, does the museum allow funds from deaccessioning to be used for? Check all that apply.
- Purchase of new collections
 - Acquisition of new collections by other means
 - Conservation treatment of collections
 - Direct care (if you have defined this more precisely, explain:)
 - Preservation (if you have defined this more precisely, explain:)
 - Other:
- 145.** Do you limit the use of deaccession funds to new acquisitions and/or the direct care of collections? Yes No
- a. If yes, what is your definition of direct care?

G. Facilities

- 146.** What is the interior square footage of the museum?
- 147.** What is the total acreage of the developed exterior grounds?
- 148.** How many buildings does the museum occupy?
- 149.** How many buildings contain museum collections?
- 150.** Are the buildings all on the same site? Yes No
 a. If no, where are the buildings located?
- 151.** Are any of the buildings historic structures? Yes No
- 152.** How many sites does the museum maintain?
- 153.** Does the museum own the buildings or sites in which they operate from/store collections in?
- 154.** Does the museum have off-site collection storage? Yes No
 a. If yes, describe the collections space, including distance to the main facility, security and size.
- 155.** What is the percentage of space devoted to each area of the museum? Break the total percentage down by the following function and rate how well each space is fulfilling its function.

	The space suits this purpose:			
	Percentage	Very well	Adequately	Inadequately
Exhibit				
Collections storage				
Collections processing/lab				
Classroom/auditorium				
Exhibit production/shop				
Operations (i.e., maintenance areas, mechanical rooms)				
Offices				
Gift shop/retail				
Other:				
Other:				

- 156.** Who performs basic housekeeping in these areas? How are they trained?
- 157.** Does the museum have a regular maintenance schedule for major building systems and structural integrity (including heating/air-conditioning, parking lot, roof, etc.)?
Yes No
- 158.** Who maintains the physical plant and/or grounds (major building systems and structural integrity)?
- 159.** Does the museum's site include interpreted grounds or natural areas (e.g., nature center, botanical garden, arboretum, archaeological site, historic farm, or village)?
Yes No
a. If yes, describe the grounds, structures and/or nature areas.
- 160.** Is the museum building(s) shared with non-museum-related activities (e.g., commercial office space, classrooms, non-museum retail operations)? Yes No
a. If yes, describe the activities. How do these activities affect the museum in a positive or negative way?
- 161.** Are non-collections items housed in the same spaces with collections? Yes No

162. Do the museum's structures have the following? Check all that apply.

	Whole building(s)	Part of building(s)	None
Heating			
Cooling			
Humidification			
Dehumidification			
Air filtration			
Electricity			
Fire suppression			
Security/alarms			

163. If you have more than one structure, elaborate here about other buildings/structures answering the above question.

Team Discussion Question:

164. What are your greatest concerns about the museum's facilities?

H. Legal Issues

165. Does the museum care for collections that it does not own (such as abandoned property, long-term loans or collections managed by others)? Yes No Not sure

a. If yes, describe the collections and discuss their legal status.

- 166.** Does the museum have a management agreement (MOU) or repository agreement for collections cared for by the museum but owned by others? Yes No
- 167.** Does your museum hold any collections or engage in any activities which may raise issues regarding compliance with associated laws and regulations? (ex. endangered species, NAGPRA) Yes No
- a. If yes, please describe.
- 168.** Is there any material in the collections that might have changed hands in continental Europe between 1932 and 1946? Yes No Don't know
- a. If yes, is the museum following the American Alliance of Museum's Guidelines Concerning the Unlawful Appropriation of Objects during the Nazi Era?
- Yes No Don't know
- 169.** Is the museum out of compliance with any relevant laws or regulations – such as those above? Yes No Don't know
- a. If yes, what steps are being taken to remedy the situation?
- b. If uncertain, what steps are being taken to assess the museum's compliance with relevant laws or regulations?
- 170.** Does the museum have any abandoned property? Yes No
- a. If yes, are you following your state's abandoned property laws? Some states have museum-specific laws. Explore your state's regulations about abandoned property and share below.

Team Discussion Questions:

171. Concerning your museum's collections, what does your museum do well?

172. What are the major concerns about collections stewardship?

I. Risk Management

173. What is the current status of the museum's disaster preparedness/emergency response plan?

Preparing to start a new plan

Working on a new plan (expected date of completion: _____)

Just completed a new plan that is not yet approved

Engaged in a regular review of current plan

No current disaster preparedness/emergency response plan

174. If you have a disaster preparedness/emergency response plan, when was the last date of review or date completed?

175. If there is no disaster preparedness/emergency response plan, explain how your museum knows how to handle disaster and emergency situations, planning and decision-making.

176. How does the museum insure its collections?

Commercial policy

Self-insured

177. Do the collections contain any health and safety hazards (i.e., biological collections stored in formaldehyde or alcohol, munitions/ordnance, etc.)? Yes No

a. If yes, describe:

b. If yes, does the museum have procedures for protecting staff and visitors from these potential hazards? Briefly describe them:

178. Do you have a list of contacts to mitigate any hazardous issues, if needed?

Yes No

179. Are these procedures and contacts articulated in your museum's Collections Management Policy and/or Emergency Planning documents? Yes No

180. How often is the emergency/disaster training completed? When was the last time it was practiced or tested?

Team Discussion Question:

181. What are the most important changes you would like to make to the museum's risk management?

Further Reading and Additional Collections Stewardship Resources:

- AAM Core Document and Required Elements: [Collections Management Policy](#)
- AAM Core Standards: [Collections Stewardship](#)
- [Direct Care of Collections, March 2019 Update](#), American Alliance of Museums
- ["Knowing Better, Doing Better: The San Diego Museum of Man takes a holistic approach to decolonization"](#)
- More AAM articles related to [Collections Stewardship](#)
- *Museum Registration Methods 6th Edition*, edited by John E. Simmons and Toni M. Kiser
- [The Capitalization of Collections Ethics Position Paper #1](#), American Association for State and Local History
- *Things Great and Small: Collections Management Policies* (Second Edition) by John E. Simmons

Activity Four: Disaster Preparedness Activity

Purpose: To explore your museum's readiness to respond to emergency situations that can affect your facilities and collections. This activity can help identify weak links in your existing disaster preparedness plans or help start the process of creating a plan. A good disaster plan, well-conceived and familiar to all staff, is your museum's best risk management tool for the protection and recovery of collections in the case of natural or man-made disasters. These plans also help protect museum staff and visitors and assist the museum in recovering crucial business and operational records, so it can continue to function in the aftermath of a disaster and reopen to the public as quickly as possible.

Materials Needed

- Copies of your museum's disaster plan (if you have one). If you do not have an approved plan, consider if you have other institutional documents that are used for emergencies. These can be used for this activity.
- Copies of the attached "Emergency Supplies and Information" checklist (this can also be found in the MAP Portal Library)

Suggested Participants: In addition to the MAP Team, a cross-section of staff, including the director, and staff responsible for collections, the building and grounds, security, conservation, and public relations. As a disaster preparedness plan protects your whole museum and helps you to get up and running again as soon as possible, it would be beneficial for all sections of the museum to be represented.

Part I—Check Your Emergency Supplies and Information

(For museums with or without a disaster preparedness plan)

Have several people work together to use the attached "Emergency Supplies and Information" checklist to assess the adequacy of your supplies and information in case of an emergency. This will be used in the next part, and in the summary discussions.

Part II—Simulating a Disaster

If you have a disaster preparedness/emergency response plan, use that document during the activity. If you do not have a disaster preparedness/emergency response plan, go through the simulation to see your institution's readiness for a disaster situation.

Choose one person to serve as the "Disaster Master" (DM). Have the DM (working with others, if appropriate) craft a disaster scenario for something likely to happen at your museum. This could be a regional disaster, such as a flood, hurricane, tornado, or earthquake, or a localized incident, such as a burst water pipe. Identify the people who would need to be involved in a response to the chosen incident (Include a representative of frontline or maintenance staff likely to be the first to discover a localized problem). We recommend scheduling at least two hours for this group to run through the exercise.

When the group convenes, explain the simulation rules:

- They will read the introductory scenario, and role-play their response as the disaster response proceeds
- The DM gets to specify all variables that are “fictional” in the scenario (e.g., whose phone line is knocked out? Where, exactly, is the water coming in?)
- Where you can, check whether a given step in the process will really work. You can refer to the completed Emergency Supplies checklist from Part I to assess the availability of supplies and information. Other kinds of things you can test with this group: do people know where the shut off-valve is for the gas? For water? If your phone system depends on electricity, where is the nearest cell phone or radio you can use if the power is out?

Proceed with the simulation until you have stabilized the situation. During the simulation, and in the wrap-up discussion, evaluate the following points:

- Was it clear who was in charge during the response?
- Were participants familiar with the contents of your disaster plan?
- Is the plan current, and did it help you deal with the simulated disaster?
- Were there materials or information you did not have available, or procedures you needed that were not included in the plan?
- How did you determine priorities for rescuing or salvaging collections material, records, and equipment?
- Was it clear who would communicate with the press, and what information would be released?

Part III – Summary

Select someone to record the activity findings, simulation, and discussion. Address the following points:

- Was staff familiar with the contents of your disaster plan/other disaster documentation or policy?
- Did they know where to find it?
- Did each person know what he or she should do in this situation, or did they have to stop and figure it out?
- Was it clear who was in charge?

Did they find the equipment and information they needed to respond effectively?

- Did you discover any weak points in your preparedness, and did you come to any conclusions about how to address them?
- If you don't have a current disaster plan, how might this activity help you address potential disasters at your institution in the future?

Include your summary here:

Further Reading and Additional Disaster Preparedness/Emergency Response Resources:

- AAM Core Document and Required Elements: [Disaster Preparedness and Emergency Response Plan](#)
- AAM Core Standards: [Facilities and Risk Management](#)
- [“Let it Bloom: Reconstructing a hurricane-stricken historic garden”](#)
- More AAM articles related to [Collections Stewardship](#)
- [“Thinking about the Unthinkable: Disaster preparedness and emergency response plans for small museums”](#)
- [National Heritage Responders Tip Sheets](#)
- [NEDCC Preservation Leaflets: Emergency Management](#)

Emergency Supply and Information Checklist

Which of the following supplies and information can you find at your facility? As you inventory, consider: are they easy to find? Stored in one place or in scattered locations? Do you need a key to get to the necessary supplies? Could you find them/get them if the power were out?

Protection for people:

- First-aid kits (check contents)
- Gloves (rubber and leather)
- Hard hats
- Rubber boots and aprons
- Safety glasses
- Tyvek suits

Communications/access:

- Batteries
- Bullhorn
- Flashlights
- Home phone numbers of paid staff, volunteers and key board members
- Phone tree (who will call whom?)
- Walkie-talkies or cell phone(s)

Phone numbers for:

- Administration
- Conservation services
- Contractors/services
- Facilities
- In-house security
- Insurance representative
- Management
- Police/fire/emergency
- Radio/TV stations

Basic light cleaning supplies:

- Broom
- Mop
- Plastic buckets and trash cans
- Plastic trash bags
- Rolls of paper towels
- Shovels/rakes
- Sponges/rags

Water control/cleanup/

humidity control:

- Dehumidifier
- Extension cords (long, grounded)
- Hygrometer
- Plastic sheeting
- Portable electric fans
- Scissors
- Tape (masking and duct)
- Wet/Dry vacuum

Documentation/collections

recovery:

- Blank newsprint
- Camera and films
- Carts
- Clipboards
- Duplicate records off-site
- Freezer/wax paper
- Indelible marking pens
- Laptop computer
- Plastic crates
- Plastic wrap
- Written collections recovery procedures
- Zip-lock baggies or equivalent

Resumption of business

supplies:

- Blank checks and purchase orders
- Duplicates of essential office records off-site (paper &/or electronic)
- Stationary and blank forms

Facilities repair/stabilization:

- Basic tool kit (hammer, screwdrivers, nails, screws, saw)
- Plywood to cover broken windows

Section Five: Education and Interpretation

Description: This section includes answering questions and examining your museum's education and interpretation functions. It also includes one group activity.

Introduction: In this final section of Part One, you will examine your museum's education and interpretation functions. This will provide a baseline for both the MAP Team and Peer Reviewer for the Site Visit and moving forward after MAP.

Purpose: To examine the broad overview of your museum's education and interpretation efforts.

Directions: As you've done in previous sections, decide as a team how you would like to address the questions in this section. They can be approached together as a group or divided amongst your team members.

Related Standards:

- The museum clearly states its overall educational goals, philosophy, and messages, and demonstrates that its activities are in alignment with them.
- The museum understands the characteristics and needs of its existing and potential audiences and uses this understanding to inform its interpretation.
- The museum's interpretive content is based on appropriate research.
- Museums conducting primary research do so according to scholarly standards.
- The museum uses techniques, technologies, and methods appropriate to its educational goals, content, audiences, and resources.
- The museum presents accurate and appropriate content for each of its audiences.
- The museum demonstrates consistent high quality in its interpretive activities.
- The museum assesses the effectiveness of its interpretive activities and uses those results to plan and improve its activities.
- The museum is a good steward of its resources held in the public trust.
- The museum identifies the communities it serves and makes appropriate decisions in how it serves them.
- Regardless of its self-identified communities, the museum strives to be a good neighbor in its geographic area.
- The museum strives to be inclusive and offers opportunities for diverse participation.
- The museum asserts its public service role and places education at the center of that role.
- The museum demonstrates a commitment to providing the public with physical and intellectual access to the museum and its resources.

A. Audiences and Visitors

182. Describe the museum’s current audiences as defined by whatever parameters are relevant (e.g., socioeconomic, demographic, special interest groups, etc.).

183. How does the museum collect information about who comes to the museum or satisfaction with visitor experience? Check all that apply.

- Focus groups
- Follow up evaluation after a visit (by phone, email, or mail)
- Guest book
- Informal observation by front-line staff
- Information from donor forms
- Mailings
- Membership surveys
- Online survey
- Post visit educator surveys
- Program registration forms
- Store sales data
- Ticket sales data
- Visitor evaluation form on site
- Visitor interviews
- Visitor surveys
- Visitor observations
- Zip code study
- We do not collect data on visitor experience
- We do not collect data on who comes to the museum
- Other (specify):

184. What is the museum’s annual attendance/visitation for reach of the last three years?

Year	Attendance

- 185.** Describe how your institution defines attendance/visitation and explain any trends in this data.

B. Community

- 186.** Describe how you have defined the geographic community served by the museum (e.g., neighborhoods, academic campus, a town, city, county or region).
- 187.** Use the sources of information below to generate a demographic picture of the geographic community you identified in the previous question. Summarize the information for:
- Age:
 - Gender:
 - Sexual orientation:
 - Disability:
 - Education:
 - Employment:
 - Income:
 - National origins and languages spoken at home:
 - Poverty:
 - Race and ethnicity:
 - Household relationships (married, single, children, etc.):

Note: This information is usually available from your local chamber of commerce or local school board. Include any other demographics that are relevant to the museum's operation, for example, resident versus seasonal population, major employers, economic growth. (For college and university museums: include both size and demographics for the student population, and for the surrounding community.) Please note that all data may not be available. Complete as best you can with available data.

188. If the available data is more than seven years old, does your team feel it still accurately reflects the makeup of your geographic community? What shifts or changes are you noticing in your community?

189. How does the museum serve these communities?

190. If the makeup, resources, needs or behaviors of the museum's geographic community or audiences have changed in the last three to five years, describe these changes, their impact on the museum, and how the museum has adapted/responded to them.

191. Has the museum worked collaboratively with other local organizations? Yes No
a. If yes, describe the program(s) and nature of the collaboration(s):

192. If you are a collecting institution, how is the community represented in the museum collection?

193. Describe any opportunities that are in place to establish ongoing, two-way communication/relationships between the museum and its geographic community.

Advisory groups

Annual meetings for members

Community open houses

Community curated exhibits

Focus groups

Onsite comment card boxes or kiosks

Participation in membership-based organizations such as chambers of commerce, downtown development groups, or business improvement districts

Social media

Text messaging

Town meetings

Visitor participation in program and exhibit design and implementation

Website feedback options

None of the above

Other (describe):

194. Does the museum have strategic partnerships and/or relationships with any of the following entities? Check all that apply.

Arts & culture organizations

Educational community organizations/associations

Government agencies

Institutions of higher learning

K-12 schools

Law enforcement/first responders

Libraries/archives

Local businesses/chamber of commerce

Local media

Social service/civic affairs community organizations

Other:

195. If you indicated the museum has strategic partnerships and/or relationships, describe them.

196. How is the museum bringing in new audiences and sustaining their engagement?

C. Public Programs

- 197.** Describe the museum's interpretive content offered in the last three years. Include: all exhibits, public programming, school programming, etc.
- 198.** What methods does the museum use to deliver its educational and interpretive content?
Check all that apply.
- Academic classes for credit
 - Archives or library available to public
 - Art/craft/equipment demonstrations
 - Collections available for research
 - Docent-guided tours
 - Hands-on station(s)
 - Mission-related public events (lectures, films, etc.)
 - Multi-media (videos, CD-ROMs, DVDs, etc.)
 - Outreach to groups other than schools
 - Permanent exhibits
 - Printed publications with interpretive/educational content
 - Resource room(s)
 - School activities: at schools or other sites outside the museum
 - School activities: at the museum
 - Self-guided tours: personal audio device/podcasts
 - Self-guided tours: signage and/or printed guide
 - Temporary exhibits organized by the museum
 - Theatrical interpreters
 - Traveling exhibits from other institutions
 - Traveling trunks/rental kits
 - Website content
 - Other (specify):
- 199.** Have you developed any educational programs that are linked to school district curriculum and/or state/federal educational standards? Yes No
- a. If yes, describe the programs.

200. How does the museum evaluate its programs? Check all that apply.

- Comment forms
- Evaluation forms for teachers and participants
- Facilitated participant review sessions
- Outside evaluators (peer or consultants)
- Test groups for pilot programs
- Other:
- No formal system of evaluation

201. Is the museum doing any of the following to be more accessible? Check all that apply.

- Experimenting with alternative evening/weekend hours
- Facilities or dedicated spaces for groups with special needs
- Free admission days
- Free pass system at the local library
- Museum passport program with other local organizations
- Reduced admissions for military families
- Tailored programs and/or hours for groups with special needs
- Universal design
- Other:

D. Exhibitions

202. What types of exhibits has the museum offered in the last 12 months? Check all that apply.

- Permanent/long-term
- Temporary (non-traveling)
- Traveling: developed by the museum and shown on site
- Traveling: developed by other institutions and displayed by the museum
- Other:

203. Briefly describe the museum's major exhibits.

204. Where are the collections exhibited or displayed? Check all that apply.

- Board room
- Classrooms
- Common areas
- Dedicated public exhibition spaces
- Food service areas (e.g., cafes, restaurants, etc.)
- Galleries
- Gardens/greenhouses
- Hallways
- Historic buildings/structures
- Libraries
- Lobbies/lounges
- Nonpublic areas
- Other public areas
- Period rooms
- Staff offices
- Stairwells
- Throughout a natural or interpreted landscape
- Other:

205. On average, what percent of the collections are on exhibit?

206. Who plans and organizes your museum's exhibitions?

207. How many staff members are part of your exhibitions team?

208. Are external stakeholders involved in the conception and creation of your exhibits?

Yes No

a. If no, why not?

209. How far in advance are your exhibitions planned?

210. How often do exhibitions change in your museum?

- 211.** How does the institution get feedback from the public about the exhibit?
- 212.** What methods does the museum use to explain the collections on display to visitors? Check all that apply.
- Academic coursework
 - Archives or library available to public
 - Art/craft/equipment demonstrations
 - Collections available for research
 - Docent-guided tours
 - Hands-on stations
 - Mission related public events (lectures, films, etc.)
 - Multimedia (videos, CDs, DVDs, etc.)
 - Mobile app
 - Outreach to groups other than schools
 - Permanent exhibits
 - Printed publications with interpretive/educational content
 - Resource rooms
 - School activities: at schools or other sites outside the museum
 - School activities: at the museum
 - Self-guided tours: personal audio device/podcasts
 - Self-guided tours: signage and/or printed guide
 - Social media
 - Temporary exhibits organized by the museum
 - Text panels
 - Theatrical interpretations
 - Traveling exhibits from other institutions
 - Website content
 - Other:

213. Who is involved in developing exhibitions? Check all that apply.

Advisory committee (or other like group)
 Board/board committee
 Community
 Curators
 Curators/educators from other museums
 Designers
 Directors
 Educators
 Evaluators
 Independent curators/educators
 In-house
 Other subject matter experts
 Outside expertise
 Teachers
 Other:

214. What visitor services does the museum provide? Check all that apply.

Audio tours	Nursing area
Baby-changing stations	Online ticketing
Braille labels or exhibit guides	Parking and/or shuttle service
Closed captioning	Restrooms
Coat room	Seating
Elevator(s)	Sign language interpreters
Food services	Special tours
Independent research area	Toddler play room
Information desk	Vending machines
Language translation	Wheelchairs
Large-print labels	WiFi
Membership desk	Wheelchair-accessible exhibit design
Museum store	Other:

215. Do the museum's exhibitions make effective and appropriate use of the collections?

Yes No Somewhat

216. Which "voices" are represented in the institution's exhibitions?

217. Are your exhibits accessible to all visitors? Yes No

a. If no, why not?

Team Discussion Question:

218. What would you most like to change or add to your exhibitions?

E. Research

219. Does the museum have a library/research center? Yes No

220. Describe how access to these collections, archives or facilities is made known to the public.

221. Are the museum's collections available online? Yes No

a. If yes, in what way (ex. catalog, online exhibit, finding aids, etc.)?

F. Publications and Communications

222. Which of the following interpretive publications/non-print media does the museum produce?

Check all that apply.

Audio recordings
Books
Catalogs
Gallery guides
Newsletters

Periodicals/journals
Technical publications
Videos, DVDs, CD-ROMs
Other:

223. What information does the museum website provide? Check all that apply.

- Affinity group information (young professionals, teens, etc.)
- Annual report
- Blog
- Calendar of events
- Background information on collection
- Collections information
- Current programs/exhibitions
- Directions to the museum
- Entrance fees and ticket prices
- Images of the collection
- Interpretive information or activities
- Intranet capability
- Links to related sites
- Links to the museum's social media accounts (e.g., Facebook, Twitter)
- Listing of members of your governing authority
- Membership information
- Museum store
- News/press releases
- Photos of the museum
- Photography guidelines
- Podcasts
- Online databases (searchable)
- Online exhibits
- Online sales
- Operating hours
- Programs, kits, resources for teachers
- Rental information
- Secured payment portal (for membership, donations, etc.)
- Special event RSVP
- Sponsorship/donor opportunities
- Staff contact information
- Subscription portal (to receive newsletter, event info, etc.)
- Video
- Volunteer information (docents, teens, etc.)
- Other:
- No website

G. Marketing & Public Relations

224. How does the museum promote the museum, its programs and exhibits? Check all that apply.

- Audio tours
- Banners
- Blog
- Brochures/rack cards
- E-mail
- E-newsletter
- Facebook
- Flickr
- Foursquare
- Instagram
- Live streaming and on-demand video broadcasts
- Mailings to members
- Mass mailings to non-members
- Media openings for exhibits
- Membership, chamber of commerce
- Membership, convention and visitors bureau
- Museum newsletter/calendar/magazine (printed)
- Newspaper articles
- Online
- On site signage
- Outdoor signage (e.g., billboards, kiosks)
- Podcasts
- Promotional partnerships
- Print
- Public presentations
- Public service radio/TV
- Radio
- Social media and traditional press releases
- Speakers Bureau
- Television
- TikTok
- Texting
- Twitter
- Viral marketing
- Website
- Webinars
- Wiki
- YouTube
- Other:

225. What types of poster, billboard, or directional signs does the museum have in the community, including major highways/public transportation, to guide the public to the museum?

Team Discussion Question:

226. What are your greatest concerns regarding audience development, marketing and public relations?

Education and Interpretation Resources and Further Reading:

- Center for the Future of Museums: [Building the Future of Education: Museums and the Learning Ecosystem](#)
- [“From a Teacher: How to make your museum field trips ones to remember for students and staff”](#)
- More AAM articles related to [Education and Interpretation](#)
- [National Association for Interpretation](#)
- Wallace Fact Sheets on [Building Audiences](#)

Congratulations!

Your MAP Team has completed
Part One of the MAP Workbook!

Please email this completed portion to your Peer Reviewer by [\[Date\]](#).
Contact your Peer Reviewer about which documents on the following page
you will need to provide.

Please discuss this list with your peer reviewer and provide copies of requested documents at least 3 weeks before your site visit:

- Annual report (most recent)
- Audience Surveys (blank forms)
- Audience Surveys (examples of completed recent surveys, summaries)
- Brochure
- Bylaws
- Calendars of events and programs
- Chamber of Commerce Information
- Current exhibition schedule
- Current year's approved budget
- Exhibition policy
- Ethics policy
- Facilities maintenance plan
- Facility rental and special event policy
- Floor plans for all facilities
- Guidelines for organizing and installing exhibitions
- Institutional plan (e.g., strategic plan, long-range plan)
- Interpretive plan
- List committees of governing authority
- List of current members of governing authority
- Map of your community
- Mission statement
- Newsletter (most recent)
- Organizational chart
- Photographs of museum
- Position descriptions
- Previous MAP reports (if applicable)
- Promotional materials
- Program/exhibit evaluation sample forms and results
- PR and marketing plan
- Staff list
- Other Document:

Part Two:

Engaging on Site

Part II: Engaging on Site

Description: This section includes one group activity to be completed with your Peer Reviewer during their site visit.

Directions: Schedule time during the site visit to complete the activity below. Please note that your Peer Reviewer may assign additional activities to be completed during the Site Visit. Be sure to add any worksheets, handouts or summaries to the end of the MAP Workbook.

Activity Five: Vision & Core Values Activity

Purpose: To help your institution review and/or begin the process of creating a vision statement and core values. Although not one of AAM's five core documents, a vision statement is an aspirational declaration of an institution's intentions that may include a description of the ideal scenario or successful future for the institution. As you were reminded in the Mission Activity, a mission statement defines an institution's purpose and is a yardstick for accountability. What an institution does is measured against its mission. While a mission and vision lay out the organization's purpose and long-term goal(s), core values are the core belief system that provide a moral compass and framework for an institution's goals, priorities and decisions.

Conversations related to and actually developing a vision statement and core values can inform strategic planning and vice versa. These statements can be refined, reaffirmed, or developed in conjunction with strategic planning. This activity is designed to help participants think about the vision and values of their institution, and developing and/or reaffirming these statements should involve stakeholders such as governing authority, leadership, staff across various departments, and other relevant groups at the institution.

Materials Needed

- Copies of your mission statement or your answer from question #1 of this MAP Workbook.
- Copies of your vision statement and core values (if you have them)
- Copies of your Code of Ethics (if you have one)
- **MAP Portal Resource Library pdf:** O-What is a Vision Statement Handout (BoardSource)
- **MAP Portal Resource Library pdf:** O-Mission Statement vs. Vision Statement Handout (BoardSource)
- **MAP Portal Resource Library pdf:** O-Vision and Values Samples

Suggested Participants: The MAP Team members, members of the governing authority, outside staff members, and the Peer Reviewer. Assign one member of this team as the note taker. They will also write a one-page summary of the activity findings and discussions included at the end of this activity.

During the meeting your Peer Reviewer will attend primarily to observe a team meeting, but is also encouraged to ask the team members questions during the discussion to help clarify or focus responses and help keep your efforts well balanced between discussion time and decision time. Of course, the team is welcome to ask the reviewer for his or her observations on something, but remember the recorded presentation in Module Three of the MAP Portal! The role of the Peer Reviewer is not to make decisions for the museum or solve conflicts.

Directions:

- **Before the Meeting:** Review these three MAP Portal Handouts: O-What is a Vision Statement, O-Mission Statement vs. Vision Statement, and O-Vision and Values Samples.
- **During the Meeting:** Complete the three parts of this activity. Select someone to record the responses and write a one-page summary of your discussion and conclusions.

Part I—Review and Discuss: Vision

As a group, review the institution's mission or response to question #1 of the MAP Workbook. With the mission in mind, address the following depending on which scenario applies to your institution, and be sure someone is designated as the note taker to capture the responses and ideas:

A. The institution has a written/defined vision statement:

- Do participants feel that the vision is still relevant and aligns with the institution's mission, strategic plan, priorities, etc.?
- Do participants feel that they know the vision of the organization?
- When was the last time the vision was reviewed? What changes might you envision for the institution's vision (if at all)?
- Did the handouts create any ah-ha moments or other realizations for how the institution's mission and vision are inter-related?
- Are there any areas of agreement and disagreement among participants?

B. The institution does not have a written/defined vision statement:

- Have MAP Team members begin to brainstorm what phrases or words come to mind when thinking about the institution's big picture and long-term or aspirational goals. Remember, as the "What is Vision Statement" handout says: "visioning is a process of looking into the future, justifying and imagining the ideal place for the organization in ten to 30 years."

- How do these big picture and long-term aspirational goals relate to the museum's mission and planning?
- What are areas of agreement or disagreement among participants regarding the long-term or aspirational goals that come to mind during this brainstorm?
- Did the handouts create any ah-ha moments or other realizations for how the institution's mission and vision are inter-related?

Part II—Review and Discuss: Core Values

Address the following depending on which scenarios apply to your institution. Refer to the handout: O-Vision and Values Samples for examples of vision and core values from other institutions as needed.

A. The institution has a Code of Ethics developed:

- Have participants take some time to review the Code of Ethics and read to see what words and/or phrases are showing up the most in the document.
- Are there ideas or concepts included that might help inform the discussion of the institution's core values?

B. The institution has written/defined core values:

- When were the core values created and/or last reviewed?
- Do activity participants still feel that the values are still relevant and align with the institution's goals, mission and vision?
- What changes might you envision for the museum's values? Are there values that come to mind that aren't currently represented in the institution's core values?
- Where are there areas of agreement or disagreement when it comes to the organization's core values?
- Did the handouts create any ah-ha moments or other realizations for how the institution's mission, vision and values are inter-related?

C. The institution does not have written/defined core values:

- Have MAP Team members begin to brainstorm what phrases, words, and/or values come to mind when thinking about what values they find important for the institution and their work.
- Are there phrases, words, and/or values that are being brought up more than others? What are areas of agreement or disagreement among participants during this brainstorm?
- How might these phrases, words, and/or values relate to the mission, vision and planning of the institution?
- Did the handouts create any ah-ha moments or other realizations for how the institution's mission, vision and values are inter-related?

Part III—Summary & Next Steps

Think about what your next steps might be. Consider sharing the findings from this activity with your board/governing authority, leadership staff, advisory board members, external community members or stakeholders, volunteers and/or at an all-staff meeting. Findings from this activity can help inform potential strategic planning conversations, help update your vision statement and/or core values or create your vision statement and core values for the first time.

Include your summary of potential next steps, activity findings and discussions here:

Part Three:

Keeping the Momentum (After the Site Visit)

Section Six: Getting Focused After Your Site Visit

Description: This section includes reflection questions and two group activities.

Introduction: The site visit isn't the end of your MAP journey, use this section to keep the momentum going and take some time to reflect on the visit by answering the questions in this section. After answering the questions, there are two activities to complete.

Purpose: Now that you've examined your museum's mission and planning, governance, administration and finance, collections stewardship, and education and interpretation, it's time to reflect on the site visit and dig a little deeper into how your museum compares to other attractions in your surrounding community and how the public experiences your museum.

Directions: After the site visit, take some time with the MAP Team to answer the questions as a group and complete the two activities. Select someone to record responses and summarize your discussion and conclusions.

A. Team Discussion Questions

- 227.** What new insights or perspectives do team members have as a result of the site visit?
- 228.** What are two or three ideas or changes that occurred to staff, volunteers and/or your governing authority during the site visit that can be acted on now?
- 229.** Did your Peer Reviewer make any suggestions during the site visit that the team or museum could begin to implement now? (if not, write N/A and go to the next discussion question.) If yes, list two or three to act on while waiting for the assessment report.

230. Did your Peer Reviewer assign an activity or ask you to implement something? If yes, describe team's plan for addressing this.

231. Review your three MAP goals included in your original MAP Application. Does the team feel they need to be adjusted or changed?

Yes No Maybe

Why or why not?

232. Write any changes to your MAP goals here:

Activity Six: Cultural Environment Activity

Purpose: To increase your awareness of your local environment and examine how the museum compares to other attractions that your audience may choose.

Materials Needed

- Information about other area attractions, both for-profit and nonprofit
- List of your target audiences and their needs

Suggested Participants: In addition to the MAP Team, a cross section of staff, including public relations/marketing staff if you have them, as well as staff not usually responsible for these functions. Include staff, volunteers, and/or members of your governing authority who match the demographics of your target audience (for example, parents with young children, singles ages 25-35, etc.).

Part I—The Environment

Meet with your participants to generate a list of the area attractions that are offered and may engage your target audience. You might include museums, zoos, botanic gardens, historic houses, aquariums, amusement parks, movie theaters, etc. Divide the names on the list among the participants. Ask them to gather information on hours, pricing, membership fees and benefits (if applicable), presence of amenities (shop, food sales, etc.) for each attraction. Gather as much as you can on their respective missions, attendance and membership figures, and audience demographics.

Part II—Analyze the Environment

Meet to share this information. Create a table comparing them with the museum. As a group, address the following questions about the area attractions:

- What do the other attractions offer?
- Who overlaps with you on your mission or services?
- How does their pricing for admissions or programs compare to yours?
- Do they have specific events or programs (holiday festivals, galas, summer camps) that compete directly with you for customers? Discuss the implications.
- Are there areas where you might consider changing your operations in order to avoid overlapping with these organizations?
- Are there areas where you “own the market?”
- Do you see potential for collaboration with other organizations on programs or marketing?
- Do you see potential partners or allies with any of these other organizations?
- Do you have any recommendations for actions you might take as a result of this analysis?

Part III – Summary

Select someone to record responses and summarize your discussion and conclusions.

Include your summary here:

Attach a copy of the chart or list comparing the museum with the other attractions to your completed workbook.

Activity Seven: Public Experience Activity

Purpose: To increase staff and governing authority awareness of the quality of the public experience in your facility and identify areas for improvement.

Materials Needed

- Whiteboard, chalkboard, or flipchart
- Floor plan of your facilities

Suggested Participants: The MAP Team and a cross section of your museum's staff. Include front-line/visitor services staff, if applicable. Part III involves recruiting participants from other businesses in your community.

Part I—Create a Flowchart of Your Visitors' Experience

Have the participants draw a flowchart of the visitor experience. Diagram each step in the process of visiting your facility, starting with how they can get directions and check hours, and ending when they leave your property. Start by focusing on the main activities experienced by the visitor, and expand later, if relevant.

- Chart each step in its normal sequence.
- Track some actual visitors.
- For each "front stage" step (e.g., taking an exhibit map) chart the necessary supporting steps (e.g., produce and restock exhibit maps).
- Mark the points on the flowchart where things are most likely to go wrong. (What if no one answers the phone when they call? What if the bathroom is out of toilet paper? What if the exhibit interactive is broken?) These are "Potential Pain Points" (PPPs).
- Verify the completeness of the flowchart by showing it to several staff and visitors and asking them to critique or test it.

Part II—Test Your Potential Pain Points (PPPs)

Assign each participant one or more PPPs for testing. Have them assume the role of a visitor, try the relevant part of the flowchart, and record their experience.

Examples of PPPs:

- Does the front desk staff give good directions?
- How long do they have to wait in line for a ticket, or in the checkout line at the store, when a school group is visiting?
- How clean is the public restroom?
- What if they need to sit, is there anywhere to do this in the public space?

Part III—Learn from Others

Select local businesses that your team agrees provide exceptional customer service. This might be a grocery store, department store, theater—any place where you, as a customer, have felt well treated. Invite their representatives to talk to your staff about how they create this good customer experience.

- Do they have a written customer service philosophy statement?
- How do they train new employees to provide this service?
- How are employees recognized and rewarded for providing good service?
- What process is used to ensure continuous improvement?
- Have the MAP Team discuss what elements of these practices might be applicable to the museum.

Part IV – Summary

Have the MAP Team write a one-page summary of their analysis of the flowchart, and their actual experiences. Address the following points:

- What are the weak links in your customer service?
- What can you do to improve the experience at those points, or decrease the chance of something going wrong?
- If there are some steps that simply take too long (kept on hold for directions, buying tickets) is there some way to shorten the waiting time, or provide something for them to do or look at while waiting?
- What overall techniques might you adopt to improve your customer service?

Include summary here:

Part Four:

Moving Forward

Part IV: Moving Forward

Section Seven: Implementing Change After the Report is Received

Description: This final workbook section contains one activity that explores implementing change and setting goals and additional resources.

Introduction: Keeping up the momentum and collaboration of the review process is key to make the time and energy invested in MAP worthwhile over the long run. Now that you have received your final report from your Peer Reviewer, it's time to think about and examine how your organization might implement change based on the recommendations outlined in the report.

Purpose: To help the institution strategically and transparently the best ways for the institution to implement change and create SMART goals.

Directions: Complete this final activity. Be sure that each MAP Team member has had a chance to review the final report and read through the report's recommendations.

Activity Eight: Implementing Change

Materials Needed:

- Responses to previous workbook sections
- Final MAP Assessment report
- **MAP Portal Resource Library article pdf:** Major Types of Organizational Change (or click on: <https://managementhelp.org/misc/types-of-orgl-change.pdf>)
- **MAP Portal Resource Library article pdf:** Understanding Change and Transformation in History Museums

Directions:

- **Before the Meeting:** Ask all participants to read the two articles before the meeting, to review the SMART chart and to review the final assessment report.
- **During the Meeting:** Select someone to write down responses to the questions below and record the discussion.

Reflection Questions and Discussion

- 233.** Select five ideas your team generated in previous workbook sections and activities to address areas needing improvement or better support.

- 234.** Select five recommendations from your Peer Reviewer’s final assessment report that your team would like to focus on.
- 235.** Using the descriptions in the article “Major Types of Organizational Change,” which changes in the above questions are Organization-wide and which are Subsystem changes? Are any of them Transformational or are they mainly Incremental changes? Which seem to fit the descriptions of Remedial Change or Developmental change?

Use the column in the far left corner to list your chosen recommendations/ideas and then place an X in the box for each type of organizational change category you believe is the best fit. Here is a sample table from a MAP museum, followed by a blank table for your use.

SAMPLE:

Recommendations	Organization-Wide	Subsystem	Transformational	Incremental	Remedial	Developmental
#1 Streamline Exhibitions on the Calendar	X		X		X	
#2 Interpretive Launch party		X		X	X	
#3 Develop a Plan for Content (programs, events, etc.)	X		X		X	X
#4 Better Understand our Audiences	(education) (marketing)	X		X		
#5 Prioritize Campus Impact		X		X	X	(curatorial)
#6 Alignment with DEAI	X			X	X	
#7 Create Strategic Plan for Education		X	X			X
#8 Adopt Interpretation & Education Policy	X			X	X	

For Your Museum:

Recommendations	Organization-Wide	Subsystem	Transformational	Incremental	Remedial	Developmental
#1						
#2						
#3						
#4						
#5						
#6						
#7						
#8						
#9						
#10						

- 236.** Using the descriptions in the article “Understanding Change and Transformation in History Museums,” which of the seven key understandings for organizational change seem the most relevant to your institution? Why?

Key Understanding #1: Organizational change and transformation are inherently complex and difficult.

Key Understanding #2: Deep organizational change requires human reflection & interaction at the level of heart & soul.

Key Understanding #3: Change agents in history organizations play important roles in change & transformation processes.

Key Understanding #4: Leadership matters a lot during change, & transformational leadership is a particularly effective strategy and approach.

Key Understanding #5: The quality of stakeholder participation in change & transformation processes affects the outcome.

Key Understanding #6: Organizational learning is a generative strategy & process that helps to build organizational capacity.

Key Understanding #7: Organizational change & transformation are inherently paradoxical, as history organizations balance their uniqueness & connectedness.

- 237.** What possible constraints or barriers to initiating these changes do you perceive?

238. Who needs to be included?

239. How could these be included in organizational planning?

240. What decisions will need to be made?

241. What funding and other resources will you need?

242. How can you use the SMART chart to create achievable goals? Here is a sample from a MAP museum to get your thoughts flowing:

Specific	Measurable	Attainable	Relevant	Time-Bound
Goal is focused with an outcome and a list of needed resources.	Goal has a definition of success that includes “how many” or “how much”.	Goal is realistic and the needed resources are available. Barriers are identified.	Why are we doing this? Goal is mission and values aligned and is a true priority.	Realistic target date, with dates for milestones along the way.
Decapitalizing collections as assets. Focused, no resources needed, just educate staff.	Yes, when the collections are no longer monetized, the goal is completed.	Yes, we need to educate accounting and make the change.	Required by AAM.	By the end of fiscal year on 6/30/2021
Create disaster plan pocket version. Focused, no resources except staff time.	Yes, goal is complete when pocket version is completed and distributed.	Yes, no barriers except staff time.	Yes, improves our response to a potential disaster which improves our ability...	Yes, by end of fiscal year on 6/30/2021

For Your Museum:

Specific	Measurable	Attainable	Relevant	Time-Bound
Goal is focused with an outcome and a list of needed resources.	Goal has a definition of success that includes “how many” or “how much”.	Goal is realistic and the needed resources are available. Barriers are identified.	Why are we doing this? Goal is mission and values aligned and is a true priority.	Realistic target date, with dates for milestones along the way.

Congratulations!

Your MAP Team has completed this MAP Workbook!

Please:

- Sign the Signature Page at the end
- Email this workbook (with signatures) to the MAP office

Due: Six weeks after you receive your final report. Your Program Officer will provide an exact date after your site visit has been completed.

Additional Resources and Further Reading:

- [AAM Code of Ethics for Museums](#)
- American Alliance of Museums, [Core Standards for Museums](#)
- American Alliance of Museums, [Excellence in DEI Report](#)
- Diversity, Equity, Accessibility, and Inclusion-Related Resources:
 - [Facing Change: Insights from the American Alliance of Museums' Diversity, Equity, Accessibility, and Inclusion Working Group](#)
 - [Welcoming Guidelines for Museums](#)
 - Gender Transition and Transgender Inclusion in the Museum Workplace: A Toolkit for Trans Individuals, Institutions, and Coworkers
 - ◆ [A Transitioning Professional's Guide To: Gender Transition and Transgender Inclusion in the Museum Field](#)
 - ◆ [An Institution's Guide To: Gender Transition and Transgender Inclusion in the Museum Field](#)
 - ◆ [A Coworker's Guide To: Gender Transition and Transgender Inclusion in the Museum Field](#)
 - [More articles on Diversity, Equity, Accessibility, and Inclusion](#)
- [HistoricFunding.com](#)
- American Alliance of Museums, [Museums as Economic Engines](#)
- [National Standards & Best Practices for U.S. Museums](#) (PDF is free for Museum members, \$14.95 for non-members)
- National Park Service, [Native American Graves Protection and Repatriation Act \(NAGPRA\)](#)
- [TrendsWatch: Navigating a Disrupted Future](#), 2021 Edition
- [TrendsWatch: Museums as Community Infrastructure](#), 2022 Edition
- [UNESCO Database of National Cultural Heritage Laws](#)

Glossary

A

Abandoned and Unclaimed Property: Property that the museum houses but which it does not legally own. This includes:

1. unclaimed property or old loans
2. doorstep donations or items left at the museum on purpose by the donor but with no documentation
3. and undocumented or found in collection items

Some states have abandoned property laws. Refer to your state's laws for further information on how to handle abandoned property.

Access: The right, opportunity or means of finding, using or approaching collections or information.

Access and Use Policy: The access and use policy balances the museum's legal responsibility to provide access to the objects with its obligation to protect the collections for future generations. The policy establishes who can have access, to which collections, in what manner (physical access, electronic access, etc.), for what purposes and with what safeguards. The policy also identifies categories of objects or documentation that have restricted access.

Accessibility: Giving equitable access to everyone along the continuum of human ability and experience. Accessibility encompasses the broader meanings of compliance and refers to how organizations make space for the characteristics that each person brings.*

Accession: (a) Formal act of accepting an object(s) into the category of materials that a museum holds in the public trust; (b) the creation of an immediate, brief and

perma-nent record utilizing a control number for an object or group of objects added to the collection from the same source at the same time, and for which the museum has custody, right or title. Customarily, an accession record includes, among other data, the accession number; the date and nature of acquisition (gift, excavation, expedition, purchase, bequest, etc.); the source; a brief identification and description; condition; provenance; value; and name of staff member recording the accession. (from National Standards and Best Practices)

Accession Record: The creation of an immediate, brief and permanent record utilizing a control number for an object or group of objects added to the collection from the same source at the same time, for which the museum has custody, right, or title. Customarily, an accession record includes among other data, the accession number, date and nature of acquisition (gift, excavation, expedition, purchase, bequest, etc.); source; brief identification and description; condition; provenance; value; and name of staff member recording the accession. (2018 workbook)

Appraisal: A judgment of what something is worth. It is best practice that the accession policy state the museum will not make, arrange or pay for appraisals of donations and that internal appraisals will not be shared with donors.

Audience: Groups of people who use the museum's services. Audiences can be defined by the types of services they use and how they use them (e.g., visitors, subscribers, researchers, program participants), or by their demographic characteristics (e.g., families, school groups, seniors)

- **Current audience:** The groups or individuals who actually use the museum services.
- **Target audience:** The groups who the museum wants to be their primary users and for whom they design programs and services.

Advisory Group: An advisory group is a collection of individuals who bring unique knowledge and skills that complement the knowledge and skills of the formal governing authority. The advisory group does not have authority to govern the museum; it cannot issue directives that must be followed. Rather, the advisory group serves to make recommendations or provide key information to the formal governing authority. The advisory group can be standing (on-going) or ad hoc (one time) in nature.

Audit: An examination of the records with the intent to verify, possibly including a reconciliation of objects to records or records to objects.

Authority and Delegation of Responsibility: Delegation of responsibility outlines who is responsible for implementing the collections management policies and procedures.

B

Best Practices: Commendable actions and philosophies that successfully solve problems, can be replicated, and demonstrate an awareness of standards.

Bylaws: Legal documents that describe matters delegated to the governing authority, such as membership categories, the logistics of scheduling and holding meetings of the corporation and the governing authority,

committee charges and provisions for amendments. Self-regulatory provisions for the governing authority, such as membership in the organization, attendance requirements and termination, also are in the bylaws.

C

Catalog Record: Creation of a record of information specific to an item, assembly, or lot, and cross-referenced to other records and files, including identification and documentation of this material in some detail. The catalog record establishes the identity and significance of an item, and it often contains a photograph, sketch, film, sound, or electronic data. There is no universally accepted set of information that constitutes a catalog record. Each discipline and type of museum has its own conventions. Catalog records may be kept as hard copy, electronic data, or both.

Code of Ethics: An institutional code of ethics expresses the institution's policies, consistent with the public service it affirms in its mission statement. A code puts the interests of the public ahead of the interests of the institution or of any individual and encourages conduct that merits public confidence. A code of ethics acknowledges applicable laws and appropriate discipline-specific professional practices in order to help museums meet or exceed them.

Collection Categories: Categories are classifications assigned to collections that determine how they are acquired, cared for, made accessible, or used by the museum (e.g., permanent, teaching, research, reference). These categories are usually defined in the collections management policy, which provides specifics on the museum's policies regarding each category of collection. There are no standard definitions for different categories

of collections, though there are some trends. For example, many museums use the term “teaching collection” to refer to material that is safe to handle, made accessible for hands-on use, and held to a lower standard of care. Many museums use the term “permanent collection” to refer to material that they intend to hold in perpetuity, and for which they provide the highest level of care. Note that some categories of collections (notably teaching or reference) are designated as non-accessioned by some museums—material that is not held in the public trust, for example, and not subject to the museum’s policies regarding deaccessioning or use of funds resulting from deaccessioning.

Collections Management: All the activities that relate to the administration of a museum’s collections. These include the deliberate planning, development, and documentation of collections.

Collections Management Policy: A written document approved by the governing authority that specifies the museum’s policies concerning all collections-related issues, including accessioning, documentation, storage and disposition. Policies are general guidelines that regulate the activities of the organization. They provide standards for exercising good judgment.

Collections Plan: A plan that guides the content of the collections and leads staff in a coordinated and uniform direction over time to refine and expand the value of collections in a predetermined way. Plans are time-limited and identify specific goals to be achieved. They also provide a rationale for those choices and specify how they will be achieved, who will implement the plan, when it will happen and what it will cost.

Community: Each museum self-identifies the community or communities it serves. This may be a geographically defined community (e.g., neighborhood, academic campus, town, city, county or region), a community of interest (e.g., the scientific community, the international business community), a group viewed as forming a distinct segment of society (e.g., the gay community, the Asian community) or a combination of these types.

Condition Report: An accurate, informative descriptive report of an object’s or document’s state of preservation at a moment in time.

Conservation: Conservation is actions aimed at safeguarding collections for the future. Includes examination, documentation, preventative conservation, preservation, restoration and reconstruction.

Cultural Property: Cultural property are materials or remains, including historic and archaeological objects, that compose a culture’s non-renewable heritage, including ethnographic objects, historic and prehistoric buildings, structures, sites and landscapes. A culturally sensitive object requires special handling or use restrictions due to its importance to a particular culture.

D

Deaccessioning: Formal process of removing an accessioned object or group of objects from the museum’s collections. A museum still owns a deaccessioned object until it disposes of it but no longer holds it in the public trust. Removing the object from the museum’s possession is commonly referred to as disposal.

Decolonization: The long, slow, painful, and imperfect process of undoing some of the damage inflicted by colonial practices that remain deeply embedded in our culture, politics, and economies.**

Digital Collection: Digital collections are objects or materials that are available digitally. They may include analog materials that have been digitized, as well as items that were “born-digital.”

Direct Care: Note that direct care has not been formally defined, though it is generally viewed as object treatment, testing and analysis related to treatment, and materials and supplies related to treatment.

Directors and Officers Liability Insurance: Insurance coverage for the exposure of directors, officers and trustees to claims from donors, board members, beneficiaries, State Attorneys General, staff, and others alleging mismanagement.

Disposal/disposition: Disposal/disposition is the formal transfer of items deaccessioned from the collections to another owner or, within the museum, for another use. Methods of disposal include: sale, exchange with another museum, donation, destruction or transfer within the museum to teaching or reference collections.

Diversity: All the ways that people are different and the same at the individual and group levels. Even when people appear the same, they are different. Organizational diversity requires examining and questioning the makeup of a group to ensure that multiple perspectives are represented. *

Documentation/Collections Records: Any official, recorded information created, received, and maintained by the museum about collection objects.

Documented Title: The possession of rights of ownership of personal property including copyright and trademark.

Dominant Culture: Dominant culture in a society refers to the established language, religion, values, rituals, and social customs on which the society was built. It has the most power, is widespread, and influential within a social entity, such as an organization, in which multiple cultures are present. An organization’s dominant culture is heavily influenced by the leadership and management standards and preferences of those at the top of the hierarchy. These are often reflected in organizational practices such as what language is used, which holidays are celebrated, values, attitudes towards time and how deadlines are treated, and whether or not emotions are freely expressed. This culture defines what is considered “normal”.

E

Emergency/Disaster-Preparedness Plan:

Written policies and procedures intended to prevent or minimize damage to people (staff and visitors), buildings, collections, archival materials or organizational records resulting from natural and man-made events that threaten the building and the people and objects inside it. All museums are expected to have plans that address how the museum will care for staff, visitors and collections in case of emergency. This includes evacuation plans for staff and visitors, and plans for how to protect, evacuate or recover collections in the event of disaster.

Endowment: Funds gifted to the museum for a specific purpose (donor-restricted endowment) or set aside by the governing authority (board-designated endowment). Generally, refers to a permanent fund, the principle of which is not touched. Sometimes used synonymously with capital fund, reserve fund, or special project fund—all funds that allow expenditure of the principle.

Equity: The guarantee of fair treatment, access, opportunity, and advancement while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. The principle of equity acknowledges that there are historically underserved and underrepresented populations, and that fairness regarding these unbalanced conditions is needed to assist equality in the provision of effective opportunities to all groups.

Evaluation: Obtaining valid and reliable information from visitors that helps in the planning of exhibitions, activities, and programs and in determining the extent to which the activities are meeting their intended objectives. Can include observation (tracking) studies, questionnaire, interviews, community meetings, and focus groups. Visitor evaluation can be carried out before (front end), during (formative), and after (summative) exhibition or program development.

F

Facilities Maintenance Plan: A written document outlining appropriate facility maintenance procedures.

Facility Rental and Special Event Policy: A policy outlining how the museum uses space, who can use the space and how the space can be used.

Fiduciary: Of or relating to a holding of something in trust for another: a fiduciary heir; a fiduciary contract; of or being a trustee or trusteeship; held in trust.

Field Collecting: For archaeological, biological or paleontological material, the process of collecting material from their original sites (e.g., archaeological or paleontological excavation).

Financial resources: The income and expenses of the museum.

Friend/Auxiliary: An organization whose purpose is to work solely on behalf of the museum.

Friends Group: A support organization that is separately incorporated and whose primary purpose is the support of the museum. This may involve financial support, volunteers, or expertise.

Full-time staff: Employees who work 35 hours or more per week.

G

Governing Authority: The entity that has legal and fiduciary responsibility for the museum (this body may not necessarily own the collection or the physical facility) and may include not-for-profit boards, appointed commissions, governmental bodies, and university regents.

Names of governing authority include advisory council, board of commissioners, board of directors, board of managers, board of regents, board of trustees, city council, commission, or tribal council.

Head of governing authority: The elected or appointed head of the executive body to which the director reports. For institutions that are part of a larger non-museum parent organization, the head of the governing authority is considered to be the individual within the institution's larger parent organization to whom the director reports/ is responsible (e.g., dean or provost of a university, director of parks and recreation for a city government, military post commander, etc.).

H

Housekeeping Plan: A written document outlining appropriate housekeeping procedures.

Human Remains or Funerary Objects: Human remains or funerary objects are items, that as part of the death rite or ceremony of a culture, are reasonably believed to have been placed intentionally with or near individual human remains at the time of death or later. Sacred objects are specific ceremonial objects which are needed by traditional religious leaders for the practice of traditional religions by their present-day adherents.

Human resources: All of the people, paid and unpaid, who regularly work at the museum.

I

Inclusion: The intentional, ongoing effort to ensure that diverse individuals fully participate in all aspects of organizational work, including

decision-making processes. It also refers to the ways that diverse participants are valued as respected members of an organization and/or community. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”*

Insurance and Risk Management: A program of risk control that includes analyzing the probability of risks to museum collections, facilities, visitors and staff as well as planning and implementing appropriate preventative measures and response methods.

Integrated Pest Management (IPM): The coordination of information about pests and environmental conditions with available pest control methods to prevent unacceptable levels of pest damage while minimizing hazards to people, property, collections and the environment. IPM programs apply a holistic approach to pest management decision making and consider all appropriate options, including but not limited to pesticides.

Interpretation: The media/activities through which a museum carries out its mission and educational role:

- Interpretation is a dynamic process of communication between the museum and the audience.
- Interpretation is the means by which the museum delivers its content.
- Interpretation media/activities include but are not limited to exhibits, tours, Web sites, classes, school programs, publications, and outreach.

Inventory: An itemized listing of objects, often including current location, for which the museum has responsibility.

L

Landscape/Grounds Maintenance Plan: Plan that describes creating, preserving, or restoring natural and cultural features for functional purposes and/or aesthetic enjoyment; also a map of these features. The landscape may include vegetation, walks, drives, fences, walls, terraces, water features, decorative features, and topography (grading). May be incorporated into a land management plan—a plan that states the objectives the museum has for its grounds (e.g., conservation, interpretation).

Loan: A loan is when one party allows a collection element it owns to be temporarily transferred to the custody of a second party for some length of time, without a transfer of ownership taking place.

Loan Agreement Form: A contract between a lender and a borrower of an object, specifying the object and outlining the conditions of the loan and the respective responsibilities of each party.

M

Management Agreement: A management agreement is a legal agreement between two organizations, whereby an organization that governs a museum contracts with another organization to manage the museum (i.e., be responsible for day-to-day operations). A repository agreement is an agreement under which a facility such as a museum, archaeological center, laboratory, or storage facility provides professional, systematic, and accountable curatorial services on a long-term basis to another entity (such as a state government or the Federal government) for collections that the museum does not own.

Marketing: Marketing is the wide range of activities involved in making sure that you're continuing to meet the needs of your customers and getting value in return. These activities include market research to find out, for example, what groups of potential customers exist, what their needs are, which of those needs you can meet, how you should meet them. Marketing also includes analyzing the competition, positioning your new product or service (finding your market niche), pricing your products and services, and promoting them through continued advertising, promotions, public relations, and sales.

Mission Statement: A statement approved by the museum's governing authority that defines the purpose of a museum—its reason for existence. The mission statement establishes the museum's identity and purpose, provides a distinct focus for the institution, and identifies its role and responsibilities to the public and its collections.

Memorandum of agreement/memorandum of understanding: A written agreement spelling out the terms of the relationship between two entities, such as a museum and a support organization, or a museum and a municipality. It is signed by the governing authorities of the organizations.

Microaggression: The everyday verbal, nonverbal, and environmental slights, snubs, or insults, whether intentional or unintentional, which communicate hostile, derogatory, or negative messages to target persons based solely upon their marginalized group membership.

N

Nonoperating income and expenditures:

Income and expenditures related to temporarily or permanently restricted funds, such as endowment contributions and pledges; capital campaign contributions and pledges; all realized capital gains and losses that are rolled back into principal; income from capital campaigns; and capital expenditures.

NAGPRA (Native American Graves Protection and Repatriation Act):

Federal law requiring agencies and institutions that receive Federal funds to repatriate Native American human remains and other cultural items to the appropriate parties. For more information on NAGPRA visit <https://www.nps.gov/subjects/nagpra/index.htm>

O

Objects Found in Collection: Objects in the collections that lack any useful documentation as to how they were acquired.

Objects in Custody: Any objects that the museum is responsible or liable for, including both objects that the museum owns and those left temporarily in the museum's care.

Operating income and expenditures: Income generated by or expenditures supporting the museum's general operations in a given fiscal year, including exhibitions, education, conservation, collections management, acquisitions, research, training, development, and administration. It includes any portion of income from the endowment that is applied to operating expenses in a given year. It does not include capital expenditures. See also nonoperating income and expense.

P

Parent organization: The overseeing organization (such as a historical society or university) which is responsible for the fiduciary control of the museum.

Part-time staff: Staff who work less than 35 hours per week.

Permanent Loan: A loan with no specified ending date of material that the museum will not be actively using for a large part of the loan period.

Planning: The creation of policy and written plans. Thomas Wolf (Managing a Nonprofit Organization, 1990) lists two essential prerequisites of planning as, 1) an evaluation/assessment of the organization's current position, and 2) a clear vision of the organization's future expressed through a statement of mission and goals. These prerequisites apply to all types of planning, whether it is long-range, disaster, exhibition, marketing, or program.

Preparation: In biological collections, the process of stabilizing or cleaning a specimen. For example, preserving an animal as a fluid specimen, stuffing a bird or mammal skin, or removing a fossil from the surrounding rock.

Processing: The supporting evidence, recorded in a permanent manner and using a variety of media, of the identification, condition, history, use or value of a specimen, object or collection.

Professional Practices: A professional practice [aka best practice] is generally accepted in the field as a reliable method or technique for achieving a desired result.

Proprietary Keyway: A special lock system for which keys can only be purchased through one supplier, and then only with a signature card by an authorized person. Keys cannot be purchased or copied at local stores.

Purpose: The museum's broad guiding principle as stated in its governing documents.

R

Risk Management: A program of risk control that includes analyzing the probability of risk to museum collections, facilities, visitors, and staff as well as planning and implementing appropriate preventative measures and response methods.

S

Scope of Collections: A statement that defines the purpose of a collection and sets agreed upon limits that specify the subject, geographical location and time period for the collection. The statement also considers the uses to which a collection will be put and states the types of objects that will be acquired to fulfill the purposes of the collection.

Social media: Forms of electronic communication (like Web sites for social networking and microblogging) through which users create online communities to share information, ideas, personal messages, and other content (such as videos).

Social justice: A concept of fair and just relations between the individual and society. This is measured by the explicit and tacit terms for the distribution of power, wealth, education, healthcare, and other opportunities for personal activity and social privileges.

Special events: Concerts, festivals, or special seasonal programs.

Special exhibitions: Usually short-term, temporary exhibitions.

Staff: Unless otherwise noted, refers to full- and part-time staff (paid or unpaid) of your organization.

Stakeholders: People who have influence on your institution or are impacted by your institution.

Standard: Generally accepted level of attainment that all museums are expected to achieve.

Strategic Plan: Comprehensive plan that broadly delineates where the institution is going and provides sufficient detail to guide implementation. Sets priorities and guides important decisions that are oriented towards the future. Some museums split this into two parts:

- **Multi-year plan:** Big-picture plan that sets strategies, goals, and priorities. Sometimes referred to as a strategic or long-range plan.
- **Operational plan:** Plan that provides the details needed to implement the decisions in the strategic or long-range plan. Usually focuses on a short period of time and is typically geared to the museum's budget year. Sometimes referred to as an implementation plan. For more information see: AAM Standards regarding an Institutional Plan.

T

Temporary Deposit: Objects left temporarily in the museum for other than loan purposes—for attribution, identification, examination for possible gift or purchase.

Title: Regarding personal property, the possession of rights of ownership in that property. Separate rights of possession include copyright interests, trademark rights, and any specific interest that the previous owner may have reserved.

Tours: Any type of tour of the exhibitions, includes school, self, audio, and guided.

V

Values: The core belief system that provides a moral compass and framework for an organization's goals, priorities and decisions.

Vision Statement: An aspirational declaration of a museum's intentions that may include a description of the ideal scenario or successful future.

Visitors: Groups and individuals who go to the museum's physical facilities to use the museum services.

Visitor services: Facilities or services that provide comfort to visitors, including assistive devices, baby changing stations, checkrooms, dining area/food service, first aid stations, information desk, nursing areas, restrooms, seating, signage, water fountains, wheelchairs, and WiFi access.

Visual Documentation: Sketch, photograph, videotape, or electronic image file recording the physical appearance of an object. Museums may create visual documentation to record condition, facilitate access and inventory, or support insurance records, or for other purposes.

Volunteer: An individual who offers time and service to the museum for no salary or wage.

W

Waiver of Subrogation Rights Clause:

Endorsement to a policy whereby an insurer gives up the right to take action against a third party for a loss suffered by an insured. If a museum borrows collections and someone else is providing the insurance for the loan, the borrower should require a waiver of subrogation clause in the policy.

**** From TrendsWatch 2019**

Organizational MAP Workbook

Signatures Page

MAP TEAM

Composition of the MAP Team completing this workbook: (Attach a separate sheet if there are additional members)

We the undersigned, indicate that we have work on and read this workbook in its entirety and agree that the answers given in this MAP Workbook are true to the best of our knowledge.

Name	Title	Signature

SIGNATURE

On behalf of the institution, I acknowledge the submission of this MAP Workbook, completed by our internal MAP team.

DIRECTOR/CEO:

EMAIL:

SIGNATURE:

DATE:

