

Critical Issues Checklist: Institutional Assessment

A. MISSION AND INSTITUTIONAL PLANNING

1. Mission and Vision

- How do the staff and governing authority members demonstrate a clear, shared understanding of the museum's mission?
- How does the museum demonstrate that it has sufficient abilities and resources to fulfill its mission?
- How is the mission fulfilled through policies, procedures, and resource allocation?

2. Institutional Planning

- How do staff and governing authority members demonstrate effective planning for the museum's future?
- How do the museum's planning documents guide its actions and address its major challenges?

3. Engaging the Community

- How does the museum demonstrate a clear understanding of its role in the community?
- How active in and supportive of the museum is the community?

Related Documents

Census or other demographics information
IMLS grant application(s)
Institutional plan (e.g., strategic plan, long-range plan)
Map of the community
Minutes of recent governing authority meeting
Mission statement
Policy manual(s)
Previous MAP reports (if applicable)

B. GOVERNANCE

1. Governing Authority

- How do governing authority members demonstrate a clear and shared understanding of their roles and responsibilities in administering a public trust?
- How does the composition of the governing authority help the museum fulfill its mission and implement its planning?
- How effectively does the governing authority operate?

2. Support Organizations

- In what ways do membership and affiliate organizations provide financial and other support?
- How closely does the museum's membership reflect its target audience? Does the number of members reflect the museum's location and size?

Related Documents

Articles of incorporation, charter, or enabling legislation
Audited financial statements from the two most recent fiscal years
Board recruitment or development plan
Bylaws
Ethics policy
List of governing authority committees
List of current members of governing authority
Minutes from a recent governing authority meeting

C. FINANCIAL STABILITY

- How strong is the museum's financial health?
- How do its financial position and planning reflect its current and future needs?
- How is the governing authority involved in the museum's financial management and fund raising?
- What new or expanded sources of income, earned and unearned, might the museum explore?
- How is the budgeting process linked to institutional goals and planning?

Related Documents

Audited financial statements from the two most recent fiscal years
Current year's approved budget
Financial plan (if available)
Most recent annual report

D. INTERPRETATION AND EDUCATION

1. Audience

- How does the museum identify its target audiences and endeavor to serve their needs?
- How does the museum gather information about its audiences and visitors? How does the museum use that



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information to evaluate its performance and guide its planning?

2. Programs

- How are the museum's educational goals articulated and determined to be appropriate to its mission, audiences, and resources?

- How does the museum determine whether its programs meet the needs of its audiences?

3. Exhibits

- How is the museum's mission reflected in the exhibitions?

- What is the museum's process for exhibit selection and development?

How effectively does this process

- make appropriate use of collections and human resources,
- meet audience needs, and
- serve the financial needs of the museum?

4. Research (for museums conducting or supporting research)

- How does the quality and extent of research reflect the potential of the collections?

5. Publications

- What are the museum's goals for communicating with audiences and community through its publications? Have they been achieved?

Related Documents

Guidelines for organizing and installing exhibitions
Current exhibition schedule
Education/interpretation planning documents
Program brochure(s)
Program/exhibit evaluation forms
Visitor demographics collection forms and results
Most recent newsletter
Research policies and/or procedures
Copies of research publications
Other publications

E. COLLECTIONS STEWARDSHIP

(for museums that own or borrow collections)

- Are the collections appropriate to the museum's mission?

- How does the museum demonstrate responsible collections stewardship?

- How does the museum use its resources to provide appropriate care for its collections?

- How does the museum ensure that it obtains and maintains its collections in a legal and ethical manner?

Related Documents

Collecting plan
Collections management policy and procedures
Conservation Assessment Program report
Conservation survey reports
Conservation plan

F. MARKETING AND PUBLIC RELATIONS

- How does the museum use its resources to promote its goods and services?

- How does the museum determine goals for attendance? Are they clear and appropriate?

- If applicable, how does the marketing plan support these goals?

- How are public relations initiatives planned and executed?

Related Documents

Marketing plan
Marketing materials
Examples of media coverage

G. HUMAN RESOURCES

- How well do the staff demonstrate a clear understanding of their jobs?

- How well does staffing meet the museum's needs in terms of:

- number of staff
- responsibilities
- training

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- What additional staff, if any, are most needed? How might the museum obtain the resources to add them?
- Do volunteers demonstrate a clear, shared understanding of the museum's mission?
- Can the museum demonstrate that volunteers' roles are defined, understood, and appropriate to the museum's mission?
- How well are the museum's needs met by its volunteers in terms of:
 - number
 - responsibilities
 - training
- How does the museum evaluate and recognize its volunteers?

Related Documents

Staff list and resumes of key staff
Organizational chart
Position descriptions

Related Documents

Floor plans for all facilities
Facilities maintenance plan
Facility rental and special event policy
Housekeeping plan
Landscape/grounds maintenance plan
Accident, emergency, and disaster plans

H. FACILITIES AND RISK MANAGEMENT

1. Facilities Management

- Do the museum's facilities for collections, exhibitions, public programs, visitor services, parking, etc., support and fulfill its mission?
- Does the museum have effective policies and procedures for maintaining the facilities in good, safe working condition?
- How does the museum's use of its facilities reflect the mission?

2. Risk Management

- How do the museum's emergency preparedness procedures address its greatest risks?
- How does the museum provide a safe working environment for the staff?
- How does the museum provide a secure environment for the collections?