

Museum Assessment Program

MAP

Sample Institutional Assessment Report for the “Candy Bar Museum”

Tourist City, California

Submitted August 2009 by MAP Surveyor Jane Doe

Disclaimer:

The purpose of this sample document is to help illustrate a sample report. The contents of this information shall not be substituted for, nor substantially used as the basis for, any document produced by the recipient. This should serve as a model only.

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This sample report from the Museum Assessment Program is based on a real museum. The report is a good example of the challenges typical of many museums participating in the MAP program. All of the names of the staff, board members, museum, town, buildings, as well as the Surveyor, have been changed.

Why is this a good report?

This report follows the new writing guidelines and is excellent in showcasing what the museum does well and giving reasonable recommendations on how to achieve even stronger results. Additionally, the surveyor has included important resources, such as corresponding characteristics of excellence, at the beginning of each section, which highlights how the museum is connecting to these standards. The museum also is at the forefront of using social media in effective and novel manners, which may be helpful in providing suggestions to other institutions. Priority recommendations are given at the beginning, discussed in detail throughout the report, and then extended in the end – including a timetable featuring short-term, mid-term, and long-term objectives, which is a good method of making the timetable more manageable for the museum.

EXECUTIVE SUMMARY

The Candy Bar Museum was founded in 1990. They are well operated and are fortunate to have a dedicated, talented, professional staff. The director and other museum professionals on staff are respected in the California museum field and are highly motivated to ensuring that their museum is following the standards and best practices of the profession. The Candy Bar Museum is in the middle of a major expansion project and seeking capital funds to complete their Master Plan. They have recently undergone a planning process that culminated in the adoption of Strategic Plan 2008-2010. An Institutional Museum Assessment was completed in June 1998. This MAP, completed 12 years ago, along with the current MAP application and activities, documents, policies, and my on-site visit will aide in the completion of this Institutional MAP report.

My interviews with the staff and two board members revealed a realistic sense of the museum's strengths and weaknesses. A consensus of the strengths are: competent, dedicated, dynamic staff; their participation in social media and ability to keep up with technology; the collection; perform really well given financial limitations; free enterprise program; uniqueness; good board; brand is well identified; name recognition; well thought of by the City of Tourist City; marketable product; historic building; better financial position than in years past; good relationship with corporate, the Candy Bar Group; and, the partnership with Tourist City University Museum Studies Department.

Weaknesses mentioned by the staff and board include: fundraising and overall lack of resources to complete plans and add staff; lack of strong volunteer base; lack of a financial forecaster; staff overtaxed with multiple job roles and responsibilities, so not enough time to focus on core job; lack of cross training to see what all positions do in the museum; and, a feeling that the board does not understand the full scope of staff responsibilities.

The one common vision mentioned almost without exception by the board and staff interviewed was to complete the Master Plan. This is a great example of how successfully the vision has been conveyed internally and externally. Everyone knows what they are working towards. Other visions of the Candy Bar Museum of the future were voiced in these terms: to have the best candy collection in the world and to have this more broadly recognized; to break 100,000 in visitation and have increased revenues; to have more interactive exhibits to appeal to future users; to have more sustained media coverage; to have an expanded staff to accommodate growth and expectations; to be a leader in the museum field in social media; to be a place where people can come enjoy the experience and learn in a variety of ways; and, to modernize where appropriate, but to respect the history that they preserve.

I am impressed with the professionalism and operation of the Candy Bar Museum, and have no great concerns about their current operation. My recommendations are made in order to improve an already efficient operation, to minimize the weaknesses mentioned and encourage them to focus on their strengths, and to point out areas of concern for sustainability.

A summary of major recommendations are as follows:

- Improve communications and team building across museum departments.
- Modify existing staff workloads and expectations if additional staff cannot be added in the short term.
- Reprioritize Strategic Imperatives. Board recommendations should be implemented sooner to set the tone for a successful plan and campaign to complete the campus.
- Evaluate the Strategic Plan regularly (at least quarterly) to take the opportunity to celebrate successes as they occur and to recognize what areas may not be receiving attention.
- Develop a process of evaluation for programs and exhibits.
- Check the guest book regularly (if you aren't already) for comments and suggestions.
- Set realistic attendance, program, exhibit and revenue goals for existing staffing and infrastructure.
- Investigate possibility of full-time fellowship to complete collection inventory.
- Revise and update the emergency plan to include the new building and distribute to entire staff with training.
- Reevaluate staff duties, supervision responsibilities and consider reorganization. The museum would benefit from a consistent, integrated customer service and educational message throughout the interpretive and front-line staff.
- Implement a daily routine inspection of the facility and grounds by facility staff before opening to the public.
- Provide more regular staff presence throughout the museum in order to have more informal customer contacts and to provide more security.
- Improve segregation of duties as recommended in Reports of Internal Control.
- Board members should take the time to observe and understand all areas of the museum's operation in order to better advocate for its needs.
- The Nominating Committee should work with existing agencies noted in the report to continue diversification of the board.
- Implement process of board evaluation.

These recommendations will be discussed in more detail throughout the report.

INTRODUCTION

The American Association of Museums (AAM) Museum Assessment Program (MAP) is a program that helps museums improve their operations by helping identify their strengths and weaknesses, while providing guidance to address priorities and goals. This survey for the Candy Bar Museum (hereafter referred to as CBM) is an Institutional Assessment. The Institutional Assessment reviews the museum's entire operation, including mission and planning, governance, administration, finance, collections stewardship, interpretation and presentation, marketing, public relations, membership, and community support.

The museum's performance is reviewed in the context of its mission, its governing structure, and by comparing their operations to generally accepted museum standards and best practices. This report provides recommendations and identifies potential resources the museum can use to further its goals.

The information used to complete this assessment is: the AAM Application Information Sheet, Institutional Self-Assessment, the museum's operating documents, a prior Institutional MAP report, and an on-site visit by the surveyor, Jane Doe. The on-site visit was conducted on June 21-22, 2009. Over the two day period I toured the facility and met with key staff and board personnel including:

Executive Director & President, CB Enterprises – John Dahlia

Director of Communications – Jenny Tulip

Business Manager – Kim Rose

Programs Manager – Daphne Lily

Collections Manager – Susan Flowers

Director of Interpretation – Jessica Daffodil

Facility Manager – Bob Iris

Board President – Jim Carnation

Board President Elect – Ben Daisy

The Staff and Board objectives for completing the assessment (as stated in the application) are:

1. Clearly define the role of board and staff in relation to fundraising and management.
2. Validation that collections care and management meets best practices and professional standards.
3. Assessment of current marketing practices in order to increase numbers and encourage other demographics to visit.

Sections of this report will cover recommendations related to achieving and analyzing these objectives as well as offer suggestions related to other operational areas.

BRIEF INSTITUTIONAL HISTORY

The Candy Bar Museum was founded in 1990, and opened to the public in 1993. The Museum is housed in the old Candy Bar Factory building located in downtown Tourist City. The Tourist City Chamber of Commerce and the City of Tourist City hoped that the Museum would be a catalyst for renewed development in the area, and it has met this challenge well. The Museum receives support from the Candy Bar Group (parent company of Candy Bar), but is not owned or operated by them.

The Candy Bar Group donated the old manufacturing plant to the non-profit in 1989. Renovation began in the summer of 1991. The CBM formally opened to the public in May 1993. At that time, only a small portion of the ground level was open to the public. During the next six years, the Museum completed three additional construction phases, completely restoring and opening the building in May 1999.

The museum helps educate California school children and adults about the candy making process. The program uses the candy industry as a model to teach students about developing, producing, and marketing products.

The Museum employs a staff of museum professionals and educators that work with the Board of Directors to fulfill the Museum's mission. The Museum has an annual operating budget of approximately \$900,000 that it gets from donations, memberships, admissions, and the sale of merchandise. They are recognized as the only nonprofit museum in the country dedicated to the entire candy industry. At the time it opened to the public, the Museum's collection of artifacts totaled approximately 1,600. Today that collection includes over 20,000 artifacts and approximately 100,000 objects on loan from the Candy Bar Group.

In 2007, the Museum completed a new collections and archives storage center in the new building. This made the consolidation of all collections and archives in one space possible. The old façade of the building has been restored to its original configuration. Additional site work and interior renovation will be done in preparation for the next phase of the expansion.

MISSION AND PLANNING

Characteristics of excellence that relate to mission and planning, according to National Standards and Best Practices for U.S. Museums, include: "the museum has a clear understanding of its mission and communicates why it exists and who benefits as a result of its efforts; all aspect 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; the museum engages in ongoing and reflective institutional planning that includes involvement of its audiences and community; and the museum establishes measures of success and uses them to evaluate and adjust its activities."

MISSION

The mission of the CBM, a non-profit organization, is to educate and entertain the general public through the collection, preservation, interpretation, and exhibition of objects relevant to the history of the candy industry, and through that example, the candy making. The mission was adopted in April 2008, and reviewed in January 2009.

The board and staff of the CBM have a clear understanding of its mission, and communicate that to the public and each other. During site visit interviews, all full-time

staff and board members showed that they understood the mission and felt that it was still relevant and appropriate. The mission of the CBM is part of board and new employee training materials, is written on the back of name tags, and is stated on their web site and in the gift shop elevator that guests take to exit the upper floor exhibits. The exhibits that I had the opportunity to view related explicitly to the mission, and creatively addressed the free enterprise component.

With respect to meeting standards and best practices in the field, the CBM excels with respect to their focus on mission. I was impressed by the understanding and importance that the director and full-time staff placed on the mission and how they saw its place in all aspects of the museum operations. The CBM's message is consistent, defines their unique identity without being too wordy, and realistic in terms of focus.

An area that the CBM could improve on is in integrating all areas of the museum's operations. Although there is a lot of departmental crossover because several staff work together on projects, there seems to be distinct separation of staff and cross-departmental knowledge due to physical restraints (staff in separate, spread out offices and buildings) and little time due to excessive workloads on a small staff. This could be resolved through more team building experiences, regular communication on what is going on in all departments, and dealing with staff conflicts sooner. The movement of all staff offices to the New building may help this area immensely because there will be more opportunity for regular staff interaction.

PLANNING

The Strategic Plan 2008-2010 of the CBM was formally adopted on April 2008 after a six month process undertaken by the Board of Directors and the staff, guided by a professional museum consultant. The plan was reviewed in June 2009. The process started with 57 stakeholder interviews about their perceptions of the CBM and their visions for the future. These interviews, like the interviews I conducted during my site visit, reinforced agreement with the CBM mission. The consultant interviews also uncovered concerns that required attention. Challenges were ranked by the board and staff according to priorities, and the top ten goals became "Strategic Imperatives" of the CBM. The board and staff are quite realistic in stating the following requirements for the plan's success: employ and maintain a qualified, committed, and energetic staff to address the mission; appoint and maintain a qualified, committed, energetic board to lead the museum; and leverage the fundraising capacity of the board to raise money to support the museum.

The ten Strategic Imperatives of the CBM are: Finish the Campus; Increase Museum Endowment; Maintain the Facility; Develop Strategic Partnerships; Clarify Roles, Responsibilities, and Organization of the Board of Directors and Staff; Identify Audiences for Programming, Marketing, and Community Collaborations; Outline Plans for the Collections; Define Exhibit Philosophy and Develop Long-term Exhibit Plan; Extend Influence and Impact of the CBG; and, Eliminate Debt. These ten imperatives are further broken down into specific goals and objectives.

The imperatives cover major components of the museum's operations. A major component that is lacking is a serious look at the human resources to operate the museum as it currently exists. A portion of the imperative on clarifying roles of board and staff touches on recommending the number of staff in each work area and detailing the budget impact of staff additions. This is not, however, just an issue for the future. The staff is currently overwhelmed by their current duties, expectations, facility size, and added duties of now planning ahead for the ongoing expansion. If resources do not exist now to increase staff size, then expectations and workload of existing staff need to be modified accordingly. The board needs to remember that the Master Plan is not complete when the capital campaign is fully funded. There will be many more human resources needs with an enlarged, completed campus.

The plan can further be strengthened by follow through. The main thrust of this plan is finishing the museum campus. This is justified in that the completion of this component will lead to the completion of other goals and objectives. By focusing so intently on this one objective, however, other areas of the plan seem to take much less attention or to be totally forgotten. The imperatives focusing on the responsibilities, size and structure of the Board of Directors should be focused on and moved up in priority. A strong board will help accomplish many imperatives of the plan. The recommendation of the consultant should be revisited and implemented by the board. A plan without board buy-in and participation cannot achieve the full support of the staff.

To make the Strategic Plan as successful as it desires, the CBM should set up a regular (possibly quarterly) check of where it stands on completing different areas of the plan. This will provide an opportunity to either celebrate the successful completion of a goal or objective, or clearly show what areas may not be receiving the attention they need.

INTERPRETATION AND EDUCATION

Characteristics of excellence that relate to Interpretation and Education, according to National Standards and Best Practices for U.S. Museums, include: "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; and the museum assesses the effectiveness of its interpretive activities and uses those results to plan and improve its activities."

The CBM identifies its target audience as student, adult and senior groups. They develop exhibits and events for in-state and out of state visitors based on their mission. For the general public, or walk-in visitors, they serve a contingent of Candy Bar fans, area residents, and traffic captured from the nearby interstate going through Tourist City. The programs created for students are geared to the California educational standards and state curriculum guidelines.

PROGRAMS

There are three main programs developed for students throughout Central California and beyond. The CBM has modified these programs for adults as well. The programs are:

- Advertising for Kids – an all day hands-on program in which students tour the museum and create candy, learn about advertising and marketing, and develop a marketing campaign
- Candy Creation – a two hour program in which students tour the museum and experiment with flavors in a lab to create their candy
- Orientation Tour – the basic tour of the museum for schools, senior groups, civic clubs, and other public groups
- Orientation Tour for Kids – designed for younger audiences, it engages youth in more sensory experiences

Other tours and programs include:

- Behind the Scenes Tours – a special behind the scenes tour that includes a tour of museum collections and archival storage and a brief overview tour of museum to point out artifacts and preservation practices
- Various summer and winter day camp activities
- Special events

The Interpretation Department designs programs to cover significant curriculum topics and to reflect the mission. The Behind the scenes Tour program was developed at the request of area gifted and talented teachers to meet a need. Special events programming is designed by looking at the strengths of the museum and developing them into something that could be a draw for visitation. The board Special Events subcommittee comes up with one or two special events a year with the goal of high visitation, public awareness, and added revenue.

The Interpretation staff ensures that content presented in programs and exhibits is accurate and current. Tour narratives are updated as exhibits change. Staff performs research during the planning and development stages and research continues throughout the process and as questions arise. New information is provided to all guides and staff through on-going training. The staff also incorporates current learning theory and educational research into the design of programs. Specific theories are: Experiential, Behavioral, Constructive/Cognitive, and Social Learning.

The Interpretation Department has already considered many ways to improve their offerings. They mention upgrading their educational standards codes, a pilot program with a partner school for the third floor exhibit area, and the development of further specialized tours. My major recommendation with regard to Interpretation and Education is to introduce evaluation into their processes. They have developed remarkable, innovative programming, but to truly know what the customer wants to see, they must ask them. It is important to find out how successful the programs were to the participant, but it is also necessary to ask what the visitor or participant might change or

add to make the program or exhibit even better. If the partnership is developed with the class to do a pilot program, they might possibly also want to serve in a Student Advisory Board capacity on an ongoing basis. Or, perhaps Tourist City University Marketing Department students may be interested in performing on-site evaluation and dialogue with guests. The museum does provide a guest book at the entrance/exit to the museum which asks for date, name, email, zip code, comments, and whether or not the visitor stayed in a hotel. All of this information is useful for generating distribution lists, demographic data and general comments from guests. Hopefully, this information is checked regularly and information utilized accordingly.

I am concerned with the amount of importance placed on school groups for revenue generation. School field trips are down across the country due to field trip budgets being reduced or eliminated and the cost of transportation going up. The CBM definitely has marketable programs, but to expect attendance and revenue to increase in this economic climate is not realistic. I am also concerned about trying to reach out to more and more schools when the staff is not in place to handle the return if it comes. A more targeted appeal at the demographic groups that the museum does not currently reach may be a better use of resources.

EXHIBITS

The staff of the CBM utilizes an Exhibits Philosophy to guide them in the development of concepts, themes, materials and process for the creation of temporary and long-term exhibits. This philosophy ensures that the exhibits reflect the mission and vision of the museum. The exhibits featured during my site visit are certainly indicative that the philosophy is adhered to. The exhibits featured vibrant graphics, interactive questions and/or components, varied forms of display, informative text, and interesting themes that appeal to a variety of age groups. The exhibits foster an environment of thought, fun and creativity.

The CBM maintains long term exhibits on three floors of its building. The exhibits vary by content and design. Visitors start their experience with a permanent exhibit.

The majority of the second floor is dedicated to temporary exhibit space that it changed every six to nine months. The third floor has a brand new interactive exhibit that is both fun and educational for the whole family. Throughout these exhibit areas are "Twitpic" locations where visitors can place themselves in the exhibits and send those pictures back to the museum via Twitter. This is a fantastic way to involve visitors in the museum and to target a younger demographic.

There are three temporary exhibit areas that are changed every six to nine months by the Interpretation Department. As with all of the permanent or long term exhibits, each of these relates to the candy industry in some way. The exhibits are developed by the Director of Interpretation with input from other staff members, and often subject matter specialists. The staff worked with the Tourist City University School of Education to provide Math Packs to young visitors for informal math learning.

Once topics are developed, the Director of Communications is brought into the process. Each team member is assigned an area to research and regular meetings are held. Each team member is then responsible for writing text which is then proofed and printed by the Director of Interpretation. The team works on design, title and interactive development, and the Collections Manager locates objects and ensures that their placement in the exhibit is not damaging in any way. The Interpretation Department uninstalls the previous exhibit and then installs the new one. The Director of Communications distributes press releases with object and exhibit photographs.

The exhibits that the CBM produces are directly related to their mission, and assist them in meeting their educational goals. The CBM has consistently attracted approximately 65,000 visitors a year, with a goal of ultimately hitting 100,000. The exhibits certainly help attract current visitors. Until the campus expansion is complete, I think that 65,000 is a commendable number for the museum. To consistently reach numbers greater than this average will require a much larger staff to implement programs, to create new exhibits for a larger campus, to provide appropriate guest services, to maintain the exhibits and facilities, and to care for the collections being preserved and exhibited.

MARKETING

The Director of Communications works with the Collections Manager (who also serves as the CBM's IT Specialist) to creatively and dynamically market the CBM and its programs and exhibits. They are on the forefront of technology and social media, utilizing their web site, Twitter (over 900 followers), Facebook (over 500 fans), blog, YouTube and MySpace to keep the CBM in the public eye and to market to new demographics in a way that they want to communicate. They provide current updates on what is happening at the museum, and inform their fans and followers where the museum has been featured, or in many cases, where their objects have been featured.

The CBM fills a unique niche with their large candy collection. Most recently some of their artifacts were featured on a popular television show. That "appearance" garnered follow up promotion in a national newspaper. They have also been featured on several other television shows. Given the fact that one ad purchased in a local magazine consumed half of the marketing budget, this free advertising is truly priceless in spreading the word about the museum to the public.

The CBM also utilizes more traditional forms of marketing materials: mailings, press releases, paid advertising, public service announcements, banners, brochures and rack cards. They are fortunate to be located near the interstate, and take advantage of their good relationship with corporate to get a corner "spot" on two highway billboards. Once off the highway, the museum is found easily with directional signage.

The CBM staff has taken advantage of their close proximity to Tourist City University. They not only have a strong partnership with the Department of Museum Studies, but also with the School of Business. The Dean of the School of Business currently serves on the museum board. Past projects with the School have been the development of the Advertising and Marketing: Kid Style booklet. They have also utilized interns from the Marketing Department. Currently, School of Business classes are working on two

projects for the CBM. This is a fantastic way to leverage resources and to get fresh ideas on promoting the museum.

As with programs, the CBM should undertake more evaluation of their exhibits. Given the staff's technological abilities and the minimal cost, something like SurveyMonkey or Zoomerang could be used to electronically tally survey responses. Since the CBM likes interactivity in its exhibits, perhaps on site evaluation could be worked into the exhibits. Another recommendation is to reduce the number of temporary exhibits that the Interpretation Department is asked to develop. It may seem that more people would come more frequently if the exhibits were changed more often, but the same results may be gained by properly marketing over a longer period and giving more people a chance to see the exhibit. With more time to spend in research and develop, the department could focus more on quality and creativity rather than quantity.

COLLECTIONS STEWARDSHIP

Characteristics of excellence that relate to Collections Stewardship, according to National Standards and Best Practices for U.S. Museums, include: "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 conducts collections-related research according to appropriate scholarly standards; the museum strategically plans for the use and development of its collections; and, guided by its mission, the museum provides public access to its collections while ensuring their preservation."

The permanent collection of the CBM contains over 20,000 objects that relate directly to its mission. The collection is comprised of a variety of objects, documents, and photographs that represent candy and candy making. The audio-visual collection is in the process of being inventoried, but includes approximately 7,100 items. Archival materials, also un-inventoried, are conservatively estimated at 51,000 items. In addition to this large collection, the CBM is also responsible for the long-term loan of the Candy Bar Group (CBG) corporate collection which numbers around 100,000 objects. This collection is insured by CBG, who also recently began providing funding for interns to work on cataloging the massive collection. The variety and expansiveness of the candy collection greatly enhances the CBM's ability to represent the candy making. Their vision of being the best candy collection in the world seems quite reachable, if they have not already achieved it.

The CBM has made great improvements in collections care over the last few years. The completion of a segment of their Master Plan was the most crucial element of this improvement. The adjacent 1880s New building was purchased in 2001 for expansion, and in 2007, the museum's collections and archives were moved into the back third of the partially renovated building. Security cameras housed in the Facility Manager's office provide clear visuals of the surrounding areas. Future stages of renovation will provide staff offices, relocated retail space, and new exhibits. The collections storage area vastly improved the collections storage space and conditions. Collections are spread through three separate contained rooms. These climately-controlled rooms utilize SpaceSaver shelving, flat files, metal filing cabinets, shelving and open storage.

The cold storage room holds the large collection of audio-visual materials. This portion of the collection needs to be transferred to updated digital files to preserve their contents before they deteriorate. This would be a prime project for grant funding. The archives holdings have their own room, and are kept current and organized.

The basement of the New building lacks climate control, and is the open storage holding area for the CBG collection that has not been opened and cataloged. Over 70 pallets hold boxes and boxes of shrink-wrapped objects awaiting attention. They are brought upstairs via freight elevator for cataloging two pallets at a time. Approximately 20 pallets have been emptied, and objects stored. The task of tackling this enormous collection is overwhelming given the other duties and a permanent collection that the staff is already charged with.

The collections of the CBM are now centralized under improved conditions and have professional staff overseeing their care. Due to the move, the large collection size, and a lack of resources, some collections are still housed in cardboard boxes, and the CBG collection is temporarily stored in a basement with no climate control. However, conditions are vastly improved. Wooden shelves have been replaced, acid free materials are used, and the Collections staff is in the process of migrating old notebook and binder records to Past Perfect for storing collections information. The pallets in the basement serve to keep the artifacts off of the ground. Staff will need to ensure that other large objects stored in the basement are kept at least six inches off the floor in the event of flooding.

The collections staff is too small to handle the immense backlog of objects. Rather than hiring part-time museum studies students each semester, which leads to constant training of new staff, perhaps the CBG would like to underwrite a full-time fellowship that would allow someone to come in and finish the inventory much sooner. Given the frequent requests of corporate and outside researchers, current exhibit schedule demands, and other duties, the Collections Manager does not have much time to work on the collection itself.

Collections care is regulated with policies set by staff and approved by the board of directors. The Collections Management Policy is thorough, and includes the following sections: Purpose and Definitions, Definition of Collections, Collections Management Activity, Use of Collections, Care and Maintenance, Risk Management, and Archives and Library. The Policy was last reviewed in 2008, and is scheduled for review in every even numbered year.

The CBM does have an emergency plan, but the plan is not up to date and not easily accessed by staff. Staff realized this oversight during the self study process. The plan should be updated to include the new building and widely distributed to the whole staff. All areas of the museum's operation should be able to readily retrieve the emergency plan and implement the required actions.

ADMINISTRATION AND FINANCE

Characteristics of excellence that relate to Facilities and Risk Management, according to National Standards and Best Practices for U.S. Museums, include: “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; and, the museum takes appropriate measures to protect itself against potential risk and loss.”

Characteristics of excellence that relate to Financial Stability, according to National Standards and Best Practices for U.S. Museums, include: “the museum legally, ethically and responsibly acquires, manages and allocates its financial resources in a way that advances its mission; and, the museum operates in a fiscally responsible manner that promotes its long-term sustainability.”

HUMAN RESOURCES

The CBM’s human resources are their greatest asset, collections excluded. The board hired a tenured Executive Director with a background in experience museums in 2000. Six dedicated full-time staff supports the director, and covers all areas of museum operation. The Director of Communications has a BA degree in Museum Studies and History, and is responsible for marketing the organization to the general public. She is responsible for the web site, graphic design of brochures and ads, publication of newsletter and annual report, and the membership and volunteer programs. She has been with the CBM since 2000 full-time, and previously worked part-time 1993-1996.

The Director of Interpretation, employed since 2002 part-time and 2003 full-time with a two year break, is responsible for the overall interpretation of the collections and archives through exhibits and education programming. She supervises the Collections Manager and Programs Manager. She has an MS degree in Museum Studies and a BA in History. The Programs Manager leads and manages the museum’s education programs on and off site. She has an MS and BA degree with a background n education and historic park environments. She is the most recent hire, coming in 2008. The Collections Manager, with the CBM since 2004 part-time and 2006 full-time, supervises the collections and archives, including their preservation, interpretation and exhibit. She supervises part-time staff and interns hired to work with collections. She has a BA in Museum Studies, and also serves as the CBM’s IT Specialist.

The Business Manager and Director of CB Museum Enterprises has been an employee for almost twelve years. This position handles the financial operations of the museum and supervises the revenue producing sales and services. This includes supervision of admission desk, gift shop and soda fountain staff. The Facility Manager has been on staff for nine years, and is responsible for the maintenance and custodial care of the CBM physical plant, property, grounds, and some exhibit repair, maintenance and construction. He also supervises contract and/or part-time maintenance and custodial personnel.

The staff is talented, resourceful, competent and mostly tenured. The Executive Director has a great team that is capable of handling their job duties. The existing work load and expectations would be more appropriate for a staff twice its size. Ultimately, each department needs to double in size to handle the scope of the collections, the size of the campus, and the responsibilities of a popular attraction. The board and director need to understand early on that the campus expansion, when fully realized, cannot operate effectively with the current staff. Proper staffing needs to become a top priority or the completion of the Master Plan will not be the success that they all envision.

When resources or reorganization allow, I would recommend that some staff duties be reevaluated. Currently, the Director of Communications is responsible for recruiting and maintaining volunteers. This duty would be more appropriate in the Interpretation department because most of the volunteer opportunities are in this area. A larger volunteer base would enhance the current staff's ability to meet their goals. Ideally, for the number of programs desired, this would be a minimum of a part-time position to recruit, train and schedule volunteers for assisting with programs and special events. Current staff could not handle this added responsibility.

The duties of the Business Manager have expanded over the last few years. As employees left, their duties were absorbed in this position. This is a dangerous precedent as it makes recruitment for this position more difficult in the future and prevents the position from focusing on core duties in the present. The Business Manager position should focus solely on financial operations. And, as mentioned in the Finance section, a system of checks and balances needs to be implemented. The supervision of front line staff would be better suited to a department, such as Visitor Services, with a focus on customer service and guest experience. There needs to be a unified voice in dealing with the public, whether they are experiencing staff in the gift shop, soda fountain, exhibit areas, or in the education programs. A customer's experience needs to have continuity in content and training.

FACILITIES

The CBM is a multi-site facility. Due to successful capital campaigns, the museum has expanded from its main building, which was restored in 1993, and includes two other buildings. The expansion is not completely finished, but the CBM has completed the relocation of its collections and archives storage to the renovated back third of the building. As mentioned in the section on Collections Stewardship, this renovation vastly improved the storage of the collections. The collections may still be strained in the new area, but the director mentioned some contingency plans for restructuring the building. Future phases of the Master Plan call for a connector from one building to the other that not only obviously connects the two buildings, but better controls the traffic. Once the campus expansion is realized, the resulting facilities of the museum will better meet the needs of their current and anticipated visitors.

The museum has ample parking immediately across the street from their courtyard entrance. The main building is completely handicapped accessible, with ramps and elevators provided for the mobility impaired, and text and audio tours available for hearing and visual impairments. The ticket booth and soda fountain greet visitors on

the first floor, making entry an easily understood process. Maps are provided to visitors for navigation throughout the three floors of exhibits. Due to room size restrictions in the historic building, some areas get backed up with traffic, and flow of exhibits is not always discernible. The staff realizes that this is a concern, and is actively working on ways to improve navigation.

With the recent relocation of collections from the main building to the new building, more space was available in the main building for exhibits. However, the main building is still short on space to adequately meet all of their visitors needs. When certain programs are booked, an exhibit gallery must be closed down. This need is part of the emphasis for the Master Plan and the ultimate expansion goals for the new building. Currently, staff offices are spread throughout floors of the main building and the new building. This is not conducive to staff interacting with visitors or with each other. When all phases of the expansion are complete, administrative offices will be centralized, retail services relocated, and exhibits expanded. It is crucial when this happens, that the supervisor for the frontline staff maintain an active presence in both structures. Communication and customer service will be more important than ever in an expanded campus. It is easy for staff and visitors to feel disconnected when spread out through such a large site. It would be helpful currently for staff to have more interaction with guests as they experience current exhibits. Sometimes a presence is good for security and for visitor comfort.

Both of these buildings, the large courtyard in between, and the parking lot total 1.94 acres. The courtyard plays a critical role in the museum. It not only is a space for rental revenues, but is it also the first image that potential visitors have of the museum. If it is clean, well-maintained and inviting, visitors are more likely to enter. Likewise, if the interior of the museum is cared for and maintained, the public is more likely to return. I found the CBM to have impressive, close parking, an easily identifiable entrance, and easy to find restrooms and amenities. It is obvious that the Housekeeping Plan written in January 2008 is implemented. The building, restrooms, and public areas were clean. Some of the exhibits were showing wear (frayed text panel edges and burned out bulbs), but no major problems were noticed. The security system was functioning, and cameras monitored the courtyard and exteriors of the facility.

My major recommendation with regard to facilities is the need for the Facility Manager or someone on his staff to perform a routine, daily walk through all of the public and private areas. While preparing the museum to open, issues could be spotted and more efficiently taken care of before having any effect on the public. On the morning of my site visit, the aging HVAC system was leaking, had overflowed a trash can, and was running down two flights of stairs. This was discovered by program staff opening up the facility and then reported to Facility Manager. There were also large ant hills in the courtyard that needed treating and cleaning up. With a regular checklist for facility staff and trained eye, many issues could be caught before they become major problems.

As mentioned previously, the board and director should look closely at prioritizing goals. The capital campaign and Master Plan are essential to the growth and further development of the CBM, but there are pressing concerns with their aging infrastructure and their relatively small staff. If current needs cannot be taken care of, what are the

stresses that will be placed on the institution once they double in size? Perhaps if training budgets allow and classes are available in the area, the Facility Manager could receive more in-depth training or certifications that would save contractor costs for more costly repairs.

FINANCES

The CBM has been financially stable for the last three years. Due to the current economic climate, their endowment fund has fallen and may make this year and next more difficult. The museum has a thorough budget process that involves the full board, finance committee, Treasurer, Director and the Department Heads. They start the process in the third quarter by reviewing the Strategic Plan, and staff is charged with developing their calendars for the following year. Staff then reviews the proposed calendar and how it meets the mission and fulfills goals and objectives. The final budget document presented to the board should reflect progress on implementing the Strategic Plan.

Each cost center of the budget is expected to generate some offsetting revenue. Exhibitions are expected to generate revenues, programs generate fees, collections must generate income from services and consignment sales, and fundraisers must raise more than they cost to produce. This pressure on staff to generate revenues contributes to the need for the small staff to perform so many duties.

The CBM operates in a fiscally responsible manner with its funds. They raise money appropriately and spend it based on their mission. Their operating income in 2007 was \$1.36 million with operating expenses of \$487,302. They have ended the previous three years with surpluses. Their budget process is fluid, and they make adjustments in the budget as necessary. Based on forecasted endowment earnings in 2009, budget cuts of \$35,000 were recommended. Approximately 79% of their income is considered stable, coming from store sales, food services and admissions, primarily. Their admission fee is reasonable and competitive compared with other local attractions and museums. Unstable income is derived from the endowment and from donations/contributions.

An area of concern noted in audits of the 2006 and 2007 fiscal years is the need to improve segregation of duties. They note in both Reports on Internal Controls that “the account manager is responsible for receiving payments from customers, balancing the daily cash drawers, preparing the deposit, delivering the deposit to the bank, reconciling the bank accounts, disbursing and replenishing petty cash. Finally we noted that the account manager is also responsible for all functions of the disbursement of cash...Typically, these incompatible functions would be separated from each other.” Proper segregation of duties requires a system of checks and balances so that the functions of one employee are subject for review through the interconnected functions of another employee. This is not the case with regard to the financial operations of the CBM. The staff size prohibits segregation completely, but there are steps that the CBM should put in place to more closely adhere to recommended guidelines. Perhaps part of these duties could be outsourced, or an operations manager hired to more reasonably split the duties of the Business Manager.

The lack of income from grants and donations is a concern. There is potential with the education programs and collections care needs to apply for federal and state funds. Hopefully when the capital campaign is complete, if not before, the board will focus their efforts on fundraising for necessary operating, programmatic, and preservation needs. The director negotiated a large donation from the former corporate owner in 2000, \$150,000 a year for 10 years, which expires in 2010. He is diligently working on potential challenge grants.

The board and director have been extraordinarily successful with raising funds for capital needs. Over the last four years, the CBM has tackled four capital projects. The new collections storage area was their first priority and came in at a cost of \$900,000. The second project was the development and installation of the new interactive exhibit on the third floor of the main museum building. This interactive exhibit space cost \$250,000 to complete. The third project was the restoration of the façade of the historic new building with \$225,000 in TIF funds from the City of Tourist City. TIF funds had been received in the past for the construction of the museum parking lot, which is also provided for the public visiting downtown Tourist City. The fourth project is the capital campaign the museum is currently involved in. It is the continued renovation of the new building to prepare the space for offices and classroom space. The estimated cost of this phase is \$800,000, and it is in the bidding stage.

The fact that this expansion is not complete seems to be a major source of frustration for the board and staff. This is regrettable, because the board and staff of the CBM have made tremendous strides in achieving their goals and raising an impressive amount of funds in a relatively short time. It is important during each of these phases to pause and celebrate the accomplishments. Maintain the momentum, but congratulate each other on what has been accomplished instead of focusing on what has yet to be done. This pause can reinvigorate everyone to focus even harder on the final goal.

GOVERNANCE

Characteristics of excellence that relate to Governance, according to National Standards and Best Practices for U.S. Museums, include: “the governance, staff and volunteer structures and processes effectively advance the 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 Board of Directors of the CBM has a clear understanding of the museum’s mission. The board members interviewed also understood that their role as a board member is to provide overall direction and set broad policy for the Director to implement. The Board has the following documents in place with regard to governance: Articles of Incorporation, Bylaws and Purpose, Conflict of Interest, Ethics Policies and the Strategic Plan.

The President and President Elect of the Board mentioned their obligation to adhere to the goals and objectives of the Strategic Plan. Fundraising, facilitating, and assisting with areas of expertise were also noted as their roles. The board has established committees that cover all areas of the museums operations: Development and Resources, Exhibitions and Institute Programs, Finance and Audit, Nominating, Special Events, CB Museum Enterprises, Facilities and Services, Marketing and Membership, and Candy Industry Relations. The committees are comprised of a mix of appropriate staff and/or Executive Director and board members.

The Board of Directors has hired a motivated, professional Executive Director and entrusted him to develop a professional staff to take the museum into the future. This is a dedicated staff who works incredibly hard to leverage the resources they are provided. There is a general consensus amongst the staff that the board understands their role as a governing authority and does not interfere with the proper chain of command. Most communications between the board and staff come through the Director. The staff does interact with the board on their specific committees. I would encourage the board to take time to visit with staff to get a full glimpse of their job duties and responsibilities. The board cannot fundraise or advocate for the museum effectively if they do not fully understand all of the needs of the museum.

The Board is to be commended for the thorough strategic planning they went through in 2007-2008 with an outside professional consultant. It shows a desire to improve in their roles and to better the museum. It is important, though, that this plan is implemented in its entirety. Some areas of the plan are being set aside by focusing so intently on just the capital campaign and campus expansion. The imperatives recommended by the consultant that focus on the responsibilities, size, and structure of the Board of Directors should be revisited and moved up in priority. A stronger board will help accomplish many other imperatives of the plan. A plan without board buy-in and active participation cannot achieve the full support of the staff.

The Board of the CBM has varied skills and areas of expertise. More than half of the board has worked in the candy industry or manufacturing. There is not adequate representation in education or legal field, causing legal representative to be called upon frequently. Education representation is vital if the Strategic Imperatives regarding the CBG are to be successful. The board has had good success with in-kind services and products through board member connections. There are hopeful connections with granting agencies as well. These contacts should be actively developed and relationships forged. Board members must be informed and resolute in presenting their case for funding the museum, be it for endowment, capital, or operating funds. As noted in the strategic planning process, success is dependent upon the board leveraging its fundraising capacity.

The Board started the important process of changing their board composition several years ago. Until that time, new board members were chosen based primarily on friendships. A board profile and matrix was developed to analyze the board and to fill gaps. The board has not been as successful as they would like, but are still trying to recruit younger members that include women and minorities. The composition of the board represents neither the demographics of the community that it serves, nor the

audiences that it wants to attract. Eighty-four percent of the board is male, 94% is Caucasian (compared with 79% in the Tourist City area), and 81% is over the age of 56 (while that age is close to 25 for Tourist City). The Nominating Committee could work with Leadership Tourist City to find potential alumni or current enrollees who would be a good match. The Greater Tourist City Chamber of Commerce and other local business groups could be good resources, along with the many connections the staff has with Tourist City University and the school districts.

It is imperative that the board represents the larger community in order to see the big picture, to access and leverage diverse resources, to attract new audiences, and to grow future advocates for the museum. If the leadership of the museum remains with a small, select group, who will be ready and willing to take the reins in the future? Those relationships will not have been fostered and the audiences will not be there. Until the board truly reaches this state of diversification, it is critical that they rely and trust the recommendations of the professional staff when planning the museum's future. They are aware of current trends in the field and the best practices that need to be followed.

The Board appears united behind the common goal of wanting a successful future for the CBM. If they remain steadfast in following the goals and objectives they adopted in the detailed and well-planned Strategic Imperatives, and continue to diversify the board to better represent the whole community, the Board will continue to foster excellence in the CBM. Reviewing the imperatives on a regular basis will provide checkpoints of progress to be celebrated. It will also provide tangible areas of evaluation for the board in fulfilling their obligations. Since the board currently has no mode of self-evaluation, these regular reviews and checkpoints are a great start. I would recommend instituting some form of board evaluation in the future.

SUMMARY

The CBM has three main objectives for this Institutional Museum Assessment: clearly define the role of board and staff in relation to fundraising and management, validation that collections care and management meets best practices and professional standards, and an assessment of current marketing practices in order to increase numbers and encourage other demographics to visit. The CBM appears to be operating under well defined roles between staff and board. Areas needing stronger board participation have been addressed in the narrative and recommendations. Vast improvements have been made in collections management, and the staff is working to meet best practices to the best of their ability given existing resources. Staff and collections are still in transition from the move from the main building, but progress is continuing to be made. The museum does an incredible job of using existing funds and staff to market programs, collections and exhibitions. They are utilizing current technology to appeal to current and potential advocates. With more funds allocated for advertising, target audiences could be appealed to in the best manner (senior magazines, California travel publications, tour bus operators, etc.).

In reviewing the previous Institutional Assessment report, several common themes still resonate:

- Emphasized that the new master plan must provide adequate space and staffing for all of the museum's functions.
- Noted that the board is dominated by white males, and that the opportunity exists to diversify the board.
- The museum was fortunate to have a professional, hard working staff.
- More help was needed in areas of education, maintenance, collections, security, development and administration.
- Because of limited staff, proper checks and balances are not in place for control of funds.
- Security could be helped by personnel walking around the museum and being visible.
- The front admission desk serves a valuable educational role. This is where the visitor forms their first opinion of the museum, so communication between senior staff and this position is important.
- The museum has a story and a product that sells, and the museum should go after larger, more diverse audiences.
- The museum should find a way to formally listen to its audiences.
- The size of the collection and pace of collecting should not exceed the staff's capacity to deal with each object in a professional manner.

As the museum staff and board review this assessment and its place in their planning and evaluation, they should also take time to look at the 1998 review. As noted above, several recommendations are still showing up 11 years later. However, many of the recommendations were acted upon and improvements made.

The Candy Bar Museum is well operated and efficiently managed. They have much to be proud of. Board and staff alike need to celebrate their successes as they come, and not be overwhelmed or frustrated by what is yet to be. They have accomplished so much in a short time, and are an admirable, professional institution. They need to focus on their strengths, acknowledge their weaknesses, and continue to follow professional standards and best practices.

Listed below are major observations and recommendations from the report narrative to assist them in their efforts. Many of these relate to goals and objectives already detailed in the Strategic Imperatives.

- Improve communications and team building across museum departments.
- Modify existing staff workloads and expectations if additional staff cannot be added in the short term.
- Reprioritize Strategic Imperatives. Board recommendations should be implemented sooner to set the tone for a successful plan and campaign to complete the campus.
- Evaluate the Strategic Plan regularly (at least quarterly) to take the opportunity to celebrate successes as they occur and to recognize what areas may not be receiving attention.
- Develop a process of evaluation for programs and exhibits.

- Check the guest book regularly (if you aren't already) for comments and suggestions.
- Set realistic attendance, program, exhibit and revenue goals for existing staffing and infrastructure.
- Investigate possibility of full-time fellowship to complete collection inventory.
- Revise and update the emergency plan to include the new building and distribute to entire staff with training.
- Reevaluate staff duties, supervision responsibilities and consider reorganization. The museum would benefit from a consistent, integrated customer service and educational message throughout the interpretive and front-line staff.
- Implement a daily routine inspection of the facility and grounds by facility staff before opening to the public.
- Provide more regular staff presence throughout the museum in order to have more informal customer contacts and to provide more security.
- Improve segregation of duties as recommended in Reports of Internal Control.
- Board members should take the time to observe and understand all areas of the museum's operation in order to better advocate for its needs.
- The Nominating Committee should work with existing agencies noted in the report to continue diversification of the board.
- Implement process of board evaluation.

RECOMMENDATIONS

Short Range Objectives

- Improve communications and team building across museum departments.
- Check the guest book regularly (if you aren't already) for comments and suggestions.
- Revise and update the emergency plan to include the new building and distribute to entire staff with training.
- Implement a daily routine inspection of the facility and grounds by facility staff before opening to the public.
- Provide more regular staff presence throughout the museum in order to have more informal customer contacts and to provide more security.

Medium Range Objectives

- Modify existing staff workloads and expectations if additional staff cannot be added in the short term.
- Reprioritize Strategic Imperatives. Board recommendations should be implemented sooner to set the tone for a successful plan and campaign to complete the campus.
- Evaluate the Strategic Plan regularly (at least quarterly) to take the opportunity to celebrate successes as they occur and to recognize what areas may not be receiving attention.
- Develop a process of evaluation for programs and exhibits.

- Investigate possibility of full-time fellowship to complete collection inventory.
- Reevaluate staff duties, supervision responsibilities and consider reorganization. The museum would benefit from a consistent, integrated customer service and educational message throughout the interpretive and front-line staff.
- Board members should take the time to observe and understand all areas of the museum's operation in order to better advocate for its needs.
- The Nominating Committee should work with existing agencies noted in the report to continue diversification of the board.

Long range Objectives

- Set realistic attendance, program, exhibit and revenue goals for existing staffing and infrastructure.
- Improve segregation of duties as recommended in Reports of Internal Control.
- Implement process of board evaluation.

RESOURCES

AAM Information Center online <http://www.aam-us.org/museumresources/ic/index.cfm>

Museum Audience Insight <http://reachadvisors.typepad.com/> - Audience research, trends, observations from Reach Advisors and friends. Reach Advisors is a marketing research and strategy firm focused serving community-driven enterprises, including museums. This blog is their primary vehicle for sharing some of their museum audience research more broadly, and to provide a forum for professionals across the museum field to share their insights and observations relevant to the future of museums.

www.BoardSource.org - BoardSource, the voice of nonprofit governance, is dedicated to increasing the effectiveness of nonprofit organizations by strengthening their boards of directors. Its highly acclaimed programs and services mobilize boards so that organizations fulfill their missions, achieve their goals, increase their impact, and extend their influence. BoardSource, formerly the National Center for Nonprofit Boards, is a 501(c)(3) organization. Free monthly online newsletter.

www.blueavocado.org - Blue Avocado speaks for and from the people in community-based nonprofits.

National Standards and Best Practices for U.S. Museums Commentary by Elizabeth E. Merritt - For the first time, the U.S. museum profession's current operating standards in areas from public accountability to facilities and risk management are available in a single publication. This guide is an essential reference work for the museum community, presenting the ideals that should be upheld by every museum striving to maintain

excellence in its operations. An introductory section explains how virtually anyone associated with museums will find the book valuable, from trustees to staff to funders and the media. It is followed by a full outline of the standards, including the overarching Characteristics of Excellence and the seven areas of performance they address. Throughout the book is commentary by Elizabeth E. Merritt, former director of AAM's Museum Advancement and Excellence Department and founding director of AAM's Center for the Future of Museums.

Handbook for Museum Trustees by Harold and Susan Skramstad - Make your museum board the best that it can possibly be! This book from Harold and Susan Skramstad, two of the field's most highly regarded experts in museum management, gives you the tools you and your board need to handle the challenges facing museums today. *A Handbook for Museum Trustees* was written to help museum trustees better understand the "why" and the "how" of trusteeship, giving board members and museum directors a thorough understanding of their critical and non-negotiable duties. The book clearly identifies areas of responsibility and offers valuable, how-to advice on board discussion and decision-making, providing practical guidelines for improving board practices and fine-tuning the work of the effective board.

Museum Governance by Marie Malaro - Marie Malaro explains the purpose and use of professional codes of ethics and offers practical advice about board education and its role in fostering the long-term health of an organization. She discusses how to set collection strategies, balance mission and entrepreneurial ventures, handle deaccessioning, maintain effective board oversight, approach automation, and deal with repatriation requests.

Ultimate Board Member's Book by Kay Sprinkel Grace - Operate with maximum effectiveness, clarify exactly what their job is, ensure that all members are on the same page with respect to roles and responsibilities. It will take your board members only one hour to read, but they'll come away with a firm command of how to help your organization succeed. This title explains how boards work, what the job entails, time commitment, role of staff, serving on committees, fundraising, conflicts of interest, group decision-making, effective recruiting, de-enlisting board members, board self-evaluation, and more.

Creating Great Visitor Experiences: A Guide for Museums, Parks, Zoos, Gardens, and Libraries by Stephanie Weaver - Museums, libraries, parks and other cultural institutions today face the daunting task of attracting visitors who have almost limitless choices for education and entertainment. What gets them through your front door and coming back again and again? In the commercial world, some businesses stand apart from their competition and profit by providing sophisticated, meaningful, and memorable customer experiences. In this practical, user-friendly guide, Stephanie Weaver translates these methods to non-profit organizations. She introduces readers to the latest thinking and research on consumer behavior, branding, leisure studies, and staff training. She offers an eight-step process to evaluate how the visitors view you, from before they arrive at

the front door until after they leave. Exercises in each chapter allow the institution to put this self-examination into practice and find new ways of attracting and retaining visitors.

Life Stages of the Museum Visitor: Building Engagement Over a Lifetime by Susie Wilkening and James Chung - Offers a rich array of new data about how and why museum visitors behave as they do at different stages of their lives, and how museums can respond to the changing needs and perceptions of their audiences. With smart and engaging analysis, authors Wilkening and Chung point toward the goal of creating museum advocates for life.

Visitor Surveys: A User's Manual by Randi Korn and Laurie Sowd - An easy-to-understand guide to designing and conducting your own visitor survey from start to finish. With a computer, commitment to the project, and this manual, your staff can accurately measure your museum's performance in any area of operation. Two experienced evaluators outline a step-by-step format for assessing your programs in the public dimension and guide you around potential pitfalls in data collection and analysis.

APPENDICES

Board of Directors Self-Evaluation

Written by [Carter McNamara, MBA, PhD, Authenticity Consulting, LLC](#). Copyright 1997-2008.

Adapted from the [Field Guide to Developing and Operating Your Nonprofit Board of Directors](#).

The following table can be used by all board members and the chief executive to get an impression of how well the board is doing. The table is a rather basic form for board evaluation. But, if the evaluation is conducted wholeheartedly, the form should indicate how the board is generally doing in conducting its role.

Each member and the chief executive should complete the form about four weeks before a board retreat. Members attach suggestions about how the board could get higher ratings for any or all of the following 14 considerations.

Ideally, someone outside the organization receives the completed forms, collates the results and writes a report indicating the number of respondents who rated the board for each of the 12 considerations.

	Considerations	5 Very Good	4 Good	3 Ave.	2 Fair	1 Poor
1	board has full and common understanding of the roles and responsibilities of a board					
2	board members understand the organization's mission and its products / programs					
3	structural pattern (board, officers, committees, executive and staff) is clear					
4	board has clear goals and actions resulting from relevant and realistic strategic planning					
5	board attends to policy-related decisions which effectively guide operational activities of staff					
6	board receives regular reports on finances/budgets, products/program performance and other important matters					
7	board helps set fundraising goals and is actively involved in fundraising (<i>nonprofit</i>)					
8	board effectively represents the organization to the community					
9	board meetings facilitate focus and progress on important organizational matters					
10	board regularly monitors and evaluates progress toward strategic goals and product/ program performance					
11	board regularly evaluates and develops the chief executive					
12	board has approved comprehensive personnel policies which have been reviewed by a qualified professional					

13	each member of the board feels involved and interested in the board's work					
14	all necessary skills, stakeholders and diversity are represented on the board					

Please list the three to five points on which you believe the board should focus its attention in the next year. Be as specific as possible in identifying these points.

- 1.
- 2.
- 3.
- 4.
- 5.

Individual Board Member Evaluation Form

Your name: _____

Part 1 Are you satisfied with your performance as a board member in the following areas: (check spaces that apply below)

	Very good	Adequate	Needs work
Input in policy development and decision-making	_____	_____	_____
Committee participation	_____	_____	_____
Fund-raising	_____	_____	_____
Community	_____	_____	_____

outreach

Other _____

Part 2: What factors contributed to your performance or lack of performance in the areas above: (please be specific)

Part 3: Here's what I would need from the organization to maintain/increase my level of board commitment:

Part 4: Do you have any other comments or suggestions that will help the board increase its effectiveness?

Individual Board Member Self-Evaluation

Use the following questions for individual board member evaluation. For board members answering yes to these questions, they are likely to be fulfilling their responsibilities as board members.

Yes No Not Sure

1. Do I understand and support the mission of the organization?
2. Am I knowledgeable about the organization's programs and services?
3. Do I follow trends and important developments related to this organization?
4. Do I assist with fund-raising and/or give a significant annual gift to the organization?
5. Do I read and understand the organization's financial statements?
6. Do I have a good working relationship with the chief executive?
7. Do I recommend individuals for service to this board?
8. Do I prepare for and participate in board meetings and committee meetings?
9. Do I act as a good-will ambassador to the organization?
10. Do I find serving on the board to be a satisfying and rewarding experience?