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Step 4: Group Self-Assessment

The self-assessment phase is a time for examining, reflecting, delving into and understanding what you are currently doing and how that helps or hinders developing a closer relationship with your community. It is a time to take stock, celebrate successes, and re-energize to build capacity for future opportunities.

STEPS – OVERVIEW

- 1) Gather background information (one team member)
- 2) Group Self-Assessment (Working Group)
 - a. Share Information
 - b. Group Self-Assessment
 - c. Identify opportunities

SNAPSHOT

Timeframe

Team member gathering information: 3 hours

Working Group: 3 hour meeting

Participants

Working Group

Facilitator

Materials

Post-it notes

Blank wall or whiteboard

Markers or tape

1) Gather Background Information

Who: One Working Group team member

Time: 3-5 hours

Appoint a team leader or staff member to be responsible for gathering the information listed below. This person can enlist the help of other team members if desired. This information will be shared at the start of the group self-assessment to provide background information so that all participants have the same contextual information as a base.

Questions:

- 1) According to your mission statement or strategic plan, who is the museum's current target audience (people or groups that the museum wants to be its primary users)?
- 2) According to your mission statement or strategic plan, what is the museum's responsibility to or relationship with your community?

- 3) How is your strategic plan measured or evaluated? Describe any known outcomes/outputs of the museum's work as it relates to the community over the past 3 years. If you do not have a strategic plan, how do you measure whether the museum is fulfilling its mission?
- 4) Does your museum have a way to keep informed about the community – its demographics, changes, what's happening, needs/issues? What are these sources and are they sufficient?
- 5) Describe in detail your museum's community:
 - a. Geography
 - b. Demographics
 - c. Economics
 - d. Politics
 - e. History
 - f. Strengths
 - g. Challenges
 - h. Important current issues
- 6) Describe the museum's sources of income. What amount or percentage comes from key community supporters?
- 7) What type of evaluation does your museum use when developing exhibits and programs?
 - Front-end evaluation—topic testing, data collection from potential audience members prior to exhibit or program creation
 - Formative evaluation – testing carried out during development, including building prototype/scale model, testing label copy, etc.
 - Summative evaluation – analysis of impact and effectiveness of a completed exhibition or program

2) Group Self-Assessment

Who: Working group + facilitator

Time: One meeting (3-4 hours)

Process:

- a) Share Information
- b) Group Self-Assessment
- c) Identify opportunities

a) Share Information

The team member who gathered the background information should share the findings with all participants. This can be presented verbally, through a presentation, or handout that participants review together. This will allow all group members to be grounded in the same contextual information before starting the self-assessment. *(30 mins)*

If there are key documents that should be reviewed by participants (such as a strategic plan) these can be shared in advance of the session.

b) Group Self-Assessment

The group self-assessment is led by the facilitator with all Working Group members participating. This exercise takes stock of the current activities, programs and initiatives of the museum, and draws attention to the areas of opportunity for deepening the museum's relationship with the community.

For the first part of this exercise, complete Step 1 and Step 2 for a category, then move on to the next category.

5 mins setup

15 mins per category (Step 1 – 10 mins, Step 2 –5 mins)

STEP 1

The facilitator asks participants to individually write down the programs, activities, services and strategies that the museum carries out within each of the following five categories. Each example/activity should be written on a separate post-it note.

Facilitator tips:

- *If there are more than 8 participants, this can be done in small groups of 2-3 rather than individually*
- *Ring a bell to signal each 10 minute interval and prompt participants to move to Step 2*
- *This is a brain-dump exercise, so encourage participants to write down whatever comes to mind*
- *Print the Group Self-Assessment question handout for participants to reference (p. 49)*

Category 1: Mission & Planning

Mission and Planning asks questions about the museum's mission and strategic plan and how it relates to the community.

On individual post-it notes, write down:

- Ways the museum's mission statement or strategic plan is communicated/shared with the community
- Ways the museum's mission statement or strategic plan serves the community
- Ways the strategic plan prioritizes deepening the museum's relationship with the community

Category 2: Audience & Community

Audiences and Community focuses on getting an understanding of the museum's target audiences, the community in which the museum lives, and its relationship to that community.

On individual post-it notes, write down:

- Ways the museum has defined its target audience
- Ways the museum has a clear understanding of the community and its needs
- The programs and services being run that reflect the community's needs
- The programs, activities and services that are intended for specific target audiences
- The programs, activities and services that integrate audiences that normally would not interact

Category 3: Community Perception

Community Perception focuses on how the museum keeps in touch with the community and how the community responds to the museum.

On individual post-it notes, write down:

- Ways in which the museum markets its programs/exhibits to the community
- The ways in which the museum gets an understanding of how the public perceives the museum and its programs
- Ways that the museum changes and adapts according to the community's needs
- Ways that museum staff, volunteers and board members act as ambassadors for the museum
- How the museum is portrayed in the media

Category 4: Community Experience

Community Experience is all about the community's interactions with, and responses to, the museum through exhibitions, programming, research and services.

On individual post-it notes, write down:

- What the community enjoys about your museum (key assets and strengths) and how you know it
- Ways the community is welcomed into the museum
- Activities that the museum offers outside of 'the norm' (regularly scheduled exhibits and programs) for the community to interact with the museum
- Ways that the museum gains information from the community to shape future programs, services and exhibits

Category 5: Community Involvement

Community Involvement examines the museum's interaction with the community through partnerships, volunteerism, staffing, board membership and financial planning.

On individual post-it notes, write down:

- Ways the museum profiles local community members or community groups
- Ways in which members of the community are involved in the museum in a deeper capacity than being a visitor
- Ways in which volunteers are recruited
- Ways the museum is involved in community events and programs organized by others
- Partnerships the museum has with community groups
- Ways in which the museum collaborates with the community
- The degree to which the demographics of the staff, volunteers, and board reflect the make-up of the community
- Ways that staff and board members interact with the community to inform their decision-making
- Any advisory committees or Friends groups that exist
- Training and development opportunities for staff, volunteers and the board to improve their knowledge and understanding about the community

STEP 2

In advance of the session, the facilitator should create a large version (5'x7') of the grid below. This could be done by drawing the grid onto a large whiteboard or taping it out on a wall or floor – get creative!

The facilitator asks each person to bring their individual post-its to the grid and place each one in the appropriate category on the 1-5 scale. (5 mins)

Facilitator tips:

- *Encourage participants to ask another team member for their opinion if they're stuck on where to put it along the scale*
- *When all categories are complete, take a photo/document the final grid as this serves as a synopsis of community-related activities that the museum is involved in*

	1	2	3	4	5
	Early stage	Developing	Moderately Developed	Well-Developed	Exemplary
<i>Definition:</i>	<i>Have developed a plan but have not yet implemented it</i>	<i>Implemented X within the past year</i>	<i>Have been doing X for more than a year</i>	<i>Have been doing X for a number of years, it's going well and we are evaluating it</i>	<i>Have been doing X for a number of years, have evaluated it, and incorporated feedback</i>
Mission & Planning					
Audience & Community					
Community Perception					
Public Experience					
Public Involvement					

View [Group Self-Assessment Step 2](#)

STEP 3

Do a walk-through so that all participants can read other responses. Ask participants to remove or pile the duplicate responses. If there are any discrepancies (for example, the same program is placed at both Moderately Developed and Exemplary) discuss this as a group and together determine where it best fits.

Stand back and observe (30 mins):

- Where are there clusters of post-its? What does that indicate?
- Which categories are more advanced?
- Which categories are in an early stage?
- Are there a lot of similar responses (e.g. Programs that really shine)?
- What are specific areas for improvement?

Facilitator tips:

- *Encourage the group members to make observations. Don't feel you need to do this all yourself!*
- *Invite the group to stand close to the grid rather than returning to their seats. This way they can interact, gesture, and get up close to read the post-its as needed.*

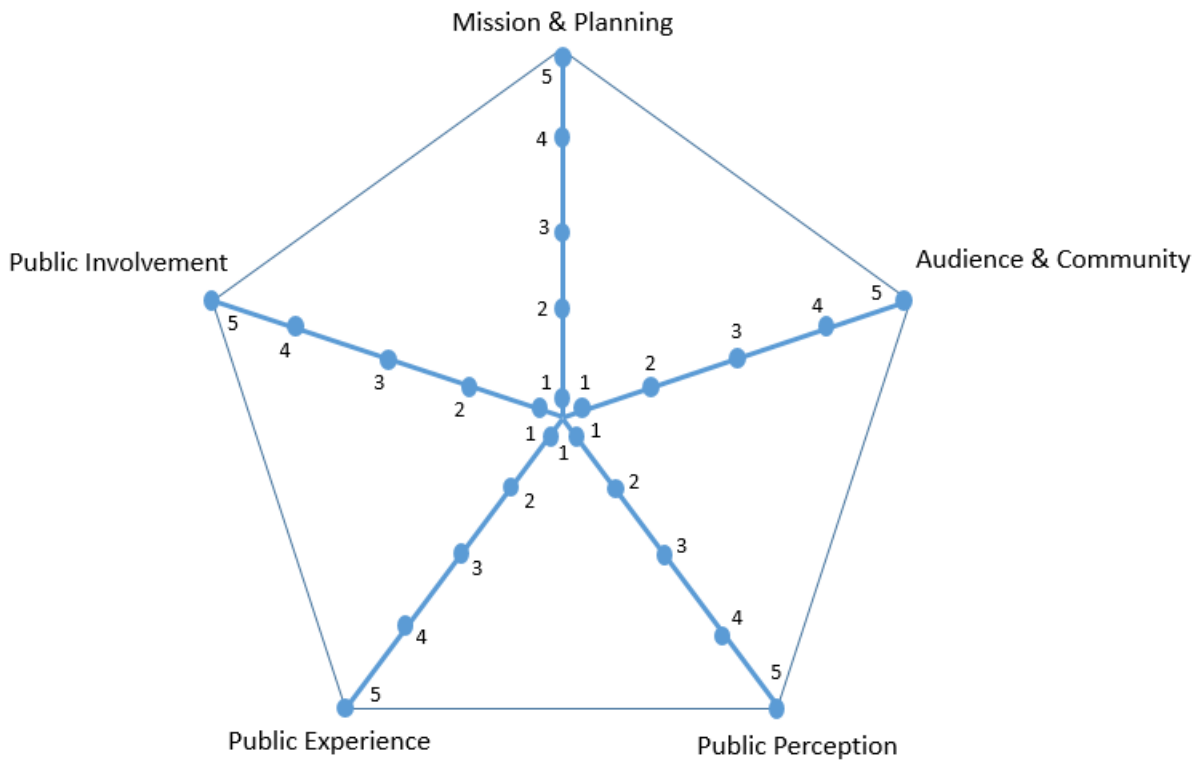
STEP 4

In advance of the session, the facilitator should create a large version of the diagram below. This could be done by drawing the spider diagram onto a large whiteboard or taping it out on a wall or floor.

As a group, decide where along the spectrum your museum would be in that category based on the observations and discussion.

- One way to determine where along the spectrum the museum should sit in each category is to count the number of post-its in each box. Then discuss whether this accurately represents the observations of the group.
- Another way is to do a good ol' show of hands voting system for each category. E.g. Raise your hand if you think we're a 1,2,3...

Plot each category on the spider diagram below by circling the dot and number. (10 mins)



View [Spider Diagram](#)

Draw lines between each circle. This accentuates the categories that the museum is doing well in and shows the areas where more work needs to be done.

c) Identify Opportunities

List any ideas and opportunities that came out of the observation stage or plotting stage. Highlight the ideas that generate a lot of excitement from the group. Identify any quick wins vs. longer term initiatives. (30 mins)

This list will be kept and referenced following the community consultation. Together the insights and ideas will be prioritized based on the community and museum's needs.