A Checklist for Evaluation Capacity Building in Museums

This checklist is meant to help museums consider how to incorporate evaluation routinely into their organizational practice and foster institutional data-driven decision-making. It can be used to drive discussion & reflection but is not meant to be prescriptive.

It was adapted from the 2007 checklist by Boris B. Volkov and Jean A. King, available here: https://www.wmich.edu/sites/default/files/attachments/u350/2014/organizationalevalcapacity.pdf

Leadership and Culture
Cultivate a positive, ECB-friendly internal organizational context, being aware of the internal and external organizational contexts, power hierarchies, and administrative culture.

☐ Make sure that key leaders support and share responsibility for ECB.
☐ Seek out existing and enlist new evaluation champion(s) in the museum.
☐ Determine and work to increase staff interest in and demand for evaluation information.
☐ Determine if and to what extent the internal environment is supportive of change.
☐ Discuss the connection between the museum’s mission and evaluation of its efforts.
☐ Generate an appropriate conception of evaluation for museum policies and procedures.
☐ Identify external mandates/accountability requirements and expectations (such as AAM accreditation or IMLS grant requirements) and integrate them into the ECB efforts.
☐ Establish an awareness of the ethics of human subjects research (for example, connect with an IRB organization and model ethics training by having administrators get certified)

Resources
Provide resources—or access to resources—to support evaluation within the organization.

Personnel & Time:
☐ Provide sufficient time during the work day for evaluation activities.
☐ Prioritize evaluation skills in hiring considerations.
☐ Partner with external evaluation experts (such as university scholars or consulting firms).
☐ Consider offering internships focused on evaluation.

Funding:
☐ Assure long-term fiscal support from the board or administration—explicit, dedicated funding for evaluation activities.
☐ Set aside funding in the budget for staff professional development (such as attending conferences or participating in evaluation workshops).
☐ Provide necessary hardware and software (tablets for digital visitor surveys, statistical and qualitative data analysis software, etc.).
☐ If needed, develop revenue-generating strategies to support program evaluation (for example, selling data collection instruments or serving as paid external evaluation consultants).

Other Resources:
☐ Join relevant professional organizations like the Visitor Studies Association.
☐ Provide or arrange easy access to relevant research bases that contain best-practice evaluation content (for example, through direct subscription to journals or database access).
☐ Develop a shared and regularly updated collection of evaluation resources (such as websites, books, and exemplar reports).
Structures and Systems
Purposefully create structures and systems—mechanisms within the organization—that enable the development of evaluation capacity.

Infrastructure:
- Assign responsibility for oversight of evaluation processes to one or more staff members.
- Establish a capable ECB committee (composed of members of the staff, board of directors, and community) to initiate, evaluate, and advance evaluation processes continually.
- Develop and use an internal reporting/monitoring/tracking system.
- Develop an effective communication and reporting capability to explain evaluation processes and disseminate findings, both positive and negative, to external stakeholder groups.
- Model a willingness to be evaluated by providing ample opportunities for input (for example, data-based discussions of successes, challenges, and failures).
- Provide opportunities for staff to use data to make decisions in their work.
- Organize opportunities for socializing around evaluation during the workday (for example, discussing evaluation at special brown bag lunches).

Staff Supports:
- Build individuals’ readiness and skills to implement evaluation activities.
- Establish clear expectations for people’s evaluation roles.
- Provide or make available formal training, professional development, and coaching in evaluation (see Resources, above).
- Require staff involved in evaluation to complete human subjects research ethics training (see electronic resources handout).
- Promote and facilitate staff members’ evaluation training by involving them in meaningful ways in evaluation planning and implementation (“learning by doing”).
- Create ongoing learning activities through which staff interact around evaluation processes and results, incorporating an effective communication system so that people will learn from evaluation activities.

Written Materials
Clearly articulate and disseminate the organization’s evaluation-related practices and policies, embedding evaluation into general organizational materials.

- Ensure a detailed written ECB plan exists, is distributed throughout the organization, and is used to assess progress. The plan should incorporate existing evaluation frameworks, guidelines, and professional standards.
- Develop a code of ethics and policy for studying visitors in the museum.
- Incorporate evaluation into the museum’s strategic plan.
- Include evaluation as an explicit part of job descriptions and employee evaluations.
- Integrate evaluation processes purposefully into museum policies.