

# CLEVELAND GRAYS ARMORY MUSEUM – INITIAL STEPS TOWARD STRATEGIC PLANNING

## American Assoc. of Museum's MUSEUM ASSESSMENT PROGRAM OVERVIEW

This Overview is intended to brief the Armory staff and governing authority on the Museum Assessment Program. It is to be distributed and used as a point of departure for discussion about how the **MAP** can be of assistance to our museum, and about the goals of the **MAP** assessment.

### **Purpose and Process**

Each **MAP** assessment is a tool to be used in your organization's ongoing cycle of strategic planning and performance evaluation. This **MAP** process consists of three phases: (1) **self-study**, (2) **peer review**, and (3) **implementation**. *The first two phases occur within a period of two years.* The third phase, implementation, begins after the first two phases are complete and lasts for two to three years as your museum uses what you have learned to make improvements to your operations.

### **Recommendation for Forming an Assessment Team**

To achieve the greatest success, **MAP** Assessments must be an institutional priority. Ideally, key paid and unpaid staff, and members of your governing authority are all involved in the process. As part of the **MAP** process you will form an Assessment Team that is responsible for conducting the assessment and integrating it into the museum's planning and implementation process. Who from your organization should be on this team? People with the:

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

This may include members of your governing body and of your community, paid and unpaid staff. Staff who work directly with the public have valuable information to contribute, and may be the ones actually implementing changes you make in your operations. Consider who should be the team leader: it may be a member of your governing authority, the director, or another staff member with appropriate skills to lead a team.

### **Phase One—Self-Study**

AAM provides you with a **MAP** Self-Study Workbook containing instructions, questions, and activities that will guide you through the self-study process. Self-Study is a method that:

- Stimulates a review of your institution's policies, procedures and records;
- Enhances institutional dialogue and openness;
- Informs the peer review phase;
- Encourages new ways of operating;
- Serves as a baseline against which to measure your progress.

The Self-Study Workbook is designed to help your institution see itself systemically, not merely as a way to prepare the peer reviewer. Most organizations find that they derive at least half the benefit of their assessment from the self-study.

## Preparation Issues

These questions are primarily for the benefit OF THE CLEVEAND GRAYS.' Discussing and answering them will help prepare our organization for the **MAP** process, and ensure that museum will derive the greatest benefit from this assessment.

- Describe how the governing authority and staff as a whole (paid and unpaid) will be involved in the MAP process. How have they been briefed on this application? How will their input be solicited and incorporated?
- How will you review the information you acquire from the self-study and the Assessment Report and decide on what actions you will take? (For example, this might include using the information in your strategic planning process or forming a committee of staff and board members to make recommendations.)
- List **THREE OBJECTIVES** you would most like the **MAP** process to accomplish, and explain why. (Note: Surveyors only provide recommendations. They do not draft policies, catalog objects, design exhibits, etc. prior to, during, or after their site visit.). **Use the next two pages to prioritize your concerns about the future of museum operations ~**

**For AMA Records**

**What are your three greatest concerns regarding the operations of the museum? [2 pages]**

**DIRECTIONS:**

**(Part 1) Rate the relative importance of each operational category (assign numbers 1-9)**

Place a number on the line above each category heading: 1 = Most important / 9 = Least relevant.

Use 10 Category Headings list additional concerns if appropriate.

**(Part 2) Under your top three most relevant categories, CHECK  Only One item in each category.**

**CHECK ONLY THREE BLOCKS TOTAL !**

\_\_\_\_\_ **Collections Stewardship**

- Collections Management
- Collections Planning
- Documentation
- Ethical & Legal Collections Issues
- Preservation & Conservation

\_\_\_\_\_ **Facilities & Risk Management**

- Construction (New, Renovation, & Expansion)
- Facilities & Site Management
- Risk Management
- Visitor Services

\_\_\_\_\_ **Financial Stability**

- Codes of Ethics
- Earned Income
- Financial Management
- Development

\_\_\_\_\_ **Governance & Support Organizations**

- Accountability & Ethics
- Parent Organizations
- Promoting Effectiveness
- Recruitment & Selection
- Relationship With Staff
- Structure
- Support Organizations

\_\_\_\_\_ **Human Resources**

- Contracted Services
- Diversity
- Employment Law
- Job Description Development
- Organization Chart Development
- Performance Appraisal/Evaluation
- Personnel Policy Development
- Recruitment
- Salary & Benefits
- Volunteers

**What are your three greatest concerns regarding the operations of the museum? [Final Page]**

*DIRECTIONS: (continue rating categories and narrowing your focus)*

**(Part 1) Rate the relative importance of each operational category (assign numbers 1-9)**

Place a number on the line above each category heading: 1 = Most important / 9 = Least relevant.  
Use ten Category Headings to list additional concerns if appropriate.

**(Part 2) Under your top three most relevant categories, CHECK  Only One item in each category.  
CHECK ONLY THREE BLOCKS TOTAL**

\_\_\_\_\_ **Interpretation & Education**

- Audience
- Codes of Ethics
- Collaboration
- Docents
- Educational Role of Museums
- Engaging the Community
- Evaluation
- Exhibits
- Interpretive Plan Development
- Online Resource Development
- Programs
- Publications & Non-Print Media
- Tours

\_\_\_\_\_ **Marketing & Public Relations**

- Marketing Plan Development
- Market Research
- Positioning & Branding
- Promotion
- Public Relations

\_\_\_\_\_ **Mission & Institutional Planning**

- Annual Operating Plan Development
- Business Plan Development
- Change Management
- Engaging the Community
- Information Technology
- Institutional Performance Measures & Indicators
- Institutional Planning
- Leadership
- Master Plan Development
- Mission and Vision

\_\_\_\_\_  **Professional Development & Training Resources**

\_\_\_\_\_  **Other Area of concern** (Please specify):