

Historic Site & Museum Effectiveness Evaluation

Instructions: For each category, rate the site on a scale from 1 (Poor) to 5 (Excellent). Provide notes and recommended actions where applicable. Categories are broken into more specific evaluation points.

Scoring Guide:

41-50 = Outstanding – model example for small historic institutions

31-40 = Strong – effective but with room for fine-tuning

21-30 = Developing – good potential, key areas need improvement

11-20 = Limited – significant gaps in multiple categories

Below 10 = At Risk – urgent action needed to remain relevant and sustainable

Category	Detailed Evaluation Points	Score (1-5)	Notes
Maintenance & Preservation	<ul style="list-style-type: none"> <input type="checkbox"/> Facility upkeep (cleanliness, repairs, landscaping) <input type="checkbox"/> Lighting (both exhibit and general safety lighting) <input type="checkbox"/> Artifact care (storage, handling, display environment) <input type="checkbox"/> Accessibility (parking, ramps, restrooms, pathways) <input type="checkbox"/> Preservation plan (preventive maintenance, conservation strategy) 		
Storytelling & Interpretation	<ul style="list-style-type: none"> <input type="checkbox"/> Historical accuracy and credibility of sources <input type="checkbox"/> Engaging narratives that connect visitors emotionally <input type="checkbox"/> Inclusion of diverse perspectives and voices <input type="checkbox"/> Use of interpretive panels, guides, docents <input type="checkbox"/> Talks, classes, or special programs to deepen learning 		
Advertising & Outreach	<ul style="list-style-type: none"> <input type="checkbox"/> Visibility in the community (posters, bulletins, press releases) <input type="checkbox"/> Online presence (updated website, social media, photos, videos) <input type="checkbox"/> Cross promotions with local tourism boards, libraries, or cultural orgs <input type="checkbox"/> Consistency and professionalism of marketing materials <input type="checkbox"/> Email newsletters, membership communication 		
Community Engagement	<ul style="list-style-type: none"> <input type="checkbox"/> Local partnerships (schools, civic groups, other nonprofits) <input type="checkbox"/> Volunteer recruitment, training, and appreciation <input type="checkbox"/> Special community days, free events, local heritage celebrations <input type="checkbox"/> Ongoing relevance—site feels meaningful to today's community <input type="checkbox"/> Outreach programs beyond the site (school visits, mobile exhibits) 		

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Technology Integration	<ul style="list-style-type: none"> ☐ QR codes linking to additional information ☐ Audio guides, smartphone apps, or podcasts ☐ Virtual reality or augmented reality experiences ☐ Online resources (digital archives, virtual exhibits) ☐ Accessibility technology (captioning, screen reader compatibility) 		
Branding & Identity	<ul style="list-style-type: none"> ☐ Clear mission statement communicated consistently ☐ Cohesive visual identity (logo, signage, printed material) ☐ Memorable visitor experience linked to brand identity ☐ Merchandising that reflects the site’s story and brand ☐ Professional, consistent tone in all communications 		
Website Accessibility	<ul style="list-style-type: none"> ☐ ADA compliance (alt text, readable fonts, high contrast) ☐ Mobile-friendly design ☐ Clear navigation and up-to-date content ☐ Online ticketing or event registration options ☐ Educational resources available for download 		
Directions & Signage	<ul style="list-style-type: none"> ☐ Accuracy of online directions and maps ☐ Road signage leading to the site ☐ On-site directional signs (entrances, restrooms, exhibits) ☐ Visitor orientation maps or brochures ☐ Clarity and visibility of interpretive signage 		
Hours & Availability	<ul style="list-style-type: none"> ☐ Clear and consistent public hours (first page of website, posted signage match) ☐ Seasonal scheduling (posted in advance, accessible online) ☐ Special openings for schools, groups, or events ☐ Responsiveness to inquiries about hours and tours ☐ Accommodation of different audiences (weekends, evenings, by appointment) 		
Outreach Programs	<ul style="list-style-type: none"> ☐ Educational programs for schools and youth groups ☐ Special lectures, talks, and classes ☐ Collaborative programs with universities or cultural organizations ☐ Traveling exhibits or pop-up displays in community spaces ☐ Family-friendly events that encourage repeat visits 		