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## **Evaluation of the Canadian Heritage Information Network 2008-09 to 2012-13**

**Evaluation Services Directorate**

**December 23, 2014**



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## **ACRONYMS AND ABBREVIATIONS**

CCI	Canadian Conservation Institute
CCOS	Canadian Culture Online Strategy
CHIN	Canadian Heritage Information Network
CIF	Canada Interactive Fund
CM	Community Memories
CMA	Canadian Museum Association
CMH	Canadian Museum of History
LAC	Library and Archives Canada
MAP	Museum Assistance Program
NIP	National Inventory Program
PE	Professional Exchange
PMA	Provincial Museum Association
PCH	Department of Canadian Heritage
PMS	Performance Measurement Strategy
PMERS	Performance Measurement, Evaluation and Risk Strategy
SODEC	Société de développement des entreprises culturelles
TBS	Treasury Board Secretariat
VE	Virtual Exhibits
VMC	Virtual Museum of Canada

## Executive Summary

This evaluation presents the key findings and recommendations from the 2013-14 evaluation of the Canadian Heritage Information Network (CHIN).

The evaluation was designed and conducted in accordance with Treasury Board Secretariat's *Policy on Evaluation* (April 2009). The evaluation objective is to provide comprehensive and reliable evidence on the ongoing relevance and performance (effectiveness, efficiency and economy) of CHIN to support program planning and decision-making. The evaluation covers the period 2008-09 to 2012-13 and was led by the Evaluation Services Directorate of the Department of Canadian Heritage (PCH).

## Overview of the Canadian Heritage Information Network

CHIN is a Special Operating Agency of PCH that enables Canada's museums and other heritage institutions to connect with each other and their audiences through the use of digital technologies. Over the period of the evaluation, CHIN was responsible for two main areas of activities: providing professional development, and enabling the creation and presentation of digital history and heritage content through the Virtual Museum of Canada (VMC). CHIN administered three websites: CHIN's corporate website, the VMC portal and the Professional Exchange website.

In Budget 2014, the Government of Canada announced that the VMC's sun setting funding (\$4.2 million) would be made ongoing and that the total \$6.2 million in VMC funding would be transferred to the Canadian Museum of History (CMH). This transfer was completed in September 2014. CHIN now consists only of the professional development component.

## Evaluation Approach and Methodology

In accordance with the requirements of the TBS *Policy on Evaluation* (2009), CHIN must be evaluated every five years. The evaluation approach involved a combination of qualitative and quantitative data collection methods designed to address the evaluation issues and questions, including interviews, expert panels, survey of VMC funding recipients, survey of VMC website visitors, document review, administrative data review and literature review. The data collection methods were aligned with the data sources identified for each question and indicator. The evaluation methodology included triangulation of the results from the multiple lines of evidence to identify trends and patterns.

The evaluation had the following limitations:

- Data on the achievement of program outcomes is largely self-reported, and is therefore potentially biased. To reduce the effect of respondent biases, self-reported information was validated through other sources of data; and,
- Data to enable an in-depth assessment of economy and efficiency was limited. CHIN's performance measurement system did not contain indicators or

mechanisms to measure the efficiency of programming and it lacked financial data on program outputs and outcomes for individual components of the program. However, the evaluation was able to make some observations on efficiency by examining CHIN's budgeted resources against actual program expenditures, and the VMC Investment Programs operational costs relative to direct investment costs.

## **Findings**

### **Relevance**

CHIN remains relevant. All lines of evidence indicated a continuing need to support Canadian museums and heritage organizations to enable them to adopt new technologies to make high quality and interactive digital content available online and through mobile devices, and to support training of and skills development related to digital technologies.

Recent developments including wide-scale use of the Internet, Web 2.0 technologies, social networks, and mobile technologies have significantly increased the need for museums and heritage institutions to create and market digital content online and through various mobile devices. Without sufficient funds and expertise, it is difficult for museums to keep up with emerging technologies and build digital capacity.

Over the past five years, CHIN has, to a certain extent, addressed the needs of participating museums and heritage organizations to create digital content and make it available to the Canadian public and international audiences. However, Canadian museums and heritage institutions' needs related to digitization are much greater than the amount of support and content development funding made available through CHIN's programming. CHIN has not been able to meet the high demand for funding.

The need to clarify and communicate CHIN's role and mandate have become even more critical since the transfer of the VMC program to the CMH in September 2014 and the reduction of CHIN's resources as a result. CHIN should, in consultation with program stakeholders such as CHIN network members, solicit input on the mandate and role of CHIN going forward. It should also assess its stakeholder needs with respect to professional development and determine the most effective means of providing professional development and collaborative opportunities and of ensuring accessibility across Canada given the limited resources.

CHIN's objectives and activities are aligned with three of the Department's organizational priorities: "taking full advantage of digital technology," "celebrating our history and heritage," and "investing in our communities," as well as PCH's strategic outcome "Canadian artistic expressions and cultural content are created and accessible at home and abroad."

The objectives and activities of CHIN are also aligned with the Government of Canada's "A vibrant Canadian culture and heritage" strategic outcome outlined by the Treasury Board in 2008-09 as well as the 2008 and 2011 speeches from the Throne and Budget 2012, which highlighted the importance of Canadian museums and heritage institutions.

The activities and objectives of CHIN are also consistent with federal and PCH roles and responsibilities. Supporting digitization of heritage content on a national scale, promoting skills development of heritage professionals in the digital realm and encouraging information sharing in the heritage sector are appropriate federal roles, as they support the continued existence and public availability of Canadian culture and heritage at home and abroad and contribute to the development of a Canadian identity.

PCH, with wide-ranging responsibilities for "Canadian identity and values, cultural development and heritage," is well positioned to support Canadian arts and heritage organizations in implementing digital technologies to create, manage, present and preserve Canadian digital heritage content.

There are a number of federal and provincial government and non-profit sector programs in Canada that share objectives similar to those of CHIN. However, for the most part, CHIN complemented, rather than duplicated or overlapped, other programs and initiatives. To avoid duplication and overlap, CHIN has worked in close collaboration with other similar federal programs (e.g., the Museum Assistance Program (MAP)). Many provincial programs complemented CHIN by providing funding in areas and initiatives that fall outside of CHIN's scope. However, as the nature and scope of CHIN's professional development activities fall within the digital realm, there may have been some overlap with professional development outputs and activities produced by other similar programs.

### **Achieving expected outcomes**

CHIN has made progress towards achieving its expected immediate and intermediate outcomes in the areas related to improving capacities of participating museums and heritage institutions to create digital content and making the content available for Canadian and international audiences. CHIN was able to reach out to a large number of representatives of Canadian museums and heritage institutions and improve their skills and capacities by providing them with a wide range of learning and collaborative opportunities. For example, CHIN launched 54 professional resources and publications which were accessed 2.2 million times, and organized 113 in-person workshops, events and meetings which were attended by more than 2100 professionals. The number of visits to CHIN's professional development website has more than doubled between 2010-11 and 2012-13.

To increase the number of Canadian and international heritage institutions and workers who use its tools and resources to improve their knowledge, skills and practices, CHIN needs to be more proactive in reaching out to members of the



heritage community through various methods, such as in-person workshops and events, and to improve its promotional and awareness-building activities to better promote its professional development services and resources. CHIN should engage representatives of museum and heritage institutions, and other stakeholders across Canada, to increase the awareness and visibility of its tools and resources and the use of CHIN's professional development resources.

CHIN has enabled Canadian museums and heritage institutions to create digital history and heritage content. About 250 projects were funded through the Virtual Exhibits and Community Memories investment programs with a total investment of about \$11 million. As a result of the VMC Investment programs, online exhibits increased from 486 in 2008-09 to 653 in 2011-12. CHIN also made possible the presentation of content on the Artefacts Canada website. The number of heritage records available through Artefacts Canada increased by 14% and the number of arts and heritage images increased by 43%.

Canadian and international audiences accessed content presented by heritage institutions. Between 2010-11 and 2012-13, nearly 8 million individuals across Canada and the world visited the VMC website searching for specific information or content.

A number of unintended outcomes were generated by CHIN's programming. Positive outcomes reported by funding recipients, key informants and experts included the following: creating a foundation on which museums and heritage institutions were able to build their digital content; increased profile of heritage institutions in the communities, increased community participation and partnership and increased knowledge about the historical significance of buildings and landmarks; increased profile and visibility of heritage institutions, museums and museum associations; and, increased in-person attendance at museums and heritage institutions. However, a negative outcome identified by funding recipients of the VMC was the increased time associated with meeting the reporting requirements of the program and addressing technical issues and challenges.

## **Economy and Efficiency**

There was limited information available to conduct a thorough efficiency and economy analysis for different CHIN activities. CHIN's performance measurement system did not contain indicators or have mechanisms in place to collect data to measure the efficiency and economy of the program, particularly the professional development component. Although the program had limited financial data on program outputs, the evaluation noted, based on a review of the available data, that there was minimal variance between CHIN's budgeted resources and actual program expenditures. Data for the VMC Investment Programs indicated the ratio of operational cost to direct investment cost for the VMC Investment Programs averaged 23% over the five year period. Given that much of the operational costs are dedicated to collaborative work with the successful applicants after the contract is awarded, the operational costs of VMC cannot be compared to Grant and

Contribution programs. Forty percent of the VMC Investment funding recipients leveraged resources from other sources to develop and launch their exhibits.

There are opportunities to improve the design and delivery of the professional development component after the transfer of the VMC program to improve effectiveness of the program and to use limited resources more efficiently.

Some key informants noted that the federal government could achieve the same results at a lower cost by increasing efforts to work in closer collaboration with provincial partners, other stakeholders and representatives from the private sector; or by fine tuning certain delivery components (e.g. requiring matching contribution from VMC Investment Program beneficiaries).

The most frequent recommendations to improve the efficiency of CHIN included updating technology and ensuring internal operational capacity so that CHIN could be at the forefront of technological changes.

Some key informants identified alternative delivery mechanisms that could lead to efficiencies, including the delivery of some components of professional development activities such as partnerships with provincial and territorial museum associations to develop and deliver training, and partnerships with the private sector to assist with CHIN's IT needs and online training or webinars. According to key informants, online training and webinars had the potential to reach target audiences with relatively lower costs. Partnering with the private sector would result in more efficient delivery and timeframes, and access to more targeted expertise and working in partnership with the provincial museum associations (PMAs) in the development of tools and training would lead to increased capacity at the provincial and community level.

The program could also consider aligning the program activities with existing PCH programs with a professional development component, such as MAP and CCI, to benefit from shared resources and increase efficiency. MAP and CCI also have a focus on the professional development of museums and heritage institutions by providing financial help and support for professional development.

## **Other Evaluation Issues**

CHIN developed its Performance Measurement Strategy (PMS) in 2010 and included most necessary components to support program measurement. The main limitation of the current PMS is that it does not include indicators to measure the efficiency and economy of the program. Furthermore, there is no mechanism to collect information on longer-term outcomes, such as the extent to which participants apply the knowledge and skills learned at in-person events and sessions in their work practices.

Improvements could be made to the performance measurement system to systematically collect, analyze, and report performance information on the results of its professional development programming. The extent to which program participants apply the knowledge and skills learned as a result of participating in sessions and use CHIN's tools and resources could be measured through follow-up surveys several months after the participation.

A number of standard efficiency indicators are commonly used in programs with a professional development and/or skills and knowledge building component. Examples of efficiency approaches/indicators include utilization of funds, inputs and resource requirements to deliver the program, ratio of overhead cost to program expenditures, cost per program output, and leveraging of resources from other sources.

One or more approaches could be used. Approach selected should be based on the program theory and expected outcomes. To conduct an efficiency analysis, CHIN will need to identify units of analysis (e.g., inputs, activities, outputs, outcomes, results chains or service lines). Being able to identify the program's results chains will help to identify units of analysis for assessing the cost of outputs, and the efficiency of the program.

The performance measurement system will need to be revised to reflect the changes to activities, outputs and outcomes in light of the transfer of the VMC to the Canadian Museum of History and will need to include indicators to measure program efficiency and economy and to track long-term results of professional development programming.

A performance measurement system will enable CHIN to improve its ability to plan, manage and measure performance through the development and use of performance indicators and evaluation frameworks.

### **Recommendations emerging from the evaluation findings**

Following the transfer of funding and responsibility for the VMC program to the Canadian Museum of History in September 2014, CHIN now consists only of the professional development component. Therefore, while results for both areas of activity are reported in this evaluation, the recommendations are directed toward improvements to the professional development activities which remain under the responsibility of PCH.

#### **Recommendation #1**

In light of the transfer of the VMC and reduced program resources, and given the evolving technical environment and increasing pressures to adapt to a variety of digital technologies, the Assistant Deputy Minister of the Citizenship and Heritage sector should consult with stakeholders, such as CHIN network members, in order to prioritize the needs of the museum community in the digital realm.

#### **Recommendation #2**

Following consultations with stakeholders, the Assistant Deputy Minister of the Citizenship and Heritage sector should leverage program activities within PCH's Heritage Group, and explore expanding partnerships, in order to maximize synergies and efficiencies with complementary professional development initiatives.

#### **Recommendation #3**

Following the review of CHIN's activities, the Assistant Deputy Minister of the Citizenship and Heritage sector should build awareness, within available resources, of CHIN's services and tools to ensure these are used and provide value, and revise its performance measurement system to ensure it includes the indicators and data collection mechanisms needed to conduct an analysis of efficiency and economy, and to track longer-term outcomes.

# 1. Introduction

## 1.1. Purpose

This report presents the findings and recommendations from the 2013-14 evaluation of CHIN. The purpose of this evaluation is to provide PCH with comprehensive and reliable evidence to support decisions regarding continued implementation of CHIN programs or initiatives.

The evaluation report provides information on the program, the evaluation methodology, and the findings for each of the evaluation questions, as well as overall conclusions and recommendations. This evaluation was conducted as indicated in the *2014-2019 Departmental Evaluation Plan*. This evaluation covered the period from 2008-09 to 2012-13. The evaluation was led by the Evaluation Services Directorate of PCH.

In keeping in line with Treasury Board Secretariat *Directive on the Evaluation Function* (2009), the evaluation focused on assessing the five core issues relating to the relevance and performance (effectiveness, efficiency and economy) of CHIN. Specifically, the objectives of the evaluation were to determine:

- The continued relevance of CHIN;
- Its performance in terms of effectiveness, namely in achieving immediate, intermediate and, to the extent possible, ultimate outcomes; and
- Its performance in terms of efficiency and economy.

The next sections of the report present:

- a description of CHIN (Section 2);
- evaluation methodology (Section 3);
- findings related to relevance (Section 4);
- findings related to performance (effectiveness and efficiency and economy (Section 5); and
- overall conclusions and recommendations arising from the evaluation (Section 6).

## 2. Program Profile

This section briefly describes CHIN, including the Program's objectives and expected outcomes, its program management and governance structure, resources, its target groups and key stakeholders.

### 2.1. Background and Context

CHIN is a Special Operating Agency of PCH that enables Canada's museums and other heritage institutions to connect with each other and their audiences through the use of digital technologies. CHIN's activities are structured around PCH's strategic outcome "Canadian artistic expressions and cultural content are created and accessible at home and abroad" which supports the continued existence and public availability of Canadian cultural products, artistic work by Canadian creators and performers and Canada's cultural heritage.

In 1972, CHIN was launched as the National Inventory Program (NIP) under the National Museums Policy. The mandate of NIP was to create a computerized national inventory of Canadian cultural and scientific collections. The inventory would facilitate the sharing of the information found in collections. In 1982, NIP was renamed CHIN. During the 1980's, CHIN developed professional standards and resources for the museum heritage community to exploit digital technologies and in the 1990's, introduced Web access to these resources. In 2001, CHIN launched the Virtual Museum of Canada (VMC), enabling museums to develop and make available online content that draws on their collections.

At the onset of the evaluation, CHIN operated three websites:

- CHIN's corporate website featuring information on how to participate in CHIN's network of member institutions, the VMC Investment Programs, and resources such as Jobs in Heritage.
- the Professional Exchange website for heritage professionals and volunteers, featuring online skills development resources including online courses, bibliographies and databases, research studies and best practices.
- the VMC website featuring content produced by CHIN's museum partners. It features a Teachers' Centre, allowing museum educators to engage teachers and students through Web 2.0 tools and customizable content.

The VMC website is now operated by the Canadian Museum of History (CMH), while CHIN's corporate and Professional Exchange websites have been merged to better integrate resources and information available made through CHIN.

For the period covered by the evaluation, CHIN was responsible for two main areas

of activities: providing professional development, and enabling the creation and presentation of digital history and heritage content through the VMC. In Budget 2014, the Government of Canada announced that ongoing funding of \$6.2 million per year and responsibility for the VMC would be transferred to the CMH. This transfer was completed in September 2014. CHIN now consists only of the professional development component.

### **Providing Professional Development**

CHIN develops and provides online and in-person skills training for heritage professionals and volunteers. CHIN provides bilingual online skills development products and research and reference resources through the Web. Its online properties provide an online space for heritage workers to learn, share and collaborate and provide information on subjects such as intellectual property, standards, collections management and image digitization.

CHIN also provides in-person skills development, including presentations, workshops, and one-on-one training to meet specific needs of member institutions and their staff.

### **Creating Digital Heritage Content**

For the period covered in the evaluation, CHIN supported the development, presentation and promotion of digital heritage content through the VMC Investment Programs and provided technical support to museums in developing digital heritage content associated with the VMC portal. Through the VMC portal, CHIN enabled Canadians to access content developed by Canadian museums and galleries. The portal enabled museums to collaborate in the development of a visible online presence. Key components of the VMC were the presentation of online exhibits, the Image Gallery, the Teachers' Centre micro-site, the Museums in Canada Directory, and online exhibits created by CHIN's member organizations.

CHIN operated two VMC investment programs, the Virtual Exhibits (VE) Investment Program and the Community Memories (CM) Program, in support of museums to create online content in both English and French. This content included virtual exhibits and community-based productions, and associated educational resources featured through the VMC Teachers' Center.

### **Virtual Exhibits Investment Program**

Through the VE Investment Program, network members were able submit a proposal to develop online exhibits and associated interactive resources, including educational resources that engaged online audiences in Canada's history and heritage. Calls for proposals under the program were generally made once a year.

Starting in 2013, members applying to the program submitted their proposal under two streams: the Thematic stream (projects commemorating events leading up to



Canada's sesquicentennial in 2017) or the Regular stream. Proposals under the program were assessed by the VMC Editorial Board which then provided recommendations to CHIN's Director General with respect to the proposals in which the VMC should invest. Organizations applying for investment under the program received up to \$250,000 to develop their productions.

The VE Program was open only to CHIN members and was awarded on a competitive contractual basis. All exhibits or products had to be created in both official languages and be available for a period of five years following their launch. CHIN members who had previously received an investment from the VMC and wanted to make minor updates to the content or technical functionality of their virtual exhibit were able to apply for additional investment after five years.

To be eligible for investment under the Thematic stream, exhibits had to encapsulate the overall story or a particular aspect of the selected key milestone anniversary, and provide authoritative information and details to depict the event in an engaging and informative way. On the Regular stream, exhibits had to demonstrate a dynamic exploration of Canada's diverse heritage in ways that encouraged enjoyment and learning. For both streams, exhibits had to exploit the digital medium to create experiences that were not feasible in physical space or by using analog media, and involve partnerships with other public and private organizations for content development, and educational and/or technical expertise.

### **Community Memories Program**

The CM Program enabled CHIN's smaller member museums with no more than five full-time employees to produce online exhibits that explored their communities' local history. CM exhibits offered insights into the events and the people that shaped a community. These online exhibits had a specific focus, such as a town's industry or early settlers. Exhibits drew from an institution's permanent collection and community members' personal photographs, documents and stories. Museums with approved proposals received a standard investment of \$5,000 for the first exhibit and \$2,500 for any subsequent proposal. They also received a software package. Recommendations concerning the selection of proposals were submitted to the Director General of CHIN based on advice from the VMC Investment Programs staff. CM Program exhibits were hosted by CHIN and presented on the VMC website.

The CM Program was open to CHIN members only and was awarded on a competitive contractual basis. Although participant museums were not required to translate their exhibits into the other official language, they were encouraged to do so to serve a wider audience and could receive additional investment for translation.

To be eligible for investment, proposals under the CM Program had to include strong evidence of exhibit planning; including a clearly defined subject that explores a particular aspect of community's history and way of life, community participation

and exhibit promotion. Priority was given to proposals that had the strongest community partnerships and/or intergenerational participation.

## **2.2. Objectives and Outcomes**

CHIN's primary goal is to enable Canada's museums and other heritage institutions to connect with each other and their audiences through the use of digital technologies.

The activities and outputs of CHIN contributed to the achievement of the following immediate, intermediate and PCH strategic outcomes:

### **Immediate outcomes**

- Canadian and international heritage institutions and workers use learning and collaborative opportunities provided by CHIN to improve their knowledge, skills and practices in the creation, presentation, management and preservation of online and other digital content; and
- Canada's museums create digital history and heritage content.

### **Intermediate Outcomes**

- Heritage institutions and heritage workers improve their professional knowledge, skills and practices in the creation, presentation, management and preservation of online and other digital heritage;
- Digital heritage content is available to Canadian and international audiences; and
- Canadian and international audiences access content presented by heritage organizations.

All three intermediate outcomes contribute to the PCH Strategic Outcome: Canadian artistic expressions and cultural content are created and accessible at home and abroad.

## **2.3. Program Management, Governance, Target Groups, Key Stakeholders and Delivery Partners**

At the time of the evaluation, CHIN was headed by a Director General who serves as the Chief Operating Officer (COO). The Director General was responsible for the day-to-day management of the program and to provide long-term strategic direction. The Director General reported to the Executive Director of the Heritage Group, who, in turn, reports to the Assistant Deputy Minister, Citizenship and Heritage.

CHIN consisted of two directorates: Program Development and IM/IT Directorates. The Program Development directorate worked with the Canadian heritage community in the development of products and services such as:

- membership administration;
- the implementation of marketing and communication strategies;

- the creation of business partnerships;
- the development and management of CHIN content for professional audiences, through the Professional Exchange website, and museum content for the public, through the VMC; and
- supporting the development of the Canadian museum community's collection management capacity in the digital realm.

As of April, 2013, the IM/IT Solutions Directorate responsible for the information and technology infrastructure which supports CHIN's activities reports directly to the Chief Information Officer Branch. It provides CHIN-funded services, outlined in a service level agreement, such as:

- The oversight of IT infrastructure installation, configuration and operations;
- Application development and integration; incident and problem management;
- Database management; and,
- Quality assurance of online products, including those developed by CHIN member institutions.

The ultimate beneficiaries of CHIN are Canadians since the program ensures that Canadian heritage institutions and workers are enabled to create, present, manage and preserve digital heritage content for the public's benefit.

The target groups for CHIN activities are:

- Heritage institutions and workers who use learning and collaborative opportunities provided by CHIN in relation to creation, presentation, management and preservation of online and other digital content;
- Through the VMC, Canadians have access to a free, bilingual selection of online exhibits and other museum content that celebrates history and heritage. Teachers and students are a particularly significant target audience; and,
- As a Web-based program, the VMC also provides Canadian museums with a platform to reach international audiences.

CHIN's key stakeholders are:

- Canada's museum associations and museum studies programs which use CHIN's products, services and expertise on digital resources and technologies. Nearly 1,600 large and small museums partner with CHIN to develop content for the VMC;
- Educators who use digital learning resources developed by museums; and
- Within PCH, CHIN is a component of the Heritage Group which also includes the Heritage Policy and Programs Branch as well as the Canadian Conservation Institute.

CHIN's delivery partners include:

- Canada's museum associations and museum studies programs. Museum associations and museum studies programs are ongoing partners in the delivery of CHIN's professional development opportunities;

- Museums. CHIN uses a limited tender contracting process to contract with museums to develop online exhibits and other digital learning resources to present Canada’s history, heritage and culture. Participating museums voluntarily contribute other content, including images of their collections;
- National and international organizations. These organizations undertake research (e.g. standards) and deliver authoritative resources, such as reference databases. These include: Parks Canada; the Smithsonian Institute; the Getty Conservation Institute; the Joint Information Systems Committee; and committees of the International Council of Museums;
- Educational and other digital content promotion partners. These include the History Education Network, the Canadian Broadcasting Corporation and Via Rail; and
- The Chief Information Officer Branch of the Department of Canadian Heritage and Shared Services Canada. This Branch manages the technological infrastructure behind CHIN’s online properties, databases and applications.

## 2.4. Program resources

A total of \$51.4 million was budgeted for CHIN over the five year period from 2008-09 to 2012-13. The following table illustrates CHIN’s budgeted and actual expenditures during the period covered by the evaluation.

**Table 1: Budgeted and actual expenditures**

Resources	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	Total
Budgeted resources	\$11,408,652	\$11,056,565	\$10,950,086	\$9,926,841	\$8,017,393	<b>\$51,359,537</b>
Actual expenditures	\$11,685,761	\$11,334,331	\$10,244,856	\$10,175,934	\$8,350,205	<b>\$51,791,087</b>

### 3. Evaluation Methodology

#### 3.1. Evaluation Scope, Timing and Quality Control

The evaluation’s objective is to provide credible and neutral information on the ongoing relevance and performance (effectiveness, economy and efficiency) of CHIN. Although the VMC was transferred to the Canadian Museum of History in September 2014, results for both the professional development and VMC components are reported in this evaluation; however, recommendations have only been directed toward the components remaining with PCH (i.e., professional development).

The evaluation was designed and conducted in accordance with TBS Policies and Guidelines as outlined in the TBS *Policy on Evaluation* (2009) and the other components of the TBS policy suite. The evaluation will meet PCH accountability requirements in relation to the TBS *Policy on Evaluation* requirement that all direct program spending be evaluated every five years. It will also provide PCH management with analysis and recommendations to inform future program decisions.

The evaluation examined the Program’s theory of change as presented in its logic model and the contribution of the activities to bringing about change and the achievement of expected results. The evaluation involved a combination of qualitative and quantitative data collection methods designed to address the evaluation issues and questions. The data collection methods were aligned with the data sources identified for each question and indicator. The evaluation methodology included the collection and triangulation of multiple lines of evidence to address each evaluation question to identify trends and patterns.

#### 3.2. Evaluation Questions by Issue Area

The evaluation addressed the five core issues as per the TBS *Directive on the Evaluation Function*. The evaluation questions for the evaluation were selected on the basis of the program logic model. The questions and indicators by core issue are set out in the evaluation evidence matrix, found in Appendix A.

**Table 2: Overview of Evaluation Issues and Questions**

Issues	Questions
<b>Relevance</b>	
Continued need for the program	Is there a continued need for CHIN and is CHIN responsive to the needs of museums and heritage organizations?
Alignment with government priorities	To what extent is CHIN aligned with the priorities of the federal government and departmental strategic objectives?

Issues	Questions
Consistency with federal roles and responsibilities	Is CHIN aligned with departmental and federal roles and responsibilities?
<b>Performance – Effectiveness</b>	
Achievement of expected outcomes	To what extent did CHIN achieve its expected outcomes?
<b>Performance – Efficiency and Economy</b>	
Demonstration of efficiency and economy	Are there more efficient and economical ways to deliver CHIN and achieve the same results?
<b>Other</b>	
Other evaluation issues(s)	Has the program implemented the recommendations from the previous evaluation? Does performance measurement properly support the evaluation?

### 3.3. Evaluation Methods

#### 3.3.1. Preliminary consultation

Before undertaking the evaluation, preliminary discussions were held with CHIN staff. This led to the validation of the logic model and the development of Terms of Reference for the evaluation, including a work plan and the methodological approach.

#### 3.3.2. Lines of Evidence

Data for this evaluation were collected from multiple sources. The methodology incorporated seven lines of evidence: literature review, document and file review, administrative data review, interviews with key informants, expert panels, surveys with funding recipients and a survey of VMC website visitors. Data was analyzed and findings were correlated to identify trends and patterns. Preliminary findings related for each line of evidence were synthesized and analyzed into a summary matrix.

The following section describes each line of evidence:

- Interviews with 28 key informants** Key informants were selected on the basis of their involvement, knowledge and experience with the program. External stakeholders interviewed were representatives of museum associations who work in partnership with CHIN in different large scale projects and other representatives of museums and heritage institutions.

- **A group discussion with 7 expert panel members.** Expert panel members were selected on the basis of their knowledge of the heritage sector in Canada and familiarity and involvement with CHIN. Panel members are involved in various aspects of research, education, arts, digital development, collection development and preservation.
- **Survey of 109 representatives of Canadian museums and heritage institutions** who received funding from CHIN from 2008-09 to 2012-13. The survey was emailed to 131 representatives of the museums and heritage institutions that received funding through the Community Memories Program and 39 representatives of the museums and heritage institutions that received funding through the VE Investment Program. Of the 131 representatives contacted through the Community Memories Program, 73 completed the survey yielding a 56% response rate. Of the 39 representatives contacted through the VE Investment Program, 35 completed the survey yielding a 90% response rate. The surveys were conducted by PCH between April 2014 and May 2014, using the online survey software FluidSurveys.
- **Survey of the VMC website visitors.** The survey was administered during visits to the sites; a pop-up window would appear inviting visitors to respond to the survey after they had concluded their visit. Visitors were only able to respond to the survey once. The survey of VMC website visitors was conducted between September 12, 2013, and November 21, 2013 and 455 visitors completed the survey fully and 176 visitors completed the survey partially.

In addition, surveys conducted by CHIN were analysed. CHIN conducts regular surveys with visitors of VMC and professional exchange websites. Surveys with visitors of the Professional Exchange website were conducted in 2011 and 2013. A total of 319 visitors completed the first survey in 2011, while another 247 visitors submitted partially completed questionnaires; and a total of 405 visitors completed the survey in 2013, while another 254 visitors submitted partially completed questionnaires. The responses from the VMC and Professional Exchange website visitor surveys were used to address issues related to relevance and achievement of expected outcomes.

- **Administrative data review** including web logs, which provide information on the number of visits to the CHIN corporate and Professional Exchange websites as well as the VMC online resources; VMC Feedback Messages, which provides analysis of the messages left by visitors to the CHIN website; the VE and CM project databases, which include information on the VE and CM projects funded during the five years under review, as well as information obtained through a review of both funded and rejected projects; and CHIN financial information.

- **Document review** was used to assess the relevance of the program, particularly its alignment with federal government and departmental priorities and strategic outcomes. Key documents analysed as part of the document review included federal reports (e.g., speeches from the Throne, Canada's Performance Reports, Federal Budgets), departmental documents (e.g., Departmental Performance Reports, Reports on Plans and Priorities, etc.), program documents (e.g., the previous Canadian Culture Online Strategy (CCOS) evaluation, the PMS, annual reports and existing, survey results, VMC Investment Programs guidelines).
- **Literature review** that reviewed academic papers and other sources, and a scan of other programs that share similar objectives with CHIN. The first component covered published reports, articles, periodicals, and websites documenting the current context for technology and professional development in the heritage sector, focusing on mobile and web-based technology, and the skills development needs of museum professionals. The second component included a scan of other national programs as well as funding opportunities from other levels of government, and private sector options.

### 3.3.3. Methodological Limitations

The following were some of the key challenges and limitations in relation to the evaluation of CHIN:

- **Potential biases of key stakeholders.** Much of the data on the achievement of program outcomes was self-reported and potentially biased, particularly data collected from groups that have a vested interest in the program. Many of the key informants were involved in the program and most survey respondents were direct beneficiaries of CHIN, which can lead to possible biases in their responses. Several measures were implemented to reduce the effect of respondent biases. Responses, to the extent possible, were corroborated key stakeholder feedback with the other groups (e.g., experts) and other sources of evidence.
- **Limited availability of data to assess the efficiency and economy of the program.** The administrative data reviewed was limited in its scope and ability to assess the efficiency and economy of the program. Due to the highly integrated nature of the program delivery, CHIN was not able to provide a breakdown of the program expenditures for the professional development component. It was therefore difficult to clearly isolate spending by activity and assess the overall efficiency of the program.
- In addition, web logs, which provide information on the number of visits to the CHIN corporate and Professional Exchange websites, as well as the VMC online resources, were available for only the last three years (2010-11 to 2012-13) of program implementation, which limited the ability to review the progress over all program years.



The following guidelines were used to report the findings of the surveys and key informant interviews:

- “A few respondents” = less than 25 per cent;
- “Some respondents” = 25 to 45 per cent;
- “about half” = 46 to 55 per cent;
- “a majority of those interviewed/surveyed” = 56 to 75 per cent;
- “most of those interviewed/surveyed” = over 75 per cent; and
- “almost all of those interviewed/surveyed” = 95 per cent or more.

## 4. Findings - Relevance

The following sections present the key evaluation findings related to relevance.

### 4.1. Core Issue 1: Continued Need for the Program

**Is there a continued need for CHIN and to what extent is CHIN responsive to current and evolving needs of Canadian museums and other member heritage institutions in the digital realm?**

#### KEY FINDINGS

All lines of evidence indicated a continuing need to support Canadian museums and heritage organizations to enable them to adopt new technologies to make high quality and interactive digital content available on-line and through mobile devices and to support training and skills development related to digital technologies.

Over the past five years, CHIN has addressed the needs of participating museums and heritage organizations to create digital content and make it available to the Canadian public and international audiences. However, Canadian museums and heritage institutions' needs related to the digital realm are greater than the amount of support and funding made available through CHIN's programming.

After the transfer of the VMC to the Canadian Museum of History in September 2014, CHIN consists only of the professional development component and as a result operates with reduced resources.

#### Continued need for CHIN

A review of the relevant literature demonstrated the greater use and the increasingly important role of technology in the heritage sector and indicated that museums and heritage institutions need for support in the creation and presentation of digital heritage content. The diffusion of Web 2.0 technologies, social networking, mobile technologies and other platforms has modified the business models for the creation and dissemination of cultural content, generating both opportunities and challenges.<sup>1,2,3</sup> Websites have now become the leading marketing tool for museums,<sup>4</sup> as digital technologies such as social media platforms allow museums to establish an online presence, and increase their reach to engage new audiences and

1 PCH, Report on Plans & Priorities 2008-2009.

2 PCH Minister's James Moore Speech, Occasion of a keynote luncheon speech at the Calgary Chamber of Commerce, November 13, 2009.

3 The Conference Board of Canada in collaboration with PCH. Valuing Culture: Measuring and Understanding Canada's Creative Economy, August 2008.

4 University of Toronto, Faculty of Information, Museum Knowledge Workers for the 21st Century (commissioned by CHIN), April 24, 2009.

attract more visitors.<sup>5</sup>

To enable museums to successfully adopt these new technologies, technological expertise and support with digital heritage content are increasingly crucial.

Acquiring expertise that incorporates both the museum context and new technologies is key to developing innovative and interesting content for the public.<sup>6</sup>

Without sufficient funds and expertise, it is difficult for museums to keep up with emerging technologies that are being implemented by commercial websites.

The literature review demonstrated that the most critical training and professional development skills required for Canadian museum and heritage institutions include:

- Skills and competencies related to digital content management at museum and heritage institutions, particularly in relation to using new technologies in museums, and technology-related issues affecting current museum processes (i.e., digital preservation, and storage concerns);<sup>7</sup>
- Information technology (IT) skills for museum professionals to manage increasing IT requirements such as a need for skills in the use of image editing or graphic design software to create exhibitions, web development skills to design and maintain websites, and experience in the use of web analytics to track the success of the website in reaching out to representatives of the target groups;<sup>8</sup>
- Leadership and museum management training to offset impacts of the retiring baby boomers;<sup>9</sup>and,
- Basic skills necessary for daily museum operations such as information management skills to deal with information requirements of museum operations, critical thinking skills to solve problems in innovative ways, and written and verbal communication skills to communicate clearly and concisely.<sup>10</sup>

The results of the Digital Preservation Survey of member institutions conducted by CHIN in 2011 indicated that the skills training topics that received the highest priority rankings by respondents were digital assets and training and support for preservation strategies and tools and digitization. According to results of the survey, there was a need for both in-person and online professional development training for heritage institutions. A collaborative approach between heritage institutions and other relevant organizations may be an effective way to respond to this need.

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5 Cultural Human Resources Council, *Culture 3.0: Impact of emerging digital technologies on human resources in the cultural sector*, October 2011.

6 Cultural Human Resources Council, *Culture 3.0: Impact of emerging digital technologies on human resources in the cultural sector*, October 2011.

7 Duff, W., et al., *Museum Knowledge Workers for the 21st Century*, CHIN-Professional Exchange. April 29 2009.

8 Duff, W., et al., *Museum Knowledge Workers for the 21st Century*, CHIN-Professional Exchange. April 29 2009.

9 Drori, J. *Encouraging Digital Access to Culture*. Department for Culture, Media and Sport. March 2010

10 Duff, W., et al., *Museum Knowledge Workers for the 21st Century*, CHIN-Professional Exchange. April 29 2009.

Both groups of key informants and expert panelists supported the findings from the literature review that there is an increasing demand for Canadian museums and heritage institutions to make high quality and interactive digital content available online and through mobile devices and to support training and skills development related to digital technologies. As part of the interviews, key informants were asked to comment on the extent to which the needs related to the creation, presentation, management, preservation and availability of digital heritage content have evolved over the last five years.

As presented in Table 3, key informants noted an increased need in several areas. The table below shows the breakdown of responses between PCH officials and other stakeholders.

**Table 3: Increased Needs as Identified by Key Informants**

Response	PCH officials	Other stakeholders
		%
Accessibility of content online and through various mobile devices	62%	73%
High quality, sophisticated and interactive content.	69%	47%
Funding and resources to assist organizations to create, present and manage digital content	62%	47%
Training in digital technologies across all levels of skills and specializations	70%	80%
Increase access to content for a wide range of users (bilingual, visually impaired, etc) which increases a need for training and skills development	38%	7%

In addition, some (36%), identified an increased need to use social media (e.g., Facebook, Twitter, YouTube, etc.) to promote museums and heritage institutions.

All expert panelists agreed that there has been a notable increase in the use of mobile devices to access online content (including apps on smartphones and tablets) over the last five years. Museums are thus facing increasing pressure to adapt their content to mobile format. The increased use, availability and variety of digital technologies have resulted in new training needs for museum professionals. Professional and skills development opportunities are necessary so that staff are equipped with the skills to take advantage of the new technologies and organizations can keep content relevant for audiences. According to some panelists, the sector has lagged behind in terms of uptake and adaptation to these technologies. Museum studies or training programs are attempting to adapt current classes to these new realities. Many of the programs still focus predominantly on training curators and collections managers, and have not yet embraced the digital realm. Over the coming years, self-paced, flexible and easily-accessible learning opportunities will be the key to facilitating professional development of museum and heritage staff. The need for more online learning, through webinars, podcasts and templates, will also increase.

Both VE and CM funding recipients indicated that their needs with respect to

creation, presentation and preservation of the digital heritage content have increased over the period covered under this evaluation. Funding recipients surveyed indicated that their needs have increased with respect to:

- creation of digital content (84%);
- presentation and marketing of digital content (77%);
- preservation of digital content (76%);
- management of digital heritage content (75%);
- training and skills development (71%);
- expansion of audience outreach (85%); and
- partnership building (74%).

According to the survey of funding recipients, there is an increased demand for digital content, which also increases the need for relevant technologies, resources and expertise. Museum and heritage institutions are experiencing difficulties with respect to building and maintaining the necessary skills levels and technologies due to funding and resource limitations.

### **CHIN's Responsiveness to the Needs of Museums and Heritage Organizations**

Ninety-five percent of funding recipients who participated in the survey indicated that CHIN was to some extent (26%) or to a great extent (69%) successful in enabling the creation of Canadian digital content; 92% of survey participants indicated that CHIN was to some extent (26%) or to a great extent (66%) successful in ensuring availability of Canadian digital content; and 88% also indicated that CHIN was to some extent (34%) or to a great extent (54%) successful in terms of encouraging access to this content.

Fifty-four percent of key informants also noted that CHIN has been successful in meeting the needs of museums and heritage organizations and heritage workers; and 50% indicated that CHIN has been successful in meeting the needs of educators in museology and other teachers.

However, some key informants (27%) noted that CHIN could better meet the needs of museums heritage institutions and workers and that the needs were greater than the support available through CHIN programming.

CHIN's ability to address the needs of and provide high quality services, professional development opportunities, in-person training and workshops and/or financial support to representatives of target groups has been constrained by funding cuts and resource limitations. Consequently, the modernization of professional resources such as Artefacts Canada has been repeatedly postponed in order to allow for the gradual renewal of VMC products. Resource limitations also restrict CHIN's flexibility to adjust to technological advances. Technologies are changing faster than CHIN can adapt and provide up-to-date resources and assistance to museums and heritage institutions.

The need to clarify and communicate CHIN’s role and mandate was noted by some key informants and Professional Exchange website visitors. A review of CHIN’s mandate is even more critical after the transfer of the VMC program to the Canadian Museum of History in September 2014 and the reduced resources as a result of the transfer. CHIN should assess its stakeholder needs with respect to professional development and determine the most effective means of providing professional development and collaborative opportunities and of ensuring accessibility across Canada. In undertaking a needs assessment, CHIN should consult with program stakeholders, such as CHIN network members, to solicit input on the mandate and role of CHIN’s programming going forward and the types of services and assistance it should provide with respect to professional development. A needs assessment and stakeholder consultations would help to identify and prioritize professional development needs.

## 4.2. Core Issue 2: Alignment with Government Priorities

### To what extent is CHIN aligned with PCH and federal government priorities and strategic objectives?

#### KEY FINDINGS

CHIN is aligned with PCH departmental strategic outcomes and three of the four organizational priorities.

- i. *-celebrating our history and heritage;*
- ii. *-taking full advantage of digital technology; and*
- iii. *-investing in our communities*

CHIN is aligned with Government of Canada priorities. The Budget 2012 highlighted the importance of Canadian museums and heritage institutions in supporting economic development.

### Alignment with PCH Priorities and Strategic Outcomes

The document review combined with key informant interviews demonstrated that the activities associated with CHIN’s primary goal *to ensure that Canada’s cultural heritage is preserved and accessible to Canadians today and in the future* support the achievement of the PCH strategic outcome “Canadian artistic expressions and cultural content are created and accessible at home and abroad.” CHIN supports the heritage sector *“to improve professional knowledge, skills and practices, to preserve and present heritage collections and objects, and to create and circulate exhibitions and other forms of heritage content.”*<sup>11</sup>

Further, CHIN’s goals aligned with the following three PCH organizational priorities:

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11 PCH, Report on Plans & Priorities 2012-2013.

- “Taking full advantage of digital technology” organizational priority includes departmental plans to support “the creation of cultural content for dissemination on various digital platforms; develop and make available resources that enable the preservation of Canadian digital heritage content so that it is available to future generations; and support arts and heritage organizations in the implementation of digital technologies to improve the audience experience and to reach Canadians everywhere;”
- “Celebrating our history and heritage” organizational priority requires PCH to take concrete steps to “contribute to infrastructure projects that improve the facilities of heritage organizations” and “undertake measures to enhance the ability of museums to present Canada’s history and heritage in the context of the celebration of significant historic anniversaries;
- “Investing in our communities” organizational priority requires PCH to “support arts and heritage organizations in leveraging private-sector funding and other expressions of community support.”

CHIN contributed to these priorities and strategic outcomes by providing support for the creation of digital heritage content through the VMC Investment Programs, and by providing access to resources on the Professional Exchange website for the creation and preservation of digital heritage.

### **Alignment with Government of Canada Priorities**

The document review concluded that the objectives and activities of CHIN were also aligned with federal government priorities. The Government of Canada’s “*A vibrant Canadian culture and heritage*” strategic outcome, as outlined in the Treasury Board’s *2008-2009 Canada’s Performance Report*, stressed the importance of cultural and heritage institutions in developing stronger communities. Further evidence of alignment with federal government priorities was found in speeches from the Throne (2008 and 2011) and the 2012 federal budget:

- The Speech from the Throne 2008, stressed the importance of cultural creativity and innovation for Canada’s future by stating, “Cultural creativity and innovation are vital not only to a lively Canadian cultural life, but also to Canada’s economic future;”
- The Speech from the Throne 2011 stressed the government’s commitment to supporting innovation and development of digital infrastructure and skills development by stating that the government “will also release and implement a Digital Economy Strategy that enhances digital infrastructure and encourages Canadian businesses to adopt digital technologies and provide digital-skills training for their employees and new hires”;
- Budget 2012, highlighted the importance of Canadian museums and heritage institutions in supporting economic development, quality of life for the Canadian public and job creation by stating, “the Government recognizes that arts and culture is an important generator of jobs and growth... The Government believes that supporting the arts is essential to supporting

Canada's economy and quality of life and will continue strong support for Canadian culture... Canadians value museums, the stories they tell, the collections they house, and the role they play in preserving culture. Because of this, Economic Action Plan 2012 will maintain funding for Canada's national museums."

### 4.3. Core Issue 3: Alignment with Federal Roles and Responsibilities

#### Is CHIN aligned with departmental and federal roles and responsibilities?

##### KEY FINDINGS

All lines of evidence demonstrated that support for professional development in the digital realm and digitization at museums and heritage sector is an appropriate role for the federal government.

CHIN is well positioned to support Canadian arts and heritage organizations in implementing digital technology to create, manage, present and preserve Canadian digital heritage content.

There are a number of federal and provincial government and non-profit sector programs in Canada that have objectives similar to those of CHIN. For the most part CHIN complemented, rather than duplicated or overlapped, other programs and initiatives.

However, as the nature and scope of CHIN's professional development activities fall within the digital realm, there may have been some overlap with professional outputs and activities produced by other similar programs.

The federal government has a clear role and responsibility to support digital content management, innovation and research on a national scale, promote skills development particularly as it relates to digitization, innovation and research, encourage information sharing in the heritage sector, celebrate Canadian culture and heritage, and contribute to the development of Canadian identity.

In 2010, the Government of Canada released a *Consultation Paper on the Digital Economy Strategy for Canada* According to the Consultation Paper, "the Government of Canada must play a leadership role to galvanize all sectors of the economy in order to achieve the shared goal of making Canada a global leader in the digital economy."<sup>12</sup> To achieve this, the Consultation Paper highlights the need for the federal government to take actions to develop the digital skills of Canadians across the workforce as well as to support "[m]ore investments ... to provide online access to Canadian content, build next generation networks, and acquire the skills and capabilities that will sustain Canada's future prosperity, quality of life and

<sup>12</sup> Government of Canada, *Improving Canada's Digital Advantage: Consultation Paper on a Digital Economy Strategy for Canada*, 2010.



*competitiveness*”. These three areas related to accessibility of Canadian content, network building and skills development are aligned with the direction of activities and programming implemented through CHIN.

PCH, with its wide-ranging responsibilities for “Canadian identity and values, cultural development and heritage” is the organization best positioned to support Canadian arts and heritage organizations in implementing digital technologies to preserve Canadian digital heritage content.

### **Complementarity, Overlap and Duplication of CHIN with Other Programs**

An analysis of other federal and provincial programs with objectives similar to CHIN’s as identified by key informants, found that CHIN generally complements rather than overlaps or duplicates these programs, as they tend to have different target groups and activities. This finding was supported by key informants, the majority of whom saw no overlap or duplication. However, as the nature and scope of CHIN’s professional development activities fall within the digital realm, there may be some overlap with professional development outputs and activities produced by other similar programs.

Programs offered by PCH, such as the Museums Assistance Program (MAP), and by the Canadian Conservation Institute (CCI) provide financial support for professional development and research and knowledge dissemination to Canadian museums and heritage institutions. Moreover, the Canadian Museum Association (CMA) is a national organization with the main goal to advocate for the advancement of Canada’s museum sector both within Canada and abroad. CMA conducts advocacy work and provides support for professional programs, networking opportunities or training, and research and knowledge support to the museum community, among other services.

Similarly, there are provincial museum associations (PMAs) in each province which provide professional development and networking opportunities for museum and heritage staff. There are also several provincial programs such as the BC History Digitization Program, the BC Aboriginal Audio Digitization and Preservation Program, and the Saskatchewan History Online Project that focus on building capacity and providing support to museums, heritage and art institutions to digitize their content.

The governments of several provinces offer programs (e.g., Support for Heritage Projects by the Newfoundland and Labrador, Department of Tourism, Culture and Recreation; the Community Cultural Partnership Program by the Prince Edward Island, Department of Tourism and Culture; Museum - Professional and Organizational Development Grant, New Brunswick, Department of Tourism, Heritage and Culture; and the BC History Digitization Program) specifically designed to address the needs of the arts and heritage sector. These programs fund a

wide range of initiatives including those related to digitization and capacity development.

CHIN mostly complements other programs and initiatives. Most other similar programs (e.g., MAP, CCI) are focused on the overall development of museums and heritage institutions and do not have a specific focus on digital issues, whereas other programs that do have a focus on, for instance, digitization (e.g., BC History Digitization Program, BC Aboriginal Audio Digitization and Preservation Program, and Saskatchewan History Online Project) are implemented in specific regions and/or provinces and do not have a national focus.

Many similar programs also have different mandates and activities. For example, Library and Archives Canada (LAC) supports the preservation and accessibility of Canada's archival heritage and its mandate does not include museums. The CMA and PMAs represent Canadian museum professionals and work for the advancement of the Canadian museum sector through advocacy and support. Rather than duplicating CHIN's programs, these programs complement the activities of CHIN by directing their members and affiliates to CHIN's resources and services, using CHIN as a guideline for standards and practices, and working in collaboration with the program. Many other provincial funding programs such as Société de développement des entreprises culturelles (SODEC) complement CHIN.

The majority of the key informants saw no overlap or duplication between the objectives and activities of CHIN and programming implemented under the other programs. Among key informants, other stakeholders were more likely to report no overlap or duplication compared to PCH key informants. As part of the key informant interviews, representatives of other similar programs were asked to comment on the extent to which their programs and services were aligned with and complemented the activities and objectives of CHIN. All representatives indicated that their programs were aligned with activities and objectives of CHIN, and 80% indicated that the mandate and activities of their programming complemented rather than duplicated or overlapped with the objectives and activities of CHIN. According to representatives of other similar programs, they constantly worked in collaboration with CHIN to ensure that their services and programs complement rather than overlap or duplicate CHIN. These programs accessed services, training and resources provided by CHIN, upgraded and integrated digital technologies into their collections, and relied on the research conducted by CHIN to make important decisions.

As part of the evaluation, a review of training and capacity building opportunities offered for representatives of Canadian museums, heritage and art institutions was conducted. Of the programs reviewed, some incorporated training or capacity building support specifically related to digital topics. The comparative review of those programs with the types of training delivered by CHIN from 2008-09 to 2012-13 found no obvious overlap or duplication. The exceptions were some of the workshops delivered at the CMA National Conference in 2014, which focused on

museums and social networks, and which had many similarities with social media related training and workshops developed by CHIN.

However, 28% of key informants indicated that the types of activities implemented by some of the similar programs (e.g., MAP, CCI, BC Arts Council) may overlap slightly with CHIN activities. As the nature and scope of CHIN's professional development activities in the digital realm are very broad, some of the activities and outputs, such as training and workshops, may overlap with professional development outputs and activities produced by other similar programs.

## 5. Findings - Performance

The following sections present the major evaluation findings related to performance: effectiveness and efficiency and economy.

### 5.1. Core Issue 4: Achievement of Expected Outcomes

<b>To what extent did CHIN achieve its expected outcomes?</b>
<p><b>KEY FINDINGS</b></p> <p>CHIN was able to reach out to a large number of representatives of Canadian museums and heritage institutions and provide them with a range of learning and collaborative opportunities. However, the need for professional development opportunities in the museum and heritage sector is much greater than the availability of services and programming provided by CHIN.</p> <p>CHIN has enabled Canadian museums and heritage institutions to create digital history and heritage content but needs to increase its visibility to improve accessibility to professional development opportunities and increase the scale and amount of resources and training offered.</p> <p>CHIN has made digital history and heritage content available to Canadian and international audiences. However CHIN's effort to make digital heritage content available to Canadian and international audiences could be improved by upgrading design and content and using a more targeted approach for marketing.</p> <p>Canadian and international audiences accessed content presented by heritage institutions. However the website navigation and search functions were difficult to use, the content was not adequate or sufficiently diverse.</p>

#### **Provision and Use of Learning and Collaborative Opportunities**

As shown in the table below, over the period covered under the evaluation, CHIN launched 54 professional resources, which were accessed 2.2 million times by various internet users, and organized 113 in-person workshops, events and meetings which were attended by more than 2,100 professionals representing museum and heritage institutions across Canada. The professional development publications and resources covered a wide range of issues faced by heritage institutions, including handling of intellectual property issues, conducting market research and building marketing strategies, increasing their institutions' online presence and using online tools to measure success and reach out to larger audiences, using social networks, using economic impact models for the art and culture sector, accessing funding from various sources, using 3D technologies, digitizing museum collections, signing

digital licensing agreements, and addressing various technical issues such as digital asset management and cataloguing using mobile technology. Other issues and areas covered by the resources produced by the program included mobile museums standards, written communications, working with the community, and digital preservation.

Most in-person sessions covered subject areas such as contributing content to Artefacts Canada, Teachers' Centre in classrooms, use of social media in museum operations, collection management, services and programs offered by CHIN, use of mobile devices, introduction to museology and development of digital content and digital story telling.

**Table 4: CHIN Professional Development Component Major Outputs**

Outputs	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	Total
Professional resources launched	4	9	20	17	4	54
Visits to CHIN's corporate and Professional Exchange websites <sup>13</sup>	-	-	481,665	768,394	927,347	2,177,406
In-person sessions delivered in Canada	32	22	24	8	27	113
In-person sessions delivered in other countries	2	1	1	-	-	4
Participants attending in-person sessions <sup>14</sup>	-	469	1,003	181	513	2,166

Source: CHIN's annual reports, Departmental Performance Reports and Program data

Between 2010-11 and 2012-13, the number of unique visitors to CHIN's corporate and Professional Exchange websites more than doubled (from 288,824 in 2010-11 to over 617,395 in 2012-13). Ninety-seven percent of visits to the websites were accessed from the desktop and 4% from mobile devices. Each visitor viewed an average of 4 pages and spent an average of 5.4 minutes. Direct visits (bookmarks, links in emails, address bar, etc.) account for the origin of approximately 22% of visits. Sixty-two percent of visits originate from within Canada, although the percentage of visits from outside of Canada has increased over the years (from 22% in 2010-11 to 43% in 2012-13). Between 2010-11 and 2012-13, of the visits that originated from within Canada, 49% originated from Ontario, 25% from Quebec and 9% from BC.

According to the 2013 Professional Exchange survey, 62% of users visit the website

<sup>13</sup> The number of visits to online professional resources for the period 2008-09 to 2009-10 are not comparable to those from 2010-11, 2011-12 and 2012-13. Visitation statistics for the period of 2008-09 and 2009-10 include robots and other automated agents. The process for removing robots began in 2008 and lasted until 2010, leading to the creation of a new baseline in 2010-11.

<sup>14</sup> Number of participants attending in-person meetings were not recorded in 2008-09 as CHIN's performance measurement tracking had yet to be implemented, and the number of participants were not yet documented and tracked by staff

to improve their professional skills and knowledge or practices. In 2013, the top three resources accessed by users on the Professional Exchange were Jobs in Heritage (48%), Artefacts Canada (36%) and Collections Management (30%). In addition, 35% and 38% of users were very satisfied, while 42% and 38% were somewhat satisfied with the overall content of the website in 2011 and 2013, respectively.<sup>15</sup>

In 2011, 49% of visitors to the website and in 2013, 58% of visitors indicated that they were able to find what they were looking for on the website, and 36% of visitors in 2011 and 27% in 2013 indicated that they were partially successful in finding what they were looking for on the website.

A majority of key informants and most expert panelists stated that CHIN provided opportunities to heritage institutions and workers to improve their knowledge, skills and practices in the creation, presentation, management and preservation of online and other digital content. Among key informants, PCH representatives (58%) were more likely to state that CHIN has provided opportunities in these areas compared to other stakeholders (53%). According to key informants and expert panelists, CHIN provides a range of learning opportunities, and the resources and materials provided by CHIN are useful and relevant to heritage workers. Some key informants also noted that the Professional Exchange website has been particularly useful in helping museum and heritage institutions improve their knowledge and skills on all aspects of digital content management. A few key informants also considered in-person training and workshops, as well as CHIN's efforts to facilitate sector-wide collaboration on professional development, as factors contributing to its success.

A majority of key informants indicated that CHIN ensured the availability of digital heritage content to Canadian and international audiences. Key informants noted that the reasons for accessing content presented by heritage organizations through CHIN's resources included: CHIN being regarded as a trusted source, nationally and internationally; interest in learning about Canadian history and heritage; and easy access through the VMC Portal to a variety of heritage content.

The evaluation showed that CHIN needs to improve its promotional and awareness building activities to enhance the visibility of its resources and services and be more proactive in reaching out to members of the heritage community through various methods such as in-person workshops, events and meetings. Doing so would increase its reach, build awareness of its services among heritage communities, and establish more direct contacts and relationships with museum and heritage institutions to facilitate access and use of its tools and resources.

Several sources, including key informant interviews, surveys and the expert panel found that there is limited awareness and use among representatives of target groups of the range of tools and resources that CHIN's professional development components offer. According to key informants, CHIN should be more proactive

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<sup>15</sup>CHIN Professional Exchange Comparative Survey Report, June 28, 2013

and should increase its reach, build awareness of its services among heritage communities, and establish more direct contacts and relationships with museums and heritage institutions to facilitate use of its tools and resources.

The results from the 2011 CHIN Member Satisfaction survey showed that 68% of responding member institutions had accessed the corporate site over the course of the previous year, while only 18% had accessed the Professional Exchange website. It is important to note that professional online resources were delivered solely through CHIN's corporate website until 2010-11. CHIN started to deliver most of its professional online resources through the Professional Exchanges (PE) website when it was launched in 2010. This may be the reason for the low access of the PE website.

The top three resources accessed on the corporate site were: information on the VE program (77%), information on the CM program (63%) and the CHIN News section (56%). Of those who had accessed the PE website, 84% accessed resources on Collections Management and 62% on Digitization. These results indicate that CHIN's member institutions use resources provided on the corporate website and the PE website.

The need to improve the visibility of the CHIN's services and resources and to clarify the role of the PE website was also noted by 15 website visitors (5%) during the PE survey conducted in 2013. The survey participants noted that the role and usefulness of the PE website and or CHIN were not always clear or that the site needed to be promoted on a greater scale. A few respondents commented on the need for improved search functions on the Professional Exchange website and provided suggestions for improving the search function in the Jobs in Heritage section and Artefacts Canada.

As part of the 2011 VE survey, participants were also asked to rate the importance of CHIN to continue to expand its resources in different areas. According to the survey, the majority of respondents (ranging from 56 – 72%) rated the importance of expanding all resources as important or very important (i.e., Collections Management, Digital Preservation, Digitization, Intellectual Property, Standards and Best Practices and Web and Tech Guidelines).

Survey participants were also asked to rate the potential usefulness of some of the emerging digital technologies that could be incorporated into the PE website. Respondents rated exploring Cultural tourism and the web (47%), Mobile Technologies (39%), Semantic Web (24%) and Visual Data Analysis (37%) as either very useful or extremely useful. These results suggest a continued need for expansion of CHIN's professional resources supporting the creation, management, presentation and preservation of digital heritage content, as well as expansion of new technologies influencing the heritage sector.

CHIN needs to consider strategies to better engage CHIN members. According to

the results of the CHIN Member Institution Satisfaction Survey (2011), CHIN members considered the site's content as trustworthy, and providing information that they needed. However, the members were less satisfied with site's visual appeal and navigation and search function – ease of finding the content that they were looking for. Suggestions for improvements provided by CHIN members included:

- improving the search functions on the Professional Exchange website;
- clarifying the role of CHIN's professional development activities;
- improving communication with members;
- building cooperative relations; and,
- better engaging the members in CHIN's activities.

Of the 617 VMC website visitors surveyed, 84 provided suggestions as to how the VMC website could be improved. The most frequently noted suggestions included recommendations to improve the search function to facilitate access (16); improve the visual presentation and site layout (13), add more content (13), increase the marketing of the VMC (8), make the site more interactive (7) and provide links to other relevant exhibits/sites (4).

Among the reasons for the limited use of the tools and resources noted by some expert panelists were that financial constraints and a lack of clear focus have made it difficult for CHIN to adapt to rapidly changing technological advancements. For example, some of the tools and resources developed by CHIN are already outdated, and the program is having difficulties remaining at the forefront of digital initiatives in the sector. Expert panelists noted that CHIN needs to ensure the content and delivery methods of its training and resources are continuously updated and adjusted to respond to the changing needs and conditions in the sector.

In CHIN Teacher's Centre Survey (2012) with 106 teachers, administrators, professors, students, and museum educators who are stakeholders of the CHIN Teachers' Centre, respondents provided recommendations for improving the Teachers' Centre website. Respondents ranked the recommendations among several options. The rankings are shown in the table below.

**Top Three Recommendations for Improving the Teachers' Centre**

<b>Topic</b>	<b>Rank 1</b>	<b>Rank 2</b>	<b>Rank 3</b>	<b>Total</b>
Allow for individual pieces of content (e.g., images, AV files)	7	6	5	18
Mobile friendly content	2	6	2	10
Print friendly content	4	7	11	22
Live webinar/chat with experts	2	4	2	8
Navigation	9	1	4	14

### **Creation of Digital History and Heritage Content**

Over the five years covered by this evaluation, about 250 projects were funded through VE and CM with a total investment just over \$11 million. VE funded a smaller number of

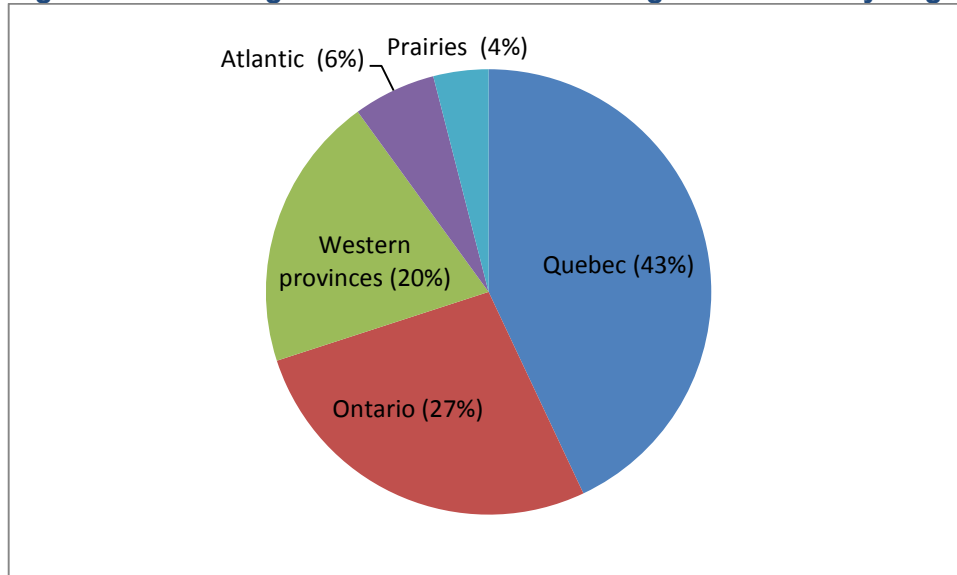


projects of about 50 with a significantly larger funding portfolio of about \$10 million, while CM funded almost 200 with a total budget nearly \$1 million in investments. Almost half of the CM projects consisted of additional investments to the initial standard investment.

## Virtual Exhibits Investments

In terms of the type of VE funded projects, Virtual Exhibits (86%) were the most common primary production type, while Curricular Resources (61%) were the most common secondary production type of funded projects. Other primary and secondary production types included virtual tour, games and other resources. The projects were invested throughout Canada as described below.

**Figure 1: Percentage of Virtual Exhibit Funding Distribution by Region**



Source: Program documents

As the figure below shows, 47 and 239 VE and CM exhibits were launched for the period covered in the evaluation.

**Figure 2: Virtual Museum Investment Programs Launched**

	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	TOTAL
Virtual exhibits launched	7	14	12	8	6	<b>47</b>
Community Memories exhibits launched	68	45	36	40	50	<b>239</b>

Source: Program documents

Of the key informants who responded, almost all (96% of all key informants, 89% of PCH officials and 100% of other stakeholders) indicated that CHIN has supported Canada's museums in the creation of digital history and heritage content. According to key informants, the resources, tools and expertise provided by CHIN helped to improve the ability of museum professionals to create online heritage content; and the VMC Investment Programs supplied the necessary funding for creating digital museum collections content. Some also noted that CHIN provided museums with an online platform to present and promote their exhibits, which is especially important

for the visibility of smaller museums.

### **Improvements to Professional Knowledge, Skills and Practices**

Since the 2010-11 fiscal year, CHIN has tracked the effectiveness of the in-person sessions through a short written questionnaire on the quality of the session and reported improvement of knowledge, skills and practices. This questionnaire was administered at the end of the in-person session, thus the reported improvement is immediately following the learning session. Majority of participants reported improvement in their knowledge skills and practices.

Eighty-four percent of key informants indicated that CHIN had improved knowledge, skills and practices in the creation, presentation, management and preservation of online and other digital heritage content among CHIN's stakeholders. Among key informants, other stakeholders (91%) were more likely to report improvement in this area compared to PCH officials (75%). Key informants noted that CHIN had provided professional development resources and tools, in-person training and workshops and opportunities for knowledge-sharing, all of which have assisted representatives of Canadian museums and heritage institutions to improve their knowledge, skills and practices in all areas of the digital realm.

Similarly, 74% of VE Investment Program funding recipients indicated that participation in the program has contributed to the development of skills and/or educational expertise in their institution to support the production of virtual exhibits.

Respondents to the survey of VMC funded project recipients reported that participating in the program:

- helped them to increase their online presence (87%);
- helped them reach out to new audiences across Canada (69%);
- strengthened their capacity to create digital content for the Web (64%);
- increased their online visits (61% );
- increased the number of new audiences reached in their communities (56%);
- strengthened exiting partnerships (41%);
- led to the development of new partnerships (33%); and,
- helped them reach new audiences outside of Canada (31%).

In 2011, 55% of representatives of target groups who visited the Professional Exchange website with the intention of acquiring new knowledge indicated that they were successful in improving their skills and knowledge as a result of visiting the website. In 2013, the percentage of Professional Exchange visitors who were successful in increasing their skills and knowledge increased to 72%.

Nevertheless, a few external stakeholders (27%) noted that CHIN had not been able to achieve the outcome of improving knowledge, skills and practices to a certain extent, for a variety of reasons, such as the demand for professional development and knowledge and skills building being much greater than the resources CHIN is able to offer. According to key informants, in order to have an impact in this area,

CHIN needs to increase the visibility of CHIN resources and services, improve accessibility to professional development opportunities and increase the scale and amount of resources and training offered.

### **Availability of Digital Heritage Content to Canadian and International Audiences**

CHIN used two major methods to make digital heritage content available to audiences: the first was by providing VMC program funding to Canadian museums and heritage institutions to develop online exhibits, and the second was by presenting content on the Artefacts Canada website. There has been a steady increase in the total number of online exhibits available as a result of investments through the VMC Investment Programs, growing from 486 in 2008-09 to 653 in 2011-12.<sup>16</sup> In the 2011-12 fiscal year, 80% of exhibits were related to arts and leisure, 76% were related to history and society, and 57% reflected science and technology.

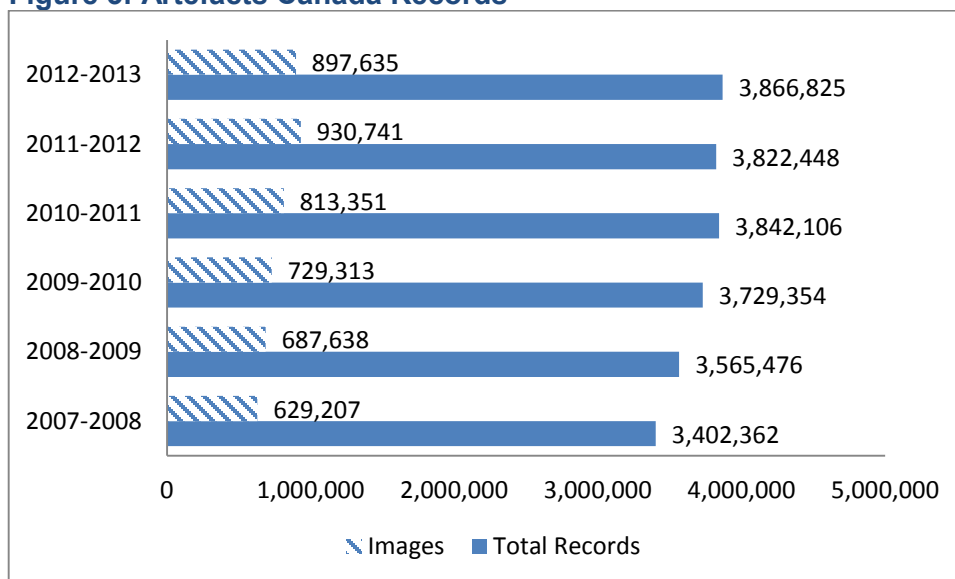
CHIN also increased the number of Canadian museums and heritage institutions contributing digital content to Artefacts Canada. As of 2011, the number of Canadian museums and heritage institutions contributing digital heritage content to Artefacts Canada was 460, accounting for 31% of all CHIN membership.<sup>17</sup> As demonstrated in the following table, by the 2012-13 fiscal year, approximately 3.9 million heritage records and 898,000 arts and heritage images were made available to Canadian and international audiences through Artefacts Canada. As shown in the figure below, the number of heritage records available through Artefacts Canada increased by 14% and the number of available arts and heritage images increased by 43%.

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16 CHIN, Year in Perspective 2011-2012

17 The 2008-2011 CHIN Annual Report

**Figure 3: Artefacts Canada Records**



Source: Program documents

As demonstrated in the following table, over the three year period from the 2010-11 to 2012-13 fiscal years, through support provided by CHIN, Canadian museums and heritage institutions launched 1,109 new multimedia learning resources and a total of 1,773 learning resources were available to Canadian and international audiences.

**Table 5: Learning Objects Launched by CHIN from 2010-11 to 2012-13**

Indicators	2010-2011	2011-2012	2012-2013
Learning Objects (i.e., multimedia learning resources) launched	816	183	110
<i>Total number of Learning Objects</i>	1,480	1,663	1,773
Recorded percentage of time the VMC portal was online	99.37%	99.99%	99.89%

CHIN has increased the availability of digital heritage content through its growing use of social media, its continuing online newsletter campaigns and by optimizing its web properties and content for mobile use. CHIN created specific content for social platforms, such as video shorts and thematic image galleries, and is active on Twitter, Facebook, LinkedIn and YouTube. At the time of this evaluation, through its Twitter account, CHIN reached almost 10,000 followers on six profiles (CHIN, VMC, VMC Teachers' Centre), had almost 2,000 fans over four Facebook pages (VMC, VMC Teachers' Centre), reached nearly 600 museum professionals through its LinkedIn discussion group, and had more than 100 videos available in its YouTube account with hundreds of video views per week.

As demonstrated in the following table, the total number of teachers registered in the VMC Teachers' Centre reached 3,271 in the 2012-13 fiscal year and 58,943 VMC related newsletters were distributed to representatives of the target groups over the last three years of the evaluation. The percentage of newsletters accessed by

representatives of the target groups ranged from a low of 21% in the 2010-11 fiscal year to a high of 56% in the 2011-12 fiscal year.

**Table 6: Number of Teachers Registered in the VMC Teachers' Centre and VMC Related Newsletter**

Indicators	2010-2011	2011-2012	2012-2013
New teachers registered in the VMC Teachers' Centre	746	675	418
Total number of teachers registered in the VMC Teachers' Centre	2,178	2,853	3,271
Number of VMC-related newsletters delivered	27,011	16,586	15,346
Percentage of VMC-related newsletters opened**	21%	56%	29%

\*\* Results for 2012-13 do not include duplicate newsletter opens, only unique opens, and is therefore not comparable to the 2011-12 result. Henceforth, duplicate numbers were eliminated.

As part of the survey, VMC program funding recipients were asked to rate the accessibility of their exhibits using search engines such as Google and the VMC website on a scale from 1 to 5, where 1 is strongly disagree, 3 is neither agree nor disagree, and 5 is strongly agree. Seventy percent of funding recipients indicated that they strongly agreed or somewhat agreed that it was easy to locate their exhibits on the VMC website, 77% agreed or somewhat agreed that it was also easy to find their exhibits using a search engine (e.g., Google). According to survey participants who provided lower ratings (ratings of 3 or less), it is somewhat difficult to locate a specific exhibit on the VMC site without knowing the actual name of the exhibit. Therefore, they prefer to look for exhibits through search engines such as Google rather than use the VMC website.

Eighty-seven percent of funding recipients indicated they have undertaken promotional efforts to build awareness of their exhibits. Among the top awareness building and promotional strategies were press releases (61%), social media (60%); presentations (47%), e-newsletters (46%), email marketing (43%) and media events and printed and promotional materials (37%).

The survey of VMC website visitors demonstrated that representatives of target groups learned about the VMC through search engines (40%), links from other websites (26%) and through academic institutions (10%), newsletter (10%) word of mouth (7%), social media (4%) and newsletters (4%).

A majority of key informants (70% or 19/27) indicated that CHIN was able to make available digital history and heritage content to Canadian and international audiences. Other stakeholders (73% or 11/15) and PCH representatives (67% or 8/12) provided similar ratings. According to key informants, the VMC portal, which serves as a single destination for heritage information, offers easy access to digital content for all audiences. Funding provided by CHIN through the VMC Investment Programs has contributed to the creation of digital history and heritage content. Without such support, many smaller institutions would not have the means to

develop digital content. A few key informants (17% or 4/23), mainly other stakeholders (3), noted that CHIN's efforts to make digital heritage content available to Canadian and international audiences could be improved by upgrading the VMC website design and content and using a more targeted approach for marketing and building awareness of CHIN's products and digital exhibits.

### **Access to Content by Canadian and International Audiences**

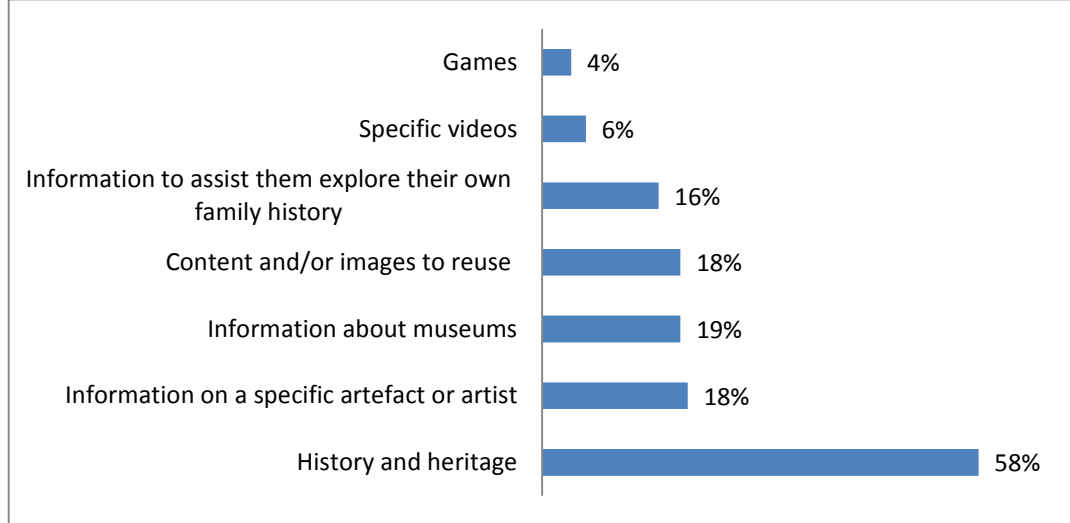
Between 2010-11 and 2012-13, about 2.6 million individuals across Canada and the world visited the VMC website every year searching for specific information or content. Half of all visits to the website originated from Canadian locations, and another half from international audiences. VMC content was accessed from 200 countries, indicating the success of the program in reaching out to international audiences. Most visits from Canada originated in Ontario, Quebec and British Columbia.

More than 2.1 million visitors were recorded at the VMC website in the 2010-11 fiscal year, 2.5 million visitors were recorded in the 2011-12 fiscal year and 2.4 million were recorded in the 2012-13 fiscal year. The number of visits also ranged from 2.4 million in 2010-11 to 2.7 million in the 2012-13 fiscal year. Visits to the VMC portal increased by 13% between 2010/11 and 2012/13. Over the three year period covered under this evaluation, the number of visitors and page views did not change significantly. The visitors viewed an average 5 pages per visit and spent about 6 minutes. The vast majority of visitors accessed the VMC from a desktop computer (over 90%), although the percentage of those who are accessing the website through a mobile device grew from 1% in 2010-11 to 8% in 2012-13. Search engines and other websites were the most common avenues through which visitors accessed the VMC. Direct visits (e.g., bookmarks, links in emails, address bar, etc.) were accountable for the origins of approximately 20% of visits.

In the 2012-13 fiscal year, the virtual exhibits created through CHIN's support received an average of 11,000 visits; the exhibits created through CM Program support received an average of 450 visits; each museum profile at the Museum of Canada Directory received an average of 35 visits; each news item posted on the VMC website received an average of 56 visits; and each learning object posted in the VMC Teachers' Center received an average of 183 visits.

About two-thirds of VMC website visitors surveyed indicated that they were seeking something specific during their visit.

**Figure 4: Most Commonly Sought Information on the VMC website**



Source: Program Data

Of the 320 survey participants who visited the website searching for specific information, 38% were fully able, and 30% were partially able to find the information and 32% indicated that they were not able to locate the information they sought. Those who did not find information they needed were mainly looking for specific historical or heritage information, or a photo or image and/or experienced problems with the search function on the VMC website.

As shown in Figure 4 and according to the VMC visitors survey, the most commonly sought after information included information on history and heritage, family history, museums and content and/or images to reuse.

As part of the surveys, VMC website visitors were asked to rate their level of satisfaction with various components of the VMC website, on a scale 1 to 5, where 1 is not satisfied at all, 3 is neither satisfied nor dissatisfied and 5 is very satisfied. Survey participants provided an average rating of about 4 to indicate their satisfaction with the Museums in Canada, virtual exhibits, the Image Gallery, the Teachers' Centre and the News Section. Survey participants who provided lower ratings (ratings of 3 or less) noted that the website navigation and search functions were difficult to use, the content was not adequate or sufficiently diverse, the specific information that they were searching for was not found, some images did not have the necessary high resolution, and the labelling of the images was not satisfactory.

According to results of a pop-up survey of VMC website visitors, the content of the website is trustworthy, the site is visually appealing, includes a wide range of subjects and easy to access and navigate through. Survey participants were asked to rate various aspects of the VMC website using a scale from 1 to 5, where 1 is strongly disagree, 3 is neither agree nor disagree, and 5 is strongly agree. They



provided the following average ratings for various aspects of the website and its content:

- the site provides trustworthy content (4.4);
- the content of the VMC website included a wide range of subjects (4.2);
- content was available through a variety of multimedia (e.g., images, audio, video) (4.1);
- had the necessary information that they were looking (3.9) for;
- was visually appealing (3.9);
- ease of finding what they were looking for (3.8); and,
- ease of navigation (3.8).

According to key informants, Canadian and international audiences are interested in digital content presented by heritage organizations through CHIN. Reasons for this interest include CHIN's reputation as a trusted source of information on Canadian heritage (41%); increased domestic and international interest in learning about Canada and its history and heritage (33%); and the growing online presence, availability and accessibility of heritage content provided by the VMC Portal and other virtual exhibits supported by CHIN (30%) Both groups of key informants (PCH representatives and other stakeholders) provided similar responses.

## **Unintended Outcomes**

A number of unintended outcomes were generated by CHIN's programming. Positive outcomes were noted in terms of:

- Creating a foundation on which museums and heritage institutions were able to build their digital content (5/7 expert panellists). The Virtual Exhibits and other similar projects created with CHIN's support were further developed and improved by recipients. Museums and heritage institutions were inspired by Artefacts Canada to develop their own in-house collections databases and virtual exhibits.
- Increased profile of heritage institutions in the communities, increased community participation and partnership, and increased knowledge about the historical significance of various buildings and landmarks in the communities. Some funding recipients indicated that participating in CHIN activities increased the overall profile of the museums and heritage institutions in their respective communities (31% of funding recipients), contributed to community awareness of their activities (28%), and through the process, increased their own knowledge of historical significance and heritage of their communities (6%).
- Increased overall profile and visibility of Canadian heritage, museums, museum associations and other heritage institutions. Some key informants noted that the program helped to improve the overall profile and visibility of Canadian heritage, museums, museum associations and other heritage institutions (32%); facilitated sector-wide collaboration, knowledge-sharing and networking amongst professionals (12%); and established standards and provided new technology and expertise in the heritage community (12%).

- Increased in-person attendance at museums and heritage institutions. Thirty-six percent of VMC website visitors indicated definitely and 33% indicated probably that visiting website and viewing virtual museums will increase the likelihood that they will visit a museum in-person in the near future.

However, negative outcomes were noted in terms of the significant staff time spent in meeting requirements (e.g., reporting, technical, financial, etc.) under the program and addressing technical issues and challenges associated with virtual exhibits. A few funding recipients of the VE Investment Program noted that they spent significant amounts of staff time to meet requirements under the program and address technical issues and challenges associated with virtual exhibits.

### **Strengths and Weakness of Program Design**

Key informants and expert panelists highlighted a number of areas of strength and weakness of CHIN's current design, which impact on CHIN's effectiveness. Areas of strength included:

- CHIN's affiliation with the federal government which lent extra credibility to the tools and resources prepared by CHIN and the content provided on CHIN's website;
- CHIN's national scope, which enables the organization to take a leadership role across provinces;
- CHIN's membership, which facilitates linkages, cooperation and knowledge-sharing among heritage organizations.
- CHIN's contracting and funding structure, which enables an effective, cost-efficient and fair selection process; and
- the extent of expertise and resources created within CHIN which are made available to museum and heritage institutions, the easy accessibility of CHIN's online resources, and an easily accessible funding mechanism to support small museums (CM Program) and large organizations.

Areas of weakness that affect CHIN's effectiveness identified by key informants and expert panelists included:

- limited interactions and engagement with its members, the academic community and other stakeholders, impacting the effectiveness of the services and programming delivered;
- requirement to comply with government-wide standards and directives, leading to delays in technological updates;
- lack of clarity in the role of some of CHIN's products; and,
- Outdated technology and website.

Funding recipients were satisfied with most design and delivery aspects of CHIN's VMC Investment Programs. As part of the surveys, VMC funding recipients were asked to rate their level of satisfaction with various design and delivery aspects of the program. The results demonstrated that funding recipients of the CM Program were satisfied with clarity of instructions or information provided, user friendliness

of the application process, file formats accepted, and visual appeal and were somewhat satisfied with the extent to which software was up-to-date with current technologies.

Recipients of VE Investment Program funding were also satisfied with the availability of services in the official language of their choice, the quality of the services that they received from CHIN staff, the availability of information about the VMC Investment Programs, and the clarity of the program and proposal guidelines, and were somewhat satisfied with the proposal submission process overall, the transparency of the proposal review process, and the timeliness of the application review and approval process. Survey participants who were less satisfied noted that the processes of addressing technical issues were very lengthy and they did not receive adequate support from CHIN; that program and/or technical requirements and expectations changed several times during the project implementation, which created confusion; that the administrative burden to meet the program requirements was high, which created problems for funding recipients; and lastly, that the timeline of the application review and approval process was too long.

## 5.2. Core Issue 5: Demonstration of Efficiency and Economy

### Are there more efficient and economical ways to deliver CHIN and achieve the same results?

#### KEY FINDINGS

The variance between CHIN's budgeted resources and the actual program expenditures was minimal. The ratio of VMC Investment Programs operational costs to program expenditures was 23%. Given that much of the operational costs are dedicated to collaborative work with the successful applicants after the contract is awarded, the operational costs of VMC cannot be compared to Grant and Contribution programs. Program's recipients leverage funds from other sources to develop and launch exhibits.

There is an opportunity to improve the design and delivery of the professional development component since the transfer of the VMC program in September 2014 and to use limited resources efficiently notably by increasing partnerships and ensuring CHIN is at the forefront of technical advancements. CHIN could also consider aligning program activities with existing PCH programs with a professional development component such as the Museum Assistance Program (MAP) and the Canadian Conservation Institute (CCI).

The TBS *Policy on Evaluation* (2009) defines the demonstration of economy and efficiency as an assessment of resource utilization in relation to the production of outputs and progress toward expected outcomes. This assessment of economy and efficiency is based on the assumption that the program has standardized performance measurement system and that financial systems use activity-based

costing. Given the lack of departmental financial data on program outputs and outcomes, as well as incomplete program-level financial reporting, this review could not conduct an assessment of resource utilization with regards to the production of outputs and expected outcomes. Consequently, the evaluation was only able to provide limited evidence with regard to utilization of program resources.

The actual expenditures incurred by the program were very similar to the program budget. As demonstrated in the following table, a total of \$51.4 million was budgeted for CHIN over the five year period from 2008-09 to 2012-13. The actual program expenditures during the same period totalled \$51.8 million. The difference between the actual expenditures and the program budget ranged from -4% in the 2012-13 fiscal year to +7% in the 2010-11 fiscal year and accounted for less than 1% over the five-year period covered under this evaluation.

**Table 7: Comparative Review of the CHIN Budget and Actual Expenditures**

Resources	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	Total
A. Budgeted resources	\$11,408,652	\$11,056,565	\$10,950,086	\$9,926,841	\$8,017,393	<b>\$51,359,537</b>
B. Actual expenditures	\$11,685,761	\$11,334,331	\$10,244,856	\$10,175,934	\$8,350,205	<b>\$51,791,087</b>
C. Difference (C=A-B)	-\$277,109	-\$277,766	\$705,230	-\$249,093	-\$332,812	<b>-\$431,550</b>
D. Ratio (D=(A-B)/B)	-2%	-2%	+7%	-2%	-4%	<b>-1%</b>

*Source: Program Data*

As shown in Table 8, the ratio of operational cost to direct investment cost for the VMC Investment Programs averaged 23% over the five year period covered under this evaluation. The total cost of the program was \$14.6 million with \$3.3 million spent on staff salaries, employee benefits, board expenditures and other program operational costs. VMC staff was responsible for launching and managing calls for proposals, pre-screening submitted proposal, conduct quality assurance of deliverables, and maintain ongoing relationship with museums in relation to requests for further investments and technical assistance. Due to the technical requirements and commitment to provide on-going access to products via the VMC, VMC staff maintained contact with funded VMC recipients on a long-term basis. Given that much of the operational costs are dedicated to collaborative work with the successful applicants after the contract is awarded, the operational costs of VMC cannot be compared to Grant and Contribution programs.

**Table 8: VMC Investment Programs Expenditures, 2008-09 to 2012-13 (\$ Canadian dollars)**

Budget Breakdown	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	Total
A. Employee Salaries (program delivery)	482,478	421,324	382,791	445,015	358,562	<b>2,090,170</b>
B. Employee Salaries (program support)	111,658	113,890	56,261	57,202	57,852	<b>396,863</b>
C. Employee Benefits - 20%	118,827	107,043	87,810	100,443	83,283	<b>497,406</b>
D. Program Expenditures	29,771	1,317	17,890	24,313	1,037	<b>74,328</b>

Budget Breakdown	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	Total
E. Board Expenditures	50,979	60,049	45,143	48,176	42,331	<b>246,678</b>
F. Investments in Museums	2,322,626	2,531,225	2,042,240	2,586,945	1,805,039	<b>11,288,075</b>
G. Total Administrative Cost (G=A+B+C+D+E)	793,713	703,623	589,895	675,149	543,065	3,305,445
<b>H. Total</b>	<b>3,116,339</b>	<b>3,234,848</b>	<b>2,632,135</b>	<b>3,262,094</b>	<b>2,348,104</b>	<b>14,593,520</b>
I. Ratio (I=G/H*100)	25%	22%	22%	21%	23%	23%

Source: Program Data

CHIN was not able to provide a budget breakdown for the Professional Development component due to the highly integrated nature of its activities.

Some VE funding recipients leverage funds from other sources. About half (48%) of funding recipients indicated that they never requested funding from other sources. However, 40% of respondents indicated that they had received leveraged funds from additional sources. The most common sources of additional funding included municipal governments (18%), private donors (16%) and volunteers (14%). The most commonly mentioned sources of in-kind contributions were volunteers, museum/heritage institutions, educational institutions and municipal governments.

Prior to the announcement of the transfer of the VMC program to the CMH, CHIN oversaw 38 positions. In addition, 20 employees provided information and technology-related services prior to the transfer. After the transfer, CHIN will operate with approximately 14 employees with an additional five employees providing IT support.

Sixty-three percent of key informants (67% of other stakeholders and 56% of PCH representatives) noted that it is not possible for CHIN to achieve the same results at a lower cost without negatively affecting the quality or quantity of the program outcomes. Some key informants (29% of all key informants) who mentioned that the federal government could achieve the same results with lower cost noted that more could be achieved through increased efforts to work in close collaboration with provincial partners, other stakeholders, and representatives of the private sector and fine tuning certain delivery components (e.g., requiring matching contributions from VMC Investment Programs beneficiaries, improving CHIN's IT capacity).

In light of the transfer of the VMC to the CMH in September 2014, there is an opportunity to re-examine the mandate of the professional development component and to identify efficiencies through changes to the design and delivery of the program.

PCH officials and stakeholders identified opportunities to improve the design of

CHIN. As demonstrated in the following table, the most common recommendation to improve the design and efficiency of CHIN provided by key informants included updating technology and internal operational capacity, increasing its interaction with members and other partners and increasing visibility and awareness of CHIN resources and services.

**Table 9: Recommendations to Improve the Design of CHIN**

Response	PCH officials (n=13)		Other stakeholders (n=13)	
	#	%	#	%
Continuously update technology and internal operational capability to ensure CHIN is at the forefront of technological advancements	8	62%	2	15%
Increase interaction and communication with members, enhance visibility and awareness of CHIN resources and services and engage in greater collaboration with other stakeholders such as the academic community, museums.	2	15%	5	38%
Review and clarify CHIN's mandate/role, and place more focus and emphasis on the Professional Development component	3	23%	4	31%

Similarly, expert panelists noted that the design of CHIN could be improved by increasing partnerships with a broad range of stakeholders including universities and high schools, providing greater flexibility to programming to target the specific needs of member institutions, and better promoting CHIN's resources and services among representatives of the target groups.

About one-third of CM Program funding recipients and 34% of VE Program funding recipients offered comments or suggestions for improving the efficiency or effectiveness of the program. These suggestions included improvements to the functionality of exhibits for users and institutions (e.g., more responsive search and intuitive navigation, a simpler editing process, etc.), use of the latest technology and maintenance to ensure the sites, tools and programs are up-to-date, improved promotion of the program and the exhibits, improved quality of technical support provided to museums and other heritage institutions involved in the program, greater responsiveness to the needs of small institution, improvements to the visual layout and appearance of the final products, and increased maximum funding amounts.

Thirty-five percent of all key informants indicated that CHIN should continue to deliver professional development in a variety of formats, including webinars (online training), and in-person training and workshops. Other stakeholders suggested that CHIN serve as a source of expertise on digital content (3 or 21%) and play a national role in ensuring the availability and accessibility of digital heritage content (2 or 14%).

However, about half of the key informants (noted by 50% of all key informants, 42% of PCH representatives and 57% of other stakeholders) identified some alternative approaches and methods that can be more effective and/or efficient or

economical in delivering the professional development component, including increasing partnerships with museum associations and allowing the VMC Investment Programs to be administered by the CMA editorial board.

**Table 10: Alternative approaches**

Response	PCH officials (n=12)		Other stakeholders (n=14)	
	#	%	#	%
Increasing partnerships with provincial museum associations to develop and deliver tools and training (e.g., CHIN develops the tools, the CMA or the PMAs deliver the training) or partner with the private sector to assist with CHIN's IT needs	4	33%	5	36%
Allowing the VMC Investment Programs to be administered by the CMA editorial board or by the provinces	1	8%	3	21%

According to some key informants, CHIN could reach out to a greater number of target audiences with relatively lower costs by offering online training and webinars and building partnerships with representatives of the museum and heritage sector. Partnering with the private sector would result in more efficient delivery and access to more targeted expertise, while working in partnership with PMA's in the development of tools and training would lead to increased capacity to deliver training at the provincial and community level.

Expert panelists viewed working groups which allow people to work together on the same issues, in-person meetings and training sessions, and online training, resources and tools as the most effective and efficient methods of building heritage professional skills in the adoption and use of digital technologies. Of the seven expert panelists interviewed, four agreed that "active working groups" are the most effective and useful mechanisms, as they provide opportunities to improve skills and knowledge and connect with other heritage professionals. Several panelists also highlighted the importance of in-person training and sessions in professional development. Other effective methods of professional development noted by expert panelists included online training, resources and tools which provide opportunities for easy access and quick learning.

### 5.3. Other Evaluation Questions

<b>Has the program implemented the recommendations from the previous evaluation? Does performance measurement properly support the evaluation?</b>
<b>KEY FINDINGS</b>
CHIN implemented the recommendations from the previous evaluation which had a positive impact on the program.
CHIN's performance measurement system is sufficient to measure most aspects of the Program's performance.



However, the performance measurement system will need to be revised in light of the transfer of the VMC to the Canadian Museum of History and could be improved by including indicators to measure program efficiency and economy and to track long-term results of professional development programming.

## **Recommendations from Previous Evaluation**

An evaluation of CHIN was included in the Summative Evaluation of the Canadian Culture Online Strategy. The evaluation provided two major recommendations with regard to CHIN's design and delivery.<sup>18</sup> The first recommendation indicated that the department should determine the possible elements of a re-defined strategy in support of Canadian digital culture in a multi-platform environment, and the second recommendation emphasized the need for a PMS to track the success of digital interactive programming. A review of CHIN documents and files demonstrates that a number of concrete steps were taken to implement both recommendations. To implement the first recommendation, in 2010, the government created the Canada Interactive Fund (CIF), sun setted the CCO Strategy and allocated resources for the VMC directly to CHIN (Resources for the VMC have in the past flowed through the CCO Strategy and been governed by an MOU between CCO Strategy and the CHIN).<sup>19</sup> In addition, the Teachers' Centre was integrated into the VMC portal as a new feature. Other areas of improvement included: redesigning website architecture for better accessibility and creating a new technical infrastructure, adopting new Web tracking software to access the latest industry-standard best practices in statistical analysis, using new features such as a multi-faceted search engine that provides more comprehensive results, and the use of user-centred navigation. To implement the second recommendation, CHIN developed its performance measurement tools; prepared new performance indicators; developed baselines for certain indicators such as number of visits, number of CHIN members, number of VMC exhibits launched and the number of professional development resources created; and started tracking visitation statistics with new Web Analytics to filter out all non-human visits.

## **Performance Measurement**

CHIN developed its PMERS in 2010. The assessment of the document demonstrates that the PMERS includes most of the necessary components to support program management and the evaluation of CHIN. In particular, the PMERS includes a detailed description of the CHIN's background, target population and stakeholders, governance structure, and provides the CHIN logic model which outlines the expected outputs and impacts and describes the resources and budget allocated to CHIN programming. The PMERS also illustrates clear and measurable indicators, data sources and methods of data collection, the unit responsible for collecting each type of data, the frequency of data collection and the baseline for comparing

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18 Canadian Heritage. 2008. Summative Evaluation of the Canadian Culture Online Strategy (CCOS)

19 2008 CCOS Evaluation, Follow-up Report on Recommendations

progress against targets for each program year. CHIN's current PMERS includes over thirty performance indicators directly related to the program's expected outcomes. The data sources used to measure these indicators include various databases such as Web logs, CHIN's Membership Database and the VMC Feedback Message Catalogue. Modernization of the web visitation tracking in 2010-11 has significantly improved the reliability of the data on visitors.

The main limitation of the current performance measurement system is that it does not include indicators to measure the efficiency and economy of the program, particularly the professional development component. There are currently no systems in place to measure the cost per in-person training session or cost per participant. Neither was management able to provide a breakdown of the CHIN budget which could demonstrate the ratio of administrative expenditures to program cost due to the interconnectivity of activities between the various program units, making it difficult to determine costs associated with each activity area.

Other areas of concern with regard to the performance measurement system include:

- the PMERS was revised in 2010 and the program did not collect data on most of the new indicators for the 2008-09 and 2009-10 fiscal years, affecting the availability of data for the evaluation;
- the wording of the current immediate and intermediate outcomes for the professional development activities of CHIN do not explicitly take into account the significant audience of teachers and students in museum studies receiving training;
- there is no mechanism to measure the extent to which participants apply the knowledge and skills learned at in-person events and sessions to their work practices;
- some discrepancies in the data and results provided in CHIN's annual reports, PCH's Departmental Performance Reports and other program documents; and,
- the PMERS could include qualitative performance indicators to meet the needs of its stakeholders in terms of quality of both online properties and professional development resources.

The majority of PCH representatives (82%) noted that CHIN has a reliable performance measurement system which includes well-defined outcomes and a clear logic model. Officials indicated that CHIN collects a number of performance indicators on a quarterly basis and regularly provides data to management. Nevertheless, some PCH officials (27%) identified several gaps in CHIN's performance measurement system, including the need to focus on longer-term outcomes and the need to use more sophisticated measurement instruments.

A number of standard efficiency indicators are commonly used in program with a professional development and/or skills and knowledge building component. Below is a list of approaches/indicators for measuring program efficiency and is not an exhaustive list. One or more approaches could be used. Approach selected should be based on the program theory and expected outcomes. To conduct an efficiency

analysis, CHIN will need to identify units of analysis (e.g., inputs, activities, outputs, outcomes, results chains or service lines). Being able to identify the program's results chains will help to identify units of analysis for assessing the cost of outputs, and the efficiency of the program. Examples of efficiency indicators include:

- *Utilization of funds* (e.g., the percentage of the program budget that was expended). This is the most common indicator used by most programs to measure the efficient use of program resources. Usually, higher rates of budget underutilization indicate less efficient use of resources. However, this indicator alone is not sufficient to make a clear judgement on the program efficiency. The indicator should be used in combination with other measures.
- *Inputs and resource requirements to deliver the program* (e.g., level of staffing for administration and service delivery, budgeted resources for each program component, etc.). This indicator helps to provide an understanding of the amount of human, material and financial resources allocated to each program activity area. It may help to compare the program resource requirements to outputs and outcomes, or the amounts of resources utilized by other programs to make a judgement on the program efficiency. This indicator alone is not sufficient to make a clear judgement on the program efficiency and should be used in combination with other measures.
- *Ratio of overhead cost to program expenditures*. This is a standard indicator used by most programs to make a judgement on the efficient use of program resources. It is calculated by dividing the amount of resources allocated to administering the program by the total program budget. Depending on the type of programs, this ratio may vary greatly and there are no standard criteria to judge program efficiency based solely on the ratio of the overhead cost. However, by tracking this indicator, programs are able to reduce their overhead cost gradually over years (comparing the ratio across different years) and make comparisons to other similar programs. CHIN's professional development program may need to track amounts of staff hours and salaries spent on administration vs. direct service delivery as well as any other expenditures on program administration and management in order to be able to track this indicator. This indicator is considered somewhat reliable in measuring the cost-efficiency of the program.
- *Cost per program output* (e.g., brochures and information materials, online and in-person training delivered, number of event attendees, etc.) and cost per program outcome (e.g., number of participants indicating improved professional knowledge and skills, etc.). This is one of the most difficult indicators to track due to the complexity associated with calculating the cost per each output and/or outcome. Some programs calculate the cost per program output or outcome by dividing the overall program budget to the amount or number of outputs or outcomes generated. For CHIN's professional development component, this indicator may help to identify the cost per training each museum staff or heritage worker who attended an in-person session, and the cost per number of participants who indicated improved

knowledge, skills or practices. This indicator would help CHIN to measure the amount of resources it allocates to produce each output or achieve each outcome, which may play an important role in assessing the efficiency of the Program.

- *Leverage* – the amount of financial resources contributed to the program activities from other sources. The amount of funds leveraged from other partners is one of the most common indicators used by many programs to measure the efficient use of their resources. Higher efficiencies are achieved by leveraging more money from other sources for each dollar contributed by the program. Leveraged funds may be in both in-kind and in-cash form. In the case of CHIN’s professional development program, leverage may include the amount of funds saved by using training infrastructure to deliver workshops and sessions, the cost of travel and other training activities covered by partners.

## 6. Conclusions and Recommendations

### 6.1. Conclusions

#### 6.1.1. Relevance

There continues to be a need for the types of activities and programming supported by CHIN. Recent developments including wide scale use of the Internet, Web 2.0 technologies, social networks, and mobile technologies have significantly increased the need for museums and heritage institutions to create and market digital content online and through various mobile devices. Consequently, skills and competencies related to digital content creation, management, presentation and preservation and the use of new technologies have become one of the critical areas of training and professional development needs for Canadian museums and heritage institutions. Without sufficient funds and expertise, it is difficult for museums to keep up with emerging technologies and build digital capacity. Over the past five years, CHIN has to a certain extent addressed the needs of participating museums and heritage organizations to create digital content and make it available to the Canadian public and international audiences. However, Canadian museums and heritage institutions' need related to the digital realm are much greater than the amount of support and funding made available through CHIN's programming. CHIN has not been able to meet the high demand for funding.

In light of the transfer of the VMC program to the Canadian Museum of History and reduced resources and a result of the transfer, CHIN has an opportunity to assess the most effective means of providing professional development and collaborative opportunities and ensure accessibility across Canada. CHIN should consult with program stakeholders and conduct a needs assessment in order to clarify the mandate and role of CHIN's programming going forward and review the types of services and assistance it will provide to target groups. A needs assessment and stakeholder consultations should help to identify and prioritize the most critical capacity issues and needs, and help to develop best strategies to address the needs with limited resources.

CHIN's objectives and activities are aligned with three of the Department's organizational priorities: "taking full advantage of digital technology", "celebrating our history and heritage", and "investing in our communities", as well as PCH's strategic outcome "Canadian artistic expressions and cultural content are created and accessible at home and abroad". The objectives and activities of CHIN are also aligned with the Government of Canada's strategic outcome "A vibrant Canadian culture and heritage" outlined by the Treasury Board in 2008-09 as well as the 2008 and 2011 speeches from the Throne.

The activities and objectives of CHIN are consistent with federal and PCH roles and

responsibilities. The federal government has a role and responsibility to support digitization, innovation and research on a national scale, promote skills development particularly as it relates to the use and adoption of digital technologies, innovation and research, encourage information sharing in the heritage sector, celebrate Canadian culture and heritage, and contribute to the development of Canadian identity.

There are a number of federal and provincial government and non-profit sector programs in Canada that share objectives similar to those of CHIN. However, for the most part CHIN complemented, rather than duplicated or overlapped, other programs and initiatives. As the nature and scope of CHIN's professional development activities are very broad, there may be some overlap with professional development outputs and activities produced by other similar programs. CHIN seeks to avoid duplication and overlap by working in close collaboration with other similar programs implemented by federal departments, provincial governments and non-profit organizations and encouraging their members and affiliates to participate in CHIN's activities and use CHIN's resources and tools. Many other provincial programs complement CHIN by providing funding to areas and initiatives that fall outside of CHIN's scope.

### **6.1.2. Performance – Achieving Expected Outcomes**

CHIN made progress towards achieving its expected immediate and intermediate outcomes in the areas related to improving capacities of participating museums and heritage institutions to create digital content and making the content available for Canadian and international audiences. The evidence showed that:

- CHIN was able to reach out to a large number of representatives of Canadian museums and heritage institutions and improve their skills and capacities by providing them with a wide range of learning and collaborative opportunities. CHIN launched 54 professional resources which were accessed 2.2 million times by various internet users, and organized 113 in-person workshops, events and meetings which were attended by more than 2,100 heritage and museum professionals.
- Participants in CHIN's professional development workshops and in-person events and users of CHIN's tools and resources reported that Program participation improved their professional knowledge, skills and practices. For example, over 95% of participants who completed the post-participation questionnaire reported improvements in at least one impact area in 2010-11, 2011-12 and 2012-13.
- CHIN has enabled Canadian museums and heritage institutions to create digital history and heritage content and make the content available to Canadian and international audiences. CHIN used two major methods to make digital heritage content available to audiences: first, providing VMC program funding to Canadian museums and heritage institutions to develop online exhibits and, second, presenting content on the Artefacts Canada website. For example, online exhibits grew from 486 in 2008-09 to 653 in 2011-12. Also,

during this period, the number of heritage records available through Artefacts Canada increased by 14% and the number of arts and heritage images increased by 43%.

- Canadian and international audiences accessed the content presented by heritage institutions. About 2.4 million individuals visited the VMC website annually. The majority were able to find the content they were looking for and were satisfied with the content.

CHIN needs to improve its promotional and awareness building activities to increase awareness and visibility of its tools and resources and to reach out to members of the heritage community through various methods such as in-person workshops, and events to increase the number of Canadian and international heritage institutions and workers who use the tools and resources provided by CHIN to improve their knowledge, skills and practices.

### **6.1.3. Performance – Efficiency and economy**

There was limited information available to conduct a thorough efficiency and economy analysis for the different activities of CHIN. CHIN's performance measurement system does not include indicators against which the efficiency of the programming can be measured and it lacks financial data on program outputs and outcomes for individual components of the program. However, based on the available data, overall, the variance between CHIN's budgeted resources and the actual program expenditures is minimal. The data available for the VCM Investment Program enabled a calculation of the operational cost for the VMC Investment Programs. The ratio of operational cost to direct investment cost for the VMC Investment Programs averaged 23% over the five year period. Given that much of the operational costs are dedicated to collaborative work with the successful applicants after the contract is awarded, the operational costs of VMC cannot be compared to Grant and Contribution programs. The VMC also leveraged funds from other sources (i.e., 40% of recipients of the VMC Investment Programs indicated that they also received funds from other sources to develop and launch their exhibits).

The design and delivery of CHIN could be improved to be more efficient and economical in the use of resources. There are opportunities to improve the design and delivery of the professional development component after the transfer of the VMC program in September 2014 to improve effectiveness of the program and to use limited resources efficiently.

Some key informants noted that the federal government could achieve the same results at a lower cost by increasing efforts to work in closer collaboration with provincial partners, other stakeholders and representatives from the private sector; or by fine tuning certain delivery components (e.g., requiring matching contribution from VMC Investment Programs beneficiaries).

The most frequent recommendations to improve efficiency of CHIN included

updating technology and internal operational capacity to ensure that CHIN is at the forefront of technological changes.

Suggestions for alternative delivery mechanisms to improve the efficiency included partnering with the private sector to provide more efficient delivery and access to more targeted expertise and working in partnership with PMA's in the development of tools and training to increase capacity to deliver training at the provincial and community level.

The program could also consider aligning the program activities with existing PCH programs with a professional development component, such as MAP and CCI, to benefit from shared resources and increased efficiency. MAP and CCI are similar programs offered by PCH which focus on the overall professional development of museums and heritage institutions by providing funding and support for professional development,

#### **6.1.4. Performance Measurement**

CHIN developed its PMERS in 2010. The assessment of the document demonstrates that the PMERS is comprehensive and includes most necessary components to support the evaluation of CHIN. The main limitation of the current PMERS is that it does not include indicators to measure the efficiency and economy of the program and there is no mechanism to measure the extent to which participants apply the knowledge and skills learned at in-person events and sessions to their work practices.

Improvements could be made to CHIN's performance measurement system to systematically collect, analyze and report performance information on the results of its professional development programming. In particular, the system should include indicators and a mechanism to measure program efficiency and economy and to track long-term results. In addition, the performance measurement system will need to be revised to reflect the changes to activities, outputs and outcomes in light of the transfer of the VMC to the Canadian Museum of History.

A revised performance measurement system will enable CHIN to improve its ability to plan, manage and measure performance through the development and use of performance indicators and evaluation frameworks.

## **6.2. Recommendations and Management Response**

As noted in the evaluation report, the transfer of the VMC to the CMH was completed in September 2014. Consequently, CHIN now consists only of the professional development component. Therefore, all recommendations below are provided to facilitate improvements to CHIN's professional development component.

Within this context, recommendations emerge from the evaluation findings that



advocate a needs assessment to ascertain stakeholder professional development needs and alternative delivery approaches, promoting and raising awareness of the tools and resources provided by the Program, and strengthening the performance measurement system to include indicators and a mechanism to measure efficiency and long-term outcomes.

<b>Recommendation 1</b>		
<p>In light of the transfer of the VMC and reduced program resources, and given the evolving technical environment and increasing pressures to adapt to a variety of digital technologies, the Assistant Deputy Minister of the Citizenship and Heritage sector should consult with stakeholders, such as CHIN network members, in order to prioritize the needs of the museum community in the digital realm.</p>		
<b>Statement of Agreement /Disagreement</b>		
<p>Management agrees with this recommendation.</p>		
<b>Management Response</b>		
<p>CHIN will engage the museum community in discussions to consider how remaining resources can be effectively used to address their needs in the digital realm. This outreach will help establish which areas of expertise should be focused on, and which products and services will provide the greatest benefit over the coming years. CHIN will engage the community through a combination of focus groups, meetings, and an online survey.</p>		
<b>Deliverable(s)</b>	<b>Timelines</b>	<b>OPI</b>
CHIN Outreach Report	March 2015	Executive Director of Heritage Group

<b>Recommendation 2</b>		
<p>Following consultations with stakeholders, the Assistant Deputy Minister of the Citizenship and Heritage sector should leverage program activities within PCH's Heritage Group, and explore expanding partnerships, in order to maximize synergies and efficiencies with complementary professional development initiatives.</p>		
<b>Statement of Agreement /Disagreement</b>		
<p>Management agrees with this recommendation.</p>		
<b>Management Response</b>		

As it develops a renewed business model to support Canadian museums in their use and adoption of digital technologies, CHIN will explore expanded partnerships that enhance the quality of the tools and guidance it provides, and assist in their efficient delivery. In addition to PCH Heritage Group's Museums Assistance Program and the Canadian Conservation Institute, CHIN will approach provincial and territorial museum associations, post-secondary programs for graduating museum professionals, and pertinent international organizations and initiatives to discuss opportunities for enhanced collaboration.

<b>Deliverable(s)</b>	<b>Timelines</b>	<b>OPI</b>
Heritage Group's 2016-2017 Integrated Business Plan	Fall 2015	Executive Director of Heritage Group

### **Recommendation 3**

Following the review of CHIN's activities, the Assistant Deputy Minister of the Citizenship and Heritage sector should build awareness, within available resources, of CHIN's services and tools to ensure these are used and provide value; and revise its performance measurement system to ensure it includes the indicators and data collection mechanisms needed to conduct an analysis of efficiency and economy, and to track longer-term outcomes.

### **Statement of Agreement /Disagreement**

Management agrees with this recommendation.

### **Management Response**

CHIN will develop a marketing and communications plan focused on developing a clear understanding and awareness of CHIN's mandate, role, products and services throughout the museum community. CHIN will also update its logic model and develop, in consultation with the Strategic Policy, Planning and Research Branch, a revised performance measurement framework which includes appropriate and meaningful indicators.

<b>Deliverable(s)</b>	<b>Timelines</b>	<b>OPI</b>
CHIN Marketing and Communications Plan	Winter 2015	Executive Director of Heritage Group
CHIN Performance Measurement Framework	Winter 2015	Executive Director of Heritage Group
CHIN PMERS	Spring 2015	Executive Director of Heritage Group



# ***APPENDICES***

## APPENDIX A: EVALUATION FRAMEWORK

Core Evaluation Issues	Evaluation Questions	Indicators	Data Sources	Methods of collection
<b>Relevance</b>				
<b>Issue # 1: Continued need for program</b>				
Assessment of the extent to which the program continues to address a demonstrable need and is responsive to the needs of Canadians	<ol style="list-style-type: none"> <li>1. Is there a continued need for CHIN to:               <ul style="list-style-type: none"> <li>• Support heritage institutions and professionals in the creation, presentation, management, and preservation of digital heritage content?</li> <li>• Provide and enable access to digital history and heritage content for Canadians?</li> </ul> </li> <li>2. To what extent is CHIN responsive to current and evolving needs of Canadian museums and other member heritage institutions in the digital realm?</li> </ol>	<p>Views of stakeholders with respect to continuing need for CHIN to support heritage institutions in the creation and presentation of digital history and heritage content.</p> <p>Views of stakeholders with respect to continuing need for CHIN to support the professional development of heritage workers in the development and presentation of digital content and the use of digital technologies.</p> <p>Views of stakeholders with respect to continuing need for CHIN to provide access for Canadians to digital history and heritage content.</p> <p>Views of stakeholders on the extent to which CHIN is responsive to the current and evolving needs of Canadian museums and other member heritage institutions.</p>	<p>Key Stakeholders PCH officials</p> <p>CHIN Performance Measurement Indicators (Excel files)</p> <p>Program Guidelines</p>	<p>Literature review</p> <p>Document and File Review</p> <p>Key informant Interviews with CHIN officials and external stakeholders</p> <p>Past survey results</p> <p>Survey of VMC investment recipients</p> <p>Survey of VMC portal users</p> <p>Expert panel</p>

Core Evaluation Issues	Evaluation Questions	Indicators	Data Sources	Methods of collection
<b>Issue # 2: Alignment with government and department priorities</b>				
Assessment of the linkages between program objectives and (i) federal government priorities and (ii) departmental strategic outcomes	<ol style="list-style-type: none"> <li>3. To what extent is CHIN aligned with the priorities of PCH and its strategic outcomes?</li> <li>4. To what extent is CHIN aligned with federal government priorities?</li> </ol>	<p>Views of PCH officials and stakeholders on the extent to which CHIN is aligned with priorities of PCH and its strategic outcomes.</p> <p>Views of PCH officials and stakeholders on the extent to which CHIN is aligned with federal government priorities in Canada.</p>	<p>Speech from the Throne</p> <p>Departmental reports</p> <p>Annual reports</p> <p>Ministerial speeches and announcements</p> <p>MC and TB submission</p> <p>Federal budgets</p> <p>PCH officials</p>	<p>Document and file review</p> <p>Key informant interviews with PCH officials and stakeholders</p>
<b>Issue # 3: Alignment with federal and department roles and responsibilities</b>				
Assessment of the role and responsibilities for the federal government in delivering the program	<ol style="list-style-type: none"> <li>1. Is CHIN aligned with departmental and federal roles and responsibilities?</li> <li>2. To what degree is there complementarity or overlap between federal government's role and those roles played by various stakeholders in the heritage sector?</li> </ol>	<p>Views of PCH officials and stakeholders on the extent to which CHIN is aligned with departmental and federal roles and responsibilities.</p> <p>The degree of complementarity between the federal government's role and those roles played by various stakeholders in the heritage sector.</p>	<p>Department of Canadian Heritage Act</p> <p>Speech from the Throne</p> <p>Departmental reports</p> <p>Annual reports</p> <p>MC and TB submission</p>	<p>Document and file review</p> <p>Key informant interviews with PCH officials and stakeholders</p> <p>Literature review</p>

Core Evaluation Issues	Evaluation Questions	Indicators	Data Sources	Methods of collection
			Federal budgets  Official UN documents  PCH officials	
<b>Performance (effectiveness, efficiency and economy)</b>				
<b>Issue # 4: Achievement of expected outcomes</b>				
Assessment of progress toward expected outcomes (incl. immediate, intermediate and ultimate outcomes) with reference to performance targets and program reach, program design, including the linkage and contribution of outputs to outcomes.	1. To what extent did Canadian and international heritage institutions and workers use learning and collaborative opportunities provided by CHIN to improve their knowledge, skills and practices in the creation, presentation, management and preservation of online and other digital content?	Related performance indicators, such as: professional development products launched; in-person sessions delivered; visits to online professional resources; and participants attending in-person skills development sessions.  Views of PCH officials and stakeholders on the effectiveness of learning and collaborative opportunities.	CHIN Performance Measurement Indicators (Excel files)  Annual reports  Key Stakeholders	Document and file review Administrative Database Key informant interviews with PCH officials and stakeholders  Past survey results
	2. To what extent did heritage institutions and workers improve their professional knowledge, skills and practices in the creation, presentation, management and preservation of online and other digital heritage content?	Related performance indicators, such as: reported improvement in professional knowledge, skills and practices.  Views of PCH officials and key stakeholders on the extent to which professional knowledge, skills and practices were	CHIN Performance Measurement Indicators (Excel files)  Key Stakeholders	Document and file review Administrative Database Key informant interviews with PCH officials and stakeholders

Core Evaluation Issues	Evaluation Questions	Indicators	Data Sources	Methods of collection
		improved.		<p>Past survey results</p> <p>Expert panel</p>
	3. To what extent did Canada's museums create digital history and heritage content?	<p>Related performance indicators, such as: contracted VMC products launched; and museums contributing content to Artefacts Canada.</p> <p>Views of PCH Officials and key stakeholders on the extent to which museums created content.</p>	<p>CHIN Performance Measurement Indicators (Excel files)</p> <p>Key Stakeholders</p>	<p>Document and file review</p> <p>Administrative Database</p> <p>Key informant interviews with PCH officials and stakeholders</p> <p>Past survey results</p> <p>Survey of investment recipients</p> <p>Survey of VMC investment recipients</p>
	4. To what extent was digital heritage content made available to Canadian and international audiences?	Related performance indicators, such as: VMC time online; visits to VMC from search engines; and total number of VMC products available to Canadian	CHIN Performance Measurement Indicators (Excel files)	<p>Document and file review</p> <p>Administrative</p>



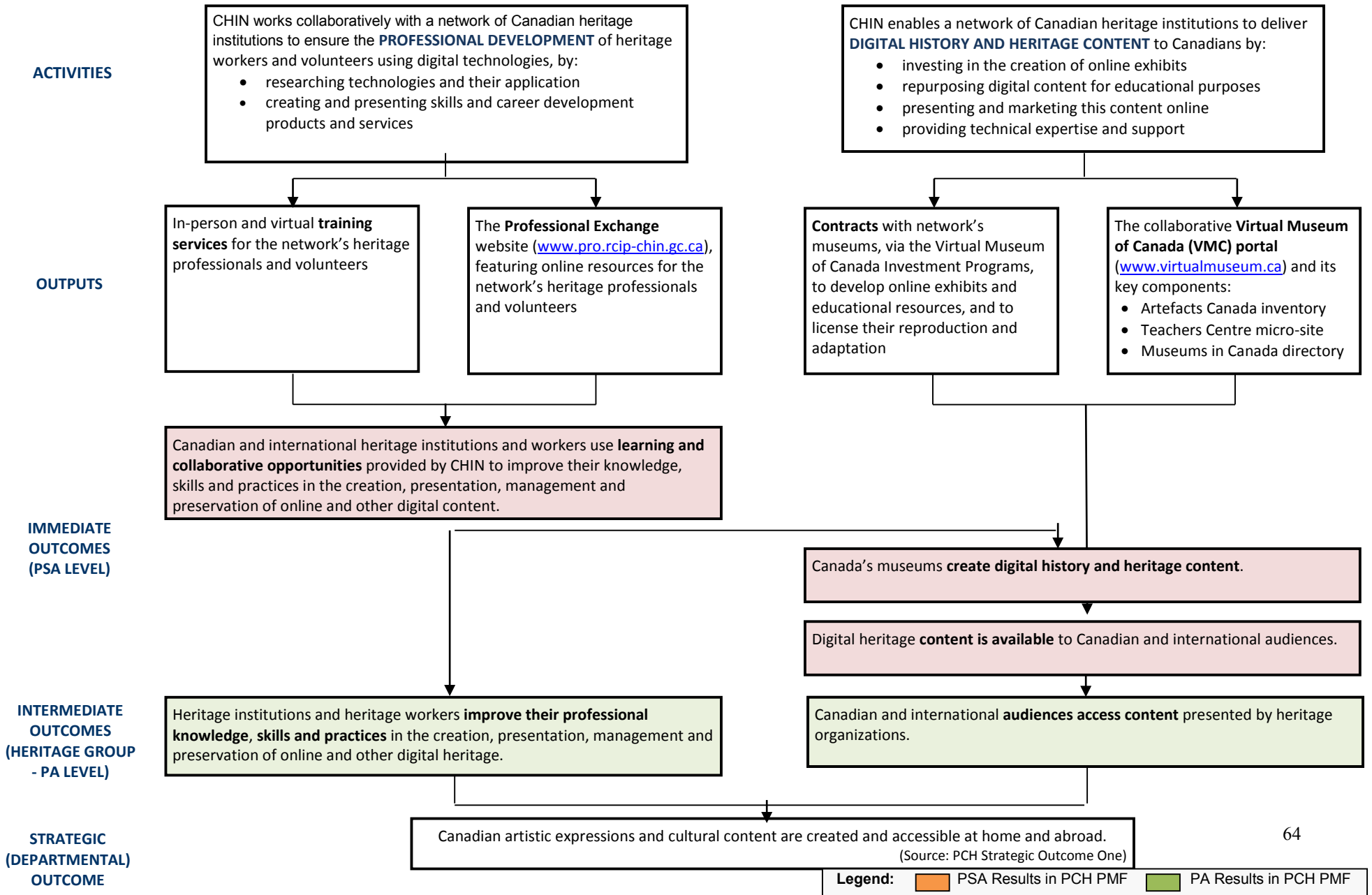
Core Evaluation Issues	Evaluation Questions	Indicators	Data Sources	Methods of collection
		<p>and international audiences.</p> <p>Views of PCH officials and key stakeholders on the extent to which digital heritage content was made available.</p>	Key Stakeholders	<p>Database</p> <p>Key informant interviews with PCH officials and stakeholders</p> <p>Past survey results</p> <p>Survey of VMC portal users</p>
	<p>5. To what extent did Canadian and international audiences access content presented by heritage institutions?</p>	<p>Related performance indicators, such as: visits to VMC; and time spent per VMC visit.</p> <p>Views of PCH officials and key stakeholders on the extent to which audiences accessed content.</p>	<p>CHIN Performance Measurement Indicators (Excel files)</p> <p>Key Stakeholders</p>	<p>Document and file review</p> <p>Administrative Database</p> <p>Key informant interviews with PCH officials and stakeholders</p> <p>Past survey results</p> <p>Survey of VMC investment recipients</p>

Core Evaluation Issues	Evaluation Questions	Indicators	Data Sources	Methods of collection
	6. What were the unintended outcomes (negative or positive), if any, of the program?	Views of PCH and stakeholders on the unintended positive or negative outcomes of the program.	Key Stakeholders	Key informant interviews with PCH officials and stakeholders  Past survey results  Survey of VMC investment recipients  Survey of VMC portal users  Literature review  Expert panel
<b>Issue # 5: Demonstration of efficiency and economy</b>				
Assessment of resource utilization in relation to the production of outputs and progress toward expected outcomes	1. How much is spent? 2. What is it spent on? 3. What are the Personnel and Operating and Maintenance costs? 4. How many FTEs are there to deliver the program?	Overall program costs Cost breakdown by areas of activity Personnel and Operating and Maintenance costs Number of FTEs Cost per visit to CHIN's corporate website, Professional Exchange and Virtual Museum of Canada	Administrative financial and HR reports	Document and file review Administrative data analysis

Core Evaluation Issues	Evaluation Questions	Indicators	Data Sources	Methods of collection
	<p>5. Are there more efficient and economical ways in which the federal government could administer/deliver the program to achieve the same results?</p>	<p>Areas of overlap and opportunities for synergy with other programs supporting heritage sector.</p> <p>Views of PCH officials on the design and the delivery of the program.</p>	<p>Program Guidelines</p> <p>PCH Departmental Reports</p>	<p>Key informant interviews (e.g. Heritage Policy and Programs Branch)</p> <p>Document and file review</p> <p>Literature review</p> <p>Expert panel</p> <p>Value for money analysis</p>
	<p>6. Has the program implemented the recommendations from the previous evaluation?</p>	<p>Percentage of recommendations implemented</p>	<p>CHIN documents</p>	<p>Document and file review</p>
<b>Issue #6: Validity of the performance measurement strategy</b>				
	<p>1. Does performance measurement properly support the evaluation?</p>	<p>Quality, frequency and reliability of data captured in support of the performances management strategies</p> <p>Usefulness of data and performance information for decision-making</p>	<p>Key Stakeholders</p> <p>PCH officials</p>	<p>Administrative Database review</p> <p>Document and file review</p> <p>Key informant interviews with PCH officials</p>

Core Evaluation Issues	Evaluation Questions	Indicators	Data Sources	Methods of collection
	2. What, if any, changes to performance measurement are required? Can any improvements be made?	Possible improvements to program performance measurement (based on opinions and analysis of documented evidence)	CHIN documents Key Stakeholders PCH officials	Key informants interviews with CHIN officials  Document and file review

# APPENDIX B: LOGIC MODEL



## APPENDIX C: BIBLIOGRAPHY

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