**

**CE Workshop Evaluation Form**

**Arrangement and Description Track**

Workshop **Evaluation Form:**

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| **Title** | Financial Management Basics for Archivists |
| **Reviewer:** | Shelby Sanett |

Directions:

* Quantitative: Each item below begins with a **bolded** statement. Score each with a 1-5 ranking to indicate your assessment of the veracity of that statement based on your review of workshop overviews/agendas, evaluations, and other materials.
* Qualitative: In the comments section for each item below, please respond to the additional questions posed and any related issues that this workshop raises for you.
* Provide any additional assessments or comments not relevant to one of the specific, numbered areas in the space provided following the table.

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| --- | --- | --- | --- | --- | --- | --- | --- |
| *Please place an “x” in the appropriate column, use* ***1=low****, undesirable, to* ***5=high****, excellent.* | | | **1** | **2** | **3** | **4** | **5** |
| 1. Does the content **appeal to its specified audience**? Does it indicate specific categories of archivists and/or levels of expertise to assist potential participants in determining the workshop's relevance for them?  Comments: | | |  |  |  | X |  |
| 2. To what extent does the subject matter **reflect current archival practices** and theory commonly accepted in the profession?  Comments: See comments below. | | |  | X |  |  |  |
| 3.. How **relevant/appropriate are the teaching and delivery methodologies** (lecture, video, PowerPoint, exercises, film, audiotape, discussion, simulation, case study, opportunities for in-course feedback, etc.) to the articulated goals and objectives, and to the content?"  Comments: | | |  |  |  | X |  |
| 4. How workable is the **time line** or **agenda** for the course? Is there sufficient detail to indicate how the workshop will evolve? Does it allow sufficient time for active engagement between course participants and the instructor(s)?  Comments: | | |  |  |  |  | X |
| 5. To what degree does the **list of assigned readings** support the content of the proposal?  Comments: Should be reviewed for updates and a webography could be developed. | | |  |  |  |  | X |
| 6. Does the presentation support the Learning Outcomes in the descriptions?  Comments: | | |  |  |  | X |  |
| **A&D Track Considerations** | | | | | | | |
| 1.Does this content bridge, enhance, and/or build on other workshops (If so, please name) | No | | | | | | |
| 2.Does this build on other workshops not on the list? | No | | | | | | |
| 3 Should this be part of the A&D Track? | TBD | | | | | | |
| 4.Where would this workshop fall in the sequence of an A&D track? | TBD | | | | | | |
| Why? |  | | | | | | |
| 5. What tier does this workshop fall in? (See attached tiers) | The tiers aren’t attached. | | | | | | |
| 6. Target Audience | Attached list of tracks can be used to indicate appropriate level of experience and job function | | | | | | |
| 7. Is the suggested prior “experience/knowledge” appropriate? | Knowledge that participants will need to gain the most from the workshop; include any workshop (from the list of suggested A&D workshops) that you suggest be taken before attending this course.  Yes  For descriptions go to <http://www2.archivists.org/prof-education/course-catalog> | | | | | | |
| 8. Learning Outcomes:  Are they appropriate and/or relevant? | List of specific, measurable, and actionable outcomes that each person should be able to do (e.g. discuss, explain, evaluate, design) by the end of the course. Yes | | | | | | |
| 9. What should they be?  Please list learning outcomes. |  | | | | | | |
| 10. Can you make suggestions for competencies this workshop would fulfill? |  | | | | | | |
| 11. Would parts of the content lend themselves to a different format? | |  |  | | --- | --- | | Check one: Webinar:   * 30 minute * 90minute | In person:   * 1/2 day * 1 day * 2 day | | | | | | | |
| 12. Which parts? | ALL | | | | | | |
| 13. Does it lend itself to repurposing as an audio CD? | NO -- Too many visuals | | | | | | |
| Which parts? |  | | | | | | |

Other comments: Some comments for consideration:

1. The content needs to be updated: currently the course is geared for Excel 2003.
2. The vocabulary sections are excellent.
3. The workbook is well thought out.
4. This course seems to be a mixture of tactical – generating reports – and strategic – analyzing data. I suggest that a decision should be made – is this a course where students are taught how to generate the reports or to analyze them.
   1. If the students generate reports using Excel on a regular basis, I suggest that the parts of this course relevant to archival practice (mostly narrative) should be added to a basic Accounting course. Microsoft probably offers a course using the current version of Excel or perhaps they can be contracted to offer it for SAA.
   2. If the students are to understand the relevancy of the data generated by their institutions and how it applies to the operations, management and decision-making for their institution, then less time should be spent on how to generate reports, which are probably going to be generated for them and more time on analysis. As a result, a scientific calculator is not a requirement.
5. Suggest that content be added related to grants and the typical contributions to grants, i.e., in-kind, match, indirect/direct cost concepts/examples, etc. as well as the strategic planning that should be included as part of the financial side of pursuing grant funding. The reason is that increasingly, institutional projects require external funding in order to be addressed. That piece could connect with the course on Grant Proposal Writing.
6. If there’s time, some information about the components of project management and their impact on institutional resources should be incorporated because increasingly, archivists are on working groups, teams and are managing by project, which may be grant-funded. That piece could connect with the Project Management course.
7. Altogether, this course could become part of a 3- or 4- part business management-oriented arc (if an Excel course is included) which would meet relevant and immediate business needs of cultural institutions.
8. The financial style question: Suggest that it is more relevant to bring out the importance of the institution’s culture and mission and how that affects financial decision-making and strategic planning.
9. Overall, suggest more of an analytical approach particularly if the course expects to address positioning students to develop good decision-making skills. Suggest students could be given a short writing or role-playing assignment to show they can explain/discuss the concepts knowledgeably.