Why and How do Museums do What They do?

A Research Study

NEMA Lunch with John W. Jacobsen
August 30, 2017
12:00 PM
Outline

- Assumptions and Definitions
- The “Why”
- The “How”
- Applying the Findings
- Q and A
Stephen Weil’s Theory
[expanded]

The value of a museum is the cumulative value of the impacts and benefits it delivers
Assumptions

- Museums pursue multiple purposes
  - Deliver multiple impacts and benefits
- Public, private, personal and institutional values should be counted
- Some operating data may indicate impacts and benefits
- Each museum is unique and must determine its measurement standards
The Community and its Tourists

Audiences & Supporters

Total Engagements

Non-Users

Public Supporters
Private Supporters

Total Support Engagements

Visitors

Total Visitor Engagements

Program Participants

Total Program Engagements

Key Visitor Segment

Exhibit Galleries  Feature Theater  Other Venues  Gift  Café

General Visitors
Adults w/Children  ●  ●  ●  ●  ●
Adults w/Adults  ●  ●  ●  ●  ●
Young Adults  ●  ●  ●  ●  ●
Teens  ●  ●  ●  ●  ●
Solo Visitors  ●  ●  ●  ●  ●
Group Visitors  ○  ●  ●  ●  ●
School & Youth  ○  ●  ●  ●  ●
Bus Tours  ○  ●  ●  ●  ●

Total Venue Visits

On-Site  Individuals  Organizations  Professionals  Hobbyists  Groups  Teachers  Households

Off-Site  Students  Teachers  Social Groups  Organizations  Passers-by  Other Museums  Fairs & Festivals

Virtual  Individuals  Linked Partners

White Oak Associates
Outcomes: Impacts & Benefits

• Impacts: What the museum does to its audiences and supporters

• Benefits: What the audiences and supporters get from the Museum
Museums are Free Choice

- No one has to go to or fund a museum
- Museums must attract and deliver value to get value in return
- When those choosing to spend their time, effort or money are experts, then their exchanges may indicate the value of the impacts and benefits
The “Why”

Why do museums do what they do?
Research sample: MIIP 1.0

• Museum Indicators of Impact and Performance (MIIP 1.0)
  ➢ A free Excel database

• 1,025 Indicators

• From 51 expert sources

• Many already tested and standardized data fields
51 Sources for 1,025 Indicators

- Data Collection Fields (2 Sources with 209 indicators = “2/209”)
- Evaluation Criteria (9/113)
- Institutional Evaluation (4/153)
- Foundation Objectives (4/20)
- Management Resources (2/56)
- Proposed Indicators (16/136)
- Research Findings (14/339)
Sample Indicators

- “How many partnerships with other organizations do you manage simultaneously?” (#544)
- “Articles per staff member—2.73 at NHM” (#997)
- “Ranking by schoolteachers as important to them in the classroom” (#393)
- “Number of international tourists annually” (#657)
- “Net Promoter Score—likelihood to recommend” (#641)
Potential Impacts: The “Why”

Public Impacts
A Broadening participation
B Preserving heritage
C Strengthening social capital
D Enhancing public knowledge
E Serving education
F Advancing social change
G Communicating public identity & image

Private Impacts
H Contributing to the economy
I Delivering corporate community services

Personal Impacts
J Enabling personal growth
K Offering personal respite
L Welcoming personal leisure
Potential Benefits: The “Why”

Public Benefits
- A Broadening participation
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Private Benefits
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Personal Benefits
- J Enabling personal growth
- K Offering personal respite
- L Welcoming personal leisure
Which of these impacts and benefits does your museum deliver? All, to some degree?

Which of these are most important to you? – your desired impacts?

Which of these perceived benefits are most valued by your audiences and supporters?

How well do they align? Is this OK?
How to Get MIIP 1.0

- Go to: http://www.whiteoakassoc.com/library.html
  See “Currently Featured”
- Download and Rename MIIP 1.0 [Your Name]
- Copy filtered short lists into new worksheets
The “How”

How do museums do what they do?
Evaluation Frameworks: Research Sample

- Moore’s Strategic Triangle
- Theory-based Evaluation and Logic Models
- Collins’ Hedgehog Concept
- Museum Theory
- Project Evaluation Frameworks
- St. John and Perry’s Infrastructure Model
- Scott’s Typology
- Mulgan’s Indicator Types
- Operating and Evaluation Data
- Accounting Definitions
Underlying Steps

NEED → MEANS → AUDIENCE → ENDS
Logic Model

Source: W.K. Kellogg Foundation Logic Model Development Guide 2004
### Overlay of Frameworks

<table>
<thead>
<tr>
<th>EXTERNAL INPUT</th>
<th>MEANS</th>
<th>AUDIENCE INTERFACE</th>
<th>ENDS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Moore's Strategic Triangle</strong></td>
<td>authorizing environment</td>
<td>organization or agency</td>
<td>public value</td>
</tr>
<tr>
<td><strong>Theory-based Evaluation (Action Steps)</strong></td>
<td>desired outcomes</td>
<td>activities</td>
<td>actual outcomes</td>
</tr>
<tr>
<td><strong>Logic Models</strong></td>
<td>resources &amp; inputs</td>
<td>outputs</td>
<td>outcomes impact</td>
</tr>
<tr>
<td><strong>Hedgehog Concept</strong></td>
<td>passion</td>
<td>unique capability</td>
<td>superior mission performance</td>
</tr>
<tr>
<td><strong>Museum Theory</strong></td>
<td>community needs</td>
<td>purpose</td>
<td>progress and social justice</td>
</tr>
<tr>
<td><strong>Project Evaluation</strong></td>
<td>intended impact</td>
<td>inputs needed</td>
<td>outcomes strategic impacts</td>
</tr>
<tr>
<td><strong>Infrastructure</strong></td>
<td>infrastructure needs</td>
<td>museum investments</td>
<td>increased social infrastructure</td>
</tr>
<tr>
<td><strong>Value Typology</strong></td>
<td>institutional values</td>
<td>use &amp; non-use values</td>
<td>intrinsic values instrumental values</td>
</tr>
<tr>
<td><strong>Indicator Types</strong></td>
<td>external advocacy &amp; validation</td>
<td>internal metrics</td>
<td>impact evaluation studies</td>
</tr>
<tr>
<td><strong>Operating Data</strong></td>
<td>resources</td>
<td>engagements</td>
<td>finance</td>
</tr>
<tr>
<td><strong>Accounting Categories</strong></td>
<td>capital assets</td>
<td>expenses</td>
<td>revenues</td>
</tr>
<tr>
<td><strong>Collected Categories</strong></td>
<td>community needs (desired benefits)</td>
<td>intentional purposes</td>
<td>guiding principles</td>
</tr>
<tr>
<td><strong>Action Steps</strong></td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>
Museum Theory of Action
Applying the Findings

Measure your museum’s impact and performance
Outcomes: Impacts & Benefits

- Impacts: What the museum does to its audiences and supporters
- Benefits: What the audiences and supporters get from the Museum

Do your desired impacts align with their perceived benefits?
Value Exchanges: Evidence of Choice

- **Money**
  - Operating revenue (not capital asset income)
  - Earned and support revenue

- **Effort**
  - Museum engagements (site visits, attendance)

- **Time**
  - Dwell time
KPIs and KII s

- Key Performance Indicators (KPI)
  - Utility $$/sq. ft.
- Some operating data may indicate impact
  - Opinions of experts
- Key Impact Indicators (KII)
  - Teacher retention rate
Quantitative & Qualitative Data

- Quantitative: Operating Data & Survey Scales
- Qualitative: Evaluation by Focus Groups and Interviews
- Both are useful

Measure constantly (Quantitative) and Validate (Qualitative) periodically.
Intentional Purpose #XX

Desired Outcome (Impact/Benefit)

Indicator (KPI) of desired impact/benefit

Data fields: definitions and collection methods

Periodic evaluation to test indicators
Indicator Chart

- Intentional Purpose #1 (Mission)
  - Desired Impact 2.1
    - KPI 2.2.1
      - Data Fields
      - Periodic Evaluation
    - KPI 2.2.2
      - Data Fields
      - Periodic Evaluation
    - KPI 2.2.3
      - Data Fields
      - Periodic Evaluation
- Intentional Purpose #2
  - Desired Impact 2.2
- Intentional Purpose #3
  - Desired Impact 2.3
Sample: Contribute Social Value

- **Strengthen civic connections**
  - The museum’s leadership and team reflect the City’s diversity
  - Our partnership network is growing
  - Our managers spend 5-10% of their time in community work
  - Corporations support the museum as they do our peers

- **Enrich quality of life in our City**
  - City residents engage with the museum
  - City residents find our programs live up to their promise
  - City housing values are increasing faster than regional housing

- **Build regional identity and engagement**
  - Investment in heritage collections care is on par with peers
  - Regional residents engage with museum
Declare Chart

Intentional Purpose
#1 (Mission)

Desired Impact
2.1

Intentional Purpose
#2

Desired Impact
2.2

KPI 2.2.1

Data Fields

Periodic Evaluation

KPI 2.2.2

Data Fields

Periodic Evaluation

KPI 2.2.3

Data Fields

Periodic Evaluation

Intentional Purpose
#3

Desired Impact
2.3
Which of these impacts and benefits does your museum deliver? All, to some degree?

Which of these are most important to you? – your *desired impacts*?

Which of these *perceived benefits* are most valued by your audiences and supporters?

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