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MODS 1.0: MUSEUM OPERATING DATA STANDARDS

Note: The questions below were prepared by the White Oak Institute and the American Association of Museums for the Institute of Museum and Library Services (IMLS) and appeared as chapter 3 in the final report, The Museums Count Roadmap (March 31, 2011). The views, opinions, recommendations, and findings expressed herein do not necessarily reflect those of IMLS, the United States Government, or its officers or employees.

The questions and definitions are also the founding version of the Museum Operating Data Standards, or MODS 1.0.

Museum Registration: Overview

Who counts?

The Research Team's understanding and recommendation is that *Museums Count*, the IMLS National Museum Census should include any entity in the United States that declares itself a "museum" and has a physical place accessible to the public on some basis (we do not recommend including new museums in the planning stage nor wholly virtual museums). Others can constrain this broad and inclusive definition of "museum" to meet their own needs, as discussed in Chapter 4 on portal functionality.

Our recommendation is to have a separate record for each geographically distinct museum. This is especially important for access by members of the general public (who commonly understand separate sites as separate museums) and for public planners and policymakers who focus on communities and their museums within a specific geographic domain. Contiguous museum campuses, zoos and parks that have several buildings, living history sites that interpret a community of buildings, etc., should have only one record, but remote satellites and affiliated museums at separate addresses should have separate records, even though they may be operated by the same entity. This approach will allow the public to map museums that match their interests and help urban and rural planners, among others, identify where museum services are abundant or lacking.

Because some museums operate multiple locations under centralized administration, this recommendation of one record per physical museum location needs to be supported by portal functionality that can link museum data records from different sites but also aggregate the totals from the different museum data records into one master museum management report, thus allowing museums that own satellites to generate summary reports.



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Who *shouldn't* bother filling out the National Museum Census?

Our recommendation is to exclude totally private museums (i.e., inaccessible to ordinary visitors), wholly virtual museums, “museum-like areas” in non-museum contexts (collections shown in restaurants or stores, petting zoos at roadside stands, trophy cases, corporate lobby displays, etc.), and museum-like spaces where the primary function is something else (commercial art galleries, antique stores, craft fairs, etc.). However, libraries and archives that think of themselves primarily as museums and offer substantial museum services should be encouraged to participate in the Census.

In the next sections, we present the recommended Data Collection Fields. Attachment A includes the full list of Data Collection Fields along with comments by the Research Team in regard to results of the Expert Reviewer and Stakeholder Survey as well as the analysis behind the decision to include or exclude a Data Collection Field. Color coding was used to indicate the following:

- ◆ Underlined text indicates links that pop-up the requested information when clicked.
- ◆ **Dark red text** reflects special instructions and feedback for museum managers who are entering data via the Museums Count portal. These include introductory and summative comments, sometimes including auto-calculating data fields – marked as “[auto].” These will appear only to museum managers who are authorized to enter data and download reports. These [auto-calculate] reports have not been reviewed by the field, but are provided by the Research Team as examples of the kinds of immediate feedback that will get more museums to fill in more data.

Recommended Part One (15 Questions)

Part One includes the most basic set of museum data fields. The requested information should be easily available and easy to enter for all museums, regardless of the resources at their disposal. The data submitted in Part One should be public, searchable by all users, and representative of the entire museum field when aggregated. These are mostly qualitative questions, with just a few quantitative questions that someone closely associated with a museum should be able to answer readily. Our expectation is that all museums in America who say they are part of the museum field should complete Part One. The letters/numbers in parenthesis (i.e., (A1)) correspond to the numbering in Attachment A, which is ordered by the six subject categories: A) Institutional; B) Engagements; C) Facilities; D) Collections; E) Human Resources; and F) Financial).

P1.1 (A1) Please provide the legal or formal name of this museum, to the best of the respondent’s knowledge: _____

There are [auto] other records with the same formal name; please check for duplicate entries. [This notice appears only if >0]



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P1.2 (A1.1) Additional name(s) by which this museum is commonly known (please separate multiple entries by commas): _____

P1.3 (A2) Please provide the address of this museum's physical location (use the main public entrance): [boxes for address, city, state, zip+4].

P1.4 (A2.2) Please provide this museum's main phone number:

P1.5 (A2.4) Please provide this museum's primary Web site address, if you have one:

There are [auto] other museums registered within a ten-mile radius of you.

There are [auto] other museums registered at the same location. Please check for duplicate entries.

Please look at the list of nearby provisional and registered museums; who are we missing? _____

Definitions:

- Museums Count includes a separate record for each geographically distinct museum in the United States. Contiguous museum campuses, zoos and parks that have several buildings, living history sites that interpret a community of buildings, etc., should have only one record. Remote satellites and affiliated museums at separate addresses should have separate records, even though they may be operated by the same entity.

P1.6 (A4) Which of the following best describes your museum? (Please select just one designation in the primary column, but as many designations as you would like in the secondary column.)

| Primary Identity | Secondary Identities | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Aquarium |
| <input type="checkbox"/> | <input type="checkbox"/> | Anthropology Museum |
| <input type="checkbox"/> | <input type="checkbox"/> | Arboretum/Botanic Garden/Public Garden |
| <input type="checkbox"/> | <input type="checkbox"/> | Art Museum/Center/Sculpture Garden |
| <input type="checkbox"/> | <input type="checkbox"/> | Children's or Youth Museum |
| <input type="checkbox"/> | <input type="checkbox"/> | Ethnically/Culturally/Tribally Specific Museum |
| <input type="checkbox"/> | <input type="checkbox"/> | General or Multi-disciplinary Museum (several subjects) |
| <input type="checkbox"/> | <input type="checkbox"/> | Hall of Fame (e.g., music, sports, entertainment, media) |
| <input type="checkbox"/> | <input type="checkbox"/> | Historic House |
| <input type="checkbox"/> | <input type="checkbox"/> | Historic Site/Landscape |
| <input type="checkbox"/> | <input type="checkbox"/> | History Museum |
| <input type="checkbox"/> | <input type="checkbox"/> | Historical Society |



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- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Military Museum/Battlefield |
| <input type="checkbox"/> | <input type="checkbox"/> | Nature Center |
| <input type="checkbox"/> | <input type="checkbox"/> | Natural History Museum |
| <input type="checkbox"/> | <input type="checkbox"/> | Presidential Library |
| <input type="checkbox"/> | <input type="checkbox"/> | Science/Technology Center/Museum |
| <input type="checkbox"/> | <input type="checkbox"/> | Specialized Museum (single topic/individual) |
| | | What specialty: _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Transportation Museum (air & space, auto, maritime, train) |
| <input type="checkbox"/> | <input type="checkbox"/> | Visitor Center/Interpretive Center |
| <input type="checkbox"/> | <input type="checkbox"/> | Zoo/Animal Park |

There are [auto] other museums registered that share your primary identity, and they are [auto]% of the total.

Definitions:

- General or Multi-disciplinary Museums include museums that combine in one location two or more distinct subjects with roughly equal importance, like history and science. Community museums with a focus on the history, culture and arts of the local community may also be considered General Museums.
- Museums of all types may also house research facilities (see [Resources: Facilities](#) to respond in this area) for staff researchers, scholars and/or the public.

P1.7 (A5) Which of the following best describes the governance, and/or control of this museum? (Select just one main category, after reading the definitions.)

Private non-profit:

- a. Private non-profit museum

Government:

- b. municipal or city
 c. other local (e.g., special park or museum district)
 d. county or regional
 e. state
 f. federal

Corporate/For-Profit:

- g. Corporate museum ([definition](#))
 h. Independent for-profit museum
 i. For-profit museum operated as a franchise or by a management company with operations in more than one location



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Tribal:

- j. Tribal museum

Other:

- k. Other, please specify: _____
- Dual or multiple governance (please indicate governing entities, use letters a through k above) _____

Definitions:

- The governing authority is the museum's primary responsible body, which means, at least, the body setting policy, approving annual budgets and hiring and firing the museum director. In some cases, the governing authority may be the parent organization, while in independent museums it may be the board of directors (in non-profits) or the owner (in for-profits).
- Dual/multiple governance applies only when two or more bodies have formal authority over the museum, as reflected in written contracts, legislation, operating by-laws, etc. Separate foundations for fund raising do not count unless they have contractual authority over museum policy, budgets and the director.
- Corporate museums, in this context, include publicly accessible museums that focus on the history, innovations and/or products of a for-profit corporation or group of businesses, and which are underwritten and governed by the corporation or business group.

There are [auto] other museums registered with similar governance. Your state has [auto] other museums with similar governance and, as compared to a national index of 1.00, your state has an [auto] index of registered museums with your governance.

P1.8 (C3) Museum sites

- Does your museum serve the public directly at more than one separate **physical location**? Yes No
- If yes, how many different physical locations? _____
- If yes, do you consider this location the **main site**? Yes No
- If yes, do (or will) the other sites have separate Museums Count records? Yes No

Definitions:

- Buildings in close proximity with a common access or admissions point should be counted as one physical location.
- Only include physical locations with facilities that are generally open to the public; exclude warehouses, garages, storage sheds, administrative offices, conservation facilities, etc., that are not generally open to the public.



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- Do not include physical locations maintained by other entities at which your museum may, from time to time, offer public programs.
- A separate physical location should have its own record in Museums Count.

P1.9 (B1) Please indicate all on-site attendance to this museum during the most recently completed fiscal year: _____

P1.10 (B1.1) Please indicate the source(s) of this data:

- Ticketing system, reservation system and/or computer reports
- One-way turnstiles and/or electronic counters
- Clicker counts
- Estimates
- Attendance is not known or not counted

There are [auto] other museums registered within a ten mile radius with on-site attendance +/- 25% of yours.

Definitions:

- Include only the museum site covered by this Museums Count record; visits to satellite museums should be reported as part of their museum data records.
- Include paid, free, member, walk-up, groups, program and service participants—all forms of on-site visitation and program use. This is an all-inclusive total of how many people crossed your threshold.
- Include those who come to the museum primarily for purposes such as attending programs, classes or lectures, attending functions and events that include your exhibits, theaters and/or programs, or engaging in research and study.
- *Exclude* people who may come on site but do not visit any of your galleries or other venues (such as people who use only the bathrooms, café or parking).
- *Exclude* foot traffic from staff or volunteers.
- One person who visits on two separate days should be counted as two visits; and participation in a six-part program on separate days counts as six engagements.
- Function and event attendees have to experience the museum's exhibits, theaters, or programs to count, and these activities must be on-site. For instance, if a museum is part of a larger neighborhood Earth Day festival, then it can count only those event participants who entered the museum and experienced some museum-run program or exhibit.
- *Exclude* people you engage off-site, also called outreach, or the people you reach through media and the Web. These are covered by other questions.

P1.11 (B12) Does this museum have specific days or times when any person can visit one or more of your on-site visitor experiences for free?

- Yes No



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P1.12 (D1) Does your institution care for or manage collections (living or non-living) on an ongoing basis?

Yes No

Definition:

- This includes your institution's permanent collection as well as objects/items on long-term loan that are under your care.

P1.13 (E1a) Does your museum employ full-time or part-time paid staff?

Yes No

Definition:

- A full-time employee works at least 35 hours a week.
- A part-time employee works at 34 hours a week or less

P1.14 (F1X_{new}) What was your museum's total operating revenue for the most recently completed fiscal year? Select the appropriate range and check only one box.

- < \$125,000
 \$125,000 - \$500,000
 \$501,000 - \$1,000,000
 \$1,000,001 - \$2,500,000
 \$2,500,001 - \$5,000,000
 \$5,00,001 - \$10,000,000
 >\$10,000,000
 Unknown
 Not applicable

Definitions:

- Include transfers from endowment or allocations from other capital funds intended to cover operating expenses.
- Include restricted fund only if they were released for operations during the reporting fiscal year.
- *Exclude* capital funds received during the fiscal year. Capital funds are funds raised for expenditures to acquire or upgrade physical assets such as property, buildings, machinery, exhibits and/or other fixed assets and are subject to depreciation.

There are [auto] other museums registered that are in the same budget category as yours.

P1.15 (F3) Does your museum charge a general admission fee? (Check only one box.)

Yes, we charge admission



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- No, admission is free but there is a suggested donation amount
- No, admission is free and we do not have a suggested donation amount

Definition:

- Answer “no” if your museum is generally free but you occasionally charge for temporary or traveling exhibits.
- Answer “no” if your museum is generally free, but you charge for group visits that require supervision and guide services.
- If you provide a donation box for visitors but do not recommend a *specific* donation amount, you should select “No, admission is free and we do not have a suggested donation amount.”

Recommended Part Two (20 Questions)

Part Two includes data fields requiring more detailed information from the museum data providers. Not every museum will chose to respond to these questions, though Museums Count should include as many incentives as possible to encourage participation (as discussed in Chapters 4 and 5). With a few exceptions, Part Two includes just qualitative questions. The data submitted in Part Two should also be public and searchable by all users.

P2.1 (A2.1) Please provide this museum’s current mailing address, if different from the physical address: [boxes for address, city, state, zip+4]

P2.2 (A2.3) Please provide this museum’s general public email address:

Definitions:

- Museums Count includes a separate record for each geographically distinct museum in the United States. Contiguous museum campuses, zoos and parks that have several buildings, living history sites that interpret a community of buildings, etc., should have only one record. Remote satellites and affiliated museums at separate addresses should have separate records, even though they may be operated by the same entity.

P2.3 (A6) Is this museum part of a larger, parent organization?

- Yes No

P2.4 (A6.1) If yes, please indicate the nature of your parent. (Select just one.)

- College/university
- Corporation
- Cultural and/or performing arts organization (other than a museum)



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- Branch of the U.S. armed forces
- Museum system or another museum
- Park system
- School or school system (other than college/university)
- Tribal organization
- Other, please specify:_____

Definitions:

- A parent organization is a larger organization and entity that operates the museum along with other activities. Examples of parent organizations include: colleges or universities; tribal, municipal, county, state, or federal government; another museum, state historical and conservation societies supervising multiple sites; libraries and archives; corporate foundations, etc.
- In some cases, the parent may also be the museum's governing authority, but in other cases, it may have delegated that authority to the museum itself.

P2.5 (A8) In what year did this museum open to the public? _____

Definitions:

- Refers to the calendar year during which the facility at this location opened its doors to public access on a regular basis.
- This may not be the same year the museum was founded or incorporated, or the year it opened at a different location, or the year it began with outreach or with limited museum services at a temporary location or as a virtual museum.

This museum has been open for [auto] years; the average age of the registered museums in a ten-mile radius is [auto].

P2.6 (A9) Museums can serve many public purposes. Please indicate which of the following categories of public purpose are most important to the mission and service of your museum, using a scale of 1 (most important) through as high as 6 (least important).

- Creating public value for the community (click list for examples)
 - Serving as a community gathering place
 - Reaching underserved audiences
 - Using institutional resources to solve community issues
 - Celebrating local identity and community pride
- Creating economic value (click list for examples)
 - Contributing to tourism
 - Providing workforce development
 - Contributing to economic welfare of the community
 - Participating in neighborhood development



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- Contributing to heritage preservation (click list for examples)
 - Caring for an historic property
 - Providing landscape and site preservation
 - Conserving significant collections
 - Offering services in research and scholarship
- Serving as a center for lifelong learning
 - Providing exhibits, theaters and programs for adult and family audiences
 - Teaching and supporting object-based literacy
 - Providing opportunities for intergenerational learning
 - Partnering with other centers for informal learning.
- Partnering with formal education
 - Developing programs for K-12 students
 - Offering teacher workshops
 - Developing outreach materials for schools
 - Training future museum professionals
- Serving as places of memory (click list for examples)
 - Preserving a memorial or shrine
 - Building on history/experiences as a source for understanding and tolerance
 - Providing a respite for those seeking solace
 - Preserving and displaying collections that are touchstones to emotional events.

There are [auto] other museums registered with a similar primary purpose, and [auto] museums that share the your same top three in the same order.

P2.7 (A10.1) Please insert a text copy of your mission statement, if you have one, here (not to exceed 200 words): _____

[Click here to see a word cloud of all submitted mission statements to see how your key words fit: \[auto, with their key words color coded\]](#)

P2.8 (B4) How many days per year is your museum generally open to the public? (Select just one.)

- Accessible by appointment or reservation only
- Open less than 60 days per year
- Open 60 to 119 days per year
- Open 120 to 199 days per year
- Open 200 to 249 days per year



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- Open 250 to 299 days per year
- Open 300 days or more per year

Definitions:

- “Open” refers to general access by the public to at least one of the museum’s visitor experiences for at least four hours in a given day (sometimes called “on a walk-up basis”), and according to the museum’s publicly announced admissions policy. Admissions may be free or paid or in some combination.
- This question refers to the museum’s normal operating schedule. You may ignore extraordinary periods of closure due to weather, construction or accidents. Funding cuts that curtail hours are *not* considered extraordinary unless the funding cut is clearly temporary (i.e., has a formal end date of less than one year from the initial curtailment).

P2.9 (B6) Please tell us which of the following categories of programs and services you regularly offer on-site in addition to your main visitor experiences. (Check all that apply; click for a drop-down list of examples)

- Regularly scheduled education programs (examples)
 - Art school
 - Film series (other than giant-screen or planetarium screenings)
 - Learning programs
 - Overnight camp-in programs
 - Pre-school/day care sessions
 - Summer and/or holiday camps
 - Professional development programs for teachers
 - Special needs programming
 - Auditorium presentations
- Informal education experiences in galleries/on museum grounds (examples)
 - Site and gallery tours
 - Live interpreters
 - Demonstrations
 - Activity carts
 - Discovery zones
- Community service(s) and public events (examples)
 - Meet-ups at the museum for Web-based social communities/groups
 - Open public events (e.g., a blood drive or rally for a local sports team)
 - Affinity group events (reenactments, vintage auto shows, craft shows)



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- Performances or concerts
- Community group meetings
- Ethnic/cultural festivals
- Polling place
- WiFi or other computer access areas
- Private rental events (examples)
 - Birthday or other parties
 - Conferences or corporate meetings
 - Private functions on a rental basis
- Partner programs (examples)
 - Charter, magnet or other school facilities
 - Public library branch
 - Adult education center
 - Giant screen theater owned by others
 - Programs run by others but held at the museum
- Research, library and conservation services (examples)
 - Public access to research libraries and facilities
 - Conservation projects for outside collectors/museums
 - Public access computer labs or terminals
 - Animal or plant rescue center
 - Collections research access for researchers and scholars
- Volunteer programs
- Other on-site programs or services, please specify ____

Definitions:

- Regularly means a) routinely available on a public schedule, and/or b) the users expect such programs to be continued in the future, and/or c) such programs happen five or more times a year.

P2.10 (B7) Please tell us which of the following programs and services you regularly offer off-site. (Check all that apply.)

- Regularly scheduled off-site education programs (examples)
 - Camp-ins off-site
 - Programs for youth in other youth settings
 - Programs in schools for students
 - Off-site lectures/speaking engagements/moderated discussions, etc.
 - Off-site professional development training for teachers
- Touring and traveling exhibits to other sites (examples)



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- Traveling exhibitions at other museums
- Van/truck tours to regional schools and other sites
- Kit rental/loan programs
- Travel programs (examples)
 - Field study tours
 - Travel packages organized in the museum's name
- Donor, supporter and stakeholder cultivation events
- Community services and public events held off-site (examples)
 - Off-site meet-ups for Web-based social communities/groups
 - Open public events (e.g., running an off-site blood drive or staffing a booth at the county fair)
 - Affinity group events (reenactments, vintage auto shows, craft show)
 - Community group meetings
 - Ethnic/cultural festivals
- Other off-site programs and programs, please specify:

- We do not regularly offer off-site programs and services

Definitions:

- Off-site programs are also sometimes called outreach programs.
- "Regularly" means a) routinely available on a public schedule, and/or b) users expect such programs to continue in the future, and/or c) such programs happen more than once a year.
- The emphasis here is on face-to-face engagements outside the museum location. *Exclude* virtual engagements via Web sites or other media.
- Include only programs where your museum has the principal responsibility for content and delivery; *exclude* programs produced by others where the museum may serve as an advisor or sponsor but is not responsible for the content.

P2.11 (B8) Which of the following media/Web/online/virtual platforms do you use regularly to engage with the public? (Please check all that apply.)

- Blogs
- Mobile and cell phone services (apps, augmented reality, location-based services like Foursquare, or any other mobile-based technology)
- Online periodicals (e-newsletters, regular email blasts, etc.)
- Online video-sharing sites (YouTube, etc.)
- Online image-sharing sites (Flickr, etc.)
- Podcasts
- Print marketing (brochures, promotional material)



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- Print periodicals (print newsletters, newspaper or magazine columns, museum magazines)
- Print publications (books, exhibit catalogs, curriculum materials)
- Radio segments for broadcast
- Social media channels (Facebook, Twitter, MySpace, etc.)
- Survey sites (such as SurveyMonkey)
- Video segments for broadcast TV or cable
- Virtual reality sites (such as Second Life)
- Webcam(s)
- Webinars or other distance learning programs
- Web site(s)
- Wiki(s)
- Other, please specify: _____

Definitions:

- The emphasis of this question is on museum/audience engagements that exclude face-to-face engagements.
- Collectively, these are called “media engagements.”
- A “media platform” is a communications format or vehicle, also called the communications medium. The platform is distinct from the content presented on that platform.
- “Regularly” means a) routinely available, and/or b) users expect such programs to continue in the future, and/or c) such programs happen more than once a year.

P2.12 (B9) Which of the following age groups do you estimate represented the largest share of your museum’s public engagements during the last fiscal year? (Select just two, a primary and a secondary audience.)

- _____ Children 1-8 with adults
- _____ Adults with children 4-12 (e.g., families)
- _____ School and youth groups
- _____ Teens 13-17
- _____ University students
- _____ Young adults (18-34) either solo or with other adults
- _____ Adults 35+ either solo or with other adults
- _____ Seniors 65+ either solo or with other adults/seniors
- _____ We have a different primary audience age/make-up (please describe): _____
- _____ We do not know our principal or secondary age ranges

There are [auto] museums registered with the same primary audience and [auto] museums with the same primary and secondary audiences within a **ten mile radius**.

There are [auto] museums registered with the same primary audience and [auto] museums with the same primary and secondary audiences within the **nation**.



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P2.13 (B12.1) If yes, on how many days of the year?

- 1-4 days
- 5-19 days
- 20-59 days
- 60 to 119 days
- 120 to 199 days
- 200 to 250 days
- More than 250 days
- Always free, but a donation is suggested
- Always free

P2.14 (C1) Does your museum have any of the following venues, amenities and/or facilities? Please check all that apply:

Venues (separately ticketed or not)

- Exhibit galleries
- Giant-screen/large-format theater (e.g., IMAX)
- Planetarium/fulldome
- Other ticketed theater(s)
- Large-scale artifact(s) (e.g., a submarine or historic structure)
- Live animal habitats
- Live animal shows (e.g., dolphin encounters)
- Multi-purpose auditorium
- Other performance space(s)
- Historic houses/sites
- Outdoor exhibits (incl. interpretive trails)
- Outdoor gardens or park
- Rides (e.g., miniature trains, simulators or pony rides)
- Other: _____

Amenities

- On-site prepared food service: restaurant, café, cafeteria, etc.
- On-site packaged food service: vending machines, other self-service
- Parking (on-site parking lot or garage)
- Picnic/eating area
- Space(s) that you rent to the public
- Store/gift shop/bookstore
- Other, please specify: _____



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Facilities and Support Spaces

- Archives accessible to the public
- Art studio space(s)
- Astronomical observatory
- Charter or other school
- Collections storage (off-site)
- Collections storage (on-site)
- Conservation lab
- Day care center/preschool
- Greenhouse/conservatory
- Learning center or classrooms (including program spaces used as classrooms)
- Library/research center accessible to the public on some basis
- Satellite and remote venues (not counted as separate museums)
- Space(s) occupied by other tenants
- Specimen/collection preparation area
- Other: _____

P2.15 (D1.2) Do you provide digital access to any of your collections or holdings? Check all that apply. (Note that another question in this Census also addresses virtual engagements with the public, but this question focuses specifically on public access to museum collections and holdings.)

- Online exhibits that *do not* have a physical counterpart
- Online exhibits that *complement* a physical counterpart (even if the physical exhibit is now closed)
- Mobile applications (for smartphones, etc.)
- Online collections database(s)
- Games featuring collections or holdings
- Other interactive resources featuring content from collections or holdings
- Digital art (i.e., created in a digital format)
- Digitally scanned photographs from collections or holdings
- Digitally scanned documents, books, or other print materials from collections or holdings
- Digitally scanned artifacts from collections or holdings
- Video artifacts (excluding interpretive video by curators, educators, etc.)
- Audio artifacts (excluding interpretive audio by curators, educators, etc.)
- Virtual tours of your museum featuring collections (audio and/or video)
- Online curriculum guides related to collections or holdings
- Other, please specify: _____



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None of the above

P2.16 (D2) Please indicate all of the types of objects or collections in your museum. Check all that apply:

- Anthropological materials
- Architecture/buildings
- Archaeological objects
- Art or other objects on paper
- Audio-visual materials/recordings/electronic media
- Books
- Contemporary objects (popular culture, recent events, etc.)
- Digital artifacts (i.e., objects that were “born digital,” not just digitized)
- Documents/manuscripts
- Ethnographic materials (including tribal or culturally-specific)
- Geological, mineralogical and/or paleontological specimens
- Historical objects
- Industrial/technological/engineering artifacts
- Living collections (live animals, plants, etc.)
- Metal artifacts
- Natural science collections
- Paintings
- Photographic materials
- Preserved animal and/or plant specimens
- Sculpture
- Textiles
- Toys/dolls
- Transport/vehicles (airplanes, automobiles, boats, trains, etc.)
- Wooden artifacts
- Other objects not listed above _____

P2.17 (D2.1) Briefly describe the focus of your collection(s), using brief tags (1-5 words) rather than complete sentences. These tags can include object type(s), media, provenance, or any other factor you consider relevant to describing the collections in your museum (e.g., “quilts, duck decoys, costumes, medieval China”). Limit: 100 words! [With warning: You have X words remaining.]

P2.18 (D3.1.1) Does your institution have a written, long-range preservation plan or policy for the care of collections or holdings (i.e., a document that describes a multi-year course of action to meet an institution’s overall preservation needs)?

- Yes
- Yes, but it is not up-to-date



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- No
- No, but one is being developed
- No, but preservation is addressed in an overall long-range plan
- Don't know

P2.19 (F1.1.3) Please indicate all sources of government funding for operations that your museum received during the most recently completed fiscal year.

- City/Municipal
- Other Local (park district or similar)
- County/Regional
- State
- Federal
- Tribal

Definitions:

- Include restricted funds, such as grants, only if they were released from restrictions during the fiscal year.
- *Exclude* donated or provided in-kind services or materials.

P2.20 (F4) Does your institution, or a separate foundation or parent organization, have an endowment?

- Yes No Don't know Not applicable

Definitions:

- Endowments are funds with permanent or term restrictions placed upon them by a donor, other funder, or governing board. Usually, just the interest, or an amount determined by some other formula, such as a percentage of the endowment based upon a three-year or five-year rolling average, can be transferred to the operating budget.
- Include endowments dedicated to the support of this museum, restricted or unrestricted, whether directly held by your institution or by others (such as a parent organization or separate foundation).

Recommended Part Three (24 Questions)

Part Three includes data fields requiring detailed operational and financial information to complete. Part Three concentrates on quantitative questions and will require having detailed budgets and other documents handy. Some museums will not have the resources (or data at hand) to complete this part of Museums Count. We recommend that museums have the option to assign the data submitted in Part Three to one of three privacy levels: open and searchable by all users; open to other users only after being anonymized and aggregated; or totally private (with limited access even by authorized



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Census administrators). We recommend that museums completing Part Three be rewarded with specialized museum management reports; for example, an **Internal KPI** report focusing on comparisons to the previous year and similar museums and an **External KPI** report focusing on comparisons to similar museums and communities.

P3.1 (A3) Some of the Census questions ask for data from the most recently completed fiscal year end in order to collect consistent data from all museums. Please indicate the final day of the museum's fiscal year for which you are providing data.

[formatted boxes for MM/DD/YYYY]

Your data is currently [auto] months old.

Definitions:

- Example: for a July-to-June fiscal year, enter 06/30/2010 above.
- A fiscal year (sometimes also called a financial year or budget year) is a period used for calculating annual financial statements in businesses and other organizations.
- For museums, the fiscal year is often different from the calendar year, any tax reporting deadlines, or the federal or state budget year.
- The fiscal year reported here should be the most recent fiscal year your museum has *completed*. Do not enter data from an incomplete fiscal year.

P3.2 (B2) Of your total on-site attendance, please indicate how many were on-site visits to the museum's visitor experiences during the most recently completed fiscal year: _____

P3.3 (B2.1) Please indicate the source of this data:

- Ticketing system, reservation system and/or finance reports
- One-way turnstiles and/or electronic counters
- Clicker counts
- Estimates
- Attendance is not known or not counted

Subtracting this number of on-site visits from your total on-site attendance means that you had [auto= B1 – B2] attend the museum primarily for programs and services in addition to the [auto= B2] visits to your museum for your visitor experiences. On-site museum programs and services include classes, workshops, labs, lectures, camp-ins, conferences and meetings, studio sessions, open appraisals, meet-ups and more (drop-down list of possibilities in QB6), provided they are operated by the museum. If these figures do not look right, please double-check the figures you submitted.

Definitions:

- Include only visits to one or more of your on-site visitor venues (see a list of possible venues by clicking [here](#) [drop-down the list in Question C1]). On-site visits to a



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museum's visitor experiences are sometimes referred to as gate attendance, gate admissions, walk-in and group gallery attendance, ticket sales, or turnstile counts. The number should include individual, member, group and free visitors.

- *Exclude* participations in programs and events that are separate from your visitor experiences, like evening lectures, studio classes, and conferences.
- For museums without separate programs, the total on-site attendance and the gate attendance will be the same.
- Do *not* double-count one person visiting two venues within this museum, such as exhibits and a theater. In other words, count a combination ticket as one museum visit, not as two or more venue visits.
- *Exclude* people who came for events produced by others and simply held at your facilities, such as function rentals or laser shows operated by an outside company, unless their participants also experienced your galleries, interpretive grounds and/or museum-programmed theater presentations.

P3.4 (B3) Please indicate the total number of off-site (also known as outreach) engagements in museum programs or services provided by your museum during the most recent fiscal year: _____

Definitions:

- Off-site museum programs and services are delivered at locations remote from a museum's physical location, such as in schools, libraries, fairs, senior centers or other off-site physical locations, and may include classes, workshops, labs, lectures, camp-ins, conferences and meetings, studio sessions, open appraisals, meet-ups, travel programs and tours, and more. [Provide a drop-down list of possibilities from Question B7 in regards to programs and services regularly offered off-site.]
- If you do not offer any off-site programs or services, please enter "0."
- *Exclude* media/Web/online/virtual programs or services or the estimated number of listeners/viewers for media productions such as TV shows, podcasts, or radio broadcasts. The emphasis of this question is face-to-face engagements between people away from your museum.
- *Exclude* attendance at traveling exhibitions or films produced by you but located at another museum, or incidental engagements such as people reading publications produced by your museum.

Based on your responses, this museum had [auto = B1 + B3] face-to face engagements (the sum of your visits and program participants, both on- and off-site during the fiscal year in addition to an uncounted number of media and virtual engagements). Your ratio of engagements to the population within a ten-mile radius for this fiscal year is [auto = (B1+B3)/ten mile population].



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- P3.5 (B8.1) Looking across all the media/Web/online/virtual platforms employed by your museum, what types of content do you offer? (Please check all that apply.)
- Collections (click list for examples)
 - Content research questions (e.g., crowdsourcing photo tags)
 - Information on collection access for scholars/researchers
 - Online collection database
 - Online publications
 - E-commerce (click list for examples)
 - Purchase (and pay for) admission tickets
 - Purchase (and pay for) a museum membership
 - Purchase (and pay for) program and service fees
 - Make (and pay for) donations
 - Purchase items from the museum gift shop or bookstore
 - Other e-commerce activities (please describe): _____
 - Educational information (click list for examples)
 - Curriculum guides and other teacher resources
 - Forums on topics related to our mission
 - News and current events related to our museum's subjects
 - Marketing (click list for examples)
 - Audience research demographics
 - Links to your other virtual sites
 - Museum descriptions
 - Media materials
 - Promotions and admissions deals
 - Virtual experiences (click list for examples)
 - Games
 - Scheduled educational programs, like webinars and distance learning
 - Virtual community(ies) for museum users/fans
 - Virtual exhibits
 - Virtual tour(s) of this physical museum
 - Visitor information (click list for examples)
 - Current events at the museum
 - Links to other sites and partners
 - Other, please specify: _____



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P3.6 (B10) How many total memberships (individual, family, etc., but *not* corporate) did this museum or its affiliated support organization(s) have at the end of the museum's fiscal year? (enter zero (0) if no membership program)

Definitions:

- Membership is a recorded relationship, usually involving a fee, for a period of time, usually annually, that confers benefits to the individuals covered by the membership.
- The count is for membership accounts, which may cover multiple individuals. One family membership, for example, may involve 3-8 individuals, but counts here as one.

Nationally, the ratio of total population to total registered museum memberships is [auto]. The same ratio for the registered museums in your ten mile radius is [auto].

P3.7 (B11) How many pre-K–12 school children did you serve during the fiscal year?

Definitions:

- Please indicate the total number of students (including homeschooled students) served during on-site visits *and* off-site programs as part of their schooling; please exclude children who came with families.

You served [auto %] of the school population in your ten-mile radius in the fiscal year.

P3.8 (B12.2) How many people do you estimate you served for free during the fiscal year? _____

Definitions:

- Free means free to visitors (or program participants), though some other funding source may cover all or part of the actual cost (such as a sponsor or grant).

Of your total face-to-face engagements, [auto]% were free.

P3.9 (C2) What is the gross square footage of the building(s) operated by this museum? Select the appropriate range and check only one box. In addition, if available, please provide the actual size, as reflected in architectural plans or other records.

- The estimated size is:
- <10,000 sq. ft.
 - 10,000-25,000 sq. ft.
 - 25,0001-50,000 sq. ft.
 - 50,001-75,000
 - 75,001-100,000 sq. ft.
 - 100,001-175,000 sq. ft.



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- 175,001-250,000 sq. ft.
- >250,000 sq. ft.
- Unknown
- Not applicable.

The actual size is _____ sq. ft.

Definitions:

- Gross square footage is an architectural term referring to the space within the outside perimeter of the building times the number of habitable indoor floors. It includes everything inside that space: the thickness of the walls, the stairs, mechanical rooms, etc. For example, if a three-story building occupies a 10,000 SF footprint on two floors, and has a third floor set back so that it covers only half of the floors below, it would be 25,000 gross sq. ft.; if it has a full basement, even if not accessible to the public, that would add 10,000 gross sq ft.
- If your institution is located within a larger, non-museum structure, report only the square footage occupied by the museum.
- If your institution has more than one building at this physical location, please report combined square footage.
- Include any building space that is supported by the operating budget associated with this physical location, whether on-site or off-site.
- Exclude outdoor exhibit areas.

P3.10 (D3.1.2) Has a survey of the general condition of your collections or holdings been done (i.e., an assessment based on visual inspection of the collections and the area where they are exhibited or held)?

- Yes
- Yes, but it is not up-to-date
- Yes, but only of a portion of the collection
- Yes, but only of a portion of the collection, and it is not up-to-date
- No
- Don't know

P3.11 (D3.1.3) Does your institution have a written emergency/disaster plan that includes the collections/holdings?

- Yes
- No
- Don't know

P3.12 (E1) How many **full-time**, non-seasonal paid employees worked at your museum at the end of the most recently completed fiscal year? If none, please write in zero (0). _____



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Definitions:

- A full-time employee works at least 35 hours a week.
- A seasonal employee works fewer than 9 months per year.
- The next question will ask you about part-time employees.

Include:

- Employees on paid leave
- Employees at remote locations not counted as separate museums
- Currently vacant positions that are authorized to be filled as soon as possible (i.e., not under a hiring freeze)

Exclude:

- Independent contractors (i.e., people who work under contract for your museum to accomplish certain goals, or to complete a specified project, or for a limited period of time, but are not paid through your museum's payroll system)
- Employees of contracted service providers (e.g., employees of temporary agencies, food service companies, janitorial services, security companies, etc., who work at your facility but are not paid through your museum's payroll system)
- Employees on unpaid, indefinite leave

P3.13 (E2) How many **part-time**, non-seasonal paid employees worked at your museum at the end of the most recently completed fiscal year? If none, please write in zero (0). _____

Definitions:

- A part-time employee works at 34 hours a week or less.
- A seasonal employee works fewer than 9 months per year.
- Exclude volunteers.

P3.14 (E2.1) How many **seasonal employees** worked at your museum during the most recently completed fiscal year? Please include both full-time and part-time seasonal employees. If none, please write in zero (0).

Definitions:

- A seasonal employee is someone who is hired to work fewer than 9 months per year to meet heightened demand for a museum's services during a particular part of the year.
- Exclude volunteers.

P3.15 (E3) Volunteers

- a) Does your institution have **volunteers**? Yes No



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- b) If yes, how many volunteers did you have during your most recent fiscal year? Please include full-time and part-time, seasonal and non-seasonal volunteers. Do not include board members. If none, please write in zero (0). If you are unsure, check "Don't know."
_____ Don't know

P3.16 (F1) What was your museum's total operating revenue for the most recently completed fiscal year? \$ _____

Definitions:

- Include transfers from endowment or allocations from other capital funds intended to cover operating expenses.
- Include restricted funds, such as multi-year grants, only if they were released for operations during the reporting fiscal year.
- *Exclude* the dollar value of donated or provided in-kind services or materials.
- *Exclude* capital funds received during the fiscal year. Capital funds are funds raised for expenditures to acquire or upgrade physical assets such as property, buildings, machinery, exhibits and/or other fixed assets and are subject to depreciation.

Your museum's operating revenue per on-site visit (total operating revenue divided by on-site attendance) is [auto] \$xx as compared to [auto] \$xx for all other museums that have responded to the Census.

P3.17 (F1.1) Please provide a breakdown of your total operating revenue for the most recently completed fiscal year, using the following categories. (The total for all categories should match the amount indicated as total operating revenue in question X.)

- \$ _____ **Earned revenue**
(*Exclude* endowment income, which is reported in another category.)
- \$ _____ **Private support revenue**
- \$ _____ **Government support revenue**
(Include local support – e.g., from a city, park district and/or county – as well as state, federal, tribal, and all other types of government support.)
- \$ _____ **Endowment and Investment operating revenue**
(Only include amount used or available for operations for the fiscal year.)
- \$ _____ **Total Operating Revenue**
[Will be automatically calculated.]



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Definitions:

- In each category include restricted funds only if they were released for operations during the fiscal year
- Earned revenue includes money from such things as admission fees, food sales, museum store sales, function rentals, fairs and festivals, on-site and off-site programs, birthday parties, membership dues and fees paid in return for benefits such as free admission and discounts. If your museum allocates a portion of higher levels of membership to private support revenue, allocate it the same way in this Census.
- Government support revenue should also include restricted grants only if they were released during the fiscal year.
- Private support revenue includes all charitable income from *non-government* sources such as corporations, foundations and individuals, including unrestricted grants and restricted grants released during the fiscal year. The portion of membership fees that are reported to members as generally deductible from taxes as a charitable contribution should be considered private support revenue. If your accounting system does not track membership revenue in this way, you should allocate membership revenue for the Census the same way you record this information for your internal financial data.

Your museum's key performance indicator (KPI) (i.e. ratio) of earned revenue per on-site visit (auto = earned revenue divided by total on-site attendance) is \$xx as compared to \$xx for all other museums that have responded to the Census.

Your museum's KPI (i.e., ratio) of government dollars per on-site visit (auto = government support dollars divided by total on-site attendance) is [auto] \$xx as compared to [auto] \$xx for all other museums that have responded to the Census.

Your museum's percentage of revenue by category (calculated as the dollar amounts for each of the four categories of revenue divided by total operating revenue) calculates to [auto] xx% for earned, [auto] xx% for private support, [auto] xx% for government and [auto] xx% of Endowment/Investment income) as compared to [auto] xx%, xx%, xx% xx% for all other museums registered in the Census.

[Note: Membership is a tricky category and may require further research to fine-tune the definitions before beta-testing the Census. Regular levels of membership are typically considered earned revenue, but higher levels of membership (or a portion of the dues) are usually counted as private support. ACM includes both non-corporate (individuals, families, etc.) and corporate membership dues in earned revenue. ASTC allocates non-corporate membership dues to earned revenue and corporate membership dues to private support. The Cultural Data Project includes a category for membership dues and fees (but it is silent on corporate vs. non-corporate) under earned revenue. AAM, under its definition for earned income, is silent on memberships.]



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P3.18 (F1.1.2) What was your on-site visitor admissions revenue for the most recently completed fiscal year? \$_____

Definitions:

- On-site visitor admissions revenue (also known as gate admissions, paid admissions, ticket sales) includes revenue from individuals, families and school and other groups visiting your exhibit halls and other regularly ticketed venues such as specially ticketed traveling exhibitions, theaters, park rides, and more.
- *Exclude* revenue from programs and services such as classes, birthday parties, special events, facility rentals, etc.
- *Exclude* membership revenue from membership programs.

P3.19 (F2) What were the total operating expenses at this museum for the most recently completed fiscal year? \$_____

Definitions:

- Operating expenses include all expenditures that support a museum's general operations in a given fiscal year, including exhibitions, education, conservation, collections management, collections acquisitions, research, training, development, administration, etc. Operating expenses do not include capital expenditures.
- Include expenses from a restricted grant or other funds only if released for use in operations during the fiscal year.
- *Exclude* depreciation or amortization expenses.
- *Exclude* in-kind services.
- *Exclude* capital expenses. Capital expenditures are used to acquire, construct or upgrade physical assets such as property, buildings, machinery, exhibits and/or other fixed assets and are subject to depreciation.

Your museum's KPI (ratio) of expenses per on-site visit (auto = total operating expenses divided by total on-site attendance) is \$xx compared to \$xx for all other museums that have responded to the Census [and/or as compared to \$xx for xx museums in the same budget category as you].

Your museum's KPI (ratio) of expenses per building square foot (auto = total operating expenses divided by gross building sq. footage) is \$xx as compared to \$xx for all other museums that have responded to the Census [and/or as compared to \$xx for xx museums with building size within 20% of your building size or of operating expenses].

P3.20 (F2.1) What were the total operating expenses for personnel at this museum for the most recently completed fiscal year, including wages, salaries and benefits?

\$_____ Wages and salaries
\$_____ Benefits
\$_____ Total personnel expenses



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(This should equal the sum of wages/salaries and benefits. If you cannot provide a breakdown of wages/salaries and benefits, enter total personnel expenses here.)

Definitions:

- Include full-time, part-time and seasonal staff for the reporting year.
- Benefits include: Payroll taxes, health benefits, disability, workmen's compensation, pension and retirement benefits and other employee benefits.
- *Exclude* contract labor (i.e., employees of contracted service providers or people who work under contract for your museum but are not paid through the museum's payroll system).

Your museum's KPI (ratio) of personnel expenses as a percentage of total operating expenses (auto = personnel expenses divided by total operating expenses) is xx% compared to xx% for all other museums that have responded to the Census [and/or as compared to xx% for xx museums in the same budget category as you].

P3.21 (F3.1) If you do charge for admission, please indicate the *current* solo ticket prices to your primary visitor experience. This is what most visitors would consider the "general admission" price.

\$ _____ Adult solo ticket
 \$ _____ Senior solo ticket
 \$ _____ Youth/Child solo ticket
 \$ _____ Younger Child solo ticket, if
 separately priced
 \$ _____ School Child solo ticket, when
 visiting in a group

Definitions:

- Ticket prices should be current prices and *do not* have to match the fiscal year for which you are reporting finance and attendance data.
- Include only the price for solo tickets to your primary ticketed visitor experience.
- If you have several ticket price levels based on place of residence, include the price for non-local residents.
- If you have a theater or other second visitor experience/venue that might be considered an equal attraction to your exhibit halls or other primary visitor experience, please enter the ticket price for only one of the venues.
- *Exclude* the price of combination ticket prices for two venues, such as exhibits and theaters.
- *Exclude* member ticket prices that are lower than non-member prices.



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P3.22 (F4.1) If yes, what was the value of your endowment at the close of the fiscal year for which you are reporting data in other sections of the Census.
\$_____?

Definition:

- Include endowments dedicated to the support of this museum, restricted or unrestricted, whether directly held by your institution or by others (such as a parent organization or separate foundation).

P3.23 (F6.) Were you, or an affiliated organization on your behalf, actively engaged in or did you complete a capital campaign within the last completed fiscal year?
 Yes No

P3.24 (F6.1) If you were actively engaged in or completed a capital campaign within the last completed fiscal year, how are you using or plan to use the funds that you raised? Check all that apply.

- Building expansion
- Building renovation
- New Building
- Collections acquisitions
- Collections care or preservation
- Endowment
- Permanent exhibits and/or exhibit renewal
- Traveling or temporary exhibits
- Infrastructure improvements (e.g. ticketing, phone, or IT systems)
- Land acquisition
- Land renewal or restoration (not part of building construction)
- Moving facilities to another existing building
- Other
- Programs
- Other

Please indicate what is included in other _____