



Note: This document was prepared by the White Oak Institute and the American Association of Museums for the Institute of Museum and Library Services (IMLS). The views, opinions, recommendations, and findings expressed herein do not necessarily reflect those of IMLS, the United States Government, or its officers or employees.

# *Museum Census Roadmap*

March 31, 2011

For the



By the

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## White Oak Institute and the American Association of Museums

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The recommended Data Collection Fields are listed in Chapter 3. Chapter 3 includes all questions and definitions recommended by the Research Team for inclusion in *Museums Count: The National Museum Census*. Any other questions/definitions (or versions of questions/definitions) contained in this report are included for *reference purposes only*.

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# PROJECT BACKGROUND AND OBJECTIVES

## CHAPTER 1

“The lack of comprehensive, reliable data about the size and scope of the museum sector in the United States is a considerable barrier to developing the type of public policy that is needed to fully realize the educational, economic, and cultural value of museums.”

*Marsha L. Semmel, Deputy Director for Museums and Director for Strategic Partnerships  
Institute of Museum and Library Services*

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### Overview

The White Oak Institute (WOI) and the American Association of Museums (AAM), under a contract with the federal Institute of Museum and Library Services (IMLS), developed the recommendations in this document in collaboration with the museum field as part of *Museums Count*, the proposed IMLS National Museum Census.

This *Museum Census Roadmap* includes:

- 1 The background of the Museums Count project and IMLS’s steps to address the data needs of the museum field
- 2 Research process and rationale
- 3 A summary of the research and analysis by the WOI/ AAM Research Team
- 4 The role of the Expert Reviewers and Stakeholders
- 5 Recommended priority groups for Data Collection Fields
- 6 Recommended Data Collection Fields (Chapter 3)
- 7 Recommended portal functionality (Chapter 4)
- 8 Recommended roll-out and sustainability strategies (Chapter 5)

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### Project Background and Objectives

The primary goal of Museums Count is to have every museum in the United States represented in a national, public database. The aspiration is that Museums Count will become the primary reference source of reliable, comprehensive data on the museum sector and will provide the public, policy and research users, researchers and the museum field with quality data for strategic decision-making.

A definitive census of all museums can also provide the foundation for gathering clear evidence about the museum sector’s role in American life and its contribution to public



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value. Standardizing the definitions for gathering basic museum information is critical for museum innovation and advancement, and the Research Team has pursued this task collaboratively with representatives from the museum field.

The recommendations made in this document are based on the goals and purposes of Museums Count as defined by IMLS, the Research Team's understanding of the potential applications of data collected through a national Census and the needs of the intended users, as well as the extensive feedback we received from experts and practitioners in the field.

### IMLS Goals/Purposes of Museums Count

- ◆ Count all museums in the United States and its territories to establish "comprehensive, reliable data about the size, distribution and scope of the museum sector in the U.S."
- ◆ Collect data that allows IMLS to account for the reach and distribution of its services to the museum field.
- ◆ Provide comprehensive data to define and describe the museum sector.
- ◆ Provide standard and consistent data for comparisons.
- ◆ Create a database that will be useful to and used by a range of users.
- ◆ Provide the public, researchers and the museum field with quality data for strategic decision-making
- ◆ Create the initial census questions and definitions that will be incorporated into a public, searchable online IMLS database. The Census data will be updated on a periodic basis, and later iterations may include a broader set of questions.
- ◆ Create a tool that will facilitate subsequent survey sampling and further museum research by IMLS, museum service organizations and others.
- ◆ Align data collection with other federal agencies and data collection initiatives as much as possible.
- ◆ Develop resources in ongoing consultation with museum organizations and other relevant agencies and organizations.

In addition to IMLS goals, the Research Team recommends the following goals:

- ◆ Head toward a framework of key performance indicators (KPIs) based on standardized museum data. These will help museums set goals for monitoring and increasing their effectiveness and value - not just in pursuit of public support, but also to better achieve self-defined mission(s).



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- ◆ Create a database that will assist in setting the type of public policy that is needed to fully realize the educational, economic, and cultural value of museums and help every museum make a better case for all museums.
- ◆ Develop and promote standard data definitions to facilitate peer comparisons and ease reporting burden, confusion and error.

*All* of these goals need to be accomplished with the collaborative support of as many museum stakeholders as practical.

### Potential Applications

The multiple users of Museums Count (see below) should be able to use the data gathered from America's museums to:

- ◆ Map the exact location of every museum in the United States;
- ◆ Find peer museums across the country;
- ◆ Determine the true scope and size of the museum sector;
- ◆ Locate individual museums or museum organizations within their larger social or economic contexts;
- ◆ Make statements about the capacity of museums in a given city, state, or region;
- ◆ Establish the known universe of institutions to inform museum research at the local and national levels;
- ◆ Find potential partners;
- ◆ Compare benchmarks and discover best practices; and
- ◆ Link to museums with common interests.

The Research Team envisions that, in time, the Census will also help museum managers: identify peer museums for benchmarking; define and monitor key performance indicators (KPIs); understand the true scope and size of their particular sub-sector of the museum field - and more.

The prime task for the Research Team's work was to identify Data Elements that, in aggregate, would achieve all the project goals listed above and provide a comprehensive and reliable portrait of the museum sector in the U.S. The aggregate portrait of museums should be useful to all listed stakeholders and easy to update on a periodic basis.



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## Potential Audience/Users

### **Museum Managers**

- ◆ Individual museums
- ◆ Museum networks

### **The General Public**

- ◆ Individuals and families planning leisure/educational activities
- ◆ Hobbyists and avocational researchers
- ◆ Local education agencies and individual educators
- ◆ Private-sector entrepreneurs
- ◆ Media

### **Policy and Research Users**

- ◆ Researchers
  - ▶ IMLS and other government agencies
  - ▶ Museum and allied service organizations at all levels (national, regional, state)
  - ▶ Academic researchers
  - ▶ Museum-based researchers and evaluators
  - ▶ Media
- ◆ Policymakers
  - ▶ IMLS and other government agencies
  - ▶ Mayors and other local executives
  - ▶ Legislators and their staffs
  - ▶ Policy analysts
  - ▶ Local economic-development/tourism/planning professionals
- ◆ Museum Advocates
  - ▶ Museum and allied service organizations at all levels (national, regional, state)
  - ▶ Museum “friends” organizations
  - ▶ Private citizens

### **Museum Supporters and Funders**

- ◆ Public grantmakers
- ◆ Private philanthropists
- ◆ Individual donors



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## Acknowledgments

The principals involved from the White Oak Institute are John Jacobsen and Jeanie Stahl. Philip M. Katz represented AAM. Our team also included Beverly Sheppard of the Institute for Learning Innovation, who reviewed drafts of the proposed Data Collection Fields and Definitions, and Elizabeth Merritt of AAM, who provided additional suggestions for Census roll-out and sustainability. Carlos Manjarrez and Erica Pastore at IMLS are in charge of *Museums Count*, and managed this aspect for IMLS.

Twenty-five (25) Expert Reviewers and sixty-four (64) Stakeholders were solicited to voluntarily lend their efforts and expertise to the process.

The Research Team thanks all the Reviewers and Stakeholders for the expertise and effort they contributed to these recommendations. Because of the multiple drafts they reviewed, their participation in Web-based meetings and a workshop in the nation's capital, their contributions to wiki site discussions, and the over 1000 written comments they provided (see Chapter 2 section on "Engaging the Field"), these recommendations truly come from the field. We also thank the various museum associations, commercial entities, and public agencies in several countries that shared with us copies of existing museum surveys.

Expert Reviewers	Affiliation
Christine Anagnos	Association of Art Museum Directors
Jessica Cahail	Cultural Data Project, Pew Charitable Trusts
Margo Carlock	Virginia Association of Museums
Randy Cohen	Americans for the Arts
Brian Crockett	Independent consultant
Terry Davis	American Association for State and Local History
Celeste DeWald	California Association of Museums
Michael DiPaolo	Small Museum Association
Robert Docherty	Official Museum Directory
Janet Rice Elman	Association of Children's Museums
Carolyn Fuqua	National Opinion Research Center
Angela Han	National Assembly of State Arts Agencies
Kristen Laise	Heritage Preservation
Erik Ledbetter	Visitor Studies Association
Jessica Luke	Institute for Learning Innovation
Kit Matthew	Blackbaud, Inc.
Suzanne McLaren	Society for the Preservation of Natural History Collections
Jill Norwood	National Museum of the American Indian
Steve Olson	Association of Zoos & Aquariums



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<b>Expert Reviewers</b>	<b>Affiliation</b>
Eric Pourchot	American Institute for Conservation
Terrie Rouse	Former CEO, U.S. Capitol Visitor Center
Christine Ruffo	Association of Science-Technology Centers
Dan Stark	American Public Gardens Association
Stephen Whittington	Association of Academic Museums & Galleries
Dan Yaeger	New England Museum Association

<b>Stakeholders</b>	<b>Affiliation</b>
Laura Abraczinskas	Michigan State University Museum
Carol Aegerter	Minnesota Children's Museum
Gail Andrews	Birmingham Museum of Art
Alan Baker	Charles Paddock Zoo
George Bassi	Lauren Rogers Museum of Art
Barbara C. Batson	Library of Virginia
Beth Beckett	Clay County Historic Sites
Elana Benamy	Academy of Natural Sciences
Heather Bigeck	Joliet Area Historical Museum
Craig Blower	Reuben H. Fleet Science Center
Leonie Bradbury	Montserrat Gallery
James Bryant	Museum Department, City of Riverside, California
Cinnamon Catlin-Legutko	Abbe Museum
Elaine Clements	Andover Historical Society
Janie Cohen	Fleming Museum
Rita Deedrick	COSI
Jim DeMersman	Museum on Main
Kim Dresser	Western Oklahoma Historical Center
Lin Ezell	National Museum of the Marine Corps
Martin Fisher	Science Central
Debbie Frandei	The Raupp Museum
Phelan Fretz	ECHO Lake Aquarium and Science Center
Tracy J. Gillespie	Aldie Mill Historical Park
Janice C. Hack	Lake Forest-Lake Bluff Historical Society
Michael Hammond	Aqua Caliente Cultural Museum
Erin Hauser	Saunders County Museum
Cheryl Hinton	Barona Museum
Anna Holloway	The Mariners' Museum
Karl Hutterer	Santa Barbara Museum of Natural History
Kathleen Jameson	Mint Museum
Gerald Jemison	Ganondagan State Historic Site

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<b>Stakeholders</b>	<b>Affiliation</b>
Berwyn Jones	Welsh Heritage & Cultural Center
Kathy Kelsey Foley	Leigh Yawkey Woodson Art Museum
Mary LaGue	Taubman Museum of Art
Amy Lent	Maine Maritime Museum
Jeff Liverman	Danville Science Center
Shawn Lum	Vacaville Museum
Mary MacNaughton	Ruth Chandler Williamson Gallery (Scripps College)
Anne McCudden	Ah-Tah-Thi-Ki Museum
Pamela Meister	Mountain Heritage Center
Bruce Michaud	Salem Witch Museum
Jeanette Miller	Ganondagan State Historic Site
Susan Moldenhauer	University of Wyoming Art Museum
Dan Monroe	Peabody Essex Museum
Jo Mueller	George A. Spiva Center for the Arts
Al Najjar	Glazer Children's Museum
Anna Nolan	Bone Creek Museum of Agrarian Art
John Noonan	Great Lakes Children's Museum
Shannon O'Dell	Sindecuse Museum of Dentistry (University of Michigan)
Ron Potvin	John Nicholas Brown Center (Brown University)
Patsy Reublin	Bootheel Youth Museum
Kathy Riggs	Earle-Harrison House & Pape Gardens
Barbara Rothermel	Daura Gallery
Gary Sandling	Monticello
Henry Schulson	Creative Discovery Museum
Kay Simpson	Springfield Museums
Stefan Sommer	Colorado Plateau Biodiversity Center (Northern Arizona University)
Deborah Spiegelman	Miami Children's Museum
Rodger Stroup	South Carolina Railroad Museum
Bev Tyler	Three Villages Historical Society
Sara Van Arsdel	Orange County Regional History Center
Elee Wood	Children's Museum of Indianapolis
Steven Worton-Cross	Franklin Institute
Don Zuris	Corpus Christi Museum of Science and History



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<b>The Research Team</b>	<b>Affiliation</b>
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Jeanie Stahl	White Oak Institute
Rebecca Robison	White Oak Institute
Philip M. Katz	American Association of Museums
Elizabeth Merritt	American Association of Museums
Beverly Sheppard	Institute for Learning Innovation

<b>Museums Count</b>	<b>Affiliation</b>
Carlos Manjarrez	Institute of Museum and Library Services
Erica Pastore	Institute of Museum and Library Services
Marsha Semmel	Institute of Museum and Library Services
Mamie Bittner	Institute of Museum and Library Services
Susan Hildreth	Institute of Museum and Library Services

<b>Survey Instrument</b>	<b>Organization</b>
2008 History Museum Forum Survey	American Association for State and Local History
Museum Financial Information Survey (2008)	American Association of Museums
2007 Medium & Small Garden Benchmarking Study (Budgets <\$2 Million)	American Public Gardens Association
ACM Member Survey of Open Museums (2010)	Association for Children's Museums
2010 State of North America's Art Museums Survey	Association of Art Museum Directors
2009 ASTC Statistics Survey	Association of Science and Technology Centers ('09)
Museums Australia, 2007/2008	Australian Bureau of Statistics
Standard Questionnaire	EGMUS (European Group on Museum Statistics)
The Official Museum Directory 2011	National Register Publishing
Cultural Data Project	Pew Charitable Trusts
Member Survey 2006	American Association for State and Local History (PM)
Visitors Count! (Museum Visitor Survey)	American Association for State and Local History (VC)
Survey of Statewide History Organizations (not conducted yet)	American Association for State and Local History
Fundraising Effectiveness Project (2010)	Assoc. of Fundraising Professionals & Urban Institute
2010 ASTC Statistics Survey (shorter)	Association of Science-Technology Centers ('10)
Spotlight on Museums Survey (FY 2006 data)	CyMAL: Museums, Archives and Libraries Wales
A Public Trust at Risk: Heritage Health Index (conducted 2004)	Heritage Preservation (The National Institute for Conservation)
IRS Tax Form 990 EZ	Internal Revenue Service
Data File Documentation: Public Libraries Survey Fiscal Year '08	IMLS
Nat'l Audience Survey ( <i>Why Zoos and Aquariums Matter</i> handbook)	Institute for Learning Innovation (IMLS funded)



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<b>Survey Instrument</b>	<b>Organization</b>
2009 Cultural Attraction Attendance Survey	Morey Group
2008-2009 Salary and Benefits Survey	Museum Association of New York
Renaissance West Midlands: Fast Forward Survey 2010	The Museums, Libraries and Archives Council (United Kingdom)
MSA Retail Industry Report (2009)	Museum Store Association
"A Quick and Easy Guide to National Standard Data Fields (March 2010)	National Assembly of State Arts Agencies
Definitions Project (January 2007)	National Association for Interpretation
Museum Program Survey of 1979	National Center for Education Statistics
Science and Discovery Centers Survey	UK Association for Science and Discovery Centres



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# PROCESS AND METHODOLOGY

## CHAPTER 2

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### Process Summary

This project involved the completion of three tasks, plus administrative duties, over the six-month term of September 1, 2010 to March 31, 2011.

**Task 1:** Develop a comprehensive review guide of current or recent museum data collection efforts, both in the United States and elsewhere, with a detailed cross-walk of data collection fields drawn from a subset of the surveys. This resulted in a *Review Guide of Existing Museum Databases*.

**Task 2:** Identify a number of representatives from museum service organizations, museum research and evaluation leaders, and other interested Expert Reviewers from the museum community. Enlist them as volunteers to offer their individual opinions on technical matters, and through them, enlist a larger circle of volunteer Stakeholders reflecting the diversity of the museum field.

**Task 3:** Prepare a final report (this document) for IMLS called the *Museum Census Roadmap*, including recommendations for prioritized Data Collection Fields (Chapter 3), Portal Functionality (Chapter 4), and a Roll-out Strategy for Museums Count (Chapter 5).

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### Engaging the Field

#### Review Guide of Existing Museum Surveys (Attachment C)

One of the first tasks undertaken by WOI and AAM was to identify and collect existing survey instruments from a variety of organizations within and outside of the United States.

The collected surveys were divided into two broad groups: Comprehensive (10 surveys) and Specialized/Alternative Surveys (18 surveys). The comprehensive surveys are broad in scope and cover many different aspects of museum operations. The specialized/alternative surveys cover specific subject areas (e.g., museum stores, collections, fund raising), complement the comprehensive surveys by providing alternative perspectives (e.g., from the performing arts), or contain exemplary data definitions. Alternative versions of some of the comprehensive surveys from different years were also included in this group.



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The collection process was quite successful, with every requested survey submitted except two. This may be a reflection of the willingness among survey organizations (including commercial providers of museum data) to collaborate on standardizing definitions and establishing a national public database.

All survey questions from the ten comprehensive surveys were then compiled into a master database. The specialized/alternative surveys were reviewed for “factors of interest,” essentially additional questions that the research team felt should be added to the master database. Each of the 1082 data elements in the resulting database (see Attachment D) was tagged by subject, topic and subtopic. This produced an overview of the topic areas, data elements/questions, and data definitions contained in existing surveys - in essence, a map of the museum data universe.

The *Review Guide* includes an annotated bibliography of the 28 surveys reviewed as well as more detailed descriptions, including summary charts and tables, for the ten comprehensive surveys. Table 2.1 lists the surveys reviewed by the Research Team.



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**Project List of Museum Surveys**  
IMLS Museums Count

Organization	Survey Instrument
<b>Comprehensive surveys reviewed in detail for data elements and incorporated into a master database of questions</b>	
American Association for State and Local History	2008 History Museum Forum Survey
American Association of Museums	Museum Financial Information Survey (2008)
American Public Gardens Association	2007 Medium & Small Garden Benchmarking Study (Buds <\$2 MM)
Association for Children's Museums	ACM Member Survey of Open Museums (2010)
Association of Art Museum Directors	2010 State of North America's Art Museums Survey
Association of Science and Technology Centers ('09)	2009 ASTC Statistics Survey
Australian Bureau of Statistics	Museums Australia, 2007/2008
EGMUS (European Group on Museum Statistics)	Standard Questionnaire
National Register Publishing	The Official Museum Directory 2011
Pew Charitable Trusts	Cultural Data Project
<b>Specialized or Alternative Surveys reviewed for factors of interest</b>	
American Association for State and Local History (PM)	Member Survey 2006
American Association for State and Local History (VC)	Visitors Count! (Museum Visitor Survey)
American Association for State and Local History	Survey of Statewide History Organizations (not conducted yet)
Assoc. of Fundraising Professionals & Urban Institute	Fundraising Effectiveness Project (2010)
Association of Science-Technology Centers ('10)	2010 ASTC Statistics Survey (shorter)
CyMAL: Museums, Archives and Libraries Wales	Spotlight on Museums Survey (FY 2006 data)
Heritage Preservation (The Nat'l Instit. For Conservation)	A Public Trust at Risk: Heritage Health Index (conducted 2004)
IRS 990 EZ / National Center for Charitable Statistics	IRS Tax Form 990 EZ
IMLS	Data File Documentation: Public Libraries Survey Fiscal Year '08
Institute for Learning Innovation (IMLS funded)	Nat'l Audience Survey (Why Zoos and Aquariums Matter Handbook)
Morey Group	2009 Cultural Attraction Attendance Survey
Museum Association of New York	2008-2009 Salary and Benefits Survey
The Museums, Libraries and Archives Council (UK)	Renaissance West Midlands - Fast Forward Survey 2010
Museum Store Association	MSA Retail Industry Report (2009)
National Assembly of State Arts Agencies	A Quick and Easy Guide to Nat'l Standard Data Fields (Mar. 2010)
National Association for Interpretation	Definitions Project (Jan 2007)
National Center for Education Statistics	Museum Program Survey of 1979
UK Association for Science and Discovery Centres	Science and Discovery Centers Survey

**Table 2.1**

Source: White Oak Institute and the American Association of Museums

As indicated in Table 2.2, the Research Team divided the survey questions into six subject areas plus an additional "other" category.



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**Survey Subjects**  
IMLS Museums Count

Subject Area	Includes the following types of topics
Institutional	General institutional data including name, location, Web address, contact info, type of museum, parent and/or support organization, opening year, year founded, governance, fiscal year, congressional district
Engagements	Attendance, membership, board, donors, programs (exhibits and education), outreach, internet accessibility, Web usage
Facility Resources	Facility, grounds and components (galleries, store, theaters, etc.), square footage and acreage, LEED certification
Collection Resources	Permanent collections, borrowed collections, acquisitions, inventory, digital, by subject, conservation and care
Human Resources	Staff, volunteers, contract labor, benefits, diversity, interns
Financial Operating Capital Balance Sheet	Revenue and expenses (total and by category), ticket prices Capital projects, campaigns and expenses, investments and endowment Assets and liabilities, reserve funds, investments and endowment
Other	Questions not otherwise categorized including emerging trends and data on economic impact

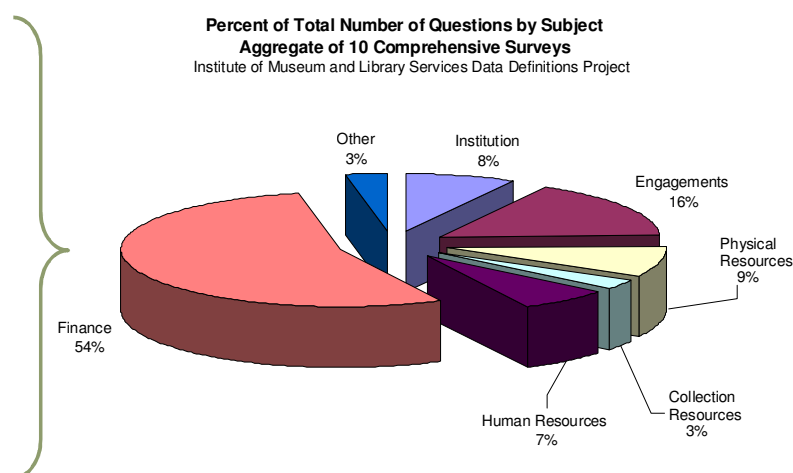
**Table 2.2**

Source: White Oak Institute and the American Association of Museums

The following diagram illustrates the percentage of questions in each of the six categories for the ten surveys reviewed in depth. Financial questions represented 54% of all questions.

**Mix of data categories:**

- ◆ Institutional
- ◆ Engagements
- ◆ Collection Resources
- ◆ Human Resources
- ◆ Physical Resources (Facilities)
- ◆ Financial
- ◆ Other







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### The Role of the Expert Reviewers

The Research Team developed a list of potential Expert Reviewers representing the diversity of the museum field, with representatives from most of the national, discipline-based museum service organizations but also from regional and state museum associations, allied service organizations, and evaluators and independent museum professionals knowledgeable about the field. Many of the Expert Reviewers had run museum surveys for their own organizations and were familiar with the issues of survey design. IMLS reviewed the list and made some suggestions. Invitations went out (a letter co-signed by AAM's Ford Bell and WOI's John Jacobsen) with an Acceptance Form that clarified the expected scope, confirmed the voluntary status, and asked for availability to attend a workshop in Washington. Almost all who were invited accepted, and the date for the workshop was set.

#### **1<sup>st</sup> Cut of Data Elements**

In parallel, the Research Team created a "1<sup>st</sup> Cut of proposed Data Elements" based on the 1082 questions in the database of existing surveys (plus new questions developed by the Team based on their own understanding of the field).

The Research Team sent the Expert Reviewers an orientation package with project goals and instructions to review the 1<sup>st</sup> Cut and help produce a shorter, prioritized 2<sup>nd</sup> Cut.

The 1<sup>st</sup> Cut only included elements that met *several* of IMLS's targeted goals/purposes for the National Museum Census and that were *also* likely to satisfy the needs of more than one potential user group. The 1<sup>st</sup> Cut was largely a distillation of the comprehensive surveys, and thus it already reflected some consensus in the museum field. We also added some additional Data Elements where, in our opinion, the comprehensive surveys were deficient in describing current museum operations and the impact of museums.

We asked the Expert Reviewers to rank the questions on an Excel worksheet and to add Data Elements they felt are needed. After analyzing the rankings and extensive discussions (including a Web-based virtual conference with the Expert Reviewers), the Research Team prepared the 2<sup>nd</sup> Cut List of Data Elements. This list was refined and re-prioritized at the workshop in Washington, D.C.

#### **Expert Reviewers: Workshop in Washington, D.C.**

The Research Team took the questions in the 2<sup>nd</sup> Cut and created a one-page review form for each data field, which were then gathered into the six categories described above. The forms included selected wording and definitions from other surveys, as well as the Team's provisional recommendations.

On January 25, 2011, the Expert Reviewers, IMLS leadership and the Research Team convened at IMLS's offices to review progress to date and upcoming steps and to discuss broad questions raised by the National Museum Census. The most detailed part



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of the four-hour session involved four breakout groups, each of which looked at roughly a quarter of the data field forms. The advice gathered during the breakout sessions, supplemented by post-workshop discussions on a wiki site developed by the White Oak Institute, led to the 3<sup>rd</sup> Cut of Data Elements and suggestions for the recommended Data Collection Fields (i.e., both questions and their definitions.)

The group as a whole also had the opportunity to provide guidance and advice about portal functionality (in particular, incentives for individual museums to provide data) as well as roll-out and launch strategies.

The Expert Reviewers who represented museum service organizations were each asked to recruit and manage three to five Stakeholders to review the Census drafts. Sixty-five (65) Stakeholders were identified in this way, and they each received an invitation letter from their "sponsor" and an Acceptance Form to send back. Stakeholders were intended to be drawn from the ranks of museum professionals who might actually be the ones to complete the Census for their institutions. Most invited Stakeholders participated and the sample generally reflected the diversity of the field - with the exception of limited representation of living collections (zoos, gardens, parks and aquaria).

#### **IMLS Review and Guidance**

After the workshop, the Research Team started translating the 3<sup>rd</sup> Cut Data Elements into operational questions, appropriate response options and definitions. A preliminary draft was shared with IMLS staff, who provided guidance for the next version.

#### **Expert Reviewer and Stakeholder Survey**

The February 11, 2011, draft of the proposed survey, totaling 76 questions and sub-questions, was the basis of a long review and ranking survey administered via the SurveyMonkey Web platform. Expert Reviewers and Stakeholders were asked to provide their opinions and suggestions for each proposed question in the following areas: degree of difficulty; reasons for difficulty; degree of importance to each of four main user groups; plus comments for improving the wording and focus of each question. A total of 72 people from the museum field responded, providing 1333 comments.

#### **Draft A Distributed to Expert Reviewers**

The numerical feedback and comments from the survey (over 200 pages long) were very helpful in re-drafting questions, adding definitions, and clarifying response options. The feedback also provided good arguments for moving lower priority Data Collection Fields to the Reserve File (questions not recommended for inclusion in the first iteration of the Census). The Research Team spent a considerable amount of time reviewing the survey input to create a list of recommended Data Collection Fields and Definitions. The outcome of this process became Draft A of the *Museum Census Roadmap*.



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The Research Team also drafted chapters on recommended portal functionality and Census roll-out and launch strategies, as well as summarizing the goals, process and participants of the project. Attachments included a summary of the *Review Guide of Existing Data*, the compilation of questions and definitions from existing surveys that we considered, the SurveyMonkey instrument and summary results, and the list of Data Collection Fields moved to the Reserve File.

Draft A also included the first attempt to prioritize the 56 recommended questions (the final cut has 59 questions) into three parts, with the goal of creating a simple, low-burden "short form" that every museum in America, no matter how small or understaffed, could fill out quickly and accurately. Parts Two and Three were conceived as places where museums could put data that was more complicated and/or that might be regarded as private information.

Draft A was sent to all Expert Reviewers and to IMLS for a final review.

### **Expert Reviewers and IMLS: Final Report and Recommendations**

Draft A was reviewed by IMLS staff and the Expert Reviewers in mid-March 2011. IMLS provided written comments and the Expert Reviewers made comments on the wiki site. Based on this input, plus our own continuing discussions, the Research Team revised Draft A to become this final document.

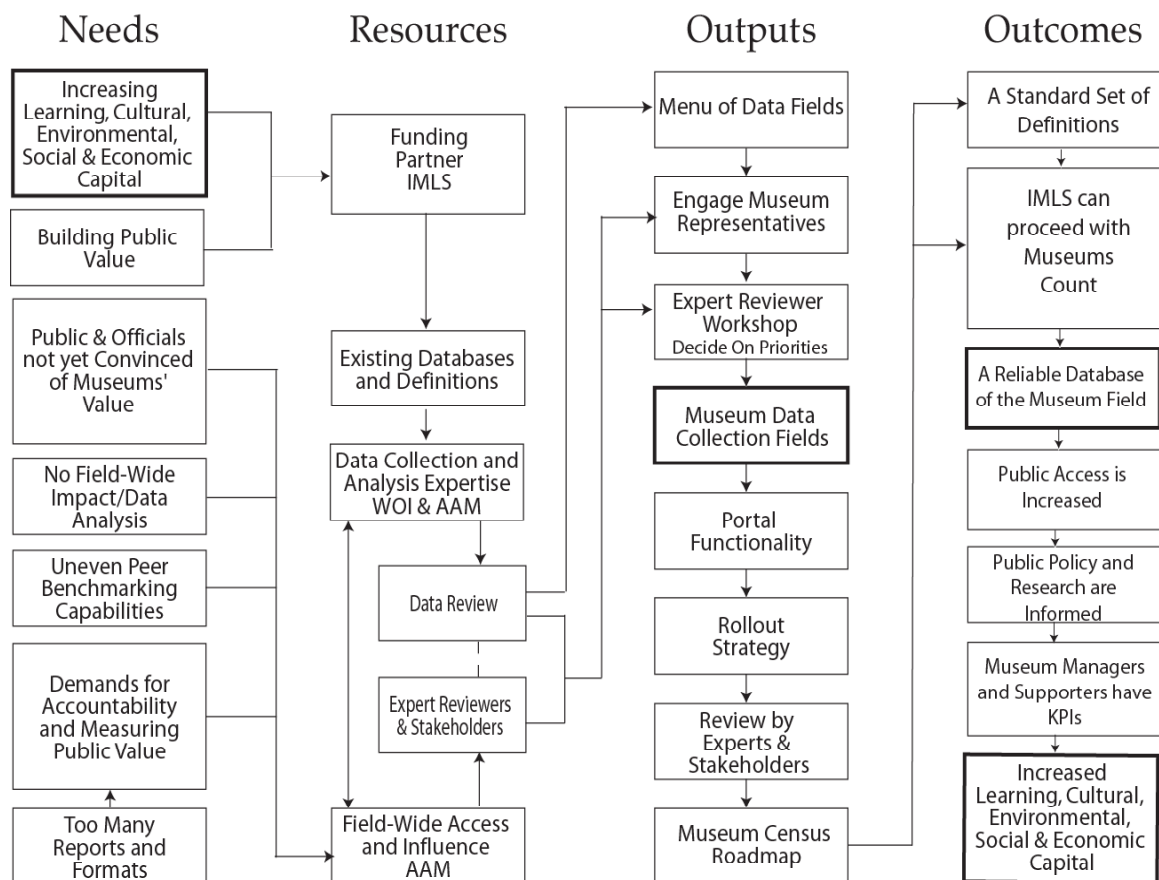
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### **Logic Rationale**

The logic rationale developed by the Research Team for this project, as illustrated in the following diagram, identifies perceived **needs** in the museum field, **resources** available to address those needs, the **outputs**, which are now gathered in this report (the *Museum Census Roadmap*), and the desired outcomes of Museums Count. The initial need and the final desired **outcome** are the same, "increasing learning, cultural, environmental, social and economic capital" in the museum field.



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## Rationale for Recommendations

As the Research Team developed its recommendations, it kept the following in mind. These were *our* expectations, not necessarily shared by IMLS, though we recommend them to the agency:

- ◆ The key consideration should be the overlapping interests of the user groups.
- ◆ Museums Count should be representative and inclusive of the entire museum field – i.e., museums both with and without collections, large and small museums, art museums and living collections, children’s museums, zoos, botanic gardens, science centers and more.
- ◆ Museums Count should be designed to gather objective data: no preference should be implied for any museum’s self-defined purposes, audiences, activities, revenue streams, etc.
- ◆ Museums Count should involve an ongoing data collection and reporting process.



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- ◆ Existing museum survey questions, however well established, should be updated with new ones to reflect the evolution and growing diversity of the museum field in the last decades.
- ◆ On balance, we would favor data fields that yield useful key performance indicators (KPIs).

### Defining "a Museum"

The Research Team is aware of the difficulty in defining what constitutes (or even “qualifies”) as a museum. We think an acceptable solution to the conundrum of “what’s a museum?” is to accept data from all institutions that want to be considered primarily as museums and as part of the museum field. A National Museum Census should involve universal access with a minimal number of barriers to avoid misuse. Particular users (like IMLS) should be able to filter for “qualifying” museums by more exacting definitions later, provided we include the right questions on our proposed list of data fields to be collected. IMLS, for instance, stipulated the inclusion of the following information for its own administrative purposes:

#### **IMLS Core Data Elements** IMLS Museums Count

<b>Element</b>	<b>Description</b>
<b>EIN Number</b>	Employer ID Number or Tax ID number
<b>DUNS Number</b>	Dun & Bradstreet DUNS number
<b>Legal Name of Organization</b>	As listed on official documents
<b>Street Address</b>	Physical location of museum
<b>City</b>	Physical location of museum
<b>Zip Code</b>	Physical location of museum
<b>Phone Number</b>	General phone number of museum
<b>Website</b>	Museum website url
<b>Email</b>	General email address for the museum
<b>Primary Organization Contact</b>	Contact information for the primary contact for the museum, may or may not be Museum Director. Includes: Name, Address, Phone, Email and Title
<b>Congressional District *</b>	Congressional District
<b>Geographic Location (Latitude/Longitude) *</b>	Geographic Location (Latitude/Longitude)
<b>Museum Type</b>	TBD
<b>Primary Collection</b>	TBD
<b>Hours of Operation</b>	Operating Hours for the general public
<b>Staffing Characteristics</b>	Per IMLS eligibility criteria
<b>Governance Structure</b>	Private for profit, Private non-profit, Public, etc.
<b>Years in operation</b>	Number of years open to the public
<b>Collections care items</b>	From HHI
<b>Program services</b>	Number of program events
<b>Institutional partnerships</b>	Character and type of institutional partnerships

\* Starred Data Elements would be added to a record through post-collection data processing.

**Table 2.3**

Source: Institute of Museum and Library Services

Of course, the definition of museum contained in the Museum Services Act is highly relevant to IMLS:



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“The term museum means a public or private nonprofit agency or institution organized on a permanent basis for essentially educational or aesthetic purposes, that utilizes a professional staff, owns or utilizes tangible objects, cares for the tangible objects, and exhibits the tangible objects to the public on a regular basis. Such term includes aquariums, arboretums, botanical gardens, art museums, children's museums, general museums, historic houses and sites, history museums, nature centers, natural history and anthropology museums, planetariums, science and technology centers, specialized museums, and zoological parks.”

### Engagements

The museum field has evolved to serve the public in new ways over the last decades, which requires new ways of quantifying the number of people served. Until recently, the term “visitation” has been expanded to include all sorts of other services beyond a simple visit to a museum’s galleries or grounds. The Research Team has introduced the umbrella term “engagements” to include all types of museum services, some of which, like Web hits, cannot yet be counted accurately. This allows “visits” to be restored to a more commonsense definition of attending a museum, yet paves the way for museums to report program participants, off-site engagements, and virtual and media exposure - adding up to a larger number of engagements.

Section B of the recommended Data Collection Fields (Engagements) draws upon all of the other museum surveys reviewed by the Research Team. The most common ways of counting how a museum engages and serves people involve four different categories: 1) On-site visitors; 2) On-site program participants; 3) Off-site (outreach) program participants, and 4) Virtual users and media consumers who may never set foot inside the physical museum. “Annual visitation” (or “total attendance”), a data field that appears in many of the existing museum surveys, is really a subset of all annual engagements. At best, it typically includes just the first two of these four categories. But over the years, as museum services have expanded in all directions, the term “visitation” has been stretched to include after-school workshops, travel programs, wedding guests, Web site hits, tweets and more. “Engagements” is a broader umbrella term for all these different ways that museums serve the public today. It takes all four categories to sum up a museum’s annual number of engagements. Because the best metrics for tracking virtual users and media consumers are still uncertain, we recommend that Museums Count focus on the other three categories at this time.

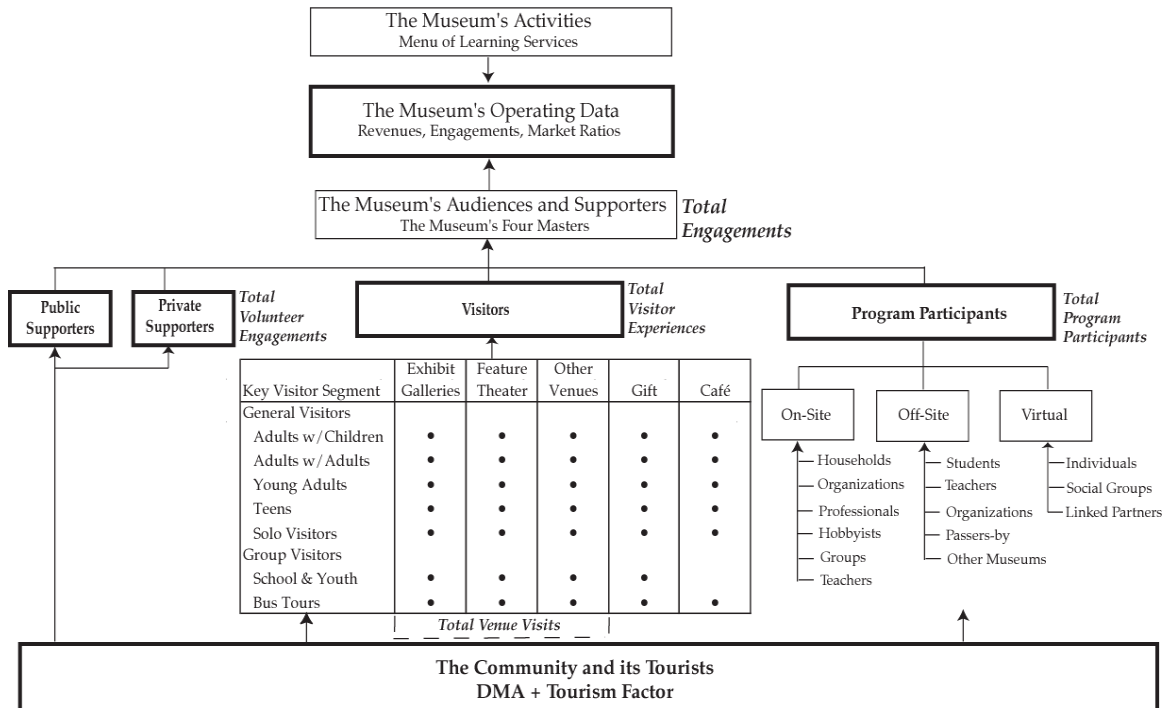
The proposed audience engagement framework is illustrated in the following diagram:





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### The Museum Audience Engagement Framework



### Survey Results: Expert Reviewers and Stakeholders

When the term "survey respondents" is used in the rest of this report, it pertains to the Stakeholders and Expert Reviewers who participated in the feedback survey developed by the Research Team and administered through the SurveyMonkey platform between February 16 and March 1, 2011.

The quantitative feedback included importance rankings for four main uses: public policy ("advocacy and research" was the phrase used in the survey), the public, museum managers, and supporters. Table 2.4 presents average, median, maximum and minimum average ratings for all questions in the survey. Voting on importance was based on a 5-point scale with 5 being the most important. For ranking the difficulty of each question we provided a different 5-point scale, with 1 as least difficult and 5 as most difficult.

72 Stakeholders and Expert Reviewers responded to 180 feedback questions, providing a wealth of quantitative data and 1333 comments.



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**Rating of Importance – All Questions in the Survey**  
IMLS Museums Count

	Advocacy	The Public	Museum Managers	Supporters	Average of All
Average of average ratings	4.16	3.55	4.37	4.24	4.08
Median of average ratings	4.22	3.49	4.38	4.31	4.13
Maximum of average ratings	4.74	4.87	4.81	4.66	4.58
Minimum of average ratings	3.53	2.56	3.5	3.39	3.48

**Table 2.4**

Source: Survey administered on SurveyMonkey February/March 2011

**Difficulty Ratings – All Questions in the Survey**  
IMLS Museums Count

Average of average ratings	1.64
Median of average ratings	1.57
Maximum of average ratings	2.41
Minimum of average ratings	1.03

**Table 2.5**

Source: Survey administered on SurveyMonkey February/March 2011

**Percentage of Respondents in Regard to Difficulty – All Questions in the Survey**  
IMLS Museums Count

	Easy to Answer	Somewhat Easy	Somewhat Complicated	Complicated	Very Complicated
Average	60%	23%	12%	4%	1%
Median	62%	22%	10%	2%	0%
Maximum	97%	43%	36%	13%	7%
Minimum	21%	3%	0%	0%	0%

**Table 2.6**

Source: Survey administered on SurveyMonkey February/March 2011

## Priorities for Optimal Participation

From the perspective of the museum manager entering data, the recommendation is that the data-entry portal of the Census be organized into three parts: Part One, Part Two and Part Three (see the description in the next section of this chapter). Part One has the highest priority. Within each part, questions are not prioritized, but left in a logical





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sequence. The criteria for these priority rankings are described in much more detail in subsequent chapters.

This recommendation means that a welcome screen describing the Census and outlining the three parts should greet the museum managers entering data. Each part will start with its own welcome screen, with specific instructions for the kinds of information that will be needed and what kinds of materials to have at hand. Each part should end with "preview" and "submit and calculate" buttons, which should activate a *museum management report*, based on the data entered in this and previous parts. As a museum provides more information by filling in more of the parts, the management reports should get richer with information, comparisons and visualizations. Again, this is described in greater detail in subsequent Chapter 3.

Some Expert Reviewers recommend against having separate parts because larger museums are likely to be disproportionately represented in Parts Two and Three, introducing bias and potential false readings. The Research Team believes that an *aggregation policy* (see Chapter 4) translated into search protocols, can address such misuse. Aggregation combines data for the same Data Collection Field from several museums (minimum number of respondents to be determined) so that individual data points cannot be associated with a particular museum. Search protocols, as part of the aggregation process, could draw a randomized sample from Part Two and Three respondents that matches the profile of the representative sample determined by Part One respondents. This algorithm would make sure that the aggregation of data was not biased toward larger museums. If this cannot be implemented, then IMLS might consider a core portal consisting of Part One and maybe some of Part Two, and sending Parts Two and Three to a randomized, but representative, sample of museums, in a similar fashion to when the U.S. Census selects households for more information in the long form.

These three parts are not likely to be apparent to other users of the Census (as opposed to those filling out the Census). The information on a screen viewed by the general public might include information from both Parts One and Two. Researchers and public policy professionals might see other screens focusing on data retrieval and generation, which may be drawing data from all three parts, some of which may need to be filtered through the aggregation policy. Users who are supporters and funders may want to generate their own array of KPIs as a snapshot of a museum or museum sector.

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### **Prioritized List of Recommended Data Collection Fields**

The recommended prioritized list of Data Collection Fields in the next chapter represents the outcome of the entire project process, from the review and analysis of other museum surveys through incorporating input from the Expert Reviewers and the Stakeholders who participated in the feedback survey described above.



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Table 2.7 below lists the short names and numbering scheme for the recommended questions detailed in the next chapter, and separates them into Parts One through Three. Unedited data fields in Part Four, which *might* be considered for use in the future, were put in Reserve Data Collection Fields (Attachment B).

Each Part is intended to be holistic, looking at all categories of data at increasing levels of detail. Within the Parts, the individual questions are not prioritized, but organized by subject. The total number of Data Collection Fields in Parts One through Three is 59. Twenty additional data fields are in the Reserve File.

**Recommended Part One (15 Questions):** Part One provides basic information that is easily available and easy to enter. This part is intended to be public and searchable, with the ability to aggregate data that will be representative of the museum field. The questions are mostly qualitative with a few quantitative questions that someone closely associated with the museum should be able to answer readily. The Census should aspire to have all museums in America who say they are part of the museum field complete Part One.

**Recommended Part Two (20 Questions):** includes more detailed descriptive information. This part has only qualitative questions. This part is public and searchable.

**Recommended Part Three (24 Questions):** includes detailed operating data fields, each of which could be assigned one of three privacy levels (open, open only by anonymized aggregation, and totally private) by the respondent. The Research Team recommends that this part be public only by the museum's choice, not searchable, and aggregated only by representative filters. This part concentrates the quantitative questions and will require having detailed budgets handy. At the end of Part Three, we recommend two museum management reports: **Internal KPIs** compared to previous years and comparable museums; and **External KPIs** compared to comparable museums and communities.



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**Prioritized Groups of Recommended Data Collection Fields**  
IMLS Museums Count

Survey Question Number	Number	Type	Question (Excerpt)	Part 1	Part 2	Part 3	Re-serve File
QA1	P1.1	Institutional	Legal or Formal Name of Museum	1			
QA1.1	P1.2	Institutional	Other Names by Which Museum is Known	1			
QA2	P1.3	Institutional	Physical Address	1			
QA2.2	P1.4	Institutional	Phone Number	1			
QA2.4	P1.5	Institutional	Web site Address	1			
QA4	P1.6	Institutional	Type of Museum (chk list)	1			
QA5	P1.7	Institutional	Governance (chk list)	1			
QC3	P1.8	Institutional	# Sites/Locations	1			
QB1	P1.9	Engagements	On-site Attendance Number	1			
QB1.1	P1.10	Engagements	Source of Data for Attendance (chk list)	1			
QB12	P1.11	Engagements	Have Free days? (chk list and ranges)	1			
QD1	P1.12	Collections	Care or Manage Collections?	1			
QE1a	P1.13	Human Res	Employ paid staff? (y/n)	1			
QF1Xnew	P1.14	Financial	Operating Revenue (\$ range)	1			
QF3	P1.15	Financial	Charge Admission?	1			
QA2.1	P2.1	Institutional	Mailing Address		1		
QA2.3	P2.2	Institutional	Public Email		1		
QA6	P2.3	Institutional	Have Parent Org?		1		
QA6.1	P2.4	Institutional	Nature/Type of Parent Org (chk list)		1		
QA8	P2.5	Institutional	Year First Opened to the Public		1		
QA9	P2.6	Institutional	Purposes (chk list)		1		
QA10.1	P2.7	Institutional	Paste Mission Statement Here		1		
QB4	P2.8	Engagements	# Days Open (chk list and ranges)		1		
QB6	P2.9	Engagements	Programs Offered On-site (chk list)		1		
QB7	P2.10	Engagements	Programs Offered Off-site (chk list)		1		
QB8	P2.11	Engagements	Media/Virtual Platforms Used (chk list)		1		
QB9	P2.12	Engagements	Principal Audiences (chk list)		1		
QB12.1	P2.13	Engagements	How many free days? (range)		1		
QC1	P2.14	Facilities	Venues, Amenities, Facilities (chk list)		1		
QD1.2	P2.15	Collections	Digital Access (chk list)		1		
QD2	P2.16	Collections	Types of Objects/Collections (chk list)		1		
QD2.1	P2.17	Collections	Focus of Collection (text)		1		
QD3.1.1	P2.18	Collections	Preservation Plan (Y/N)		1		
QF1.1.3	P2.19	Financial	Sources of Gov't Funding (chk list)		1		
QF4	P2.20	Financial	Have Endowment? (Y/N)		1		

**Table 2.7 (Part 1 of 2)**

Source: The White Oak Institute and the American Association of Museums

Note: The questions are not prioritized within each part



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**Prioritized Groups of Recommended Data Collection Fields**  
IMLS Museums Count

Survey Question Number	Number	Type	Question (Excerpt)	Part 1	Part 2	Part 3	Re-serve File
QA3	P3.1	Institutional	Fiscal Year End			1	
QB2	P3.2	Engagements	# of On-site Visits (Gate Admission Attd)			1	
QB2.1	P3.3	Engagements	Source of Data: # of On-site Visits (Gate Admissions)			1	
QB3	P3.4	Engagements	# of Off-site Engagements			1	
QB8.1	P3.5	Engagements	Digital/Virtual type of Content Offered (chk list)			1	
QB10	P3.6	Engagements	# Active Memberships (non-corporate)			1	
QB11	P3.7	Engagements	K-12 School Children Served			1	
QB12.2	P3.8	Engagements	# Served for free during year			1	
QC2	P3.9	Facilities	Gross Bldg Sq. Footage (range and #)			1	
QD3.1.2	P3.10	Collections	Surveyed Condition of Collection (Y/N)			1	
QD3.1.3	P3.11	Collections	Written Emergency/Disaster Plan (Y/N)			1	
QE1	P3.12	Human Res	# of Full-time Non-seasonal Employees			1	
QE2	P3.13	Human Res	# of Part-time Non-seasonal Employees			1	
QE2.1	P3.14	Human Res	# of Seasonal Employees			1	
QE3	P3.15	Human Res	Have Volunteers and How Many?			1	
QF1	P3.16	Finance	Operating Revenue (\$ amount)			1	
QF1.1	P3.17	Finance	Revenue Breakdown by Category			1	
QF1.1.2	P3.18	Finance	Admissions Revenue			1	
QF2	P3.19	Finance	Operating Expenses (\$ amount)			1	
QF2.1	P3.20	Finance	Personnel Expenses			1	
QF3.1	P3.21	Finance	Adult and Other Solo Tx Prices			1	
QF4.1	P3.22	Finance	Value of Endowment			1	
QF6	P3.23	Finance	Engaged/Completed Capital Campaign? (Y/N)			1	
QF6.1	P3.24	Finance	Engaged/Completed Cap. Camp: Uses			1	
QA1.2	R1	Institutional	EIN #				1
QA1.3	R2	Institutional	DUNS #				1
QA7	R3	Institutional	Have a Support Org?				1
QA7.1	R4	Institutional	EIN# for Support Org				1
QA10	R5	Institutional	Have a Mission Statement (Y/N)				1
QB5	R6	Engagements	# of Venues				1
QB13	R7	Engagements	Partnerships				1
QC2.1.1	R8	Facilities	Developed Exterior Grounds -Size				1
QC2.1.2	R9	Facilities	Net Interior Exhibit Sq. Footage				1
QD1.1	R10	Collections	How Many Objects?				1
QD3.1	R11	Collections	Preservation Mission?				1
QE3.1	R12	Human Res	# of Total Volunteer Hours				1
QF1.1.1	R13	Financial	Operating Revenue from Support Org.				1
QF1.1.4	R14	Financial	Operating Revenue from Parent Org				1
QF1.2	R15	Financial	Categories of Parent Org Support				1
QF4.2	R16	Financial	% Endow't for Operations				1
QF5	R17	Financial	Engaged in Capital Campaign?				1
QF5.1	R18	Financial	If Engaged in Cap. Camp: Uses				1
QF5.2	R19	Financial	Start of Engaged Cap.Camp.				1
QF6.2	R20	Financial	When Cap. Campaign Concluded?				1
	<b>79</b>			<b>15</b>	<b>20</b>	<b>24</b>	<b>20</b>

Table 2.7 (Part 2 of 2)

Source: The White Oak Institute and the American Association of Museums

Note: The questions are not prioritized within each part.



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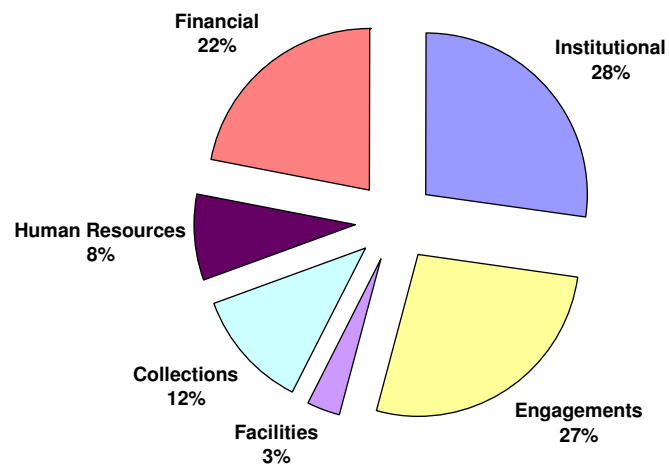
**Summary of Recommended Data Collection Fields by Category**  
IMLS Museums Count

	Part 1	Part 2	Part 3	Parts 1-3	Parts 1-3
Institutional	8	7	1	16	27%
Engagements	3	6	7	16	27%
Facilities	0	1	1	2	3%
Collections	1	4	2	7	12%
Human Resources	1	0	4	5	8%
Financial	2	2	9	13	22%
<b>Total</b>	<b>15</b>	<b>20</b>	<b>24</b>	<b>59</b>	<b>100%</b>

**Table 2.8**

Source: The White Oak Institute and the American Association of Museums

**Percentage of Recommended Data Collection Fields by Category (Parts 1 - 3)**  
IMLS Museums Count



**Chart 2.1**

Source: The White Oak Institute and the American Association of Museums



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# RECOMMENDATIONS: DATA COLLECTIONS FIELDS

## CHAPTER 3

The recommended Data Collection Fields are listed in Chapter 3. Chapter 3 includes all questions and definitions recommended by the Research Team for inclusion in *Museums Count: The National Museum Census*. Any other questions/definitions (or versions of questions/definitions) contained in this report are included for *reference purposes only*.

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### 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.

#### 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



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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]

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





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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:

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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
<input type="checkbox"/>	<input type="checkbox"/>	Military Museum/Battlefield
<input type="checkbox"/>	<input type="checkbox"/>	Nature Center





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- |                          |                          |  |
|--------------------------|--------------------------|--|
| <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

Tribal:

- ☐ j. Tribal museum

Other:



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- ☐ 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

- a) Does your museum serve the public directly at more than one separate **physical location**? ☐Yes ☐No
- b) If yes, how many different physical locations? \_\_\_\_\_
- c) If yes, do you consider this location the **main site**? ☐Yes ☐No
- d) 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.
- 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.



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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

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



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☐ 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 (F1Xnew) 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
- ☐ \$5,000,001 - \$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
- ☐ No, admission is free but there is a suggested donation amount



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- ☐ 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.”

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**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:

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*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





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- ☐ Open 200 to 249 days per year
- ☐ 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)





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- Affinity group events (reenactments, vintage auto shows, craft shows)
- 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



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- Off-site lectures/speaking engagements/moderated discussions, etc.
- Off-site professional development training for teachers
- ☐ Touring and traveling exhibits to other sites (examples)
  - 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



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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)
- ☐ 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



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\_\_\_\_\_ 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**.

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)



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- ☐ Picnic/eating area
- ☐ Space(s) that you rent to the public
- ☐ Store/gift shop/bookstore
- ☐ Other, please specify: \_\_\_\_\_

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.)



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- ☐ 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: \_\_\_\_\_
- ☐ 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.]



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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
- ☐ 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).





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### 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 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



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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 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.



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- *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].

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



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- 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: \_\_\_\_\_

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.



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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.
  - ☐ 25,000-50,000 sq. ft.
  - ☐ 50,001-75,000
  - ☐ 75,001-100,000 sq. ft.
  - ☐ 100,001-175,000 sq. ft.
  - ☐ 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



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- ☐ 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). \_\_\_\_\_

*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.



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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
- 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.)





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\$ \_\_\_\_\_ **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.]

*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.



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**[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.]

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



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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  
(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.



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- 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.

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



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Please indicate what is included in other \_\_\_\_\_

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**Part Four Reserve File (20 undeveloped questions)**

Part Four includes data fields that are not being recommended for inclusion in Museums Count for a variety of reasons, as explained in Attachment B. However, many of the questions in the Reserve File should be considered for future inclusion in the Census. Note that these questions and definitions are undeveloped. Anyone who wants to use these should look first at the results, suggestions and comments about them from the Expert Reviewer and Stakeholder Survey, and edit as needed.

R1 (A1.2) [EIN question moved to Reserve Data Collection Fields]

The EIN# for this museum (or its parent organization): \_\_\_\_\_

R2 (A1.3) [DUNS question moved to Reserve Data Collection Fields]

The DUNS # for this museum or its parent (not all museums may have a DUNS number): \_\_\_\_\_

R3 (A7.) [Question on Support Foundations moved to Reserve Data Collection Fields]

Do you have a separately incorporated support organization? (This may be known as an auxiliary, external support group, friends group, or affiliate organization.)

☐ Yes      ☐ No

R4 (A7.1) [EIN Parent question moved to Reserve Data Collection Fields]

The EIN# for this museum's parent organization: \_\_\_\_\_

R5 (A10.) [Question on Mission Statement moved to Reserve Data Collection Fields but question A10.1 for inserting the Mission Statement has been kept.]

Does this museum have a mission statement?

☐ Yes      ☐ No

R6 (B5.) [Question on multiple venues moved to Reserve Data Collection Fields]

Please tell us how many on-site, separately controlled visitor venues your museum has at this physical location.

☐ ☐ One  
☐ ☐ Two



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- ☐ ☐ Three  
☐ ☐ Four or more

R7 (B13.) [Question on partnerships moved to Reserve Data Collection Fields]  
With which of the following categories among the many potential educational partners and collaborators do you have a written statement of agreement covering on-going mutual responsibilities? (Please check all that apply.)

- ☐ Colleges and universities  
☐ Corporate Community  
☐ Libraries  
☐ Other Museums  
☐ K-12 School System (public and/or private)  
☐ Public Radio or TV  
☐ Private foundations  
☐ Government educational foundations and agencies

R8 (C2.1.1) [Question on Developed Exterior Grounds moved to the Reserve Data Collection Fields]  
What is the total area of the developed exterior grounds at your museum?  
\_\_\_\_\_ sq. ft. OR \_\_\_\_\_ acres

*Definitions:*

- Include the portion of your grounds that is developed and actively maintained by the institution. May include parking lots, picnic areas, gardens, exterior exhibits, nature trails, etc.
- Include land that is owned or leased by the museum.
- Do not include land that is not maintained, developed or actively used by the museum. "Active use" *includes* land set aside for living collections that is temporarily fallow or wild and awaiting interpretation. "Active use" *does not include* land that is permanently inaccessible to the public, such as swamps, pond/lake surfaces, restricted conservation lands, remnant private parcels, etc.

R9 (C2.1.2) [Question on Net Interior Exhibit Space moved to Reserve Data Collection Fields]  
What is the total **net interior exhibit space**? \_\_\_\_\_ sq. ft.

*Definitions:*

- "Net interior" refers to the space inside the walls of the public exhibit areas, subtracting column and duct chase footprints, stairs, elevators, etc.



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- Count only exhibit space that is “inside” the exhibit venue, not other spaces (like entrance and waiting lobbies, stairwells, board rooms, etc.) where the museum may place exhibits on an irregular basis.
- If your institution has more than one building at this physical location, please report the combined square footage for net interior exhibit space.
- Please include temporary/traveling exhibit space. Do not include other public spaces such as theaters, auditoriums, and classrooms.

- R10 (D1.1) [Question on How Many Objects moved to Reserve Data Collection Fields]  
Approximately **how many objects** are in your permanent collection (or in your care if on long-term loan)? \_\_\_\_\_
- R11 (D3.1) [Question D3.1 on Preservation Mission moved to the Reserve Data Collection Fields]  
Does the mission of your museum include **preservation** of your collections or holdings?  
☐ Yes      ☐ No      ☐ Don't know
- R12 (E3.1) [Question on Total Hours Volunteered moved to the Reserve Data Collection Fields]  
How many total hours were volunteered in your most recent fiscal year?  
\_\_\_\_\_ hours
- R13 (F1.1.1) [Question on Dollar Value of Operating Revenue from a support organization moved to the Reserve Data Collection Fields.]  
What operating revenue, if any, did you receive from a support organization, such as a “friends” group, external support group or affiliate organization? \$\_\_\_\_\_
- R14 (F1.1.4) [Question on Monetary Support from a Parent Organization moved to the Reserve Data Collection Fields.]  
What operating revenue, if any, did you receive from a parent organization? (Do not include in-kind.) \$\_\_\_\_\_
- R15 (F1.2) [Question on Categories of Operating Support from a parent organization moved to the Reserve Data Collection Fields.]  
Please indicate the categories of operating support you received from a parent organization during the reporting year. Include in-kind support. Check all that apply:





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- R16 (F4.2) [Question on Percentage of Endowment for Operations moved to the Reserve Data Collection Fields.]  
What percentage of the endowment was transferred to the operating budget during the reporting year? \_\_\_\_\_ %
- R17 (F5.) [Question on Planning a Capital Campaign moved to the Reserve Data Collection Fields.]  
Are you, or an affiliated organization on your behalf, currently planning for or engaged in a capital campaign?  
☐ Yes      ☐ No
- R18 (F5.1) [Question on Planning a Capital Campaign moved to the Reserve Data Collection Fields.]  
If yes, you are planning or engaged in a capital campaign, what is/are the intended uses of the funds from the capital campaign? (Check all that apply.)
- R19 (F5.2) [Question on Commencement of Capital Campaign moved to the Reserve Data Collection Fields.]  
When did (or will) the capital campaign commence? (Check only one.)  
☐ Already started  
☐ Will start within 1 year  
☐ Will start within 2-3 years  
☐ Don't know
- R20 (F6.2) [Question on When Capital Campaign Concluded moved to the Reserve Data Collection Fields.] When was the capital campaign concluded? (Please check only one.)

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## RECOMMENDATIONS: PORTAL FUNCTIONALITY

### CHAPTER 4

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#### Basic Portal Functionality

Note: This chapter contains the Research Team's recommendations for making the Museums Count data collection and reporting portal as useful and effective as possible. The recommendations are based on general advice and direct feedback from the Expert Reviewers and Stakeholders, conversations with other leaders in the museum field, and our own knowledge of museums and data collection initiatives. We believe that IMLS should implement some of these recommendations in the initial year of the National Museum Census and work towards others as the Census is refined and extended in years to come. Not every aspect of functionality is addressed here, so it is a partial wish list combined with a set of expectations. On occasion we lapse into the future declarative, with plain statements about what Museums Count will be. But everything in this chapter should be understood as our recommendations to the Institute for Museum and Library Services. The expectations are ours alone.

The overriding recommendation is to make the portal as simple and clear as possible for all potential users of Museums Count, but especially for the institutions that will be contributing data to the museum Census, as all other uses depend on the accurate and comprehensive collection of this information.

The feedback that we gathered from Expert Reviewers and Stakeholders provided significant guidance about ambiguous questions and “stop dead” or “stumbling block” questions that were deemed likely to deter many museums from proceeding any further with the data collection instrument. Two key challenges in this regard were neatly summarized in a comment from one of the Stakeholders: “You have to be careful since there is such a wide variety of museums out there that the language that is used is not specific to one type [of museum], or just a few types. The questions posed seem to be well written by educated museum personnel, but the ones actually filling out the survey may not be quite at the same level.” These challenges apply to the functionality as well as the content of the Museums Count portal. So while we have strived to revise or remove the stumbling block questions, we strongly recommend that IMLS conduct extensive cognitive and usability testing before opening the portal.

The Research Team that produced this report does not include experts in Web site design, so we are reluctant to recommend specific technical solutions. However, as devoted users of online surveys and other data collection tools, we recommend that the following features be included:



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- ◆ Museum accounts should be set up to manage each institution's "identity" in Museums Count, accessible to authorized users from that institution and a limited number of Census administrators. Conceptually, museum accounts should include both a museum data record and a museum account record. The museum data record is where a museum's answers to the questions are stored. The museum account record is where a museum's account preferences and management choices are stored, including passwords and access levels, contact information, activity logs, privacy settings for Part 3 questions, layouts and templates for museum management reports, aggregation specifications for parent institutions with multiple sites supplying Census data, etc. Robust and explicit security features in the creation and management of museum accounts will encourage participation in Museums Count.
- ◆ Preview and off-line modes: Several Expert Reviewers and Stakeholders suggested that museum managers who plan to contribute data to Museums Count should be able to view and download a static copy of the full data collection instrument before contributing any data to the system; we concur in this recommendation. A preview copy makes it easier to understand the full scope of the data collection, see how Parts 1-3 of the data instrument are related, gather relevant data in advance, and confer with internal stakeholders (a museum's staff, leadership, and board of directors). An offline version that can be downloaded, completed by one or several staff members, and then uploaded to the portal in one process would likely increase participation and improve the accuracy of data collected through the Museums Count portal.
- ◆ Immediate feedback for museums that enter data, including: a notice on entering initial data that "you are the nth museum to contribute data to the National Museum Census — congratulations!" (which will also help sustain participation through the rest of the data collection process); a mapping function to show museums that "you are here" as they enter their data into the portal; and immediate benchmarks as selected data are entered (e.g., upon entering total revenue, a museum would be presented with a pop-up chart comparing their revenue to quartile revenues for all other museums in the database). There should be a way to print museum management reports and save them to a user's computer. As one Stakeholder told us, "A great incentive [to participation] is to offer real time data on the field at time of completion. To see where your organization measures against the [rest of the museum] field would be enlightening." Several more examples of immediate feedback are indicated in dark red type in Chapter 3 above. These examples, while recommended for incorporation into Museums Count, should not be considered exhaustive.



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- ◆ Additional help text and FAQs, including a more extensive glossary of key terms than we have provided in this report. The help text should be available on-demand, with pop-up definitions as needed. As one Stakeholder noted, “You do not want [users] to have to Google a word to better understand its definition.” IMLS should consider creating or commissioning a comprehensive glossary of museum terms, which goes well beyond the scope of the current report. The collaborative work summarized in this report is a solid model for future efforts in the same direction.
- ◆ Progress bars or other clear indicators so museum data contributors know how many more questions remain to be answered in any given part of the Census and in the Census as a whole. If possible, the progress bars should also present an estimated time of completion for the remaining data fields. Because the recommended Data Collection Fields are divided into three parts, the progress indicators may also have to be divided into three parts — i.e., “You have 3 of 14 questions remaining in Part 1, 12 of 20 question remaining in Part 2, and 23 of 23 questions remaining in Part 3. You can return at any time to complete your data record.”
- ◆ Continuous access by museums to their own museum data records: Museum managers should be able to enter or revise the current data about their institutions whenever they wish. They should also be able to share the work of submitting and revising data with colleagues at their institutions.
- ◆ “Freshness labels”: Auto-calculated cells indicating how old the data are at every level of presentation. For individual records, this could be the actual date of the most recent data-entry or the fiscal year of the financial and operational information presented. For aggregate data, this should include the percentage of museums reporting information for specific fiscal years.
- ◆ Refresh reminders that are emailed automatically to museum contacts once the freshness date is exceeded, and that are sent to Museums Count staff for individual attention after several notices have been ignored.
- ◆ Multi-year archives: In order to allow for stable archival records and analysis of multi-year trends, the entire database will be archived once a year (on a date to be determined by IMLS and well publicized to museum data contributors). It should be difficult but not impossible to correct archived data for a fixed term after that date. The date chosen to archive data might be four-to-six months after the fiscal year end identified by a majority of the museums.
- ◆ Descriptive tagging of collections: Provide opportunities for museums that are entering data and then for other users to describe collections via tagging. Expert Reviewers and Stakeholders both considered collections scope an especially



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challenging (even daunting) piece of information to request from museums, as discussed in Chapter 3 - Section D above. In the absence of a comprehensive taxonomy of collections, we propose that museums and other users be allowed to describe an institution's collections via brief tags, which can then be analyzed for patterns that can inform a future taxonomy (and Museums Count question) reflecting actual usage. There is some precedent for this in the Steve.museum project, in which users were invited to tag art objects and contribute to a folksonomy of art descriptors (see <http://steve.museum/>). However, some level of security would be needed to deter frivolous, defamatory, or merely incorrect tags.

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## **Audiences/Users**

The Museums Count portal must be useful and user-friendly for a variety of different groups that may need their own interfaces. A minimal list would include the following user groups, with no implications of priority for one group over another:

### **Museum Managers**

- ◆ Individual museums
- ◆ Museum networks

### **The General Public**

- ◆ Individuals and families planning leisure/educational activities
- ◆ Hobbyists and avocational researchers
- ◆ Local education agencies and individual educators
- ◆ Private-sector entrepreneurs
- ◆ Media

### **Policy and Research Users**

- ◆ Researchers
- ◆ IMLS and other government agencies
- ◆ Museum and allied service organizations at all levels (national, regional, state)
- ◆ Academic researchers
- ◆ Museum-based researchers and evaluators
- ◆ Media



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- ◆ Policymakers
  - ▶ IMLS and other government agencies
  - ▶ Mayors and other local executives
  - ▶ Legislators and their staffs
  - ▶ Policy analysts
  - ▶ Local economic-development/tourism/planning professionals
- ◆ Museum Advocates
  - ▶ Museum and allied service organizations at all levels (national, regional, state)
  - ▶ Museum “friends” organizations
  - ▶ Private citizens

### **Museum Supporters and Funders**

- ◆ Public grantmakers
- ◆ Private philanthropists
- ◆ Individual donors

However, we do not believe that hard-and-fast distinctions can (or should) be drawn now among users in the different groups, as they will have overlapping interests that no one can predict in advance. Rather than creating a large set of customized interfaces (or “front-ends”) for many different types of users, we suggest the following set of functional interfaces, with some functions common to all users but a few specialized functions tied to each of the major user groups. Individual museums in particular need specialized functionality for data entry and access/reporting:

### **All Users**

◆ **A mapping function** that will show all museums on a map of the United States (in the style of Google Earth or the many other web-based GIS systems), allowing any type of user to see what museums are in a specific area and to click on them for more specific information. This will be of interest to tourists, congressional staff, museum associations, museum managers and planners, and museum-lovers everywhere. With some broad filters (museum type, available amenities or venues, etc.), a user could refine his or her personal map to show, for example, just history museums with food service.

◆ **“Hot links”** in each record to a museum’s Web site, “contact us,” email address, and other selected social media channels.



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### Museum Managers

- ◆ A **data input** interface for individual museums — or their proxies, such as regional or state museum associations — to provide, review, and update their Census information. The default organization of the Census is the three-part priority recommended in Chapter 2, but experienced users may prefer to sequence the questions by subject area (Institutional, Engagements, Resources, etc.) and then by priority grouping from Part 1 through Part 3 (as described elsewhere in this report). If possible, museums should have the option of seeing all the questions in one subject area or all the questions in one priority grouping. Because we would like to have all museums in America that claim to be part of the museum field complete Part 1, the default setting for data input should be all the questions in Part 1. Again, it is vital for the data input interface to be secure and *perceived as secure*, with a confirmation process to assure that the submitter is authorized to submit data for a registered museum.
- ◆ A **comparisons** interface, where museum managers can benchmark themselves against peer institutions or all users can explore segments of the American museum population in significant detail. Because this is primarily a reporting interface, it should include several standard filters: by museum type, museum governance, location (state or region), budget size, building size, and number of engagements. Museum managers should be able to download data files in a standard format (such as CSV) for offline benchmarking. However, the full data records of registered museums should not be available for review here or *any place else in the portal* (except by the data providers themselves) unless specifically allowed by the museum. IMLS will have to determine which data points can be shielded from public inspection and the minimum number of acceptable data points for displaying aggregate information about a sub-segment of museums. See below for a further discussion of this.
- ◆ Museum managers should also be able to use this interface to generate detailed **museum management reports**, including all the data that has been submitted for their institution as well as auto-calculated ratios derived from the data and a standard set of summary graphics.

### General Public Users

- ◆ A **directory** interface for members of the public and other users who are primarily interested in where a museum is located, how to contact the museum, number of days open per year, the type of collection, available amenities, etc.
- ◆ A **search function** for potential visitors and program participants to match their individual interests with specific museums. At the start, this may need drop-down





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menus of selections, so users would have to select “aquariums” rather than “marine life”; in time, the public tagging of collections called for above could be analyzed to produce a richer set of search options.

- ◆ A **get-directions** function that allows the public to map how to get to a museum or a string of museums from someplace else. Ideally, this will include directions for mass-transit users and not just for drivers.

### Policy and Research Users

- ◆ An aggregation interface with access to information about all museums in the database. This should be divided into the six main subject areas into which we have grouped the recommended Data Collection Fields. Whenever appropriate, data should be presented as quartiles with straightforward data visualizations (such as a choice of bar, line, or pie charts). When appropriate, researchers should be able to download data files in a standard format (such as CSV) for offline analysis.
- ◆ A trends report showing the aggregate annual trends in engagements, revenue sources, expenses, employment, etc.

### Museum Supporters and Funders

- ◆ A funding status and trends report showing the economic health of the museums in a user-selected area or discipline by such factors as changes in budget size, surplus/deficit of revenues vs. expenses, and yearly trends in share of revenue from various sources (government, private, earned revenue).
- ◆ An engagements and finances report for individual museums applying for funding from specific sources—provided the individual museum has permitted a prospective funder to release the data by issuing a limited access password.

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### Look-Up Functions and Links to External Data

Museums Count: The IMLS National Museum Census is designed to combine two major streams of museum data: a) a compilation of existing information from various sources that IMLS contractors are using to build a comprehensive listing of America’s museums and b) the data that will be submitted by individual museums via the Museums Count portal. But this does not exhaust the existing sources of readily available information that are relevant to museums. We recommend that the Museums Count portal should incorporate connections to the following external data:

- ◆ **Real-time verification of addresses with automatic geocoding** of museum locations. Data contributors and other users should be able to download coding (or raw geographic coordinates) that they can use to specify a museum’s location in



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other GIS applications. (Some uses of this data are described above.) This is consistent with the goal of a National Museum Census built on an open-source platform.

- ◆ Geographic information should include **congressional and local electoral districts**, with on-demand links to additional information about a museum's elected representatives from non-partisan external sources.
- ◆ **Automated look-up of DUNS (Data Universal Numbering System) and EIN (Employer Identification Number) numbers**, for verified representatives of registered museums only. These should not be shared with other users without express permission of the registered museums.
- ◆ **Links to public databases from the U.S. Census Bureau and other federal agencies** that can be tied to specific geographic locations. Rather than clutter the Museums Count portal with automatic imports of such data, the supplemental data should be provided on-demand in one or more of the following formats: a direct link to the other database, with search information pre-populated but relying on the existing functionality of the target database; an on-screen report with data from the other database; or a downloadable report in a user-friendly format (standard spreadsheet, graphic that can be imported into presentation software such as PowerPoint, etc.). Access to this supplemental data should be prompted by plain-language questions such as: *Would you like to know more about the demographics of this museum's community?* (with a connection to the American Community Survey or other Census Bureau databases at <http://factfinder.census.gov>); *Would you like to know more about the public schools in this museum's community?* (with a connection to the School District Demographics System at the Department of Education at <http://nces.ed./surveys/sdds/index.aspx>); *Would you like to know more about the public libraries in this museum's community?* (with a connection to IMLS Public Library Statistics at <http://harvester.census.gov/imls/publib.asp>); *Would you like to know more about recent economic conditions in this museum's community?* (with a connection to Current Employment Statistics from BLS at <http://www.bls.gov/sae/> or various other databases related to economic conditions, construction, etc., maintained by federal statistical agencies).
- ◆ **Links to proprietary or open-source (but non-government) databases** that can be tied to specific geographic locations, provided through the same mechanisms as above. The prompts for these supplemental data sources might include: *Would you like to learn more about the interests of people who live near this museum?* (with a connection to one of the databases of detailed psychographics developed by market researchers, such as Nielson Claritas Inc. at <http://www.claritas.com>); *Can I get independent information about this museum before I make a donation?* (with a connection to



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one of the independent charity rating services, such as Guidestar at <http://www2.org/> or Charity Navigator at <http://www.charitynavigator./>); *Can I see this museum's most recent federal tax return?* (with a connection to the database of IRS 990 forms at the National Center for Charitable Statistics — and some explanatory text about which museums are required to submit a 990 form and why); or *What are today's weather and traffic conditions near this museum?* The last might also be incorporated into a standard "Visit this Museum" report for members of the public who are planning to visit a specific museum.

- ◆ **Links to other museum surveys** published by organizations such as museum associations at the national, regional and state levels. (See Attachment C, *Review Guide of Existing Data*, for a list of some current surveys and organizations that could be linked to Museums Count in this way.)
- ◆ **Links to external image, video and audio sources** (Flickr, YouTube, etc.) that are associated with individual museums or can be searched by location.

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### KPI's and Other Calculated Metrics

IMLS is pursuing a National Museum Census that will quantify the museum field as a whole and facilitate analysis of museum sub-sectors. We believe this analysis should include calculations of economic value, community support for museums, museum operations, and more—all of which rely on the use of Key Performance Indicators (KPIs).

From the start, one of the Research Team's criteria for recommending Data Collection Fields has been a preference for Data Elements that lend themselves to KPIs. Some examples of KPIs appear in dark red text in Chapter 3 or are discussed in the narratives, but developing a full set of KPIs is part of a later phase of work.

Operating data can provide museum managers and stakeholders with meaningful assessments—"How are we doing?"—only when data can be compared. It is the process of comparing one number to another (or to a whole set of others) that reveals the relative magnitude of a particular metric (such as annual private funds raised) and allows metrics to be compared to other metrics (such as the amount raised last year, or the amount raised by similar museums nationally, or by other museums in the region). In short, KPIs become meaningful only when they can be compared to other KPIs using exactly the same data definitions. The comparison can be internal to the museum (comparing departments or fiscal years) or external (comparing a museum to its peers or the demographic composition of its market).



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Museum managers want data comparisons to guide decisions and motivate supporters. An example of a management question might be “How much do we engage our community?” And the answer is a KPI:

$$\frac{\text{Total Annual Engagements}}{\text{Community Population}} = \% \text{ of Community Engagement}$$

Note that this particular KPI is a measure of quantity not quality; and it is not an actual capture ratio, as some engagements will come from those outside the community population, like tourists. “How well do we engage our community?” is a question better answered using evaluation methodologies. However, in a free-choice learning environment, a case can be made that a museum with an increasing community engagement ratio is showing an increasing quality of service, at least in the eyes of those choosing to be engaged.

A parallel project involving the White Oak Institute (with AAM's Katz as a reviewer), On-line Benchmarking Calculator Reports for the Association of Children's Museums (ACM), also helped inform our understanding of which KPIs are important to the field. The ACM project included a survey completed by a project review committee and representatives of children's museums, who voted on the relative importance of more than fifty museum KPIs. Since ACM represents only one segment of the museum field and only one major user group (i.e., museum managers), the results from that survey were only one factor considered by the Research Team. Nevertheless, some of the KPIs that will be part of the Benchmarking Calculator are standard metrics that apply to all museum types. Examples of KPIs include, expenses per visit, expenses per gross building sq. foot, personnel costs as a percentage of total operating expenses, earned revenue, government revenue, and contributed revenue as a percentage of total revenue.

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### Additional Challenges

- ◆ **The challenge of market area:** Several significant performance indicators use market area as the denominator (e.g., engagements per market area, private support revenue per market area, etc.). However, the Expert Reviewers strongly recommended against a specific question about “What is the population of the area where your museum is located?” and we acceded to their recommendation. The challenge is that area can be defined in many different ways, from a city block to a census tract to a defined metropolitan area - or even a national affinity group defined by the specific content of a museum rather than its geography. Nonetheless,



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we recommend that museum data providers be able to: 1) identify a preferred service area or areas from the following choices: zip code, municipality, county, congressional district, metro/micro area, state, predefined region, or the entire United States; 2) access the population data for each of their choices; 3) automatically calculate KPIs that depend on a population denominator for each of their choices; and 4) benchmark themselves against other museums that have identified the same types of service areas. This would not be another data collection field, but rather a blank in a KPI worksheet of external indicators. Once museums entered some assumption about a target market—and museums could experiment with different choices (i.e., zip code, metropolitan or micropolitan area, counties, etc.)—they would be presented with performance indicators such as their capture of the school population or per capita earned revenue compared to disposable income. A second column could show the median for a user-defined set of comparables, a third could show the difference. This would allow managers to see if other museums are doing better or worse at serving schools or whether they are capturing a large enough share of the disposable income per engagement. The Research Team recommends that these market assumptions *not be stored* as part of a museum's record, but remain part of a temporary working space (or "sandbox") for exploring KPIs. However, the development of this functionality is *not* a top priority for the development of the Museums Count portal.

- ◆ **The challenge of tourism:** Any assumption of resident population needs to be factored by the market's tourists. A museum in Washington, D.C., for example, is likely to have higher engagements per metro resident than another city of comparable size (say, Milwaukee), which does not attract as many museum-bound tourists. It would be useful information, once an appropriate geographic market has been defined by the museum, to import such tourism figures as number of tourists per year, the average length of tourist visits, tourist spending per day, etc. If these data are not already regularly collected, Museums Count could present a challenge for researchers to collect it!

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## Reporting and Exporting Functions

- ◆ **Data sunsets:** Above we recommend "freshness labels" for individual museum data records. Here we suggest that older data be hidden from view in some cases (though still available for analysis by researchers and others interested in historic or multi-year analysis). A user who selects the default view on the portal would only see "current data," with currency defined in part by how frequently IMLS conducts a thorough revision and validation of national Census data. In all cases, aggregating data from different years is a concern, as inflation and the general health of the



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economy affect museum operating data from year to year while long-term trends affect the status of collections and the size of facilities. Financial and operational data that is more than two years old has markedly reduced value for most users and should be removed from view and from current benchmarking functions.

- ◆ **A dedicated directory listing** of museum addresses and contact information (including as many Internet and social media locators as each museum decides to supply). This will be a useful look-up tool for anyone who is seeking a particular museum. However, we urge IMLS to think carefully about making this list available for download and reuse as a dataset, given the potential for misuse by spammers and unsolicited commercial propositions. Some museums will be dissuaded from providing data to the National Museum Census if they think it will lead to an increase in unwanted electronic correspondence. And some museum associations and commercial providers of proprietary museum data will be reluctant to cooperate with IMLS in promoting Museums Count if they think it will undercut traditional business practices that rely on selling access to proprietary mailing or member lists. This is a significant concern in the short run.
- ◆ Finally, we recommend the development of **two additional reports** incorporating data submitted via the Museums Count portal and selected external data. These should be available for on-screen viewing, printing, and download in various formats (including formats that will make it easy for participating museums to incorporate the reports into their own publications or presentations): 1) *“Visit this Museum”* (combining information about a museum’s location, hours of operation, contact details, pricing and facilities, etc., with a map and current weather and/or traffic conditions) and 2) *“Museum Advocacy”* (combining basic information about budget size, staff size and expenditures, volunteering, school visits, etc., with information about the residents and economy of the surrounding political unit). Although we would like to add a third report on *“Economic Impact,”* we do not believe that the data collection fields recommended in this report will provide enough meaningful data to make such a report reliable.

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### Security, Privacy, and Anonymity

Finally, we urge IMLS to pay particular attention to the confidentiality and security of the Museums Count portal. We have already discussed security issues above. Privacy and anonymity need to be addressed in the following areas as well: 1) levels of privacy for the various Data Elements collected via the portal (some of which will be considered proprietary and/or sensitive by the museum data providers); 2) standards for assuring anonymity in aggregated reports; and 3) making sure that the sample sizes are meaningful in aggregated reports.





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- ◆ We recommend **three basic levels of data privacy**: 1) public information; 2) private information that can be aggregated according to set policies; and 3) private/proprietary/information that is password protected. Museums must be very clear about which level of privacy applies to each piece of data they contribute to the Census. We have assumed in this report that many of the Data Collection Fields in Part 3 can be shielded from public inspection at the request of individual museums. Indeed, as discussed earlier, this was one of our criteria for dividing Data Collection Fields into Parts 2 and 3: Part 2 generally includes qualitative questions that we expect will be public and fully searchable, while Part 3 generally includes detailed quantitative questions that might plausibly be considered private or protected information. The Research Team's own view is that all information about museums that operate as public, tax-exempt entities should be public—but we do not feel we can impose this view on the entire museum community.
- ◆ An **aggregation policy** should be established by IMLS, indicating the minimum sample size needed before raw data from different museum records can be aggregated and shared. A knowledgeable museum insider should not be able to deduce specific details about a peer institution, which can happen with a small enough sample and a well-known "universe" of institutions that meet specific criteria. The Research Team understands that there may be stringent guidelines for Federal Statistical Agencies that will help IMLS set policy for the National Museum Census.
- ◆ Whenever possible, all data collected by the Census should be available in aggregate form and filtered by the following variables, alone or in combination (we do not consider this list exhaustive or definitive): city; state; region (using the existing divisions represented by the six regional museum service organizations); type of museum; size of operating budget (by range); size of museum (by range); specific features/amenities/venues; target audience(s). But again, filtered results that yield reports that unintentionally divulge private information should be disallowed.
- ◆ Meaningful **sample sizes** should be included in any aggregate data report, and users should be told the size of the *N*. Larger samples sizes can lead to more reliable averages and quartiles, but also to less comparable results for benchmarking. Whenever possible, users should be given the option of increasing the relevance of aggregate data by cropping extreme values (if the sample is large enough) and refining the applied filters.





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## The Challenge of the Denominator

In the end, the most accurate statement that we might be able to make about the number of museums in the United States is that “X institutions are identified as museums in Museums Count: The IMLS National Museum Census.” That number should equal the number of museum data records in the database, and it is bound to be smaller than the “total number of museums in America.” It may also be larger than the restrictive definition of “museum” than many people (including many museum professionals) currently maintain, which is bounded by such restrictions as “all non-profit museums,” or “just the museums that are professional,” or “just the museums that are open all year.”

The process of building participation recommended elsewhere in this report should result in all of the large public museums being included, as well as most of the rest. Some gaps are impossible to avoid, especially in such categories as the very small museums, organizations in flux or experiencing extraordinary stress, and organizations on the borderline of “museum” and other adjacent institutions (e.g., community centers, commercial galleries, theme parks, public buildings with trophy cases or memorials, etc.). Our experience is that many institutions with living collections (botanic gardens, zoos, nature centers, aquariums, etc.) do not think of themselves primarily as museums, and we worry that they will be underrepresented in the Census. And however light we make it, the burden of supplying data through the Museums Count portal will prevent some museums from being counted (see figure 4-1). In all, this means that the Museums Count sample will not be comprehensive or even necessarily representative of “all museums in America.”

While the U.S. Census Bureau has procedures for calculating births and deaths and making continuous improvements to current population estimates, the National Museum Census may never have the resources to accurately account for museum births and deaths. After several years, the number of records in the database is likely to exceed the number of still operational museums, as defunct museums are the least able to delete or update their records.

The Research Team recommends that IMLS should not even attempt to close the gap between the growing record count and “reality” for at least several years (except to remove the records of museums whose deaths become known through other means). Meanwhile, IMLS should investigate the best statistical procedures for developing reliable “current museum population estimates.” At all times, we should be clear about what the total number represented in Museums Count really means.



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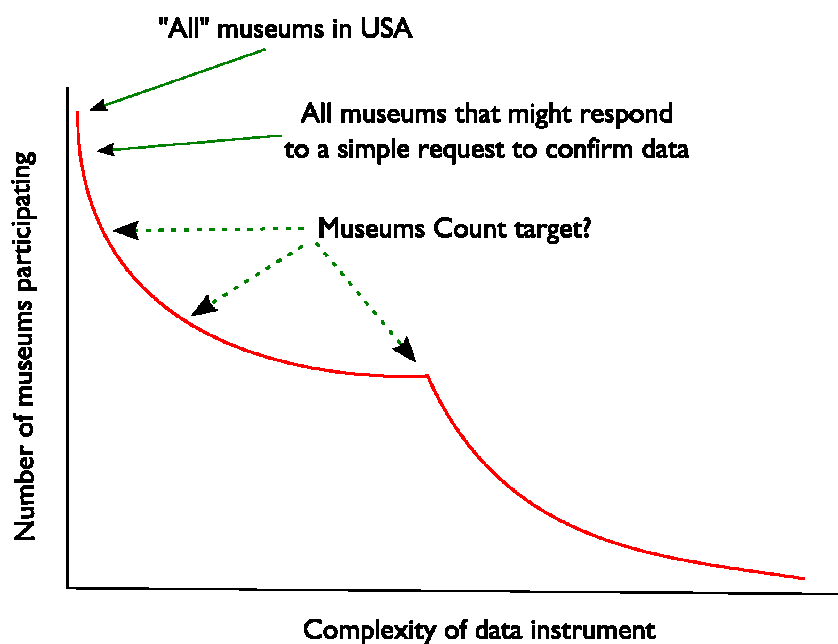


Figure 4-1

How does this affect the long-sought denominator that will allow researchers, policymakers and others to conduct reliable sample surveys and make confident statements about America's museums? We can use the total record count as a denominator if we simply define the Museums Count total as the "museum field," rather than as "all museums." This small significant semantic shift allows us to make some true statements about the museum field, as the total  $N$  = all museums who want to be considered part of the museum field.



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## RECOMMENDATIONS: ROLL-OUT AND SUSTAINABILITY STRATEGIES

### CHAPTER 5

This chapter outlines concepts and strategies to maximize participation by museums in *Museums Count: The IMLS National Census of Museums*. The recommendations here assume a series of phases:

- 1 Project Organization and Data Definitions Phase (substantially completed by this report)
- 2 Site Design, Roll-out and Launch Phase
- 3 Initial Registration Phase
- 4 Sustaining Phase

Many of the underlying assumptions apply to all phases, but most of the strategies and tactics apply specifically to the Roll-out Phase.

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#### Site Design, Roll-out and Launch Phase

##### Attracting Participation

The ultimate size, scope and ambition of the roll-out plan for Museums Count will depend on available resources. Whatever the scope of the plan, its success depends on strong collaboration with the museum community. While developing the recommended data collection fields for the Census, the Research Team has built a cadre of supporters from the museum community, including Expert Reviewers and Stakeholders representing the diversity of the field. We encourage IMLS to sustain and add to this nuclear group during the next phase of the National Museum Census. We also encourage IMLS to pursue funding from corporate and/or philanthropic sources to support initial outreach efforts and help assure the sustainability of Museums Count.

We recommend a comprehensive approach to attracting participants to the Museums Count portal, recruiting the help of a wide variety of organizations that influence museum behavior. Funders and supporters of museums, museum associations and the museum community can rally together to create a climate in which registering on the portal and sharing data is a basic prerequisite to being taken seriously as a museum. This phase can also begin to build public awareness and support of the Census by enlisting community members to encourage their museums to participate.

Success in getting museums to register will involve: 1) leadership commitment throughout the museum field; 2) a well-funded Marketing and Communications Plan;



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3) well-designed, intuitive data entry and report interfaces (as discussed in Chapter 4); 4) strategic incentives for participation; and 5) assuring participants that entering their data accurately will yield useful results for themselves and the museum field. Assuring museums that their data will remain secure is also important, as discussed in the previous chapter.

#### **Mainstream Actions:**

- ◆ Lead a roundtable session at the 2011 AAM Annual Meeting and MuseumExpo™ in Houston, Texas, on May 22 to **collect suggested tactics** for attracting and sustaining participation. Capture ideas and modify planning as appropriate.
- ◆ Create a **PDF brochure** targeted at museums explaining what the Census is, how it will benefit their individual museum and the field as a whole, basics on how to use the portal, and where to find more information.
- ◆ Develop a **test Web site** for gathering additional input from the field.
- ◆ Commission a museum-savvy PR agency/contractor to define a **PR, marketing and communications plan** for the launch, and provide appropriate funds for implementation. (Note that activities recommended here are intended as examples, not a full launch plan.)
- ◆ Test the **final prototype** before public launch.
- ◆ The **launch date** should be accompanied by a publicity blitz via museum service organizations and related professional associations (regional and discipline specific).
- ◆ Distribute **briefing packets** to chambers of commerce, philanthropic foundations, economic development councils, the National Conference of Mayors, national and state legislative offices, etc., on why and how to encourage “their” museums to participate.
- ◆ Conduct a **social media blitz** via all channels. Encourage museum associations and museums to use Twitter, Facebook and their blogs to publicize the National Museum Census and promote participation.
- ◆ Produce **“My Museum Counts” buttons** and distribute via museum service organization meetings, at training demos, etc.
- ◆ Encourage museum data providers to download a **“Museums Count” digital badge** to display on museum Web sites and append to staff email signatures, saying “We Count.”

#### **Creative Options:**

- ◆ Provide an easy **mechanism for museum supporters** (members of the general public) to identify whether “their” museum has contributed to the National



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Museum Census, and then to send an email to any non-participating museum encouraging it to participate.

- ◆ Film **short videos** by influential/famous people in and out of the field speaking about why museums need to stand up and be counted. Post to YouTube and/or other video-sharing sites and link extensively.
- ◆ Create a **gaming element**, challenging members of the public (and especially youth groups) to find museums not represented in the database and deliver recruitment fliers to them. For example, building on the model of the National Audubon Society's Christmas Bird Count (see <http://birds.audubon.org/christmas-bird-count>), IMLS could challenge members of the public to fan out across their communities on a given day, "spotting" museums and delivering fliers about the Census (downloadable as PDFs from the Web). Individuals and teams could submit their "tallies" (totals, with the lists of museums spotted) via email. IMLS and its collaborators in the museum community could encourage museums to publicize this event to their members via newsletters, Web sites and email lists.

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### Initial Registration Phase

The Research Team expects it will take time for the Census to attract registered users and become populated with museum data records—certainly longer than 12 months, given our recommendation that quantitative data be drawn from the "most recently completed fiscal year" and the fact that financial records often lag three months (or more) behind the actual closing date.

Because the Museums Count portal will launch with placeholder records for 20–30,000 museums, the actual challenge during this phase is to get museums to look at their information, then correct and augment it. To do this, a museum will have to check whether it already has an online account; if so, someone at the museum will have to validate at least some of the information in the placeholder, thereby creating a with contact information, account preferences, etc. (See Chapter 4 for more details.) Museums without placeholder records will have to create accounts from scratch.

Our expectation is that the Registration Phase (i.e., the first 15 +/- months after the Museums Count portal opens with provisional museum records) will end with fewer than 15% of the original museums unaccounted for and unregistered. Of course, the 85% of registered museums will not necessarily have provided any *new* data at this point.

### Maximizing Responses through Incentives to Participate

Once museums decide to contribute their data to Museums Count, the most important factor in maximizing the data collected is keeping the experience simple and rewarding. We recommend doing everything possible to minimize the frustration that can



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accompany survey completion (especially surveys involving the need to look up information and do math) and maximize the positive feedback and support from IMLS, funders, museum service organizations and peer institutions. Dividing the recommended Data Fields into Parts One, Two and Three should help minimize the frustration by segregating the qualitative (and generally less burdensome) questions from the quantitative questions.

### Mainstream Actions:

- ◆ Ensure there is a **low barrier to museum registration** and a seamless transition from registration to Part One of the Data Collection Fields.
- ◆ Make museums feel **safe and secure** in submitting more detailed information (Especially Part Three of the recommended data collection fields), which some of them will consider proprietary or confidential. Prominent notices about data security and the limits of data confidentiality on the portal and all promotional materials are highly desirable. As several Stakeholders pointed out while reviewing the recommended data collection fields, many museums that reflect the history and culture of specific ethnic groups or geographic communities are especially sensitive about issues of confidentiality and trust.
- ◆ Communicate that most museums already have a record established in the National Museum Census, pre-populated with data compiled by IMLS from public and commercial sources. The first step is to look up your museum's imported data. Entering and updating this data is **your chance to correct any errors on the existing official record**.
- ◆ Communicate that the public and some funders and supporters will be using the Census database to find out more about museums, so it better be accurate.
- ◆ To reiterate a point made elsewhere in this report: Keep the data collection process as **simple and short** as possible. Given the inevitable trade-off between the extent of museum participation and the amount of data requested from each museum, we advocate that IMLS favor extensive participation.
- ◆ Monitor incomplete responses and send **follow-up communications** with information on training/support for completing the data entry.
- ◆ Make a special, personal appeal to **larger, well-known museums** that are seen as leaders of the museum field by other institutions and the general public. This should include all institutions accredited by AAM and/or AZA.

### Creative Options:

- ◆ **Recruit and train volunteer field agents**, via AAM accredited museums and/or motivated regional and discipline-specific museum service organizations, to work with assigned museums in their geographic region to complete the data entry. These



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agents can provide both technical and moral support, and be on-the-ground representatives for the Census. This network would not only help some of the smaller institutions register on the portal, it would also increase the capacity of the volunteers' home institutions to participate in the portal and build a national cadre of trainers.

- ◆ **Gap Analysis:** Select a test sample of small geographic territories—zip codes, for example—that have Museums Count team members (Expert Reviewers and Stakeholders, plus new recruits) living in them. Ask these volunteers to count all the museums of which they are aware in their own neighborhoods, to see how many (if any) of these are missing from Museums Count. Repeat this exercise formally on an annual basis with volunteer field agents to see if the gap is closing. Using a representative sample of zip codes, factor a rough estimate of the total number of museums in America.
- ◆ **Rally team spirit** via state/regional challenges for the number of museums contributing to the National Museum Census. Provide an on-line map with a running count of museums registered in each state/region.

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## Sustaining Phase

### Training

Historically, one major barrier to the collection of museum financial and operational data has been the ability of staff (especially the staff of small museums) to find and report the information requested. A number of our Expert Reviewers and Stakeholders highlighted the particular challenge and potential benefit for small museums. We recommend providing significant training and support to museums, in a variety of formats from a wide range of accessible sources, to increase the capacity of museums to complete the portal data entry. This training might include:

#### **Mainstream Actions:**

- ◆ Free or low-cost **online Webinars**.
- ◆ Free **online publications** about the portal, data entry methods, and how museums can use the Museums Count database to their advantage.
- ◆ Robust **reporting functions** that help museums make sense of data they have already contributed via the Museums Count portal (see Chapter 4 and the additional discussion of museum management reports below).

#### **Creative Options:**

- ◆ Assistance from state/regions/discipline specific associations in the form of **email/phone support** for museums they serve. Provide association staff with Web-based training on data entry FAQs and other resources as needed. (Note that the





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Cultural Data Project has consistently identified phone support as vital to increasing the extent and quality of the data contributed by museums and other cultural organizations.)

- ◆ YouTube **videos** of Museums Count FAQs and tips.

### Building Institutional Capacity

In addition to training (a form of explicit capacity building), the National Museum Census will build capacity through the creation of new best practices and new peer communities:

- ◆ **Museum management reports**, automatically generated once a museum submits responses to all three parts of the recommended data collection fields, will be a significant incentive for participation. These reports have the potential to drive innovation and improvement in metrics across the entire museum field, by using key performance indicators (KPIs) to quantify impact objectives. As museum managers and governing boards become used to these reports, they will become more adept in setting strategic objectives and then measuring progress (especially for museum's that regularly update their museum data records and monitor trends for their selected KPIs). For individual museums, selecting KPIs that align with their purposes and then building them over time, will be a way to move from "good to great," as author Jim Collins puts it.
- ◆ The availability of robust and reliable data for analysis will also reveal best practices and opportunities for improvement across the museum field. Comparables searches will identify peer museums, and in time, build connections among museums with similar purposes and circumstances.

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### **Sustaining the National Museum Census for the Long Term**

The long term sustainability of the Museum Census hinges on establishing it as a norm for the field, ensuring a wide variety of users (public and private) use it as a critical resource and building support amongst potential funders as a hedge against future financial needs.

#### **Mainstream Actions:**

- ◆ Although the Research Team does *not* recommend making participation in Museums Count a condition for accreditation, IMLS funding, or participation in any other institutional development or funding program for museums (as recommended by one Expert Reviewer), we would urge all museum service organizations and funders to encourage (not force) their members and grant applicants to participate in the Census. There should also be mechanisms for using information in the Census database to fill out application forms efficiently (which has been an effective spur to participation for the Cultural Data Project).



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- ◆ Convene a yearly **funders forum** to review Census data and discuss how the data can be used to guide philanthropy and inform community planning. Solicit feedback on what data funders want and in what form. This forum might, in time, convince funders to make participation in the Census a prerequisite for funding. And it would help ensure that data from the Census is widely shared and used in decision making.
- ◆ Convene an annual **research roundtable** to share the findings about the museum field and its trends developed by researchers using Census and other data.
- ◆ Convene an annual **press roundtable** to share the findings of the Census and enable journalists, researchers, and museum representatives to discuss the state of the field.
- ◆ Invite all museum associations to include a “Museums Count” brochure with information sent (physically or electronically) to **new members**.
- ◆ Ask **national and state funding agencies** to encourage all museums applying to grants programs to register on the portal.
- ◆ Use the annual **Museums Advocacy Day** convened by AAM and other museum service organizations as an opportunity to publicize the importance of the Census and its data, remind museums to update their data, and recruit new participants. Also use Museums Advocacy Day as an opportunity to educate Congress about the Census and how they can access and use its data. (The Research Team understands that IMLS cannot directly participate in—or even encourage—most advocacy efforts, but the long-term success of the National Museum Census depends on the commitment of the entire museum field.)
- ◆ Develop incentives and provide resources for state, regional and/or discipline-specific **museum service organizations** to collect and submit updated data from their members for inclusion in the National Museum Census.

#### **Creative Options:**

- ◆ **Challenge computer programmers** to develop high-quality location-based museum apps building on data from the National Museum Census.
- ◆ The Cultural Data Project has spent million of dollars on developing a robust Web-based data portal and data-reporting capacity. The administrators of Museums Count can probably learn a few things from them, so we recommend that IMLS explore options for collaborating with CDP (ranging from consultation to joint-operating agreements). However, the Cultural Data Project is different from Museums Count in several significant ways: it serves only three of the National Museum Census core user groups; it is not a public, open-source database; it focuses primarily on the needs of funders and supporters rather than institutions and public planners; it includes not just museums but all cultural organizations (including a



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few with specific data needs that are moot for museums). The CDP is also geographically limited to certain states.

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### **Final Thoughts on Reducing the Burden of Museum Data Collection Through Standardization**

The museum organizations and individuals who contributed to the recommendations in this report support the common goal of establishing consistent, shared standards for museum data fields and definitions. We believe that the recommended data collection fields in this report, which have been vetted through broad consultation with the field, can become the basis for shared standards.

Shared standards would reduce the data-reporting burden on America's museums by enabling them to collect a single "master set" of data for their institutions—both useful for their own purposes but also readily exported for other purposes as needed (such as grant applications or policy analyses incorporating hard evidence about the impact of museums). The existence of shared standards would also enhance the data collection and analysis by museum service organizations and other museum supporters. For example, museum service organizations could concentrate on gathering supplemental information specific to their members' interests, building on the common foundation of data captured by the National Museums Census. This would be preferable to the present situation, in which AAM, ASTC, ACM, APGA, et al., ask their overlapping memberships to provide redundant bits of information in a variety of formats.

The desirability of common data standards for the museum field is clear. This report contains a well-reviewed set of data fields and definitions, built on a deep analysis of current data practices in the museum field and buttressed by hundreds of hours of review and advice from representative Stakeholders and Experts. But there is no guarantee that data fields and definitions adopted for the National Museum Census will become a standard for the field. There is the risk that service organizations and others who collect data about museums will continue to go their own ways, while ruing the continued lack of cross-platform comparisons and the burden of tracking multiple data forms and surveys.

We recommend the following strategies to encourage the adoption of the Museums Count data fields and definitions as de facto standards for the field:

**Formal adoption** of the Museums Count data fields and definitions by key museum organizations. We urge the Institute for Museum and Library Services, the museum service organizations that contributed Expert Reviewers to this project, the authors of all the domestic surveys reviewed by the Research Team, and any other organization that regularly requests and uses museum data to adopt the Census questions and definitions as the basis for their own data collection. The Research Team recommends



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that IMLS convene the various museum associations and other interested parties to discuss adoption of the Census data fields and definitions as a field-wide standard.

**Pervasiveness.** If all museums (or at least a substantial majority) participate in the Census, and if the recommended data fields and definitions become widely distributed and promoted by IMLS, AAM, White Oak Institute and other collaborators, people will come to see them as de facto standards because they are ubiquitous. Peer review is vital here—and not just the extensive peer review that has already been used to shape the recommended data collection fields but additional opportunities for thoughtful feedback. The Research Team recommends that this strategy be included in the Media and Communications Plan, and that the Census questions and their definitions be publicly available for anyone to download from the IMLS Web site.

**Coercion by funders** and accrediting associations would be less subtle, but perhaps a highly effective way of getting museums to accept the Museums Count data fields and definitions as a standard. IMLS could, for example, require any museum applying for funding to have a Census record, or require evaluations to include operating data that is most conveniently accessed from the Museums Count database.

The Research Team recommends the first two strategies wholeheartedly, and the third with caution.

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### Implementation: Overview of all Phases

- ◆ **Identify the plan, resources and talents needed to roll out** and sustain Museums Count; define scopes and budgets that can meet the expectations for Museums Count; define source and allocation of funds, with prioritized contingency/phasing should some of the funding not work out/be delayed.
- ◆ Consider several different ways that **federal funding, foundation grants** from private and/or other public foundations, **corporate sponsorship** and/or **earned revenue** might help fund and support Museums Count.
- ◆ **Identify funding and resources** to implement all or some of the plan.
- ◆ **Start Site Design, Roll-out and Launch Phase**
- ◆ **Engage an implementation team** to execute the necessary steps within specified budgets and scopes of work. The team might have the following participants:
  - ▶ IMLS
    - Provides vision and leadership
  - ▶ International Information Associates
    - Site design (engineering, graphics and visualizations)
    - Site operation
    - External data links



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- ▶ A field-testing and representative Research Team, informed by the Expert Reviewers and the Stakeholders recruited during the development of the present report
  - Public user front-end evaluation
  - Policy user front-end evaluation
  - Museum manager user formative evaluation
- ▶ A marketing agency
  - Marketing and Communications Plan
  - Publicity activities for Launch and Registration Phases
- ▶ Supporters and Partners
- ◆ **Develop a test site** with input from the implementation team
  - ▶ Portal layout with all necessary metrics and calculations (and incorporating the segmentation of Parts One, Two and Three of the recommended data collection fields)
  - ▶ Design portal and test functionality
  - ▶ Pre-populate Museums Count portal with existing data
  - ▶ Launch a password-protected version of the portal
  - ▶ Ask Stakeholders to test their data and use the input screens, entering their actual museum data into the Data Fields
  - ▶ Analysis of data quality and stakeholder comments
  - ▶ Test museum management reports and other reporting tools
  - ▶ Shakedown, de-bug, training
- ◆ Final prototype and **preview tests** of the portal before public launch
- ◆ **Public Launch Date**
- ◆ **Registration Phase**
  - ▶ Starts with publicity blitz
  - ▶ Other mechanisms for maximizing responses through incentives (as described above)
- ◆ **Twelve-month assessment**
  - ▶ Tally of registered museums
  - ▶ Gap analysis
  - ▶ Evaluate data quality and quantity
  - ▶ Summative evaluation with four primary user groups (museum managers, the general public, policy and research users, museum supporters and funders)



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- ▶ Adjustments and improvements to site, with special attention to recommended data collection fields designated as “experimental” or flagged for closer review in Attachment A
- ▶ Follow-up communications and marketing
- ◆ **Sustainability Phase**
  - ▶ Expand Museums Count by reviewing and revising existing data fields and reports and adding Data Collection Fields from the Reserve file and other sources.



# Attachments

## Museum Census Roadmap

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The recommended Data Collection Fields are listed in Chapter 3. Chapter 3 includes all questions and definitions recommended by the Research Team for inclusion in *Museums Count: The National Museum Census*. Any other questions/definitions (or versions of questions/definitions) contained in this report are included for *reference purposes only*.

- A. Recommended Data Collections Fields and Rationale**
- B. Reserve Data Collections Fields: Reviewed but not Recommended for Inclusion**
- C. Review Guide of Existing Data (selections)**
- D. List of 1,082 Data Fields Reviewed (“Full Glossary”)**
- E. Expert Reviewer and Stakeholder Survey Results**
- F. Survey Question Recommendations**

For the



By the





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## RECOMMENDED DATA COLLECTION FIELDS AND RATIONALE:

### ATTACHMENT A

The recommended Data Collection Fields are listed in Chapter 3. Chapter 3 includes all questions and definitions recommended by the Research Team for inclusion in *Museums Count: The National Museum Census*. Any other questions/definitions (or versions of questions/definitions) contained in this report are included for *reference purposes only*.

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:

- ◆ Black text is recommended for inclusion in the National Museum Census
- ◆ **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.
- ◆ Underlined text indicates links that pop-up the requested information when clicked.
- ◆ **Green text** reflects comments from the Research Team, Expert Reviewers and Stakeholders and will not appear in the Census.

Chapter 3 includes shortened versions of these same questions, but in recommended priority groups designated as Parts One, Two and Three.

The Data Collection Fields in this Attachment A are grouped by subject as follows:

Section A: Institutional  
Section B: Engagements  
Section C: Facilities  
Section D: Collections  
Section E: Human Resources  
Section F: Financial



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The lettering and numbering for each Data Collection Field are as follows:

- ◆ The first set of letters (P) and numbers indicate which Part the question is in, Part One, Two or Three, as presented in Chapter 3. Or if the letter is an (R), it indicates that it was moved to the Reserve Field.
- ◆ The second set of letters/numbers starts with the subject letter and is then numbered sequentially within the subject group.

For example **(P1.1) A1**: indicates that the question is in Part One and is the first question in Part One. If the first set of letters/numbers start with an R instead of a P, it indicates the data field was moved to the Reserve Field (see Attachment B).

The second set, such as A1, indicates it is in the Institutional section and is the first question in that section.

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## A. Institutional

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

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

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

Expert Reviewers and Stakeholders expressed a few logistical concerns involving museum names, including: recommending that the essential data field be the legal name and that the "known-as" names follow, and noting that respondents from some small historic sites or other institutions may not actually know the museum's legal name. The Research Team has incorporated all their suggested edits and has added more latitude in defining the "legal name." We have also added the possibility of multiple popular names, which increases public access by widening their search options. For these reasons, Questions A1 and A1.1 are recommended for inclusion in Museums Count as drafted above. The Research Team recognizes that incorporating "to the best of my knowledge" in the text opens up a possibility of double counting if the respondent is wrong; however, the portal should include mechanisms for preventing duplicates as necessary.

(R1) A1.2 [EIN question moved to Reserve Data Collection Fields]  
The EIN# for this museum (or its parent organization): \_\_\_\_\_

(R2) A1.3 [DUNS question moved to Reserve Data Collection Fields]  
The DUNS # for this museum or its parent (not all museums may have a DUNS number): \_\_\_\_\_

Expert Reviewers and Stakeholders expressed concerns about collecting DUNS and EIN numbers, including: doubt that small museums will be able to respond as they may not have access to such numbers, given a history of mergers and name changes; difficulty in locating the



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numbers; the need to include detailed instructions for how to find/apply for such numbers (a serious stumbling block for some small museums); a concern that such numbers are confidential information, subject to abuse or simply declared private by a parent organization. For these reasons, Questions A1.2 and A1.3 are not recommended, and have been moved, unchanged, to the Reserve File. The Research Team recognizes that IMLS considers both the EIN and DUNS numbers essential for administrative purposes and may chose to include these data fields in the Census.

- (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].
- (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]
- (P1.4) A2.2 Please provide this museum's main phone number:  
\_\_\_\_\_
- (P2.2) A2.3 Please provide this museum's general public email address:  
\_\_\_\_\_
- (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.

Expert Reviewers and Stakeholders suggested improvements to an earlier draft of this question, including a clarification of the multiple sites question and which email address to list. The Research Team has incorporated all their suggested edits. Questions A2 and sub-questions A2.1-2.4 are recommended for inclusion as drafted above.



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- (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.

Expert Reviewers and Stakeholders suggested moving the *reason* this information was being requested to the top of the question (done) and providing an example. Some were confused about "fiscal year"—both *whose* fiscal year (AAM's? The Federal budget?), and *which* ("we have one year for taxes and one for salaries")—where to find the data, and whether to divulge it ("we don't give out this information"). The Research Team has incorporated most of their suggested edits, but we still recommend fiscal year rather than calendar year or "most recent" year, in order to align data with traditional financial statements and increase accuracy. This question is the foundation for all quantitative data collected for Museums Count. For these reasons, Question A3 is recommended as drafted.

- (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.

This question was seen as easy to somewhat complicated, and as important (over 4.0 in a field of 5) for advocacy and research, for the public, for management, and for supporters. Nonetheless, Expert Reviewers and Stakeholders had many opinions in this area, including: clear support for the primary/secondary response format (forces a choice, yet allows museums to express their diversity in the secondary column); support for excluding an “other” category, and allowing “specialized” (as newly defined) to be the miscellaneous field; suggesting definitions for some potentially unclear categories (e.g., general, specialized); suggestions for adding categories (maritime, **anthropology**, medical, air and space, famous person/**Presidential**, private school, university, academic, open-air, sculpture garden—only the **bolds** have been added, to keep list as simple as possible); divisions about including/excluding visitor orientation centers (it has been retained but with their modified terms to include NPS interpretive centers); suggestions to separate functional/ownership categories (corporate, visitor center) from subject categories; suggestion to precede this question with a broad separator to identify collecting vs. non-collecting museums; suggestion to separate historic house/site and history museum/society into four categories (done); suggestion to add research center to some categories; several suggestions to add Tribal to Ethnically/Culturally Specific. The Research Team has incorporated many but not all of their suggestions, and has added definitions for some, and moved “corporate” and “academic” to the next question on governance. It may be desirable to move the main Resources: Collection question to precede this one. While a heartfelt appeal was made for maritime museums, the same case would have to apply to other categories within the world of transportation museums. For these reasons, Question A4 is recommended as drafted above. The Research Team recognizes that there will always be respondents who want their own category or who say they do not fit any listed category. There may also be museums that do not *want* to fit any pre-existing category.



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(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

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.





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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.

- (xx) A5a. Which of the following best describes the governance, and/or control of this museum? (Select just one main category, after reading the definitions.) [This is an alternate version that has been replaced by the one above.]
- ☐ a. Museum of a for-profit corporation (definition)
  - ☐ b. Government museum (park district, municipal, county, regional, state or federal)  
If selected, please check one of the following:
    - ☐ Public college or university
    - ☐ Other government entity
  - ☐ c. Independent for-profit museum
  - ☐ d. For-profit museum operated as a franchise or by a management company with operations in more than one location
  - ☐ e. Non-profit museum  
If selected, please check one of the following:
    - ☐ Independent non-profit
    - ☐ Private college or university operated
    - ☐ Other private non-profit organization operated
  - ☐ f. Tribal museum
  - ☐ g. Other, please specify: \_\_\_\_\_
  - ☐ Dual or multiple governance (please indicate governing entities, use letters a through g above)

Some Expert Reviewers and Stakeholders were concerned that an earlier draft of this question contained too many options (such as museums located in parks and community museums); others simply wanted more definitions. The Research Team has incorporated most of their suggested edits, and have broken out college/university under both public and private, due to many requests. The question was seen as easy to somewhat easy to answer, and it was seen as important (over 4.0 in a field of 5) for advocacy and research, for management, and for museum supporters. For these reasons, Question A5 is recommended as drafted above.





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

☐ Yes ☐ No

(P2.4) A.6.1 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)
- ☐ 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.

Expert Reviewers and Stakeholders expressed worry about the earlier draft definitions leading to possible confusions—an independent county history museum with its own 501(c)3 tax status may still see the county as a parent, for instance. Are all landlords parents? Or just some? Do parents necessarily provide in-kind services like security, maintenance, insurance, etc.? One Expert Reviewer found possible confusions between Question A5 (governance) and A6 (parent org). Both have been re-worded to clarify the intended difference, but combining the two or deleting QA6 might be considered. The Research Team has incorporated some of the other suggested edits, but we remain troubled by this question—principally by our inability to define parent distinctly and clearly. The question was seen as easy to somewhat easy to answer, and it was seen as important (over 4.0 in a field of 5) for advocacy and research, for management, and for museum supporters. For all these reasons, Questions A6 and A6.1 as drafted above are recommended with reservations. The Research Team recognizes that responses to these questions during testing may reveal additional confusion about “parents.”

(XX) A6.1a If yes, please indicate the nature of your parent. (Select just one) [This is an alternate version that has been replaced by the one above.]

- ☐ College/university
- ☐ Corporation or group of businesses (for corporate museums)



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- ☐ A cultural and/or performing arts organization (other than a museum)
- ☐ For-profit museum franchise or management company
- ☐ Branch of the United States armed forces
- ☐ Another museum or museum system (e.g., private non-profit, state, local, etc.).
- ☐ Other government/public agency
- ☐ Park system
- ☐ School system (other than post secondary)
- ☐ Tribal organization
- ☐ Other, please specify:\_\_\_\_\_

(R3) A7. [Question on Support Foundations moved to Reserve Data Collection Fields]

Do you have a separately incorporated support organization? (This may be known as an auxiliary, external support group, friends group, or affiliate organization.)

☐ Yes      ☐ No

Expert Reviewers and Stakeholders who did not have support groups expressed confusion about what this meant and whether it might apply to them. Some felt that “separately incorporated” should be emphasized, while others wanted to include friends, groups or even members. Finding the information was considered challenging. There was repeated resistance to providing EIN’s, and a sense that many museums would not know what they are. Some have multiple support organizations; some have them, but are inactive. While the question was seen as easy to somewhat complicated, it was seen as important (over 4.0 in a field of 5) only to museum supporters, and then just barely. For these reasons, Questions A7 and A7.1 are not recommended, and have been moved, unchanged, to the Reserve File. The Research Team recognizes that IMLS may want to add a version of this question to Museums Count in the future.

(R4) A7.1 [EIN Parent question moved to Reserve Data Collection Fields]

The EIN# for this museum’s parent organization):\_\_\_\_\_

(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.



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

Expert Reviewers and Stakeholders had various suggestions about how to define a museum's start date (date of incorporation, years in current building, founding anniversary, etc.), but there was no consensus about which definition is best. Some older institutions evolved from other types of institutions into museums, and the "founding" dates are misty. While the question was seen as easy to somewhat complicated to answer (roughly a quarter of respondents were not sure who had the answer at their own institution), it was seen as important (over 4.0 in a field of 5) only for purposes of advocacy and research. The Research Team understands the utility of this question, but is not fully satisfied with this wording. However, we know that AAM, ACM and ASTC have asked this question in the past and encountered little difficulty in getting responses. As a result, Question A8 is recommended for inclusion in Museums Count as it appears here.

(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
- ☐ 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



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- 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.

Expert Reviewers and Stakeholders expressed many ideas including expanding the earlier draft, trying to condense it, and deleting what they saw as jargon. Some suggested allowing all to be checked off, prioritized from 1 as top priority. Most understood this to be a very important question, while at the same time acknowledging that different staff are likely to list different priorities, and that there may be a difference between desired purposes and actual performance. One or two thought the data results would be too subjective, and that the question was not worth asking as every one does some of all of these. Some few felt the question of purposes did not apply to them (6%) or that they do not collect data this way (9%). Some would need approval. While the question scored relatively high on the difficulty scale (2.12), it was seen as important (over 4.0 in a field of 5) to all four users/audiences, especially to management (4.53), and to supporters (4.54). Along with the category of museum (QA3), these purposes are ways museums can identify comparables to develop meaningful KPIs; for instance, the KPI ratio of school engagements to school population can be more meaningful when compared to other museums who give roughly equal priority to serving formal education. For these reasons, QA9 is recommended as revised above. The Research Team recognizes that this is an experimental question and recommend that the answers be monitored closely and the question revised as needed in subsequent versions of Museums Count.

Suggested additions included: **Places of memory**, sustainability, **cultural accessibility**, social activism, **providing inspiration**, provoking memories and nostalgia, **building family and community bonds**, **respite for those seeking solace** and beauty, **intrinsic/aesthetic interests**, promotion and **sharing history** to foster and **rebuild understanding and tolerance**, patriotism, memorial, hall of fame, **site preservation**, **corporate history and marketing**, environmental conservation, local/community history, educational purpose for the general public, responding to community needs, **supporting curricula and instruction**, school and teacher programs, early learning, **training future museum professionals**, informal education, cultural revitalization, **celebrating local identity and community pride**, building corporate brand and identity, **memorial/shrine**, supporting the mission and purposes of the parent organization. The Research Team has incorporated all their suggested edits **in bold**.



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(R5) A10. [Question on Mission Statement moved to Reserve Data Collection Fields but question A10.1 for inserting the Mission Statement has been kept.]  
Does this museum have a mission statement?

☐ Yes

☐ No

(P 2.7) 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: \[auto, with their key words color coded\]](#)

Expert Reviewers and Stakeholders expressed a concern that many small museums do not know what a mission statement is, and would submit brochure descriptions or incorporation purposes instead. There was also some resistance to the need for mission statements to be “formally adopted,” as it would stop some respondents who may have no way of knowing if it had been adopted, or what adoption really meant. Some questioned whether the mission statement is the best corporate document to collect (as opposed to “vision statements,” goals, IRS incorporation purposes, etc.). Respondents suggested that making the text searchable might make it useful, and that comparison between mission statements and purposes might be revealing. The Research Team has incorporated all their suggested edits and removed the phrase “formally adopted.” The question was seen as both easy and important (well over 4.0 in a field of 5) for advocacy and research, for the public, for management, and for museum supporters. For these reasons Question A10.1 is recommended for inclusion in Museums Count as revised above. The Research Team recognizes that the data from this field may not reflect only formal mission statements, but in considering its uses, a variety of statements describing museums and what they are trying to achieve will be more helpful than harmful. The Research Team felt that Question A10 was superfluous, so it has been moved to the Reserve File.

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## B. Engagements

Note from the Research Team: The opening group of questions in Section B draws upon all of the other museum surveys reviewed by the Research Team. The most common ways of counting how a museum engages and serves people involve four different categories: 1) on-site visitors, 2) on-site program participants, 3) off-site (outreach) program participants, and 4) virtual users and media consumers who may never set foot inside the physical museum. “Annual visitation” (or “total attendance”), a data field that appears in many of the existing museum surveys, is really a subset of all annual engagements. At best, it typically includes just the first two of these four categories. But over the years, as museum services have expanded in all directions, the term “visitation” has been stretched to include after-school workshops, travel programs, wedding guests, Web site hits, tweets and more. “Engagements” is a broader umbrella term for all these different ways that museums serve the public today. It takes all four categories to sum up a museum’s annual number of engagements. Because the best metrics for tracking virtual users and media consumers are still uncertain, we recommend that Museums Count focus on the other three categories at this time.

Question B1 asks for the total on-site attendance (categories 1 and 2 combined); B2 calls for more detailed information about visitors (category 1) and auto-calculates the number of program participants (category 2); B3 asks for the number of off-site program participants (category 3).



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(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.

Expert Reviewers and Stakeholders offered 48 comments about an earlier draft of this question. Principal themes included: a concern that small museums do not keep count (many comments focused on this issue); the need to allow for estimates, perhaps with a sub question about the source of the data (done); the need to clarify what should be included or excluded from the count; concerns about reporting accuracy and/or temptations to game the system with inflated figures; concerns that the level of detail needed to get precise counts from large museums would confuse smaller museums who don't offer outreach or have multiple venues, etc.; a worry that museums would continue to use their own definitions, unless we were especially clear. One respondent suggested that this question should ask for the "total visitation" while the next two





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focused on visitor sub-sets. The Research Team has incorporated many but not all of their suggested edits. We acknowledge their concerns, but we want to embrace this new engagement framework both because it is more accurate and because “visitation” has so many legacy meanings. We have added a question about the source of visit data, which may partially address the gaming/accuracy issue (when the data is aggregated, the results could be limited to data derived from the most accurate counting methods, for instance). While the question was seen as easy to somewhat complicated to answer (1.95), it was seen as important (over 4.0 in a field of 5) for advocacy and research, for management (4.71), and for museum supporters. For these reasons, Questions B1 and B1.1 are recommended for inclusion in Museums Count as revised above. The Research Team recognizes that some small museums will find all the definitions and restrictions daunting, but they are needed to get accurate reporting from larger museums who will account for the largest number of on-site visits; perhaps there is a way only larger museums can see the instructions that pertain to them.

(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: \_\_\_\_\_

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 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.





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- 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.

Expert Reviewers and Stakeholders expressed a great deal of concern about defining program and service use, but had fewer qualms about total on-site attendance. Indeed, there is some precedent for gate attendance being defined as a sub-set of total attendance. The Research Team has incorporated all of their suggested edits and has restructured Questions B1 and B2 to reflect the more familiar notions of total on-site attendance (QB1) and total gate attendance (QB2), with an auto-calculation to report on the balance—which, by definition, are engagements based on something else (“programs and services”) besides coming to visit one or more visitor experiences. While the question was seen as easy to somewhat complicated to answer (2.21), it was seen as important (over 4.0 in a field of 5) for advocacy and research, for management, and for museum supporters. For these reasons, Questions B2 and B2.1 are recommended for inclusion in Museums Count as revised above. The Research Team recognizes that the resulting figure for program and service engagements will be full of many miscellaneous categories of use, from wedding guests to art studio participants to evening lecture attendees.

(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



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ratio of engagements to the population within a ten-mile radius for this fiscal year is [auto = (B1+B3)/ten mile population].

Expert Reviewers and Stakeholders expressed interest in examples, concern that school audiences were hard to count, concern that booths in fairs and festivals might get unfairly counted, and they noted many small museums do not do outreach. The Research Team has incorporated all their suggested edits. The question was seen as easy to somewhat complicated to answer (2.03) and it was seen as important (over 4.0 in a field of 5) for advocacy and research, for management, and for museum supporters. For these reasons, Question B3 is recommended for inclusion as revised above. The Research Team recognizes that data about outreach and off-site participation is going to be less precise than data about on-site engagements.

(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
- ☐ 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).

Expert Reviewers and Stakeholders offered suggestions for improving the original question by categories for adding 250-299 days and 300+ days. The also expressed some concerns about counting open days at institutions with erratic schedules due to closings for summer holidays, tribal events, etc. The Research Team has incorporated all of their suggested edits. The question was seen as very easy to answer (1.06), and it was seen as important (over 4.0 in a field of 5) for all of the purposes they were asked to comment upon. For these reasons, Question B4 is recommended for inclusion in Museums Count as revised above.

(R6) B5. [Question on multiple venues moved to Reserve Data Collection Fields]  
Please tell us how many on-site, separately controlled visitor venues your museum has at this physical location.

- ☐ One
- ☐ Two



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- ☐ Three
- ☐ Four or more

Expert Reviewers and Stakeholders expressed confusion and concern about this new question on multiple venues including definitions, applicability to only some museums, and confusion about multiple sites versus multiple venues; not understanding “separately controlled” and general non-positive feedback. While the question was seen as easy to somewhat complicated to answer (2.11), it was seen as marginally important for purposes of management only. For these reasons, Question B5 is not recommended for inclusion in Museums Count and has been moved, unchanged, to the Reserve File.

(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)
  - Performances or concerts
  - Community group meetings
  - Ethnic/cultural festivals
  - Polling place



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- 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.

Expert Reviewers and Stakeholders expressed a desire to bundle a longer list of individual programs and services into larger themes, and the Research Team has responded by providing seven broad categories plus “other.” They also asked for wording changes. They offered many suggested additions to the earlier draft: **educational** programs (rather than learning), performances, club or social group gatherings, religious services, **affinity group events** (**reenactments, vintage auto shows, craft show**) concerts, scout activities, **community group meetings**, book clubs, **special needs programming, ethnic/cultural festivals**, science demonstrations, artists in residence, arts/craft activities, **special events** (parties for members, themed holidays, athletic events, civic, veteran or community service organization meetings, **research services, library services**, object study/collections research access, **rides** on small trains or boats, VIP behind-the-scene tours, **polling place, wireless access areas** (those in **bold** have been added to the list of examples). One suggested separating this into two questions: one on specific programs and the other on target audiences. One suggested an alternate set of groupings: 1). Revenue-generating rentals including birthday, wedding, other parties, conferences (outside groups), corporate rentals, all “private functions”; 2). Learning programs; and 3). Member/volunteer programs. One suggested a distinction between internally and externally generated programs. The Research Team has incorporated some but not all of their suggested edits. The question was seen as easy to somewhat easy to answer (1.72), and it was seen as important (over 4.0 in a field of 5) for all purposes they were asked to consider.



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For these reasons, Question B6 is recommended for inclusion in Museums Count as revised above. The Research Team recognizes that a widely accepted framework does not exist for classifying programs and services, and that IMLS may want to expand and re-organize this question after a few years of monitoring the “other” responses submitted by museums.

(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)
  - 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.



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- 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.

Expert Reviewers and Stakeholders raised many of the same issues they raised in Question B6. One suggested that “Perhaps a sub-category [should be added] under ‘Engagements’ to cover research and scholarship is warranted as Research and Scholarship is listed as a public purpose in A9.” The Research Team has clustered many examples into fewer, larger categories to simplify the question as much as possible. The examples (which are intended to be illustrations only) should be available as drop-downs. The question was seen as easy to somewhat complicated to answer (1.98), and it was seen as important (over 4.0 in a field of 5) for the public and for management. Question B7 is recommended for inclusion in Museums Count as revised above. Again, the Research Team recognizes that a widely accepted framework does not exist for classifying programs and services, and that IMLS may want to expand and re-organize this question after a few years of monitoring the “other” responses submitted by museums.

(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)
- ☐ 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.





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- 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.

Expert Reviewers and Stakeholders expressed concern about the complexity of these two questions on media engagements, while acknowledging their utility. Several suggested simplifying the process by removing the request for access information (URLs, Twitter hashtags, etc.)—which was seen as “tedious” to track down for a large museum and too changeable to bring in a Census, though members of the public may be quite eager for such information. Breakdowns by in-house vs. non-museum publications and between reoccurring and occasional were suggested, but not implemented at this time, given the overriding concerns about survey length and complexity. Many comments suggested the use of brand names for clarity, and the Research Team recommends a middle ground using the format [generic term] ([brand name examples]). The Research Team does not see an objective for the Census to replace a museum’s Web site, but rather to serve the museum by driving traffic to their Web site, where the museum can provide current links to these media platforms. Suggested additions included: newsletters; online e-blasts; SurveyMonkey; webcams, and print brochures (all added). The Research Team has incorporated most of their suggested edits and has removed the access information column. While the question was seen as easy to complicated to answer (2.26), it was seen as important (over 4.0 in a field of 5) to public policy, to management, and to supporters. For these reasons, QB8 is recommended as drafted above.

(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):  
\_\_\_\_\_





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- ☐ 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: \_\_\_\_\_

Expert Reviewers and Stakeholders expressed similar concerns about complexity to B7, and the Research Team has relied on the same reorganization strategy to simply things as much as possible. The Research Team has incorporated all their suggested edits. The question was seen as easy to somewhat complicated to answer (1.98), and it was seen as important (over 4.0 in a field of 5) to the public and to management. For these reasons, Question B8.1 is recommended as revised above. Note that the Expert Reviewers were emphatic that page-view and click-through counts for web sites are still unreliable metrics and that the Census should not attempt to quantify virtual engagements at this time. The Research Team concurs.

(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



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- \_\_\_\_\_ 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**.

Several Expert Reviewers and Stakeholders expressed concern about the earlier draft of this question, in that they don't collect this kind of data, or that the question does not apply to them. Two were unsure about making this information public. Some Stakeholders come from museums with multiple target audiences, depending on season or exhibition; one worried about Halls of Fame and memorial museums that might reach all ages. One suggested splitting the question into actual audience and intended audiences, noting that a museum may "target" audiences that are not part of its core (actual question retained; intent question not developed). Several requests to expand to secondary (done). Some wanted to add questions about geography, cultural affiliations, and kinds of audiences served (at-risk, tourists, etc.) (not done). The Research Team has retained the age-focused categories because a) they are useful as comparable filters, and b) they relate to the social context in the Falk/Dierking Contextual Model of Museum Learning. The Research Team recognizes that this is an experimental question that some museums may have difficulty with it. The Research Team has incorporated many of their suggested edits. While the question was seen as easy to somewhat complicated to answer, it was seen as important (over 4.0 in a field of 5) to public policy, to management, and to supporters. For these reasons, Question B9 is recommended as drafted above.

(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].

The Research Team has incorporated all the suggested edits except for one questioning the exclusion of corporate memberships. The question was seen as easy to somewhat complicated to answer (1.51), and it was seen as important (over 4.0 in a field of 5) to public policy, to management, and to supporters. For these reasons, Question B10 is recommended as drafted above.



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

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*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.

Expert Reviewers and Stakeholders expressed concern about excluding chaperones (done), as they do not keep that data (added in). There were worries about not keeping this data. The Research Team has incorporated all their suggested edits. The question was seen as easy to somewhat complicated to answer (1.92), it was seen as very important (over 4.5 in a field of 5) to public policy, to management, and to supporters. For these reasons, Question B11 is recommended for inclusion in Museums Count as drafted above.

(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

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

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.

Expert Reviewers and Stakeholders expressed suggestions to add qualifiers to “free” such as free to tribal members, big brother/big sisters, veterans, infants, members, etc. (not done), and suggestions to allow estimates, as free is harder to document (done). One suggested the number of free attendance is more important than the free days. The Research Team has incorporated most of their suggested edits. The question was seen as easy to somewhat complicated to answer (1.63), and it was seen as important (over 4.0 in a field of 5) to public policy, to the public, to management, and to supporters. For these reasons, Questions B12 and QB12.1-12.2 are recommended for inclusion in Museums Count.



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- (R7) B13. [Question on partnerships moved to Reserve Data Collection Fields]  
With which of the following categories among the many potential educational partners and collaborators do you have a written statement of agreement covering on-going mutual responsibilities? (Please check all that apply.)
- ☐ Colleges and universities
  - ☐ Corporate Community
  - ☐ Libraries
  - ☐ Other Museums
  - ☐ K-12 School System (public and/or private)
  - ☐ Public Radio or TV
  - ☐ Private foundations
  - ☐ Government educational foundations and agencies

Expert Reviewers and Stakeholders expressed concern about verification of partnerships, the kinds of partnerships and the definitions. There were also many suggested additions, which indicates that a limited list will be frustrating. The importance and utility of the resulting data was also questioned. The question was seen as easy to somewhat complicated to answer (1.83), and it was seen as important (over 4.0 in a field of 5) only to management. For these reasons, Question B13 is not recommended for inclusion in Museums Count and has been moved, unchanged, to the Reserve File.

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### C. Resources: Facilities

- (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)



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☐ 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: \_\_\_\_\_

**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: \_\_\_\_\_

This question was ranked as easy or somewhat easy by an overwhelming majority of respondents (93%) and it was ranked as important (over 4.0 in a field of 5) for advocacy and research, for the public, for management, and for supporters. After their initial review, Expert Reviewers rejected several other proposed facilities as ambiguous or too specialized for inclusion; they also worried that a single long list would deter museum data providers and recommended grouping the facilities by type, a change that we adopted. While the Expert Reviewers and Stakeholders like the range and organization of this question, they wanted to add still more items to the list, including art studio space, collection or specimen preparation area, interpretive trail/walking path, large climb-on sculpture, lockers and coat check, research space for visiting scholars. The Research Team has incorporated some of their additional suggestions. Question C1 as revised above is recommended for inclusion in Museums Count.

- 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.



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- ☐ 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.
- ☐ 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.

(R8) C2.1.1 [Question on Developed Exterior Grounds moved to the Reserve Data Collection Fields]  
What is the total area of the developed exterior grounds at your museum?  
\_\_\_\_\_ sq. ft. OR \_\_\_\_\_ acres

*Definitions:*

- Include the portion of your grounds that is developed and actively maintained by the institution. May include parking lots, picnic areas, gardens, exterior exhibits, nature trails, etc.
- Include land that is owned or leased by the museum.
- Do not include land that is not maintained, developed or actively used by the museum. "Active use" *includes* land set aside for living collections that is temporarily fallow or wild and awaiting interpretation. "Active use" *does not include* land that is permanently inaccessible to the public, such as swamps, pond/lake surfaces, restricted conservation lands, remnant private parcels, etc.





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As with Question C2, respondents were divided on the difficulty of this question about exterior grounds, with 27% ranking it as easy and 37% ranking it as somewhat to extremely difficult; 25% reported that “I’m not sure who has the answer at my museum” and 10% said it did not apply to their museum. It was ranked as important (over 4.0 in a field of 5) for management only. After their initial review, Expert Reviewers expressed some concern about the “one-size-fits-all” nature of this question, given that many museums (such as zoos and sculpture gardens) focus on their outdoor spaces. The Expert Reviewers and Stakeholders echoed this concern: some thought it was a “somewhat tough question to answer but [the] definition provides clear understanding” while others thought that the definition of “developed exterior grounds” needed clarification. Several also pointed to the ambiguous situation when “the grounds” are controlled and maintained by another entity (such as a parent organization). For these reasons, Question C2.1.1 is not recommended and has been moved to the Reserve Data Collection Fields for further consideration and inclusion in a subsequent revision of the Museums Count data collection portal.

(R9) C2.1.2 [Question on Net Interior Exhibit Space moved to Reserve Data Collection Fields]

What is the total **net interior exhibit space**? \_\_\_\_\_ sq. ft.

*Definitions:*

- “Net interior” refers to the space inside the walls of the public exhibit areas, subtracting column and duct chase footprints, stairs, elevators, etc.
- Count only exhibit space that is “inside” the exhibit venue, not other spaces (like entrance and waiting lobbies, stairwells, board rooms, etc.) where the museum may place exhibits on an irregular basis.
- If your institution has more than one building at this physical location, please report the combined square footage for net interior exhibit space.
- Please include temporary/traveling exhibit space. Do not include other public spaces such as theaters, auditoriums, and classrooms.

While a majority of respondents saw this question on net interior exhibit space as easy (50%) or somewhat easy (23%) to answer, they only ranked it as important (over 4.0 in a field of 5) for management (and perhaps advocacy and research). A fifth (21%) reported that “I’m not sure who has the answer at my museum” and 11% said their institutions do not collect data in this manner. Several Expert Reviewers and Stakeholders thought that the use of “net” here was confusing, especially for museums with multiple venues or spaces with multiple uses; a few offered the alternative wording of “total square footage.” One also recommended that we “replace the words ‘exhibit space’ with ‘public programs space’” to reflect the fact that “many important museums do not host ‘exhibits’ in the conventional sense”; this suggestion is well considered. In the end, the Research Team agrees with the comment from one Expert Reviewer that “the value of data [from] this question may not be worth the effort to collect it.” For this reason, Question C2.1.2 is not recommended and has been moved to the Reserve Data Collection Fields for further consideration and inclusion in a subsequent revision of the Museums Count data collection portal.

(P1.8) C3. Museum sites





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- a) Does your museum serve the public directly at more than one separate **physical location**? ☐Yes ☐No
- b) If yes, how many different physical locations? \_\_\_\_\_
- c) If yes, do you consider this location the **main site**? ☐Yes ☐No
- d) 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.
- 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.

A large majority of respondents saw this question as easy (63%) or somewhat easy (19%) to answer, though 14% said it did not apply to their institution. They also ranked it as important (over 4.0 in a field of 5) for both management and museum supporters. After the initial review, one Expert Reviewer noted that “a separate site would warrant its own [record] in Museums Count if it has a separate budget (or budget line item in the case of a university or other large entity) and separate staff with primary responsibilities for that site”; the Research Team concurs, especially after several suggestions from Stakeholders that “multiple locations that fall under the same operating budget should be reported as one museum with multiple physical satellite locations.” In their subsequent review, the Expert Reviewers and Stakeholders strongly suggested that we “move this section closer to the front [because] consistency on reporting physical locations would improve with the text that is at the beginning of the survey” (i.e., Question A1). Another said, “I think it is important to find out about separate sites, but being clearer about what and how a separate site is defined.” One Stakeholder offered this alternative wording: “Does your museum serve the public directly at more than one separate physical location.” The Research Team has incorporated this suggested edit. Question C3 as revised above is recommended for inclusion in Museums Count. We also moved it to the Institution section of the recommended Data Collection Fields.

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## D. Resources: Collections

- (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.



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This question was ranked as ranked as easy (66%) or somewhat easy (21%) to answer by an overwhelming majority of respondents and it was ranked as important (over 4.0 in a field of 5) for advocacy and research, for management, and for supporters. One Stakeholder representing a tribal museum noted that “[some] Native people will take offense at calling the collections from Native cultures ‘collections,’ but understand that is the way of the dominant culture.” One representative from a Science Center pointed out that museums of this type sometime consider “exhibits” as “collections” — but the Research Team does not believe this is common practice. Several other Stakeholders urged us to split the question in half, with separate questions about permanent collections and loans; one respondent was especially emphatic on this point: “[You] cannot ask two questions in one. Will not be valid.” But another respondent offered a useful solution, rewording the question as “Does your institution care for or manage collections?” (The Research Team also recognizes that several existing museum surveys have effectively combined the two categories into one question as a way to highlight conservation and stewardship issues.) While recognizing all the difficulties surrounding the word “collections,” we recommend Question D1 as revised above for inclusion in Museums Count.

(R10) D1.1 [Question on How Many Objects moved to Reserve Data Collection Fields]

Approximately **how many objects** are in your permanent collection (or in your care if on long-term loan)? \_\_\_\_\_

Expert Reviewers and Stakeholders considered this an especially difficult question to answer: 17% said it would be complicated or very complicated to answer (the worst ranking of any proposed question) and another 17% said it would be somewhat complicated. Nonetheless, it was recognized as important (over 4.0 in a field of 5) for advocacy and research, for management, and for supporters. After their initial review, the Expert Reviewers were deeply divided about whether a question on total collection size was feasible. One argued that asking for a number would be a “shut-down question” for many institutions; another said “I recognize the difficulty in collecting this info, but think it should still be attempted”; and a third concluded it was “too difficult to ask about the number [of items] in permanent collection and difficult to get quality data. Ask this in a sample survey instead.” The Stakeholders echoed all of these positions. The key issue for them was defining what constitutes an “object”: for example, is it necessary to distinguish between “accessions and loans”; between registered objects and those awaiting cataloguing (a real concern for smaller institutions); between “lots” and single specimens (a real concern for natural history museums and museums that consider groups of manuscripts, photographs, etc. as single accessioned items); between objects on display and those in storage; or between teaching collections and permanent collections? Several Stakeholders suggested that “the word approximately gives museums a degree of latitude,” and that “even the small ones ... could give an approximate answer to this question”; others recommended that “this question is another one where having a range of numbers to choose from would provide a good compromise.” The Research Team does not think that this is a viable alternative, given the absence of reliable data that would allow us to construct appropriate ranges. For all these reasons, Question D1.1 is not recommended and has been moved to the Reserve Data Collection Fields for further consideration and inclusion in a subsequent revision of the Museums Count data collection portal. Given the potential significance of the data, however, we recommend that IMLS consider asking the question as worded to a sample of museums and using the results to construct appropriate ranges for a future question.



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- (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: \_\_\_\_\_
  - ☐ None of the above

This question was ranked as ranked as easy (64%) or somewhat easy (20%) to answer by a large majority of respondents, though 13% said “I’m not sure who has the answer at my museum” and 11% said it did not apply to their institutions. Respondents also ranked this question as important (over 4.0 in a field of 5) for all purposes they were asked to consider: advocacy and research, public users, management, and supporters. A few Stakeholders noted that the question “would require a team of people from my institution to answer effectively.” A related recommendation was to “include a category of None or Does Not Apply, [as] most small museums are not doing any of this kind of thing”; we have incorporated this suggestion. The most important objection raised by respondents, however, was the close connection between this question and *collections*: they noted that non-collecting institutions still have many of these online resources. However, the Research Team believes that Question B8 focuses on digital engagements while this question focuses on public access to collections, as noted in the directions for users. For this reason, we recommend Question D1.2 as revised above for



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inclusion in Museums Count, recognizing that questions B8 and D1.2 might be combined in subsequent revisions of these questions.

(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 \_\_\_\_\_

This question was ranked as easy (58%) or somewhat easy (30%) by a large majority of respondents, though 10% said that the wording was unclear and another 8% said “I’m not sure who has the answer at my museum” and/or “we don’t collect the data this way.” Respondents also ranked this question as important (over 4.0 in a field of 5) for all purposes they were asked to consider: advocacy and research, public users, management, and supporters. After their initial review, one Expert Reviewer recommended a more open-ended question (“What is the focus of your collection?”), but the Stakeholders generally liked the format as presented (“the checklist serves as a very helpful guide for this question”). Stakeholders also suggested a number of specific additions to the list, most of which have been incorporated (at the risk of producing an extended list that will deter some future respondents). We recommend Question D2 as revised above for inclusion in Museums Count. However, the Research Team recognizes that this is not a comprehensive classification scheme for museum collections and recommend that IMLS closely monitor responses and revise this question in the future.



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- (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.]

Respondents were strongly divided on the difficulty of this question, with 21% ranking it as easy and 14% ranking it as complicated or very complicated to answer; 15% also described the question as unclear, while 15% said that “I’m not sure who has the answer at my museum” and about 10% said it does not apply to their museum, they do not collect data this way, and/or they would have to get permission before responding. The question was ranked as important (over 4.0 in a field of 5) for management purposes only, but just barely missed this threshold for the other three purposes respondents were asked to consider (for advocacy and research, the public, and supporters). The Expert Reviewers and Stakeholders were also sharply divided in their comments. Some thought that “it’s worth it to get data from the museums themselves rather than to try to fit into predetermined categories” while others declared this question “too open-ended.” Some thought that “allowing 100 words seems too high” while others advocated for 250 words. One Stakeholder worried about “about the comparability of collections from one museum to the next”; another was afraid that museums would revert to “collections-speak” and provide cursory descriptions of little use to the general public. Finally, a common refrain was that museums would either get stumped by this question (as worded) or “get bogged down answering this question by committee.” Nevertheless, Question D2.1 is recommended with reservations. An open-ended question has the potential to shape a comprehensive framework for describing collections via crowd-sourcing (i.e., see how museum data contributors actually describe their collections by type, period, medium, etc., then use this new source of data to create a new question about collections focus for future iterations of Museums Count). This is discussed again in Chapter 4.

- (R11) D3.1 [Question D3.1 on Preservation Mission moved to the Reserve Data Collection Fields]  
Does the mission of your museum include **preservation** of your collections or holdings?

☐ Yes      ☐ No      ☐ Don’t know

- (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  
☐ No  
☐ No, but one is being developed





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

(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

Questions D3.1, D3.1.1, D3.1.2, and D3.1.3 were patterned on questions from the Heritage Health Index and designed to meet a specific mandate from IMLS to collect data about "Collections Care Items." These questions were considered as a unit by the Expert Reviewers and Stakeholders, who generally ranked them as easy (59%) or somewhat easy (22%) to answer. However, 14% said that "I'm not sure who has the answer at my museum" and 10% said "I would need to get approval from someone else before answering." The questions were also ranked as important (over 4.0 in a field of 5) for advocacy and research, for management, and for supporters. Respondents were generally clear about the motivation behind the questions, though one reminded us that "it's outmoded to expect museums to include the word preservation in their mission statement." This was echoed by one of the Expert Reviewers, who strongly urged us to drop Question D3.1 as an invitation to inaccurate reporting (as few collecting institutions will publicly deny that preservation is implicit in their mission). We accept this suggestion. Other respondents urged us to include even more specific questions about the currency of collections care plans, staff training and institutional capacity for conservation, overall condition of collections, and total budget devoted to collections care. We think questions in these areas would be too specific for the purposes of the Census. (Also note that, following their initial review, the Expert Reviewers advised the Research Team against including a question about total expenditures devoted to collections care; we have followed their advice.) For all these reasons, the Research Team recommends including Questions D3.1.1, D3.1.2, and D3.1.3 as revised above for inclusion in Museums Count. However, we do *not* recommend Question D3.1. Finally, we recommend that *all* questions in this section following Question D1 be hidden from museum data providers who select "no" in response to Question D1.

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## E. Resources: Human Resources

(P1.13) E1a. Do you have full-time or part-time paid employees?

- ☐ Yes      ☐ No



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*Definitions:*

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

(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). \_\_\_\_\_

*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

This question was ranked as easy (73%) or somewhat easy (19%) by an overwhelming majority of respondents and it was ranked as important (over 4.0 in a field of 5) for advocacy and research, for management, and for supporters. After their initial review, Expert Reviewers recommended dropping FTEs (Full Time Equivalents) from this question, as it has yielded inconsistent and inaccurate results for a number of other museum surveys; the Research Team concurred. The Expert Reviewers and Stakeholders agreed with this decision wholeheartedly. One Stakeholder suggested that we define "full-time" as 32 hours a week as standard practice at some museums, but the Research Team prefers the Bureau of Labor Statistics (BLS) standard of 35 hours. Another recommended replacing "payroll account" with "payroll system," which we have adopted. Several were concerned about the ambiguity of the target date ("the end of the most recently completed fiscal year") and suggested "during the last pay period" instead, but the Research Team has retained this wording for consistency and comparability with other questions about finances. Question E1 as revised above is recommended for inclusion in Museums Count as one of the questions in Part Three.





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Recognizing the overall importance of human resources to the national museum sector, we also recommend the following question (Question E1a) for inclusion in Part One: “Does your museum employ any paid staff members? ☐Yes ☐No.”

(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.

This question was ranked as easy (72%) or somewhat easy (18%) by an overwhelming majority of respondents and it was ranked as important (over 4.0 in a field of 5) for advocacy and research and for management. The feedback from Expert Reviewer and Stakeholders was, not surprisingly, quite similar to their feedback on Question E1. In both cases, about 10% reported that “I would need to get approval from someone else [at my institution] before answering.” Several also noted, as a general observation, that “it is always harder to keep track of PT [and] seasonal workers.” Two Stakeholders questioned our definition of part-time as 34 hours a week or less; again, the Research Team has decided to adopt the BLS standard. Two Stakeholders suggested we clarify the wording by explicitly excluding volunteers, which we have adopted. Question E2 as revised above is recommended for inclusion in Museums Count.

(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.

This question was ranked as easy (67%) or somewhat easy (23%) by an overwhelming majority of respondents and it was ranked as important (over 4.0 in a field of 5) for advocacy and research and for management. This is consistent with the feedback for Questions E1 and E2, and most respondents considered these three questions as a unit (though 15% reported that their museums do not have seasonal workers, rendering Question E2.1 moot). Again, we were advised to explicitly exclude volunteers, which we have done. Several respondents asked for a clarification about the entire set of questions related to employees: “Are you looking at positions or actual people?” After further consideration, the Research Team recommends retaining “employee” (understood as “actual worker”) without elaboration. Question E2.1 as revised above is recommended for inclusion in Museums Count.

(P3.15) E3. Volunteers



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

This question was ranked as easy (62%) or somewhat easy (27%) by an overwhelming majority of respondents — i.e., slightly more difficult to answer than the questions about paid employment, with about 10% of respondents reporting that “I’m not sure who has the answer at my museum” and another 8% reporting that “we do not collect the data this way.” This question was also ranked as important (over 4.0 in a field of 5) for advocacy and research, management, and supporters. After their initial review, the Expert Reviewers suggested that a question about the *number of volunteers* was more valuable than a question about *volunteer hours* (one told us that “if IMLS can ask only one question about volunteering, my emphatic recommendation would be that the item ask about volunteers rather than the time they’re contributing, even though it would be hugely interesting and valuable information to have”). They also recommended adding board members to the definition of “volunteer.” The Stakeholders strongly disagreed: they urged us to *exclude* board members from the definition (and pointed out that that the phrase “*may include board members*” was an invitation to incommensurate data collection from different museums). The Research Team has incorporated this advice, while recognizing the trade-off between gathering consistent data from all participating museums and under-reporting the contribution of voluntary board members to the nation’s museums. Question E3 as revised above is recommended for inclusion in Museums Count.

- (R12) E3.1 [Question on Total Hours Volunteered moved to the Reserve Data Collection Fields]  
How many total hours were volunteered in your most recent fiscal year? \_\_\_\_\_ hours

Expert Reviewers and Stakeholders considered this one of the most difficult questions to answer of all the Data Collection Fields under consideration: 16% said it would be complicated or very complicated to answer and another 25% said it would be somewhat complicated. Nonetheless, it was seen as important (over 4.0 in a field of 5) for advocacy and research, for management, and for supporters. Stakeholders recognized that “volunteer hours are a better metric of impact to the organization [than number of volunteers,” but also acknowledged the difficulty of collecting accurate data. In the words of one Stakeholder, “my estimate is that up to 90% of museums surveyed will need to guess at this question”; another admitted that “we’re bad at collecting this data, so a range of numbers would make this much easier to answer.” Others also recommended that we revise the question to include “a series of number ranges ... [to] make the question more palatable to responders.” The Research Team does not think that this is a viable alternative, given the absence of reliable data that would allow us to construct appropriate ranges. For all these reasons, Question E3.1 is not recommended and has been moved to the Reserve Data Collection Fields for further consideration and inclusion in a subsequent revision of the Museums Count data collection portal.

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## F. Finance – Overview



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There were some comments, both from survey respondents and the Research Team, that applied to all or several finance-related questions. The text in italics reflects comments from the survey respondents, some paraphrased:

- *I think it will be hard to get people to provide an open book on financial questions.*
- *For private non-profits, beyond 990 requirements, there may be some hesitation to disclose particular revenue streams.*
- *We do not give financial information out regarding tribal entities... unless we must and that information should be privy.*

We were told that instructions for the definitions should use consistent language. For example, either use “do not include” or “exclude,” not both. There was also a comment that the words “do” and “do not” need to be differentiated more. There are two ways to address this. One is to use the words “include and “exclude” and the other would be to put more space between the end of a list that says, “include” and the next sentence that says “exclude.” It may also be prudent to put the definitions in the same order for each question, starting with “include.”

In regard to obstacles, the majority of the finance-related questions had a high percentage of respondents who said they would “need to get approval from some else” and who were “not sure we should make this information public.” Note that only a relatively small percentage of survey respondents provided specific details about the “obstacles.”

Many of the finance questions were seen as relatively unimportant to the general public and the highest ratings tended to be for museum managers.

Many satellite museums, that have parent organizations, will be registering their museum separately from the parent. It is unclear whether, or how, they will enter separate financial data. When the parent organization fills out the Census there must be a way to indicate if they are entering data for some or all of their satellites. Although we provide some discussion of this challenge in subsequent chapters, the Research Team recognizes that this operational issue will need further attention from IMLS.

### Financial Questions and Definitions

Operating data should be entered for the most recently completed fiscal year. Any related data, such as attendance and number of staff, requested in other sections of the Census should also come from the same fiscal year.

Obviously, and as noted by several respondents, the above statement needs to appear as part of instructions at the very beginning of the data collection process. Repeating it in the finance section, if sections are broken out and appear on separate screens, might be useful.

### Financial – Operating Revenue

(P1.14) F1x new. [The Research Team recommends adding a new question to Part One of the Data Collection Fields, asking for ranges of operating revenue instead of a specific number. A specific amount would be asked in Part 2.]

What was your museum’s total operating revenue for the most recently completed fiscal year? Select the appropriate range and check only one box.



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- ☐ < \$125,000
- ☐ \$125,000 - \$500,000
- ☐ \$501,000 - \$1,000,000
- ☐ \$1,000,001 - \$2,500,000
- ☐ \$2,500,001 - \$5,000,000
- ☐ \$5,000,001 - \$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.

The following table shows how ASTC and AAM divide their budget categories. Some associations have a category for very small museums with budgets of less than \$125,000. The larger number of categories recommended for Museums Count will allow for a finer level of analysis for Part One Data Collection Fields.

ASTC	AAM
<input type="checkbox"/> < \$1 million.	<input type="checkbox"/> < \$250,000
<input type="checkbox"/> \$1 - \$2.5 MM	<input type="checkbox"/> \$250,000-\$1 MM
<input type="checkbox"/> \$2.5 -\$6.5 MM	<input type="checkbox"/> \$1 - \$4 MM
<input type="checkbox"/> >\$6.5 MM	<input type="checkbox"/> \$4 MM+

(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.



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- *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.

This question was seen as easy to answer by 61% of respondents, somewhat easy by 21% and complicated or very complicated by only 10%. Among the 20 finance questions it tied as third most important with an average rating of 4.22 out of 5. Over 58% of respondents ranked it as most important in three of the four categories of importance. The average rating was highest for managers (4.81), followed by supporters (4.55) and public policy (4.53). It was viewed as far less important for the public (2.98). For those who commented on obstacles, the highest percentage indicated "needing to get approval from someone else to share the information" (67% of respondents), followed by "not sure the information should be made public" (47%) and "not sure who has the information" (40%). Only 15 out of 57 respondents voted on the obstacles. Twenty-seven percent (though only four respondents) said they "don't collect the data this way." There were several general comments questioning whether museums would provide financial data.

Some respondents felt it would be easy if the question aligned with the ASTC (Association of Science-Technology Museums) and ACM (Association of Children's Museums) definitions. ACM and ASTC do not apply as their equivalent number is based on the automatic summing of sub-categories of revenue. Others felt that more definition was needed to clarify how capital funds, grants, restricted funds and research projects should be reported. The Research Team has incorporated some of these suggestions.

For these reasons, Question F1 is recommended as drafted above.

(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





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for operations for the fiscal year.)  
 \$\_\_\_\_\_ **Total Operating Revenue**  
 [Will be automatically calculated.]

*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-



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corporate) under earned revenue. AAM, under its definition for earned income, is silent on memberships.]

This question was seen as easy to answer by only 37% of respondents and somewhat easy by only 28%. It had the highest average rating for difficulty – 35% rated it as complicated or very complicated to answer. Yet it still had an average rating for importance of 4.15 out of 5, with over 52% of respondents ranking it as most important in three of the four categories of importance. It had an average rating of 4.50 or higher for public policy, management and supporters. It was only ranked very low for the public. For those who commented on obstacles, the highest percentage indicated “needing to get approval from someone else to share the information” (60% of respondents), followed by “not sure the information should be made public” (45%). Thirty percent (though only six respondents) said they “don’t collect the data this way.” Twenty out of 52 respondents voted on the obstacles.

Some respondents felt that more definition was needed to clarify the definition of private support revenue, which has been addressed. Another suggested using only the term “government” instead of public or government funds (also addressed). One respondent suggested combining private and government funds. Comments regarding obstacles were that museums would think it would take too much time to answer the question and several respondents were concerned that museums would not want to share this information and that it shouldn’t be made public.

The Research Team recommends keeping this question as drafted above but as a lower level priority.

(R13) F1.1.1 [Question on Dollar Value of Operating Revenue from a support organization moved to the Reserve Data Collection Fields.]

What operating revenue, if any, did you receive from a support organization, such as a “friends” group, external support group or affiliate organization? \$\_\_\_\_\_

(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.

This question was seen as easy to answer by 69% of respondents and somewhat easy by 20%. It had an overall average importance rating of only 4.01 out of 5. For those who commented on obstacles, the highest percentage indicated “needing to get approval from someone else to share the information” (47%), followed by “not sure we should make this information public” (35%). Almost 60% percent of respondents (ten out of 17) said they “don’t collect the data this way” or “don’t collect this data at all.” Seventeen out of 55 respondents voted on the obstacles.





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Some respondents questioned whether money from donation boxes should be included in admissions revenue. Others weren't sure if funds from restricted scholarships should be included or school group admissions revenue. Another suggested that the value in collecting the data was not worth the effort to supply the data.

Question F1.1.2 is recommended as drafted above.

(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.

This question was seen as easy to answer by 72% of respondents and somewhat easy 23%. It had an overall average importance rating of 4.20 out of 5. It had an average importance rating of 4.45 or above for public policy, management and supporters. For those who commented on obstacles, the highest percentage indicated "needing to get approval from someone else to share the information" (55%), followed by "not sure we should make this information public" (46%). Eleven out of 61 respondents voted on the obstacles.

Comments from respondents included the need to clarify whether grant dollars should be included and whether in-kind should be included or excluded. One respondent wondered whether personnel filling out the actual survey would know who to ask to get this information. Another thought this question would be a "stopper" for small museums as many might want to count in-kind lawn maintenance and other in-kind that never shows upon the books and is hard to quantify.

Question F1.1.3 is recommended as drafted above.

(R14) F1.1.4 [Question on Monetary Support from a Parent Organization moved to the Reserve Data Collection Fields.]

What operating revenue, if any, did you receive from a parent organization? (Do not include in-kind.)  
\$ \_\_\_\_\_

(R15) F1.2 [Question on Categories of Operating Support from a parent organization moved to the Reserve Data Collection Fields.]

Please indicate the categories of operating support you



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received from a parent organization during the reporting year. Include in-kind support. Check all that apply:

### Financial - Operating Expenses

(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].

This question was seen as easy to answer by 67% of respondents and somewhat easy by 18%. It had an overall average importance rating of 4.22 out of 5 with three of the categories (public policy, management and supporters) having an average rating of 4.40 or higher. For those who commented on obstacles, the highest percentage indicated "needing to get approval from someone else to share the information" (69%), followed by "not sure we should make this information public" (46%). Thirteen out of 59 respondents voted on the obstacles.

Interestingly, even though the majority indicated that the question would be easy to answer, one respondent, an Expert Reviewer, commented, "Since there is no standard definition for "operating, this number will inherently be unverifiable." Nevertheless, this is a fundamental question asked in many existing museum surveys. Another Expert Reviewer was concerned that if revenue and expenses resulted in a deficit, many museums would be hesitant to report it on a public site. A suggestion was to include a space, as some grant application forms and other museum surveys do, to explain deficits. This option has not been included, but is something IMLS might consider for the National Museum Census-



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The Research Team believes this is an important question - indeed, a critical data point for calculating several key performance indicators, including costs per square foot and costs per on-site visit and participant (total on-site attendance).

For these reasons, Question F2 is recommended as drafted above.

(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

(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].

This question was seen as easy to answer by 62% of respondents, and had an overall average importance rating of 4.06 out of 5. For those who commented on obstacles, the highest percentage indicated "needing to get approval from someone else to share the information" (69%), followed by "not sure we should make this information public" (56%). Sixteen out of 56 respondents voted on the obstacles.

There was discussion regarding including or excluding contract labor. There was concern that without knowing the amount spent on contract labor, the data would not fully account for job creation/economic impact of museums, yet the same respondent agreed that contract labor should not be included in the calculation and thus questioned the value of collecting the data. The Research Team does not recommend including contract labor as the way the data is collected by museums varies widely. Another respondent stated, "This personnel question is crucial to include." Another respondent was concerned that there would be hesitation to make this information public and widely available. An Expert Reviewer suggested that a question be added to ascertain whether the wages and benefits for the CEO/President were included or not.



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The Research Team tested this idea in Draft A2 sent to the Expert Reviewers and got a negative response.

The Research Team believes this is an important question and is a critical data point for calculating the key performance indicator, personnel expenses as a percentage of total expenses.

For the above reasons, Question F2.1 is recommended as drafted above, but should be included as a lower priority question.

### Financial – Ticket Prices

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

- ☐ Yes, we charge admission
- ☐ 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.”

This question was seen as easy to answer by 97% of respondents (rated the easiest of all the questions in the Survey), and had an overall average importance rating of 4.58 out of 5. This was the highest average rating of importance for the combined four categories of importance and 58% or more of respondents in each of the four importance categories rated it as most important. Only four questions in the Expert Reviewer and Stakeholder Survey had 50% or more of respondents indicating that a question was most important.

For the above reasons, Question F3 is recommended as drafted above.

(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



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\$\_\_\_\_\_ 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.

This question was seen as easy to answer by 92% of respondents and had an overall average importance rating of 4.47 out of 5. This had the second highest average rating of importance for the combined four categories of importance.

Comments included that it was a good idea, as the question indicated, to ask for current prices. At the same time the Research Team believes that a caveat should be added once the data is made public, indicating that the ticket prices may not reflect the most current ticket prices at the museum. One respondent said they had three different ticket prices based on geographical residence of the visitor. Another respondent pointed out that some museums have two price points for children and the question has been amended to reflect that.

For the above reasons, QF3.1 is recommended as drafted above.

Financial – Capital

(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).



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This question was seen as easy to answer by 82% and somewhat easy by 16%. It had an overall average importance rating of 4.19 out of 5. Three categories of importance (public policy, management and supporters) had an average rating of 4.30 or higher. Of the twelve respondents out of 60 who commented on obstacles, 50% indicated the question did not apply to their museum, 50% needed to get approval and 50% weren't sure the answer should be made public.

Comments included that not all endowments fund operations and thought it might be more useful to allow for types of endowments.

For the above reasons, Question F4 is recommended as drafted above.

(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).

This question was seen as easy to answer by 64% of respondents and had an overall average importance rating of 4.01 out of 5. Of the twenty-one respondents out of 51 who commented on obstacles, 52% indicated they would need to get approval and 48% weren't sure the answer should be made public.

There were several comments that organizations might be reluctant to answer this question publicly. As in the question regarding whether an organization had an endowment, comments included that some museums have more than one endowment fund.

For the above reasons, Question F4.1 is recommended as drafted above, but a lower priority level and with the understanding that additional revisions may be necessary.

(R16) F4.2 [Question on Percentage of Endowment for Operations moved to the Reserve Data Collection Fields.]  
What percentage of the endowment was transferred to the operating budget during the reporting year? \_\_\_\_\_%

(R17) F5. [Question on Planning a Capital Campaign moved to the Reserve Data Collection Fields.]  
Are you, or an affiliated organization on your behalf, currently planning for or engaged in a capital campaign?

☐ Yes ☐ No

(R18) F5.1 [Question on Planning a Capital Campaign moved to the Reserve Data Collection Fields.]  
If yes, you are planning or engaged in a capital campaign, what is/are the intended uses of the funds from the capital campaign? (Check all that apply.)





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- (R19) F5.2 [Question on Commencement of Capital Campaign moved to the Reserve Data Collection Fields.]  
When did (or will) the capital campaign commence? (Check only one.)
- ☐ Already started
  - ☐ Will start within 1 year
  - ☐ Will start within 2-3 years
  - ☐ Don't know

- (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

This question was seen as easy to answer by only 79% of respondents and had an overall average importance rating of 3.74 out of 5. The importance rating was less than for the question as to whether an organization was engaged or planning a campaign (4.22 rating out of 5.) This questions ranked 20<sup>th</sup> in importance out of the 20 finance-related questions. Obstacles included that the wording of the question was incomplete (14%), as the term “recently” needed to be defined.

Some respondents were interested in knowing the amount of the campaign based on dollar ranges such as: less than \$5 million: \$5 to less than \$10 million, \$10 to less than \$15 million and: above \$15 million. Others suggested that there are often overlapping campaigns which could complicate responses or that some don't have a specific or formal end date but gradually wind down. Several suggested, and this was confirmed in a follow-up discussion with the Expert Reviewers about this question, just focusing on the most recently concluded capital campaign.

In follow-up discussions as to what the look-back time period should be for the question, there was general agreement that it should not be as long as four years. The Research Team recommends that the retrospective period be just one year as Museums Count will involve yearly and/or continuous data collection.

For the above reasons, Question F6 is recommended as drafted above.

- (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





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- ☐ 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

---

This question was seen as easy to answer by only 71% of respondents and had an overall average importance rating of 3.95 out of 5. Seventeen percent felt the question as worded was unclear or incomplete as the term “recently” needed to be defined.

For the above reasons, QF6.1 is recommended as drafted above.

(R20) F6.2 [Question on When Capital Campaign Concluded moved to the Reserve Data Collection Fields.] When was the capital campaign concluded? (Please check only one.)



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## RESERVE DATA COLLECTION FIELDS: REVIEWED BUT NOT RECOMMENDED FOR INCLUSION

### ATTACHMENT B

The recommended Data Collection Fields are listed in Chapter 3. Chapter 3 includes all questions and definitions recommended by the Research Team for inclusion in *Museums Count: The National Museum Census*. Any other questions/definitions (or versions of questions/definitions) contained in this report are included for *reference purposes only*.

Note: If anyone wishes to use one or more of these Reserve Data Collection Fields, that person should first review the results and comments on that question in the Expert Reviewer and Stakeholder Survey to incorporate those improvements and edits.

---

#### A. Institutional

A1.2 The EIN# for this museum (or its parent organization): \_\_\_\_\_

A1.3 The DUNS # for this museum or its parent (not all museums may have a DUNS number): \_\_\_\_\_

Expert Reviewers and Stakeholders expressed concerns about collecting DUNS and EIN numbers, including: doubt that small museums will be able to respond as they may not have such numbers, given a history of mergers and name changes; difficulty in finding such numbers; requirement for detailed instructions for how to find/apply for such numbers, particularly by small museums; concern that such numbers are confidential information, subject to abuse, and/or declared private by a parent organization. For these reasons, Q1.2 and QA1.3 are not recommended, and have been moved, unchanged, to the Reserve File. The Research Team recognizes that both EIN and DUNS are among IMLS needs and non-scope list and that they may appear in the Census.

A7. Do you have a separately incorporated support organization? (This may be known as an auxiliary, external support group, friends group, or affiliate organization.)

☐ Yes ☐ No

A7.1 If yes, please provide EIN# \_\_\_\_\_

Expert Reviewers and Stakeholders who did not have such support groups expressed confusion about what this meant and whether it might apply to them. Some felt that separately incorporated should be emphasized, while others wanted to include friends groups or even members. Finding the information was challenging to some. Repeated resistance to EIN's, including not knowing what they are. Some have multiple support organizations; some have them, but are inactive. While the question was seen as easy to somewhat complicated, it was



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seen as important (over 4.0 in a field of 5) only to supporters, and that at a low rate (4.14). The utility of the question is not clear. For these reasons, QA7 and QA7.1 are not recommended, and have been moved, unchanged, to the Reserve File. The Research Team recognizes that Museums Count may want to add this in the future.

A10. [Question on Mission Statement moved to Reserve Data Collection Fields but question A10.1 for inserting the Mission Statement has been kept.]

Does this museum have a mission statement?

☐ Yes      ☐ No

A10.1 If yes, please insert a text copy of it here (not to exceed 200 words): \_\_\_\_\_

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

Expert Reviewers and Stakeholders expressed concern that many small museums do not know what a mission statement is, submitting brochure descriptions or incorporation purposes instead. There was also resistance to “formally adopted,” as it would stop some respondents who may have no way of knowing if it had been adopted, or what adoption really meant. Some questioned whether the mission statement is the best corporate document to collect (vision, goals, IRS incorporation purposes, etc.). Respondents suggested that searchability of the text might make it useful, and that comparison between mission statements and purposes might be revealing. The Research Team has incorporated all their suggested edits and has removed “formally adopted.” The question was seen as easy and as important (over 4.0 in a field of 5) to public policy, to the public, to management, and to supporters, with all above 4.26, and management and supporters at 4.63 and 4.66, respectively. For these reasons QA10.1 is recommended as drafted above. The Research Team recognizes that the data from this field may not reflect only formal mission statements, but in considering its uses, a variety of statements describing the museum and what it is trying to achieve will be more helpful than harmful. The Research Team felt that question A10 was not needed and would be adequately covered by question A10.1.

---

## B. Engagements

B5. Please tell us how many on-site, separately controlled visitor venues your museum has at this physical location.

- ☐ One  
☐ Two  
☐ Three  
☐ Four or more

*Definitions:*

- Every museum has at least one venue, sometimes known as “general admission.”



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- Separate visitor venues typically include museum galleries, giant screen theaters, planetariums, zoo grounds, visible collection storage areas, train rides, simulators, historic houses and artifacts (e.g., a submarine), separate traveling exhibition areas, etc.
- Separately controlled means that a museum's admission policy makes a distinction between different visitor experiences in public access or ticketing, whether paid or free. Frequently, only one venue is free and the others are paid.
- *Do* include areas inside other venues that always require a surcharge, like a planetarium or a 3D movie theater.
- *Do not* include areas that occasionally require a surcharge, like a blockbuster exhibition area that is normally included as part of the general admission, or a children's theater performance inside an auditorium that is normally free.
- *Do not* include programs and services addressed in QB2, even if they are held in dedicated facilities like a learning center or event center.

Expert Reviewers and Stakeholders expressed confusion and concern about this including definitions, applicability to only some museums, and confusion with multiple sites vs. multiple venues; not understanding "separately controlled" and general non-positive feedback. While the question was seen as easy to somewhat complicated to answer, it was seen as marginally important (over 4.0 in a field of 5) only to management (4.07). For these reasons, QB5 is not recommended, and has been moved, unchanged, to the Reserve File.

B13. With which of the following categories among the many potential educational partners and collaborators do you have a written statement of agreement covering on-going mutual responsibilities? (Please check all that apply)

- ☐ Colleges and universities
- ☐ Corporate Community
- ☐ Libraries
- ☐ Other Museums
- ☐ K-12 School System (public and/or private)
- ☐ Public Radio or TV
- ☐ Private foundations
- ☐ Government educational foundations and agencies

*Definitions:*

- The intent of this question is to monitor on-going substantive relationships among organizations that are part of America's educational infrastructure.
- On-going means a) currently in force, b) at least a year old, and c) planning to continue for at least a year more.
- Written statements of agreement include contracts, memoranda of agreement, co-signed letters, purchase orders and other forms of binding documents signed by both parties at an organizational level



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Expert Reviewers and Stakeholders expressed concern about verification of partnerships, the kinds of partnerships and the definitions. There were also many suggested additions, which indicates that a limited list will be frustrating. The importance and utility of the resulting data was also questioned. The question was seen as easy to somewhat complicated to answer (1.83), and it was seen as important (over 4.0 in a field of 5) only to management. For these reasons, QB13 is not recommended, and has been moved, unchanged, to the Reserve File.

---

### C. Resources: Facilities

C2. [This version of Question C2 on Gross Square Footage has been superseded by a new version that appears in Chapter 3, Recommendations: Data Collection Fields.]  
What is the gross square footage of the museum building(s) at this physical location?  
\_\_\_\_\_ 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 sq ft.
- Note that “net square footage” is a different number, usually about 50–75% of the gross that refers to the usable spaces within the building. “Public square footage” is even smaller, referring to just those spaces accessible to the public on some basis.
- If your institution has more than one building *at this physical location*, please report combined square footage.
- If your institution is located within a larger, non-museum structure, report only the square footage occupied by the museum.
- Exclude off-site facilities such as warehouses, garages, storage sheds, administrative offices, conservation facilities, etc. that are not generally open to the public.
- Exclude outdoor exhibit areas.

Respondents were divided on the difficulty of this question, with 40% ranking it as easy and 38% ranking it as somewhat to extremely difficult; 29% reported that “I’m not sure who has the answer at my museum.” It was ranked as important (over 4.0 in a field of 5) for management only. After their initial review, Expert Reviewers suggested an alternative version with a range of sizes instead of an open-ended request; the Research Team initially rejected this because it defeats the idea of consistent Key Performance Indicators based on size. However, many of the Expert Reviewers and Stakeholders urged us to adopt the alternative version, “even if it limits a metric based on size.” They also strongly criticized the distinction between on-site and off-site facilities. In light of this consistent feedback, the Research Team would now like to recommend the following version of Question C2 for inclusion in Museums Count. The original version will be retained in the Reserve Data Collection Fields for reference only.

C2.1.1 What is the total area of the developed exterior grounds at your museum?  
\_\_\_\_\_ sq. ft. OR \_\_\_\_\_ acres



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*Definitions:*

- Include the portion of your grounds that is developed and actively maintained by the institution. May include parking lots, picnic areas, gardens, exterior exhibits, nature trails, etc.
- Include land that is owned or leased by the museum.
- Do not include land that is not maintained, developed or actively used by the museum. “Active use” *includes* land set aside for living collections that is temporarily fallow or wild and awaiting interpretation. “Active use” *does not include* land that is permanently inaccessible to the public, such as swamps, pond/lake surfaces, restricted conservation lands, remnant private parcels, etc.

As with Question C2, respondents were divided on the difficulty of this question, with 27% ranking it as easy and 37% ranking it as somewhat to extremely difficult; 25% reported that “I’m not sure who has the answer at my museum” and 10% said it did not apply to their museum. It was ranked as important (over 4.0 in a field of 5) for management only. After their initial review, Expert Reviewers expressed some concern about the “one-size-fits-all” nature of this question, given that many museums (such as zoos and sculpture gardens) focus on their outdoor spaces. The Expert Reviewers and Stakeholders echoed this concern: some thought it was a “somewhat tough question to answer but [the] definition provides clear understanding” while others thought that the definition of “developed exterior grounds” needed clarification. Several also pointed to the ambiguous situation when “the grounds” are controlled and maintained by another entity (such as a parent organization). For these reasons, Q2.1.1 is not recommended and has been moved to the Reserve File for further consideration and inclusion in a subsequent revision of the Museums Count data collection portal.

C2.1.2 What is the total **net interior exhibit space**? \_\_\_\_\_ sq. ft.

*Definitions:*

- “Net interior” refers to the space inside the walls of the public exhibit areas, subtracting column and duct chase footprints, stairs, elevators, etc.
- Count only exhibit space that is “inside” the exhibit venue, not other spaces (like entrance and waiting lobbies, stairwells, board rooms, etc.) where the museum may place exhibits on an irregular basis.
- If your institution has more than one building at this physical location, please report the combined square footage for net interior exhibit space.
- Please include temporary/traveling exhibit space. Do not include other public spaces such as theaters, auditoriums, and classrooms.

While a majority of respondents saw this question as easy (50%) or somewhat easy (23%) to answer, they only ranked it as important (over 4.0 in a field of 5) for management (and perhaps advocacy). A fifth (21%) reported that “I’m not sure who has the answer at my museum” and 11% said their institutions do not collect data in this manner. Several Expert Reviewers and Stakeholders thought that the use of “net” here was confusing, especially for museums with multiple venues or spaces with multiple uses; a few offered the alternative wording of “total square footage.” One also recommended that we “replace the words ‘exhibit space’ with ‘public programs space’” to reflect the fact that “many important museums do not host ‘exhibits’ in the





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conventional sense”; this suggestion is well considered. In the end, the Research Team agrees with the comment from one Expert Reviewer that “the value of data [from] this question may not be worth the effort to collect it.” For this reason, Q2.1.2 is not recommended and has been moved to the Reserve File for further consideration and inclusion in a subsequent revision of the Museums Count data collection portal.

---

#### **D. Resources: Collections**

D1.1 Approximately how many objects are in your permanent collection (or in your care if on long-term loan)? \_\_\_\_\_

Expert Reviewers and Stakeholders considered this an especially difficult question to answer: 17% said it would be complicated or very complicated to answer (the worst ranking of any proposed question) and another 17% said it would be somewhat complicated. Nonetheless, it was recognized as important (over 4.0 in a field of 5) for public policy, for management, and for supporters. After their initial review, the Expert Reviewers were deeply divided about whether a question on total collection size was feasible. One argued that asking for a number would be a “shut-down question” for many institutions; another said “I recognize the difficulty in collecting this info, but think it should still be attempted”; and a third concluded it was “too difficult to ask about the number [of items] in permanent collection and difficult to get quality data. Ask this in a sample survey instead.” The Stakeholders echoed all of these positions. The key issue for them was defining what constitutes an “object”: for example, is it necessary to distinguish between “accessions and loans”; between registered objects and those awaiting cataloguing (a real concern for smaller institutions); between “lots” and single specimens (a real concern for natural history museums and museums that consider groups of manuscripts, photographs, etc. as single accessioned items); between objects on display and those in storage; or between teaching collections and permanent collections? Several Stakeholders suggested that “the word *approximately* gives museums a degree of latitude,” and that “even the small ones ... could give an approximate answer to this question”; others recommended that “this question is another one where having a range of numbers to choose from would provide a good compromise.” The Research Team does not think that this is a viable alternative, given the absence of reliable data that would allow us to construct appropriate ranges. For all these reasons, Question D1.1 is not recommended and has been moved to the Reserve File for further consideration and inclusion in a subsequent revision of the Museums Count data collection portal. Given the potential significance of the data, however, we recommend that IMLS consider asking the question as worded to a sample of museums and using the results to construct appropriate ranges for a future question.

D3.1 Does the mission of your museum include preservation of your collections or holdings?

☐ Yes

☐ No

☐ Don’t know

---

#### **E. Resources: Human Resources**

E3.1 How many total hours were volunteered in your most recent fiscal year?  
\_\_\_\_\_ hours





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Expert Reviewers and Stakeholders considered this one of the most difficult questions to answer of all the Data Collection Fields under consideration: 16% said it would be complicated or very complicated to answer and another 25% said it would be somewhat complicated. Nonetheless, it was seen as important (over 4.0 in a field of 5) for public policy, for management, and for supporters. Stakeholders recognized that “volunteer hours are a better metric of impact to the organization [than number of volunteers,” but also acknowledged the difficulty of collecting accurate data. In the words of one Stakeholder, “my estimate is that up to 90% of museums surveyed will need to guess at this question”; another admitted that “we’re bad at collecting this data, so a range of numbers would make this much easier to answer.” Others also recommended that we revise the question to include “a series of number ranges ... [to] make the question more palatable to responders.” The Research Team does not think that this is a viable alternative, given the absence of reliable data that would allow us to construct appropriate ranges. For all these reasons, Question E3.1 is not recommended and has been moved to the Reserve File for further consideration and inclusion in a subsequent revision of the Museums Count data collection portal.

---

## F. Financial

F1.1.1 What operating revenue, if any, did you receive from a support organization, such as a “friends” group, external support group or affiliate organization? \$\_\_\_\_\_

This question was seen as easy to answer by 59% of respondents, and had an overall average importance rating of 3.99 out of 5. Out of the 20 finance questions it ranked 13th in importance. For those who commented on obstacles, the highest percentage indicated “needing to get approval from someone else to share the information” (71%), followed by “not sure the information should be made public” (41%), “not sure who has the answer” (41%), and 35% did not collect the data at all or “in this way.” Seventeen out of 55 respondents voted on the obstacles.

Many respondents commented that this information could be difficult to break out and time consuming. Another suggested that the value in collecting the data was not worth the effort to supply the data. Another did not understand the term support organization.

For these reasons, QF1.1.1 is not recommended and has been moved, unchanged, to the Reserve File.

F1.1.4 What operating revenue, if any, did you receive from a parent organization? (Do not include in-kind.) \$\_\_\_\_\_

### *Definitions:*

- Parent Organization: If the organization for which you are filling out this survey is part of or a subsidiary of a larger organization that operates the museum along with other activities, enter any monetary support that you received from that parent on this line. This support may be in the form of a cash transfer or a budget line item. Do not include in-kind support.
- Examples of parent organizations include: colleges or universities; tribal, municipal, state, or federal government; state historical societies supervising



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multiple sites; corporate foundation, etc. Museums without parents are classified as independent museums.

This question was seen as easy to answer by 70% of respondents, and had a lower than average importance rating, 3.95 out of 5. For those commenting on obstacles, the major obstacle was cited as not applying to their museum (52%), followed by “needing to get approval from someone else to share the information” (30%), followed by “not sure we should make this information public” (26%), and 13% said they did not collect the data this way.” Twenty-three out of 49 respondents voted on the obstacles.

One respondent felt it would be difficult to get some of the parent organizations to supply this data. An Expert Review felt that it was impossible to quantify all in-kind donations, which are frequently the manner in which a parent organization contributes to a museum, so that it may not be valuable to collect only cash revenue received and too difficult to collect in-kind data. It was also noted that park districts should be added to the list of possible parent organizations.

For these reasons, QF1.1.4 is not recommended and has been moved, unchanged, to the Reserve File.

F1.2 Please indicate the categories of operating support you received from a parent organization during the reporting year. Include in-kind support. Check all that apply:

- ☐ Accounting
- ☐ Cleaning/custodial
- ☐ Collections/archives maintenance or storage
- ☐ General building maintenance
- ☐ Grounds keeping and/or snow removal
- ☐ Employees - all
- ☐ Employees - some
- ☐ Human Resources
- ☐ IT support (including web or email hosting)
- ☐ Marketing/Advertising
- ☐ Media support (e.g., recording facilities)
- ☐ Security
- ☐ Utilities
- ☐ Other
- ☐ If other, please clarify: \_\_\_\_\_

This question was seen as easy to answer by 68% of respondents, but had a lower average importance rating, 3.75 out of 5. For those commenting on obstacles, the major obstacle was the question not applying to their museum (50%) followed by “we don’t collect the data this way or don’t collect it at all (41%). Twenty-two out of 50 respondents voted on the obstacles.

Several respondents mentioned that it was confusing having in-kind included in this question but excluded from the previous question regarding amount of support from a parent organization. One suggestion was to split the question in two, one for monetary remuneration and one for in-



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kind. An Expert Review felt that much of this data would not be shared. If the question were to be included suggestions for other check boxes included collection Insurance/risk management, “none,” funding, conservation services (especially for those part of a university system), photography/developing services, and legal.

Because of the low importance rating and the need to trim the overall number of questions, QF1.2 is not recommended and has been moved, unchanged, to the Reserve File.

F4.2 What percentage of the endowment was transferred to the operating budget during the reporting year? \_\_\_\_\_%

[Part of survey question] Stakeholders please comment on the following: Should we be asking for policy regarding the percentage allocated annually instead of asking what was used or transferred in the reporting fiscal year?

---

This question was seen as easy to answer by only 53% of respondents and had an overall average importance rating of 3.91 out of 5. Of fifteen respondents out of 57 who commented on obstacles, 48% indicated the question did not apply to their museum, 48% needed to get approval and 40% weren't sure the answer should be made public.

In SurveyMonkey survey respondents were asked to comment on whether we should be asking about endowment policy or the percentage of endowment transferred to operations. Out of twenty-three respondents who replied, eleven said policy should be asked, seven felt both percentage and policy questions should be asked, only three thought the percentage should be asked and two indicated the dollar value should be asked instead of the percent.

One respondent who agreed with the wording of the question felt that, even though it would be helpful to know policy, draw formulas used by specific institutions can be quite complicated.

Because of the low importance rating and the need to trim the overall number of questions, QF4.2 is not recommended and the perceived difficulty in answering this question, it has been moved, unchanged, to the Reserve File.

F5. Are you, or an affiliated organization on your behalf, currently planning for or engaged in a capital campaign?

☐ Yes ☐ No

This question was seen as easy to answer by 74% of respondents and had an overall average importance rating of 4.22 out of 5. Of the twenty respondents out of 52 who commented on obstacles, 30% indicated they would need to get approval and 35% weren't sure the answer should be made public or who had the answer at their museum.

Several respondents did not feel this question was important or if one was going to ask this it would be better to ask if one was concluded, as not all planned campaigns are successful. Similarly, there was also a question as to whether distinguishing between on-going campaigns and concluded campaigns was really needed, though another respondent liked that differentiation between current and concluded.

Several respondents suggested that some museums are careful not to discuss capital campaigns until they are formally announced, often after a “quiet” phase of the campaign. There was also a comment that some museums themselves might not be involved in a capital campaign, as an affiliated foundation or other organization might be doing it for them. Some felt



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a definition of “planning” was needed and that the wording of the question/definition was incomplete.

QF5 is not recommended and has been moved, unchanged, to the Reserve File. The recommendation is to ask only one question regarding capital campaigns and to focus on recently completed campaigns.

F5.1 If yes, you are planning or engaged in a capital campaign, what is/are the intended uses of the funds from the capital campaign? (Check all that apply.)

- ☐ Building expansion
- ☐ Building renovation
- ☐ Building: New
- ☐ Collections acquisitions
- ☐ Collections care or preservation
- ☐ Endowment
- ☐ Exhibits and exhibit renewal
- ☐ Exhibits: Traveling or temporary exhibition
- ☐ Infrastructure Improvements (e.g. ticketing, phone, IT systems)
- ☐ Land acquisition
- ☐ Land renewal, restoration (separate than for building preparation)
- ☐ Moving locations to another existing building
- ☐ Other
- ☐ Please indicate what is included in other \_\_\_\_\_

This question was seen as easy to answer by 64% of respondents and had an overall average importance rating of 4.16 out of 5. Of the fifteen respondents out of 57 who commented on obstacles, 48% indicated they would need to get approval and 40% weren't sure the answer should be made public or who had the answer at their museum.

QF5.1 is not recommended and has been moved, unchanged, to the Reserve File. The recommendation is to ask only one question regarding capital campaigns and to focus on recently completed campaigns.

F5.2 When did (or will) the capital campaign commence? (Check only one.)

- ☐ Already started
- ☐ Will start within 1 year
- ☐ Will start within 2-3 years
- ☐ Don't know

This question was seen as easy to answer by 68% of respondents and had an overall average importance rating of 3.85 out of 5.

Several respondents did not feel this question was important or if one was going to ask this it would be better to ask if one was concluded and when. Another felt that looking out 4+ years was too long and that the longest time frame should be within two to three years would make more sense to ask. There was a suggestion to change the order of these questions to put the timeframe 5.2 before intended uses (5.1)



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QF5.2 is not recommended and has been moved, unchanged, to the Reserve File. The recommendation is to ask only one question regarding capital campaigns and to focus on recently completed campaigns.

F6.2 When was the capital campaign concluded? (Please check only one.)

- ☐ Within the past year ☐ Within the past 2-3 years ☐ Within 4-5  
☐ Don't know

This question was seen as easy to answer by 68% of respondents and had an overall average importance rating of 3.85 out of 5. Twenty-one percent felt the question as worded was unclear or incomplete.

Several respondents were interested in a dollar amount and what the final amount raised was compared to the goal. The Research Team is concerned that the majority of museums would not share the data and do not recommend asking dollar amounts.

QF6.2 is not recommended and has been moved, unchanged, to the Reserve File. The recommendation is to ask only one question regarding capital campaigns and to focus on recently completed campaigns.



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# REVIEW GUIDE OF EXISTING DATA

*ATTACHMENT C*

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# *Museums Count:*

## *Review Guide of Existing Museum Surveys*

January 11, 2011

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White Oak Institute and the American Association of Museums

January 11, 2011

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11 January 2011

# CONTEXT & METHODOLOGY

## CHAPTER 1

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### CONTEXT

This *Review Guide to Existing Museum Surveys* is part of the process to develop standardized data definitions for *Museums Count: The IMLS National Museum Census*. This document's purpose is to provide an annotated list of recent or ongoing museum surveys that are relevant to this national project, create a consolidated database of data elements included in these surveys, and provide a preliminary analysis of the database. The consolidated database and analysis will be used to inform the development of recommended data elements and standardized data definitions for *Museums Count*. The rationale and process for this is more fully described in other documents.<sup>1</sup>

The collection and analysis of the existing museum surveys has been conducted by the White Oak Institute (WOI) and the American Association of Museums (AAM), which are also developing the prioritized data elements and standardized data definitions in collaboration with the museum field. The principals involved from the White Oak Institute are John Jacobsen and Jeanie Stahl. Philip M. Katz is representing AAM. The team also includes Beverly Sheppard of the Institute of Learning Innovation, who is reviewing drafts of the proposed data elements and definitions.

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### SUMMARY OF RESEARCH AND ANALYSIS TO DATE

One of the first tasks undertaken by WOI and AAM was to identify and collect existing survey instruments from a variety of organizations within and outside of the U.S.

The collected surveys were divided into two broad groups: Comprehensive (10 surveys) and Specialized/Alternative Surveys (18 surveys). The comprehensive surveys are broad in scope and cover many aspects of museum operations. The specialized/alternative surveys cover specific subject areas (e.g., museum stores, collections, fund raising), or they complement the comprehensive surveys by providing alternative perspectives (e.g., from the performing arts), or they contain exemplary data definitions. Alternative versions of some of the comprehensive surveys from other years were also included in this group.

All the survey questions from the ten comprehensive surveys were compiled into a master database. The specialized/alternative surveys were reviewed for "factors of interest," essentially additional questions that the research team felt should be added to

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<sup>1</sup> Orientation package for Expert Reviewers

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the master database. Each of the 1111 data elements in the database was tagged by subject, topic and subtopic. The result is an overview of the topic areas, data elements/questions and data definitions contained in existing surveys. Together these constitute the museum information universe.

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## ANALYSIS PROCESS AND CATEGORIES

The collection process was quite successful, with every requested survey submitted, except for two. This may be a reflection of the willingness among survey organizations (including commercial providers of museum data) to collaborate on standardizing definitions and establishing a national public database.

There are 33 surveys in the List of Museum Surveys (see Chapter 2), and, after a preliminary look at the 28 surveys received, the collection divided logically into three categories, with implications for the depth of further review and reporting:

- **Q/D** (Question/Definitions): 10 surveys from the United States, Europe and Australia that were comprehensive in approach across many subject categories. These surveys attempt to capture a broad picture of museum operations. All aspects of the surveys were analyzed by the research team and all questions imported into a master sortable database. The team looked at every question (N=1082) and analyzed the frequency of questions on different topics (see Section 2 below).
- **FOI**: 18 surveys reviewed for Factors of Interest. FOI surveys tend to be specialized and/or international surveys. FOIs were added as appropriate to the database. FOI's might include interesting layouts; important questions missing from the core surveys; fresh ways of approaching web questions; notably high survey response rates and/or great phrasing of definitions.
- **B**: Surveys listed in the bibliography but unavailable for closer review.

All questions from the 10 Q/D surveys were imported into a database of elements/questions, and then coded and analyzed by at least the following fields: Source; Subject (e.g., "Facility," "Attendance"); Topic or sub-category (e.g., "Gallery Size," "School Attendance"); Number of questions; and Frequency of subject/topic (e.g. 10 surveys asked about address; three asked about collections).

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**Museum Survey Review Scope**

Institute of Museum and Library Services: Data Definitions Project

<b>Received Surveys</b>	<b>Review Code</b>	<b>Review Summary</b>
10	Q/D	<ul style="list-style-type: none"> <li>• All surveys reviewed and questions imported to Database</li> <li>• 1 paragraph narratives</li> </ul>
18	FOI	<ul style="list-style-type: none"> <li>• Reviewed in full for Factors of Interest and some questions added to the Database</li> <li>• Brief narrative descriptions</li> </ul>
5	B	Bibliographic citation only

**Table 1.1**

Source: White Oak Institute and the American Association of Museums

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# ANNOTATED BIBLIOGRAPHY OF MUSEUM SURVEYS

## CHAPTER 2

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### OVERVIEW

This chapter includes an annotated bibliography of the 32 surveys as well as more detailed descriptions, including charts and tables, for the ten comprehensive surveys.

Table 2.1 lists the 32 surveys reviewed or identified. As indicated in Chapter 1 of this *Review Guide*, ten surveys were deemed comprehensive in scope and were reviewed in detail and compiled into a master Database. The Database includes all of the questions from the ten surveys, with 1082 rows of information. An additional 18 surveys were read and reviewed for "factors of interest" and 29 questions were extracted from those surveys and added to the Database, resulting in a total count of 1111 rows of questions.

Many of those questions included sub-questions, drop-down lists of items to choose from or multiple-choice answers. For example, in one survey, the same question about interns/apprentices was asked multiple times in regard to artists/performers, fundraising, general and administrative, etc., but they were grouped into one row in the Database and were counted as one question. Other questions, such as type of museum, frequently featured a drop-down menu of choices.

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**List of Museum Surveys**  
Institute of Museum and Library Services: Data Definitions Project

Count	Org or Other Acronym	Organization	Survey Instrument	Number of Questions per WOI-AAM Count
Comprehensive surveys reviewed in detail for data elements and incorporated into a master database of questions				
1	AASLH	American Association for State and Local History	2008 History Museum Forum Survey	64
2	AAM	American Association of Museums	Museum Financial Information Survey (2008)	86
3	APGA	American Public Gardens Association	2007 Medium & Small Garden Benchmarking Study (Buds <\$2 MM)	94
4	ACM	Association for Children's Museums	ACM Member Survey of Open Museums (2010)	190
5	AAMD	Association of Art Museum Directors	2010 State of North America's Art Museums Survey	140
6	ASTC	Association of Science and Technology Centers ('09)	2009 ASTC Statistics Survey	37
7	ABS	Australian Bureau of Statistics	Museums Australia, 2007/2008	39
8	EGMUS	EGMUS (European Group on Museum Statistics)	Standard Questionnaire	77
9	OMD	National Register Publishing	The Official Museum Directory 2011	31
10	PEW	Pew Charitable Trusts	Cultural Data Project	324
Specialized or Alternative Surveys reviewed for factors of interest				
11	AASLH	American Association for State and Local History (PM)	Member Survey 2006	
12	AASLH	American Association for State and Local History (VC)	Visitors Count! (Museum Visitor Survey)	
13	AASLH	American Association for State and Local History	Survey of Statewide History Organizations (not conducted yet)	
14	UI	Assoc. of Fundrasigin Professionals & Urban Institute	Fundraising Effectiveness Project (2010)	
15	ASTC	Association of Science-Technology Centers ('10)	2010 ASTC Statistics Survey (shorter)	
16	CYMAL	CyMAL: Museums, Archives and Libraries Wales**	Spotlight on Museums Survey (FY 2006 data)	
17	HP	Heritage Preservation (The Nat'l Instit. For Conservation)	A Public Trust at Risk: Heritage Health Index (conducted 2004)	
18	NCCS	IRS 990 EZ / National Center for Charitable Statistics	IRS Tax Form 990 EZ	
19	IMLS	IMLS	Data File Documentation: Public Libraries Survey Fiscal Year '08	
20	ILI/AZA	Institute for Learning Innovation (IMLS funded)	Nat'l Audience Survey (Why Zoos and Aquariums Matter Handbook)	
21	MG	Morey Group	2009 Cultural Attraction Attendance Survey	
22	MANY	Museum Association of New York	2008-2009 Salary and Benefits Survey	
23	MLAC	The Museums, Libraries and Archives Council	Renaissance West Midlands - Fast Forward Survey 2010	
24	MSA	Museum Store Association	MSA Retail Industry Report (2009)	
25	NSAIE	National Assembly of State Arts Agencies	A Quick and Easy Guide to Nat'l Standard Data Fields (Mar. 2010)	
26	DEF	National Association for Interpretation	Definitions Project (Jan 2007)	
27	NCES	National Center for Education Statistics	Museum Program Survey of 1979	
28	UKSDC	UK Association for Science and Discovery Centres	Science and Discovery Centers Survey	
Additional but unavailable surveys listed in a bibliography				
29	D&B	Dunn and Bradstreet	Museum Data from DUNS files	not received
30	AZA	Association of Zoos and Aquariums	Annual Member Survey	not received
31	IAAPA	Int'l Assoc. of Amusement Parks and Attractions	2008 Zoo and Aquarium Visitor Services Survey	not received
32	IAMFA	Int'l Assoc. of Museum Facility Administrators	Museum Benchmarks Survey of Facilities Management Practices	not received

**Table 2.1**

Source: White Oak Institute and the American Association of Museums

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## BIBLIOGRAPHY OF MUSEUM SURVEYS INCLUDED IN MUSEUMS COUNT ANALYSIS

### 10 COMPREHENSIVE SURVEYS

[ALSO SEE DESCRIPTIONS AT THE END OF THIS CHAPTER]

American Association for State and Local History. 2008. *History Museum Forum Survey*.

American Association of Museums (AAM). 2008. Museum Financial Information Survey. Results published as Elizabeth E. Merritt and Philip M. Katz, eds., *Museum Financial Information 2009* (AAM, 2009). [http://iweb.aamus.org/Purchase/ProductDetail.aspx?Product\\_code=I260](http://iweb.aamus.org/Purchase/ProductDetail.aspx?Product_code=I260).

American Public Gardens Association (APGA). 2007. *2007 Medium and Small Garden Benchmarking Study*. Results published as *2007 Medium and Small Garden Benchmarking Study* (APGA, 2007). <http://www.aabga.org/content/apga-publications>.

Association for Children's Museums (ACM). 2010. *ACM Member Survey of Open Museums*. Only members have access to the survey results, which are on-line, though other publications are available. <http://members.childrensmuseums.org/public/Core/Memberonly.aspx>

Association of Art Museum Directors (AAMD). 2010. *State of North America's Art Museums Survey*. Results summarized in *2010 State of North America's Art Museums Survey* (AAMD, 2010). <http://www.aamd.org/newsroom/documents/2010SNAAMSURVEYDataCoverFINAL.pdf>.

Association of Science-Technology Centers Incorporated. 2009. *2009 ASTC Statistics Survey*. Results summarized in *2009 Science Center and Museum Statistics* (ASTC, 2010). <http://www.astc.org/about/pdf/Backgrounders/2009ScienceCenterStatistics.pdf>.

Australian Bureau of Statistics (ABS). 2007-08. *Museums Survey*. Results published as *Museums, Australia, 2007-08* (Canberra: Australian Bureau of Statistics, 2009). <http://www.abs.gov.au/ausstats/abs@.nsf/productsbytitle/E49AC12466062415CA256A80007FB6AF?OpenDocument>.

European Group on Museum Statistics (EGMUS). 2008. *Standard Questionnaire*. [http://www.egmus.eu/fileadmin/statistics/Dokumente/Common\\_Questionnaire\\_2008/Standard\\_Questionnaire\\_2008\\_en.doc](http://www.egmus.eu/fileadmin/statistics/Dokumente/Common_Questionnaire_2008/Standard_Questionnaire_2008_en.doc).

National Register Publishing. 2010. *The Official Museum Directory (OMD)*. Most recent edition published as *The Official Museum Directory*, 41st edition (National Register Publishing, 2011). <http://www.officialmuseumdirectory.com/>.

Pew Charitable Trusts. n.d. *Cultural Data Project (CDP)*. <http://www.culturaldata.org/>.



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**SPECIALIZED SURVEYS/PUBLICATIONS REVIEWED FOR ADDITIONAL FACTORS OF INTEREST**

American Association for State and Local History. 2006. *Member Survey*.

<http://www.aaslh.org>. This survey focused on member satisfaction in regard to the association (AASLH), its programs and publications

American Association for State and Local History. 2011 *AASLH Survey of Statewide History Organizations*. <http://www.aaslh.org> This short survey is sent to statewide history organizations and includes questions regarding governance, staffing, attendance, operating budget size, endowment revenue, and state funding

American Association for State and Local History. 2010. *Visitors Count!*

<http://www.aaslh.org/visitorscount>. *Visitors Count* offers museums, historic houses, outdoor museums, historical societies, and related history institutions a way to measure and analyze visitor and teacher satisfaction and opinions. There are three program options: 1) Museums, focusing on history museum visitors; 2) Historic Houses, focusing on the needs of historic houses and; 3) Education, focusing on teacher and student feedback. The program include a survey questionnaire for the museums to use, allows museums to compare their results with other similar institutions and includes a final report with key drivers that identify the most critical things the participating museum needs to address to improve or ensure a high percentage of visitors have an excellent experience. Over 130 museums and sites have participated in *Visitors Count!*

Association of Fundraising Professionals and the Urban Institute. 2006-2010.

Fundraising Effectiveness Project. Relevant reports include 2009 *Fundraising Effectiveness Survey Report* ([http://www.afpnet.org/files/ContentDocuments/2009\\_FEP\\_FinalReport.pdf](http://www.afpnet.org/files/ContentDocuments/2009_FEP_FinalReport.pdf)) and the 2010 *Fundraising Effectiveness Survey Report* ([http://www.afpnet.org/files/ContentDocuments/2010\\_FEP\\_FinalReport.pdf](http://www.afpnet.org/files/ContentDocuments/2010_FEP_FinalReport.pdf)). This Web-based survey was first piloted in 2006. The survey collects fundraising data from nonprofit organizations and enables participating groups to measure and compare their fundraising gain and loss ratios to those of similar organizations.

Association of Science and Technology Centers Incorporated. 2010. *2010 ASTC Statistics Survey*. . [http://www.astc.org/pubs/browse\\_publications.htm-basics](http://www.astc.org/pubs/browse_publications.htm-basics). A revised and shortened version of the 2009 and earlier surveys, with only 14 questions plus sub-questions. Includes basic data regarding type of museum, presence of a giant-screen theater, exhibit square footage, number of employees, attendance (on-site, gate attendance, school children served on- and off-site), admission fees, and membership. Financial data includes revenue broken out by: earned; public funds; private funds; endowment income; and resulting total

operating revenue. Expenses include total operating expenses and personnel expenses

CyMAL: Museums, Archives and Libraries Wales. 2007. *Spotlight on Museums*. <http://wales.gov.uk/topics/cultureandsport/museumsarchiveslibraries/cymal/researchandevidence/spotlight/>. A comprehensive survey of Wales' museums and collections, conducted in 2006 and published in 2007. The survey looks at "the subject, number and significance of collections, access and learning, audience development and physical aspects such as buildings, facilities and storage. It also provides information on the numbers of staff and volunteers working in the sector, working patterns and finance including admission charges, budgets and funding and support arrangements."

Heritage Preservation. 2005. *A Public Trust at Risk: The Heritage Health Index Report on the State of America's Collections*. <http://heritagepreservation.org/hhi/>. A survey of unprecedented scope and scale intended to give a comprehensive picture of the condition and preservation needs of this country's collections. Conducted in 2004 in collaboration with IMLS. Archives, historical societies, libraries, museums, and scientific organizations of all sizes and from every state and U.S. territory participated in the survey.

Institute of Museum and Library Services. 2010. *Data File Documentation: Public Libraries Survey: Fiscal Year 2008*. [http://harvester.census.gov/imls/pubs/Publications/fy2008\\_pls\\_data\\_file\\_documentation.pdf](http://harvester.census.gov/imls/pubs/Publications/fy2008_pls_data_file_documentation.pdf). "The Public Libraries Survey (PLS) is a voluntary survey conducted annually by the Institute of Museum and Library Services (IMLS). IMLS collects these data under the mandate in the Museum and Library Services Act of 2003 as stated in SEC. 210. The U.S. Census Bureau is the data collection agent for IMLS. The Fiscal Year (FY) 2008 survey is the 21st in the series. The data file includes all public libraries identified by state library agencies in the 50 States, the District of Columbia, and the outlying areas of Guam, the Northern Mariana Islands, Puerto Rico and the U.S. Virgin Islands. The reporting unit for the survey is the administrative entity, defined as the agency that is legally established under local or state law to provide public library service to the population of a local jurisdiction. In this survey, the term public library means an administrative entity. The administrative entity may have a single outlet or multiple outlets (single- and multiple-outlet libraries that do not have a central outlet are listed in Appendix E). The data for a multiple-outlet library are combined. The survey questionnaire is in Appendix F. The FY 2008 PLS collected the following information:

- State characteristics data, including the reporting period starting and ending dates, the official state total population estimate, and the total unduplicated population of legal service areas for the state (see the survey questionnaire in Appendix F, items 100-103). Each state library agency

reported these data on the “State Characteristics” record because they are not library-level data.

- Data on each public library, such as its name and address, population of legal service area, service outlets, collections, full-time-equivalent staff, and operating revenue and expenditures (see Appendix F, items 150-651). These data were reported on the “Administrative Entity” record.
- Data on each public library service outlet, such as its name and address, type, county location, metropolitan status, and square footage (see Appendix F, items 700-712). These data were reported on the “Outlet” record.”<sup>1</sup>

Internal Revenue Service. 2009. *Form 990 EZ*. <http://www.irs.gov/pub/irs-pdf/f990ez.pdf>. This is the standard filing form for tax-exempt entities with gross receipts of less than \$500,000 and total assets of less than \$1,250,000. The National Center for Charitable Statistics (<http://nccs.urban.org/>) uses data from IRS Forms 990 EZ and 990 to analyze the state of the charitable sector.

John Fraser and Jessica Sickler (Institute for Learning Innovation). 2008. *Why Zoos and Aquariums Matter Handbook*. <http://www.ilinet.org/download/attachments/5373955/Why+Zoos+Matter+Findings+-+Handbook+Full.pdf?version=1>. Based on a national study conducted for the Association of Zoos and Aquariums with support from IMLS and the National Science Foundation. “In order to better understand how the public values zoos and aquariums in their communities and lives, the research team at the Wildlife Conservation Society, on behalf of the Association of Zoos and Aquariums, undertook a three-year, multi-phase research project to document and describe this public value, with funding support from the Institute of Museum and Library Services.”<sup>2</sup> The handbook noted here supports training for zoo and aquarium professionals and provides readers with summaries, data, and analysis from the research conducted for the project. The research included: in-depth focus groups and interviews with community representatives, internal and external stakeholders and visitor groups; a review of existing literature; and quantitative nationwide surveys targeted to teachers, parents, volunteers and the general public, all with the goal of understanding the role played by zoos and aquariums in society.

<sup>1</sup> Data File Documentation Public Libraries Survey Fiscal Year 2008 May 2010.

<sup>2</sup> *Why Zoos and Aquariums Matter Handbook*. 2008.

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- Morey Group. 2010. 2009 Cultural Attraction Attendance Trend Report. [http://www.moreygroup.com/store/Products/2009-Cultural-Attraction-Attendance-Trend-Report\\_09AR001.aspx](http://www.moreygroup.com/store/Products/2009-Cultural-Attraction-Attendance-Trend-Report_09AR001.aspx). Based on an annual survey of cultural attractions including general museums, art museums, zoos, science museums, botanical gardens, children's museums and aquariums. The 2009 survey was conducted online in March-April 2009 and received 189 responses. Focuses on trends in attendance, membership, and admission pricing.
- Museum Association of New York. 2008. *2008-2009 MANY Salary & Benefits Survey*. <http://manyonline.org/2008/09/2008-2009-many-salary-survey/>. This biennial publication examines compensation of more than 70 job titles from 109 New York State museums and historical organizations. The data are sorted by budget size, location, discipline and governance. Includes information about unionization, outsourcing, hiring and layoffs, and the gender composition of the museum workforce in New York.
- Museums, Libraries and Archives Council. 2010. *Fast Forward Survey 2010* (Survey of Museums in the West Midlands). The results of the most recent version of this biennial survey are published as *Fast Forward 2008: A Picture of Museums in the West Midlands* (MLA West Midlands, 2009). [http://www.mla.gov.uk/what/programmes/renaissance/regions/west\\_mids/what\\_we\\_do/visitors\\_audiences](http://www.mla.gov.uk/what/programmes/renaissance/regions/west_mids/what_we_do/visitors_audiences). A comprehensive look at museums and galleries in England's West Midlands, with trend data since 2000. Gathers information about facilities, adherence to museum standards, the visitor experience (including attendance and admissions), the museum workforce, and collections. The 2010 questionnaire includes innovative questions about audience engagement, formal and informal learning, adoption of technology, and environmental sustainability.
- Museum Store Association. 2009. *MSA Retail Industry Report: Financial, Operations and Salary Data* (revised edition). <http://www.museumdistrict.com/pubs/09MRIR.cfm>. This survey includes statistical data from 439 museum stores that responded to survey (an overall response rate of 15.7%). Most results are broken down into five categories by gross sales. The survey includes a wide range of data, including general information about museum type, location and attendance as well as highly specific information about store size, operating hours, net sales, cost of goods, inventory, staffing, compensation and benefits.
- National Assembly of State Arts Agencies. 2010. *A Quick and Easy Guide to National Standard Data Fields, Updated with the 2003 National Standard Revisions*. [http://www.nasaa-arts.org/Research/Planning-and-Accountability/National-Standard-Reference-Center/NS\\_QE\\_Guide.pdf](http://www.nasaa-arts.org/Research/Planning-and-Accountability/National-Standard-Reference-Center/NS_QE_Guide.pdf). Contains details about the National Standard for Arts Information Exchange, a tool used by public arts

agencies to organize and report information about their constituents, programmatic activities, and grantmaking to the National Endowment for the Arts and others. The National Standard incorporates a set of terms, definitions, and reporting guidelines.

National Association for Interpretation. 2007. *Definitions Project*.

[http://www.definitionsproject.com/definitions/media/definitions\\_list\\_0107.pdf](http://www.definitionsproject.com/definitions/media/definitions_list_0107.pdf). In 2006, representatives from over two dozen federal

agencies, nonprofit professional organizations, and not-for-profit organizations came together to agree on the definitions of common terminology used by interpreters, environmental educators, historians, and others in nonformal settings such as parks, aquariums, zoos, nature centers, historic sites, and museums.

National Center for Education Statistics. 1981. *Museum Program Survey, 1979*.

<http://www.cpanda.org/cpanda/studies/a000001>. This was the most comprehensive survey to date of American museums, their finances, operations, governance, attendance, collections, etc. Many of the questions and definitions were reused or modified for subsequent museum surveys.

UK Association for Science and Discovery Centres. 2010. *Assessing the Impact of UK Science and Discovery Centres: Towards a set of common indicators*.

<http://www.sciencecentres.org.uk/govreport/index.html>. This report explores impact measures in use across the UK and elsewhere.

#### **ADDITIONAL DATA SOURCES, NOT REVIEWED FOR THIS STUDY**

American Zoo and Aquarium Association. 2010. Annual member survey. Results are published in an annual Member Directory, published exclusively as a CD-ROM starting in 2011

([http://www.aza.org/uploadedFiles/Membership/Publications/AZADirectory2011\\_Order\\_CD2.pdf](http://www.aza.org/uploadedFiles/Membership/Publications/AZADirectory2011_Order_CD2.pdf)). This includes statistical data from AZA-accredited zoos and aquariums, facts on attendance, budget and operations, admissions and membership, and key staff contacts.

Dun and Bradstreet. n.d. Museum data collected as part of the Data Universal Numbering System (DUNS). The Office of Management and Budget (OMB) requires all applicants to register for a DUNS number when applying for federal grants or cooperative agreements. Data is collected on an on-going basis and can be updated at any time.

International Association of Amusement Parks and Attractions. 2008. *The State of the Industry: Zoo and Aquarium Visitor Services in North America*.

<http://www.iaapa.org/>. From website description: "This survey presents information [for] a range of visitor generated revenues and other pertinent data



including admissions, parking, food & beverage, and catering, merchandising rides and rentals. Produced in cooperation with the AZA.”

International Association of Museum Facility Administrators. 2010. 2010 Benchmarking Exercise, Survey of Facility Management Practices.

<http://www.iamfa.org/benchmarking2010.asp>. Annual survey conducted in cooperation with commercial publisher Facility Issues (<http://www.facilityissues.com/>). Participants in this survey pay \$1475 (or \$975 for previous participants). In return they receive customized survey reports and a full-day workshop including “best practice presentations and networking through focus group exercises.”

#### DESCRIPTIONS OF THE 10 COMPREHENSIVE SURVEYS

The charts shown for each of the organizations are based on the subject areas identified by the project team and do not necessarily reflect the category names used in the survey. Seven subject areas were identified by the project team and are as follows:

##### Survey Subjects

Institute of Museum and Library Services: Data Definitions Project

Subject Area	Includes the following types of topics
Institution	General institutional data including, name, location, Web address, contact info, type of museum, parent and/or support organization, opening year, year founded, governance, fiscal year, congressional district
Engagements	Attendance, membership, board, donors, programs (exhibits and education), Internet accessibility, Web usage
Physical Resources	Facility, grounds and components (galleries, store, theaters, etc.), square footage and acreage, LEED certification
Collection Resources	Permanent, borrowed, acquisitions, inventory, digital, by subject, conservation and care
Human Resources	Staff, volunteers, contract labor, benefits, diversity, interns
Finance	
Operating	Revenue and expenses (total and by category), ticket prices
Capital	Capital projects, campaigns and expenses, investments and endowment
Balance Sheet	Assets and liabilities, reserve funds, investments and endowment
Other	Questions not otherwise categorized including emerging trends and data on economic impact

**Table 2.2**

Source: White Oak Institute and the American Association of Museums

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## SUBJECTS BY SURVEY

Table 2.3 presents the underlying data for the charts shown below for each organization.

Looking at the group as a whole, the majority of questions, and by far the largest percentage (55%) are in the finance category, especially questions regarding operations. The second highest percentage, 16%, relates to engagements. In the lower section of the table, which shows subjects by percentage, the highest percentages for each survey are in bold. The only survey that did not have finance as the highest percentage of questions was the Official Museum Directory. EGMUS, the European Group on Museum Statistics, had equal percentages for finance and engagements.

### List of Museum Surveys

Institute of Museum and Library Services: Data Definitions Project

WOI Subject #	Subjects	AAM	ACM	ASTC	APGA	AASLH	AAMD	PEW	OMD	EGMUS	ABS	TOTAL
1	Institution	11	18	7	6	0	11	18	11	4	1	87
2	Engagements	6	45	9	11	10	27	44	5	17	3	177
3	Physical Resources	4	28	2	2	3	27	18	2	6	1	93
4	Collections	1	0	0	0	0	9	5	11	6	32	
5	Human Resources	4	9	4	12	8	8	10	3	8	5	71
6	Finance	60	74	15	63	43	58	233	4	17	23	590
6.1	Operating	51	62	14	61	40	47	137	4	15	23	454
6.2	Capital	8	10	1	1	3	5	5		2	0	35
6.3	Balance Sheet	1	2		1		6	91			0	101
7	Other		16					1	1	14	0	32
	<b>TOTAL</b>	<b>86</b>	<b>190</b>	<b>37</b>	<b>94</b>	<b>64</b>	<b>140</b>	<b>324</b>	<b>31</b>	<b>77</b>	<b>39</b>	<b>1082</b>

WOI Subject #'s for Sorting	Subjects	AAM	ACM	ASTC	APGA	AASLH	AAMD	PEW	OMD	EGMUS	ABS	TOTAL
	<b>Our Survey #:</b>	<b>4</b>	<b>5</b>	<b>7.2</b>	<b>8</b>	<b>11.4</b>	<b>12.1</b>	<b>13</b>	<b>14</b>	<b>17</b>	<b>30</b>	
1	Institution	13%	9%	19%	6%	0%	8%	6%	<b>35%</b>	5%	3%	8%
2	Engagements	7%	24%	24%	12%	16%	19%	14%	16%	<b>22%</b>	8%	16%
3	Physical Resources	5%	15%	5%	2%	5%	19%	6%	6%	8%	3%	9%
4	Collections	1%	0%	0%	0%	0%	6%	0%	16%	14%	15%	3%
5	Human Resources	5%	5%	11%	13%	13%	6%	3%	10%	10%	13%	7%
6	Finance	<b>70%</b>	<b>39%</b>	<b>41%</b>	<b>67%</b>	<b>67%</b>	<b>41%</b>	<b>72%</b>	13%	<b>22%</b>	<b>59%</b>	<b>55%</b>
7	Other	0%	8%	0%	0%	0%	0%	0%	3%	18%	0%	3%
	<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

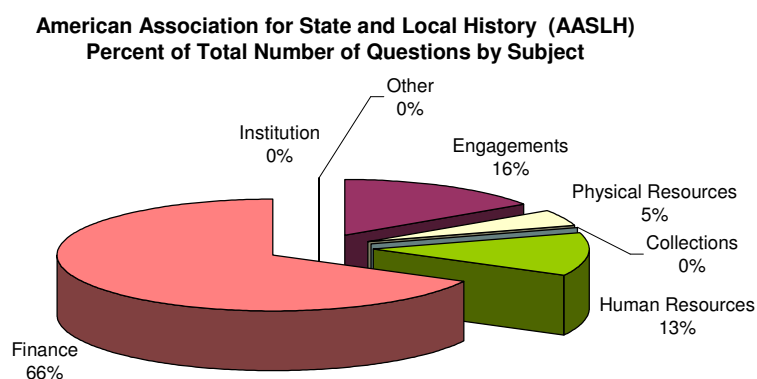
**Table 2.3**

Source: White Oak Institute and the American Association of Museums



# **1. AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY (AASLH): 2008 HISTORY MUSEUM FORUM SURVEY**

This survey was last administered for fiscal year 2008 and is for a subgroup of history museums. Survey data goes back to 1996 and reports shared with participating members show data for each of the years. It has four sections: Admissions related; revenue; expenses; and staff. Admissions attendance includes not only the normal breakdowns of total, paid and school, but also group, international, and special event attendance. Admissions revenue, membership revenue and store revenue are broken out as are government versus non-government support. In addition to total operating expenses, there is a break out for development expenses, marketing and advertising expenses.



**Chart 2.1**

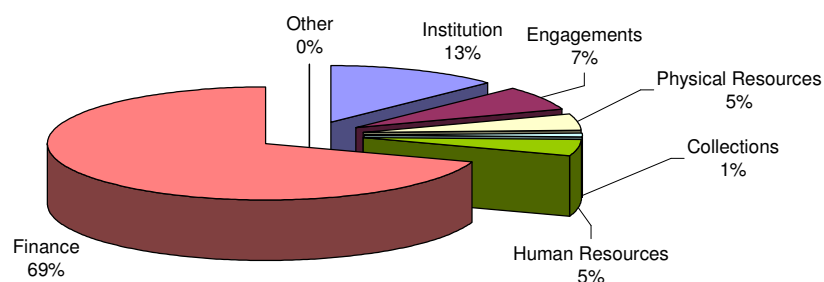
Source: Survey Instrument and White Oak Institute

## **2. AMERICAN ASSOCIATION OF MUSEUMS (AAM): 2008 MUSEUM FINANCIAL INFORMATION SURVEY**

Results published as Elizabeth E. Merritt and Philip M. Katz, eds., *Museum Financial Information 2009* (AAM, 2009). [http://iweb.aam-us.org/Purchase/ProductDetail.aspx?Product\\_code=I260](http://iweb.aam-us.org/Purchase/ProductDetail.aspx?Product_code=I260)

Includes comprehensive financial and operational data for 2006-2008 from museums of all types and sizes. Data were collected on a wide range of institutional activities, including attendance, staffing, operating and non-operating income and expenses, earned income sources, costs of collections care and education programming, memberships, and the percent of operating expenses devoted to administration and fundraising. Also collected data on web-based activities and the outsourcing of museum functions. The published report from this survey includes a focused trend analysis of 125 museums from FY00 through FY08.

**American Association of Museums (AAM)**  
**Percent of Total Number of Questions by Subject**



**Chart 2.2**

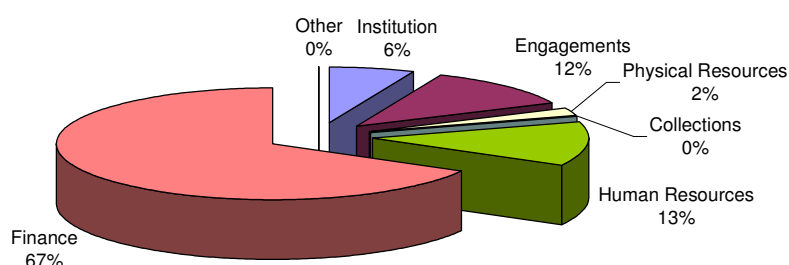
Source: Survey Instrument and White Oak Institute

### 3. AMERICAN PUBLIC GARDENS ASSOCIATION (APGA): 2007 MEDIUM AND SMALL GARDEN BENCHMARKING STUDY

Results published as 2007 Medium and Small Garden Benchmarking Study (APGA, 2007). <http://www.aabga.org/content/apga-publications>.

Survey collected information on organizational structure, visitation, membership, facilities, staffing, revenues and expenses, and other financial measures. Limited to public gardens with annual budgets of \$2 million or less. Data were collected in nine areas: institutional data, governance, local population and visitation, education programs, membership and donations, building and grounds, human resources, revenues, and expenses. 2007 was the inaugural version of this survey, which was designed to “get comprehensive data so we could calculate a variety of measures to see which best provide a representative view of the institutions.” The results are available in print format.

**American Public Gardens Association (APGA)  
Percent of Total Number of Questions by Subject**



**Chart 2.3**

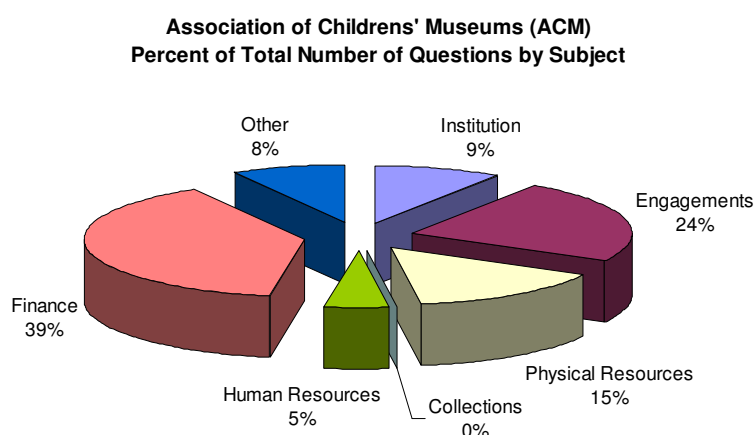
Source: Survey Instrument and White Oak Institute

#### **4. ASSOCIATION OF CHILDREN'S MUSEUMS (ACM): 2010 ACM MEMBER SURVEY OF OPEN MUSEUMS**

This mostly statistical survey was conducted bi-annually, with annual updates of only a few data fields – attendance, income and expenses. Starting in 2010, the survey was conducted on-line and beginning in 2012 the survey will be administered annually. The 2010 survey was sent to 235 museums and 179 surveys were returned, a 76% response rate.

The survey is extensive and covers the following topic areas: General museum information (E.g. type, governing authority, location); Building and facilities including square footage, components and public accessibility; attendance and membership data; exhibits, programs and publications, including types of programming and publications offered; general museum finances with questions regarding capital spending, size of endowment and grants received; detailed museum finance operating data for revenue and expenses; and questions for the director, including qualitative questions such as whether the year was an anomaly, biggest accomplishment and biggest need as well as questions regarding communications with Congressional representatives and partnering with other institutions.

The 2010 survey was updated from previous survey instruments in order to collect data that would result in statistics that would allow for the calculation of a selection of key performance indicators. Those indicators will be available in a roster of reports that members will be able to access on-line and download. Members will be able to compare themselves, via charts and tables, to approximately 12 other museums.



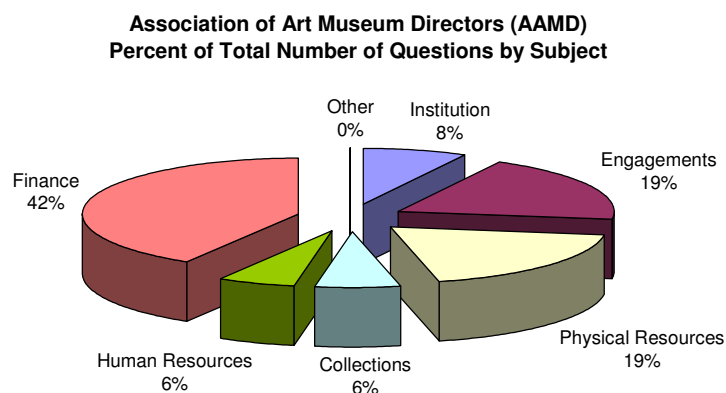
**Chart 2.4**

Source: Survey Instrument and White Oak Institute

## 5. ASSOCIATION OF ART MUSEUM DIRECTORS (AAMD): 2010 STATE OF NORTH AMERICA'S ART MUSEUMS SURVEY

Results summarized in 2010 State of North America's Art Museums Survey (AAMD, 2010). <http://www.aamd.org/newsroom/documents/2010SNAAMSurveyDataCoverFINAL.pdf>

This survey has been distributed annually to members for nine years with the most current 2010 report reflecting data for calendar year 2009. The survey is sent to its members in the U.S., Canada and Mexico. The 2010 report published by AAMD includes results for 2005 through 2010 and trends over time. The survey is divided into seven sections and include the following topics: Facilities (size, not only for total facility but for classrooms, libraries, store, food service, administrative and off-site); membership; attendance, including Web site visitors and enrolled students; financial data, including more detailed information than many surveys on contributed and earned revenue including government grant and other types of support from all levels of government, capital expenses; endowment/investment/trust values; personnel data; and art acquisition activity for purchases, donations and bequests including cost, value and number of objects.



**Chart 2.5**

Source: Survey Instrument and White Oak Institute

## 6. ASSOCIATION OF SCIENCE-TECHNOLOGY CENTERS (ASTC): 2009 ASTC STATISTICS SURVEY

Results summarized in 2009 Science Center and Museum Statistics (ASTC, 2010).

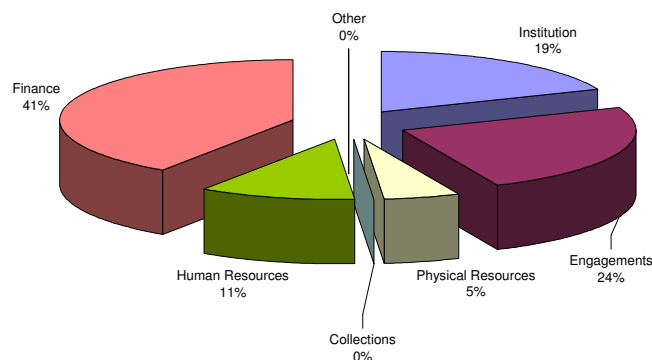
<http://www.astc.org/about/pdf/Backgrounders/2009ScienceCenterStatistics.pdf>

This annual statistical survey is sent to ASTC's global members, which include not only science centers, but also over ten other categories of museums. The 2009 survey was sent to 449 institutions. Of the 168 museums that responded to the 2009 survey, the four largest museum types were: science/technology centers and museums (58%), natural history/anthropology museums (11%), children's/youth museums and other (9%).

Survey topics include: Institutional questions (e.g., type, governing authority), square footage, a multiple choice list of programs and education activities offered, attendance data (on-site, off-site, admissions/gate and school attendance on and off-site), non-corporate membership data, financial information (total revenue and earned revenue by category, total expenses, expenses for a few specific categories, endowment value), ticket prices; and data on staffing and volunteers. ASTC publishes a summary of the results of the survey, including performance ratios and indicators and also makes the full database of responses available to members in excel format. The survey is administered by paper mailed to U.S. members and emailed to international members.

The 2010 survey was shortened compared to earlier surveys. The first survey was administered in the early 80s, though it was not annualized until later. Results of the surveys have been published in the ASTC Sourcebooks going back to 2001 for all years except 2003. The Sourcebook is no longer printed and bound, but is distributed by pdf.

**Association of Science-Technology Centers (ASTC)  
Percent of Total Number of Questions by Subject**



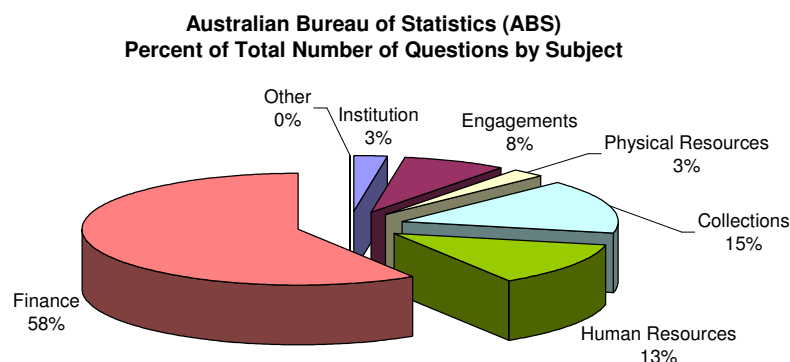
**Chart 2.6**

Source: Survey Instrument and White Oak Institute

## 7. AUSTRALIAN BUREAU OF STATISTICS: 200702008 MUSEUMS SURVEY

Results published as *Museums, Australia, 2007-08* (Canberra: Australian Bureau of Statistics, 2009). <http://www.abs.gov.au/ausstats/abs@.nsf/productsbytitle/E49AC12466062415CA256A80007FB6AF?OpenDocument>

A periodic survey of museums conducted by the national statistical agency of Australia. Comprehensive in scope yet limited to museums with collections: "historic trusts and sites; historic societies with a collection; house museums; social and natural history museums; archives (excluding the national and state archives); art galleries (excluding commercial art galleries); keeping places and cultural centers; outdoor museums; science museums; maritime museums; military museums and transport museums." Excludes living collections of all kinds, planetariums and science centers. Data collected on funding sources, income and expenses, staffing, admissions, collections and exhibitions, among others. Includes a glossary of clear and precise definitions.



**Chart 2.7**

Source: Survey Instrument and White Oak Institute

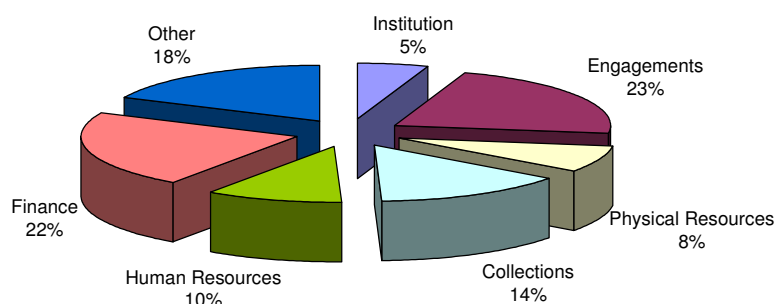


## 8. EUROPEAN GROUP ON MUSEUM STATISTICS (EGMUS): 2008 STANDARD QUESTIONNAIRE

[http://www.egmus.eu/fileadmin/statistics/Dokumente/Common\\_Questionnaire\\_2008/Standard\\_Questionnaire\\_2008\\_en.doc](http://www.egmus.eu/fileadmin/statistics/Dokumente/Common_Questionnaire_2008/Standard_Questionnaire_2008_en.doc).

EGMUS is a pan-European organization with representatives from 28 countries. The goal of EGMUS is to collect, compare and analyze national museum statistics with the long-term goal of “harmonizing” museum statistics across the continent. With that in mind, EGMUS developed the Standard Questionnaire as a set of “uniform questions ... based on international standards and current practices in the participating countries.” The questionnaire is designed as a repository of standard questions to be inserted in national museum surveys as desired by the various national statistical agencies and/or museum service organizations. The questions focus on “key indicators” in the following areas: “identification of museums (to distinguish these from the ‘museum-like’ institutions such as exhibition halls or ‘Kunsthallen’), kind[s] of museums, opening hours, legal status and ownership, exhibition and visits, expenditure and income, personnel and the use of information and communication technology.”

**European Group on Museum Statistics (EGMUS)  
Percent of Total Number of Questions by Subject**



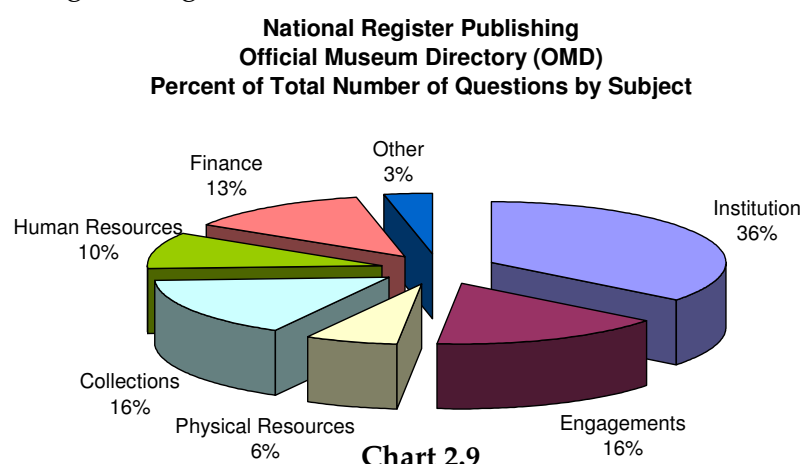
**Chart 2.8**

Source: Survey Instrument and White Oak Institute

## 9. NATIONAL REGISTER PUBLISHING LLC: 2010 OFFICIAL MUSEUM DIRECTORY (OMD)

Most recent edition published as The Official Museum Directory, 41st edition (National Register Publishing, 2011). <http://www.officialmuseumdirectory.com/>.

This commercial publication is the most comprehensive directory of U.S. museums available and is produced in cooperation with the American Association of Museums. Published in both online and print versions. The 2010 print edition includes information on more than 12,200 museums. Data are collected from museums on an annual basis using mailed surveys and follow-up contacts, but not all data reflect the most recent year. Data collected for each museum includes contact information, key personnel, collections and facility descriptions, publications, attendance, and admissions and membership pricing, among others.



Source: Survey Instrument and White Oak Institute

## **10. PEW CHARITABLE TRUSTS: CULTURAL DATA PROJECT (CDP)**

<http://www.culturaldata.org/>.

This is one of the most, if not the most, comprehensive surveys for non-profit cultural institutions. The Cultural Data Project “was developed by a partnership of Pennsylvania organizations including the Greater Philadelphia Cultural Alliance, Greater Pittsburgh Arts Council, the Heinz Endowments, the Pennsylvania Council on the Arts, The Pew Charitable Trusts, the Pittsburgh Foundation and the William Penn Foundation. These partners continue to govern the CDP, with Pew housing and administering it on a day-to-day basis. It has recently expanded to California, Illinois, Maryland, Massachusetts, Michigan, New York and Ohio. Many states, regional and other organizations are using the data in reports. The survey was developed over several years with a cost of \$3 million and was launched in PA in 2004. It has currently been adopted by eight states with another 20 states having expressed interest.

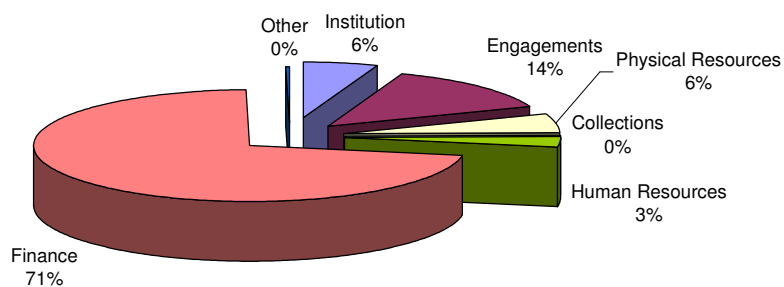
As the project’s Web site describes it, the CDP “is a powerful online management tool designed to strengthen arts and cultural organizations, advance learning and exchange throughout the cultural sector, and help funders more effectively plan for and evaluate their individual and collective grantmaking activities. The CDP allows users to track their institution’s financial and programmatic performance over time and to benchmark themselves against comparable organizations.”

In states that have signed up to use the CDP, prospective grantees have to fill out the survey in order to apply for a grant from funding organizations. The survey is administered on-line with definitions included as dropdown menus as part of specific questions. A separate definitions guide is also available as well as access, through a toll-free number, to personnel who can answer specific questions as you fill out the survey. There are internal error check functions tools that ensure the data entered totals the correct amount and, once submitted, the data are reviewed again by personnel engaged by the Pew.

The types of data collected include basic organizational information, revenues, expenses, marketing activities, balance sheet items, investments, loans and a wide range of non-financial information (including contributor and attendance numbers, facilities, pricing, capital and endowment campaigns, program activity and staffing.) Organizations who fill out the survey can access their annual reports with tables and graphs summarizing their financial activity, program activity and attendance as well as standard reports that show your institution’s trends over time and/or compare you to other organizations. Custom reports are also available.

*Review Guide of Existing Museum Databases*  
11 January 2011

**Pew Charitable Trusts  
Cultural Data Project (CDP)  
Percent of Total Number of Questions by Subject**



**Chart 2.10**

Source: Survey Instrument and White Oak Institute

*Review Guide of Existing Museum Databases*  
11 January 2011

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**SUMMARY OF SURVEY ADMINISTRATION DATA FOR THE TEN COMPREHENSIVE SURVEYS**

Table 2.3, in two parts, presents general information about the 10 comprehensive surveys reviewed including, among other items, year of survey reviewed, number sent out, and response rates.

*Review Guide of Existing Museum Databases*  
 11 January 2011  
**List of Museum Surveys: IMLS Museums Count**

Sponsor	American Association for State and Local History	American Association of Museums	American Public Gardens Association	Association for Children's Museums	Association of Art Museum Directors
Survey name	History museum survey	Museum Financial Information Survey	Medium and Small Garden Benchmarking Study	ACM Member Survey of Open Museums	State of North America's Art Museums Survey
Scope of survey	Subgroup of members	All museums in the United States	Public gardens with annual budgets under \$2 million a year (limited to APGA institutional members).	All members worldwide	AAMD member art museums
Survey year reviewed	2008	2008	2007	2010	2009
Start and end dates of data collection		October 2008-January 2009	Unknown	May 1 - June 30, in future Jan 1 - March 31	Unknown
First administered	1996	1997	2007	1992 or earlier	2001
Last administered	2009	2008	2007	2010	2010
How often administered?	Annually	Every three years	Unknown	Was bi-annually, with selected data updated annually; Will be annual from 2012 on	Annually
Number of invitations/ surveys distributed	24	Approx. 5,500 (only includes targeted invitations from AAM; some museums participated in the survey after receiving indirect notifications via electronic discussion lists and other media).	440	235	193
Number of responses	@ 21	671	51	179	149
Overall response rate	88%	12%	12%	76%	77%
# of questions contained in survey (White Oak/AAM count)	64	86	94	190	140

**Table 2.3 (Part 1 of 2)** Source: White Oak Institute and the American Association of Museums  
 TBD = to be done in future draft

*Review Guide of Existing Museum Databases*

11 January 2011

**List of Museum Surveys: IMLS Museums Count**

Sponsor	Association of Science and Technology Centers Incorporated	Australian Bureau of Statistics	European Group on Museum Statistics (EGMUS)	National Register Publishing	Pew Charitable Trusts
Survey name	2009 ASTC Statistics Survey	Museums Survey	Standard Questionnaire	The Official Museum Directory	Cultural Data Project
Scope of survey	All members worldwide	Australian museums and art galleries with collections, excluding botanic gardens, herbariums (nature centers), zoos and aquariums, planetariums and science centers.	All museums in European countries that choose to adopt the EGMUS standards for data collection.	All museums in the United States.	Non-profit cultural organizations in the United States
Survey year reviewed	2009	2007-08	2008	2010 (2009 data)	n.d. (continuous data collection)
Start and end dates of data collection	6 Weeks	Data as of June 30, 2008	Varies by country	January-November of reporting year	Continuous
First administered	2001 or earlier	1996-97	2008	1969	2004
Last administered	2010	2007-08	2009	2010	Ongoing
How often administered?	Annually	Irregularly (1996-97, 1997-98, 1999-2000, 2003-04, 2007-08)	Varies by country	Annual	Continuous
Number of invitations/ surveys distributed	449	Unknown	N/A. Different European countries use different strategies to collect data about their museums, and not all of them use the EGMUS standards (or use them selectively).	Unknown	Unknown
Number of responses	168	1,184 (total number of museums extrapolated from sample)	N/A	Unknown (the OMD database includes information about more than 13,000 museums)	N/A
Overall response rate	37% '09; 41% '08	Unknown	N/A	Unknown	For potential grantees must be 100%
# of questions contained in survey (White Oak/AAM count)	37	39	77	31	324

**Table 2.3 (Part 2 of 2)** Source: White Oak Institute and the American Association of Museums



11 January 2011

# OVERVIEW OF THE DATA ELEMENTS IN THE SURVEYS

## CHAPTER 3

### LISTS OF SUBJECTS AND TOPICS

Table 3.1 presents seven subject categories and the number of questions per subject based on an analysis of the 10 comprehensive surveys. Table 3.2 presents a count of questions by topic and sub-topic.

The majority of questions, and by far the largest percentage (55%) are in the finance category, especially regarding operations. The second highest percentage, 16%, relates to engagements, such as attendance, memberships, programs and Internet accessibility and usage.

#### List of Subjects for 10 Comprehensive Surveys

Institute of Museum and Library Services: Data Definitions Project

Subject #	Subject	Total #	Total %
1	Institution	87	8%
2	Engagements	177	16%
3	Physical Resources	93	9%
4	Collections	32	3%
5	Human Resources	71	7%
6	Finance (includes 6.1-6.3)	590	55%
6.1	Operating	454	42%
6.2	Capital	35	3%
6.3	Balance Sheet	101	9%
7	Other	32	3%
	<b>Total</b>	<b>1082</b>	<b>100%</b>

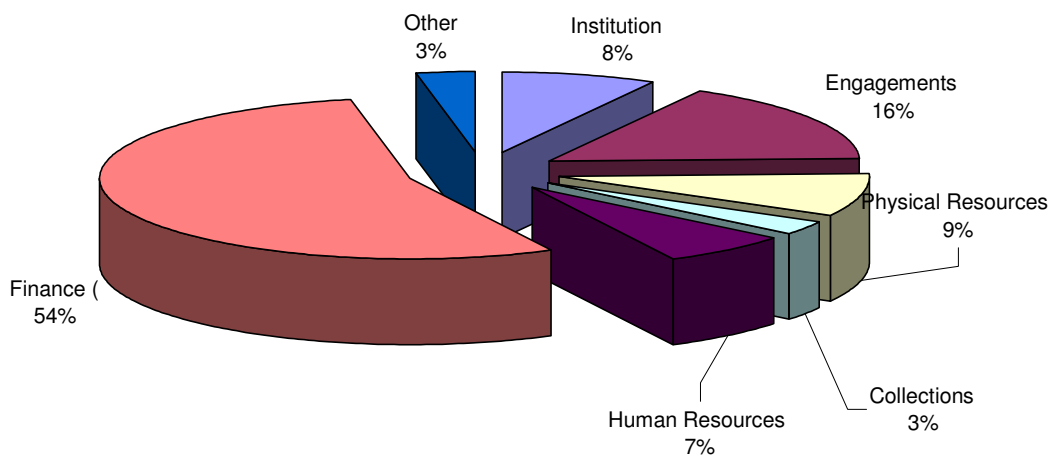
**Table 3.1**

Source: White Oak Institute and the American Association of Museums

*Review Guide of Existing Museum Surveys*

11 January 2011

**Percent of Total Number of Questions by Subject**  
**Aggregate of 10 Comprehensive Surveys**  
Institute of Museum and Library Services Data Definitions Project

**Chart 3.1**

Source: White Oak Institute and the American Association of Museums

*Review Guide of Existing Museum Surveys*

11 January 2011

**List of Topics for 10 Comprehensive Surveys**

Institute of Museum and Library Services: Data Definitions Project

Subject	Topic	Total by Subject	Total by Topic
<b>1 Institution</b>		<b>87</b>	
Instit	Address		7
Instit	Comments		1
Instit	Confidentiality		1
Instit	Congressional District		3
Instit	Contact		4
Instit	Duns#		1
Instit	Federal ID		1
Instit	Fiscal Year		5
Instit	Governance		8
Instit	Location		4
Instit	Name		7
Instit	Other		8
Instit	Other???		2
Instit	Parent Org		12
Instit	Population		2
Instit	Support Organization		1
Instit	Type		10
Instit	Web		1
Instit	Year Founded		3
Instit	Year Incorporated		1
Instit	Year Opened		5
<b>2 Engagements</b>		<b>177</b>	
Engage	Attendance		57
Engage	Board		7
Engage	Diversity (also see HR)		3
Engage	Donors		7
Engage	Hours		8
Engage	Membership		17
Engage	Programs		54
Engage	Publications		5
Engage	Schools		3
Engage	Tours		3
Engage	Web		13

**Table 3.2 (Part 1 of 3)**

Source: White Oak Institute and the American Association of Museums

*Review Guide of Existing Museum Surveys*

11 January 2011

**List of Topics for 10 Comprehensive Surveys (continued)**  
Institute of Museum and Library Services: Data Definitions Project

Subject	Topic	Total by Subject	Total by Topic
<b>3 Physical Resources</b>		<b>93</b>	
Physical	Capital Projects		1
Physical	Components		19
Physical	Entrances		1
Physical	Facility		67
Physical	IT		2
Physical	Envir. Sustain.		2
Physical	Other		1
<b>4 Collections</b>		<b>32</b>	
Collect	Acquisitions		3
Collect	Borrowed		1
Collect	Collections		14
Collect	Digital		2
Collect	Inventory		2
Collect	Loaned		2
Collect	Ownership		1
Collect	Permanent		1
Collect	Subjects		6
<b>5 Human Resources</b>		<b>71</b>	
HR	Benefits		6
HR	Diversity (also see Engage.)		5
HR	Other		2
HR	Staffing		44
HR	Volunteers		14
<b>6 Finance:</b>		<b>590</b>	
<b>6.1 Operating</b>		<b>454</b>	
Fin: Op	Accounting Method		2
Fin: Op	Anomaly		3
Fin: Op	Audit		2
Fin: Op	Endowment		2
Fin: Op	Expenses		197
Fin: Op	Grants and Contracts		2
Fin: Op	In-Kind		3
Fin: Op	Investments		1
Fin: Op	Membership		1
Fin: Op	Net Income		1
Fin: Op	Other		3
Fin: Op	Rent/Mortgage		2
Fin: Op	Revenue		192
Fin: Op	Tax		2
Fin: Op	Ticketing		40
Fin: Op	Web		1

**Table 3.2 (Part 2 of 3)**

Source: White Oak Institute and the American Association of Museums

*Review Guide of Existing Museum Surveys*

11 January 2011

**List of Topics for 10 Comprehensive Surveys (continued)**  
 Institute of Museum and Library Services: Data Definitions Project

Subject	Topic	Total by Subject	Total by Topic
<b>6.3 Balance Sheet</b>		<b>101</b>	
Fin: Bal	Assets		25
Fin: Bal	Investments		37
Fin: Bal	Liab & Net Assets		20
Fin: Bal	Loans & Mortg		19
<b>7 Other</b>		<b>32</b>	
Other	Economic Impact		1
Other	Grants and Contracts		6
Other	Other		7
Other	Partnerships		2
Other	Research		2
Other	Web		14
<b>TOTAL</b>		<b>1082</b>	<b>1082</b>

**Table 3.2 (Part 3 of 3)**

Source: White Oak Institute and the American Association of Museums

*31 March 2011*

## LIST OF DATA FIELDS REVIEWED (“FULL GLOSSARY”)

### *ATTACHMENT D*

Table D.1 presents seven subject categories and the number of questions per subject based on an analysis of the 10 comprehensive surveys reviewed by the Research Team.

Table D.2 presents a count of questions by topic and sub-topic, also based on the 10 comprehensive surveys. A complete list of topics and sub-topics that were considered is also shown.

**Recommended Data Elements**  
IMLS Museums Count

Subject #	Subjects	Total
1	Institution	87
2	Engagements	177
3	Physical Resources	93
4	Collections	32
5	Human Resources	71
6	Finance (includes 6.1-6.3)	590
6.1	Operating	454
6.2	Capital	35
6.3	Balance Sheet	101
7	Other	32
	<b>Total</b>	<b>1082</b>

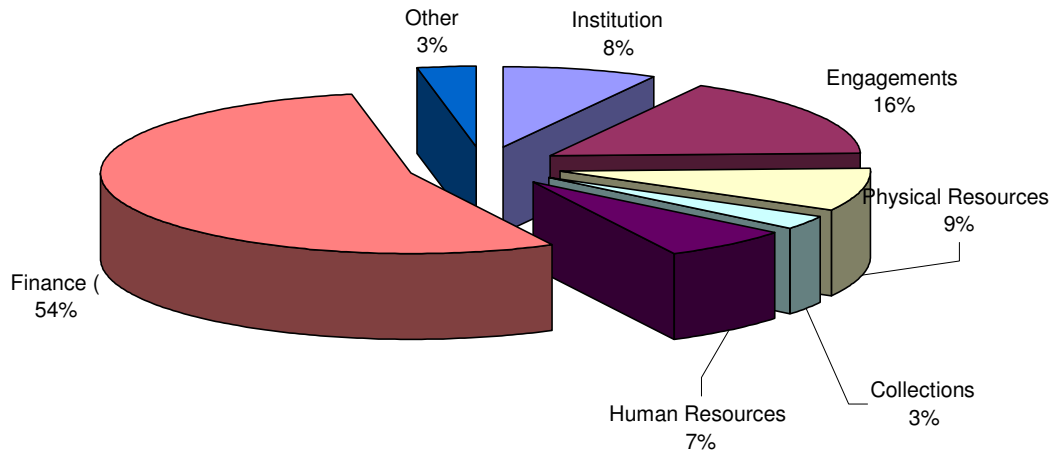
**Table D.1**

Source: White Oak Institute and the American Association of Museums



31 March 2011

**Percent of Total Number of Questions by Subject**  
**Aggregate of 10 Comprehensive Surveys**  
IMLS Museums Count



**Table D.2**

Source: White Oak Institute and the American Association of Museums





31 March 2011

**List of Topics for 10 Comprehensive Surveys**  
IMLS Museums Count

Subject	Topic	Total by Subject	Total by Topic
<b>1 Institution</b>		<b>87</b>	
Instit	Address		7
Instit	Comments		1
Instit	Confidentiality		1
Instit	Congressional District		3
Instit	Contact		4
Instit	Duns#		1
Instit	Federal ID		1
Instit	Fiscal Year		5
Instit	Governance		8
Instit	Location		4
Instit	Name		7
Instit	Other		8
Instit	Other???		2
Instit	Parent Org		12
Instit	Population		2
Instit	Support Organization		1
Instit	Type		10
Instit	Web		1
Instit	Year Founded		3
Instit	Year Incorporated		1
Instit	Year Opened		5
<b>2 Engagements</b>		<b>177</b>	
Engage	Attendance		57
Engage	Board		7
Engage	Diversity (also see HR)		3
Engage	Donors		7
Engage	Hours		8
Engage	Membership		17
Engage	Programs		54
Engage	Publications		5
Engage	Schools		3
Engage	Tours		3
Engage	Web		13

**Table D.3 (Part 1 of 3)**

Source: White Oak Institute and the American Association of Museums



31 March 2011

**List of Topics for 10 Comprehensive Surveys (continued)**  
IMLS Museums Count

Subject	Topic	Total by Subject	Total by Topic
<b>3</b>	<b>Physical Resources</b>	<b>93</b>	
Physical	Capital Projects		1
Physical	Components		19
Physical	Entrances		1
Physical	Facility		67
Physical	IT		2
Physical	Envir. Sustain.		2
Physical	Other		1
<b>4</b>	<b>Collections</b>	<b>32</b>	
Collect	Acquisitions		3
Collect	Borrowed		1
Collect	Collections		14
Collect	Digital		2
Collect	Inventory		2
Collect	Loaned		2
Collect	Ownership		1
Collect	Permanent		1
Collect	Subjects		6
<b>5</b>	<b>Human Resources</b>	<b>71</b>	
HR	Benefits		6
HR	Diversity (also see Engage.)		5
HR	Other		2
HR	Staffing		44
HR	Volunteers		14
<b>6</b>	<b>Finance:</b>	<b>590</b>	
<b>6.1</b>	<b>Operating</b>	<b>454</b>	
Fin: Op	Accounting Method		2
Fin: Op	Anomaly		3
Fin: Op	Audit		2
Fin: Op	Endowment		2
Fin: Op	Expenses		197
Fin: Op	Grants and Contracts		2
Fin: Op	In-Kind		3
Fin: Op	Investments		1
Fin: Op	Membership		1
Fin: Op	Net Income		1
Fin: Op	Other		3
Fin: Op	Rent/Mortgage		2
Fin: Op	Revenue		192
Fin: Op	Tax		2
Fin: Op	Ticketing		40
Fin: Op	Web		1

**Table D.3 (Part 2 of 3)**

Source: White Oak Institute and the American Association of Museums



31 March 2011

**List of Topics for 10 Comprehensive Surveys (continued)**  
IMLS Museums Count

Subject	Topic	Total by Subject	Total by Topic
<b>6.3 Balance Sheet</b>		<b>101</b>	
Fin: Bal	Assets		25
Fin: Bal	Investments		37
Fin: Bal	Liab & Net Assets		20
Fin: Bal	Loans & Mortg		19
<b>7 Other</b>		<b>32</b>	
Other	Economic Impact		1
Other	Grants and Contracts		6
Other	Other		7
Other	Partnerships		2
Other	Research		2
Other	Web		14
<b>TOTAL</b>		<b>1082</b>	<b>1082</b>

**Table D.3 (Part 3 of 3)**

Source: White Oak Institute and the American Association of Museums

Table D.4 shows the list of topics and subtopics with columns indicating which Data Elements were included in the 1<sup>st</sup> Cut and which Data Elements were excluded. The primary purpose of the table was to show the Expert Reviewers what was not included in the 1<sup>st</sup> Cut.

Table D.5 is the 1st Cut list of Data Elements reviewed by the Expert Reviewers. They were asked to shorten the list but also add any critical elements they felt were missing.



31 March 2011

**List of Topics Included and Excluded from 1<sup>st</sup> Cut of Data Elements**  
IMLS Museums Count

Index	Subject	Topic	Subtopic	Sub-Subtopic or Question	Included in 1st Cut	Excluded from 1st Cut
1	<b>1. Institution</b>					
2	Instit	Address			Y	
3	Instit	Address			Y	
4	Instit	Address	Mailing, if different		Y	
5	Instit	Comments				N
6	Instit	Confidentiality				N
7	Instit	Congressional District			Y	
8	Instit	Contact			Y	
9	Instit	Duns #			Y	
10	Instit	Federal ID			Y	
11	Instit	Fiscal Year				N
12	Instit	Governance			Y	
13	Instit	Location			Y	
14	Instit	Location	Mus. Complex?			N
15	Instit	Location	Rural, Suburban, Urbab			N
16	Instit	Location	Public Transportation			N
17	Instit	Name (Legal and Mus. Name)			Y	
18	Instit	Other				
19	Instit	Other	NISP Discipline			N
20	Instit	Other	Downtown Revital			N
21	Instit	Other	Director name			N
22	Instit	Other??				
23	Instit	Parent Org			Y	
24	Instit	Population				N
25	Instit	Support Organization			Y	
26	Instit	Type			Y	
27	Instit	Type	Type within types			
28	Instit	Web			Y	
29	Instit	Year Founded				N
30	Instit	Year Incorporated				N
31	Instit	Year Opened			Y	

**Table D.4 (Part 1 of 6)**

Source: White Oak Institute and the American Association of Museums



31 March 2011

**List of Topics Included and Excluded from 1<sup>st</sup> Cut of Data Elements (continued)**  
IMLS Museums Count

Index	Subject	Topic	Subtopic	Sub-Subtopic or Question	Included in 1st Cut	Excluded from 1st Cut
<b>32</b>	<b>2. Engagements</b>					
33	Engage	Attendance				
34	Engage	Attendance	Age Range	Age Range		N
35	Engage	Attendance	Program	Program		
36	Engage	Attendance	Credited or Degree			
37	Engage	Attendance	Free		Y	
38	Engage	Attendance	Off-Site		Y	
39	Engage	Attendance	On-site		Y	
40	Engage	Attendance	On-site	Gate/Admissions	Y	
41	Engage	Attendance	On-site	Paid		
42	Engage	Attendance	On-site	Non-admissions		
43	Engage	Attendance	On-site	By Members		
44	Engage	Attendance	On-site	How Measure?		
45	Engage	Attendance	School		Y	
46	Engage	Attendance	School	# Served Off-site		N
47	Engage	Attendance	School	# Groups Offsite		N
48	Engage	Attendance	School	# Served On-site	Y	
49	Engage	Attendance	School	# Groups On-site		N
50	Engage	Attendance	School	School Outreach?		N
51	Engage	Attendance	School	Total Served	Y	
52	Engage	Attendance	Total Served			
53	Engage	Attendance				
54	Engage	Board			Y	
55	Engage	Board		Have a board?		
56	Engage	Board		# of Board		
57	Engage	Diversity				N
58	Engage	Diversity		Tracked?		N
59	Engage	Diversity		Benchmarks		N
60	Engage	Donors				N
61	Engage	Hours			Y	
62	Engage	Membership				
63	Engage	Membership		By Category		N
64	Engage	Membership		Offer memberships?	Y	
65	Engage	Membership		# of Memberships		N
66	Engage	Partnerships			Y	
67	Engage	Programs				
68	Engage	Programs	School			N
69	Engage	Programs	School	Off-site		N
70	Engage	Programs	Exhibits			N
71	Engage	Programs	Off-site			N
72	Engage	Programs	Public			N
73	Engage	Programs	Public	Offer programs?	Y	
74	Engage	Programs	Public	Offerings	Y	
75	Engage	Programs	Public	Charter School?		N
76	Engage	Programs	Public	Early Childhood?		N
77	Engage	Publications				N
78	Engage	Schools			Y	
79	Engage	Tours				N
80	Engage	Web				
81	Engage	Web		Address	Y	
82	Engage	Web		Have one?	Y	
83	Engage	Web		Offerings		N
84	Engage	Web		Use social media?	Y	
85	Engage	Web		Unique users		N

**Table D.4 (Part 2 of 6)**

Source: White Oak Institute and the American Association of Museums

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31 March 2011

**List of Topics Included and Excluded from 1<sup>st</sup> Cut of Data Elements (continued)**  
IMLS Museums Count

Index	Subject	Topic	Subtopic	Sub-Subtopic or Question	Included in 1st Cut	Excluded from 1st Cut
<b>86</b>	<b>3. Physical Resources</b>					
87	Physical	Capital Projects				
88	Physical	Components				
89	Physical	Entrances				
90	Physical	Facility				
91	Physical	Facility	Components		Some	
92	Physical	Facility	Components	Childcare/Preschool		N
93	Physical	Facility	Components	GS thtr?	Y	
94	Physical	Facility	Components	Have Store?	Y	
95	Physical	Facility	Components	Have Food?	Y	
96	Physical	Facility	Components	Public Library Branch		N
97	Physical	Facility	Components	# of Bldgs		N
98	Physical	Facility	Components	Own or Rent	Y	
99	Physical	Facility	Sites			
100	Physical	Facility	Sites	Satellites	Y	
101	Physical	Facility	Sites	# of Sites	Y	
102	Physical	Facility	Size			
103	Physical	Facility	Size	Gross Bldg	Y	
104	Physical	Facility	Size	Interior Exhibit Net SF		N
105	Physical	Facility	Size	Traveling Net SF		N
106	Physical	Facility	Size	Off-Site		N
107	Physical	Facility	Size	Outdoor		N
108	Physical	Facility	Size	Public SF		N
109	Physical	Facility	Size	By Category (Small, Med. Large)		N
110	Physical	IT				
111	Physical	Environ. Sustain.				
112	Physical	LEED		Certification	Y	
113	Physical	Other				
<b>114</b>	<b>4. Collections</b>				Y	
115	Collect	Acquisitions				N
116	Collect	Borrowed				N
117	Collect	Collections				N
118	Collect	Collections		# Works of Art		N
119	Collect	Collections		Emphasis		N
120	Collect	Collections		Own or Manage		N
121	Collect	Digital				N
122	Collect	Inventory				N
123	Collect	Loaned				N
124	Collect	Ownership				N
125	Collect	Primary				N
126	Collect	Permanent				N
127	Collect	Subjects				N
128	Collect	Subjects	Prime Subjects			N

**Table D.4 (Part 3 of 6)**

Source: White Oak Institute and the American Association of Museums



31 March 2011

**List of Topics Included and Excluded from 1<sup>st</sup> Cut of Data Elements (continued)**  
IMLS Museums Count

Index	Subject	Topic	Subtopic	Sub-Subtopic or Question	Included in 1st Cut	Excluded from 1st Cut
129	<b>5. Human Resources</b>					
130	HR	Benefits				N
131	HR	Diversity				N
132	HR	Other				N
133	HR	Staffing				N
134	HR	Staffing		FT	Y	
135	HR	Staffing		PT	Y	
136	HR	Staffing		FTE of PT		N
137	HR	Staffing		Total FTE		N
138	HR	Staffing	By Dept.			N
139	HR	Staffing	Independent Contractors			N
140	HR	Staffing	Interns			N
141	HR	Volunteers				
141	HR	Volunteers	# of Volunteers		Y	
142	HR	Volunteers	Volunteer Hours		Y	

**Table D.4 (Part 4 of 6)**

Source: White Oak Institute and the American Association of Museums





31 March 2011

**List of Topics Included and Excluded from 1<sup>st</sup> Cut of Data Elements (continued)**  
IMLS Museums Count

Index	Subject	Topic	Subtopic	Sub-Subtopic or Question	Included in 1st Cut	Excluded from 1st Cut
143	<b>6.0 Finance:</b>					
144	<b>6.1 Operating</b>					
145	Fin: Op	Accounting Method				N
146	Fin: Op		Audit			N
147	Fin: Op	Anomaly				N
148	Fin: Op	Audit				N
149	Fin: Op	Endowment			Y	
150	Fin: Op	Expenses			Y	
151	Fin: Op	Expenses	Ads/PR/Mktg			N
152	Fin: Op	Expenses	By Category/Porg, Admin, Fundraise like 990			N
153	Fin: Op	Expenses	Collections			N
154	Fin: Op	Expenses	Contracted Services			N
155	Fin: Op	Expenses	Depreciation			N
156	Fin: Op	Expenses	Fundraising			N
157	Fin: Op	Expenses	Non-Operating			N
158	Fin: Op	Expenses	Staffing			N
159	Fin: Op	Expenses	Total		Y	
160	Fin: Op	Expenses	Web			N
161	Fin: Op	Grants and Contracts				N
162	Fin: Op	In-Kind				N
163	Fin: Op	Investments				N
164	Fin: Op	Membership				N
165	Fin: Op	Net Income				N
166	Fin: Op	Other				
167	Fin: Op	Rent/Mortgage				N
168	Fin: Op	Revenue				
169	Fin: Op	Revenue	Earned	Int/Div		N
170	Fin: Op	Revenue	Audit			N
171	Fin: Op	Revenue	Earned	Total	Y	
172	Fin: Op	Revenue	Earned	Programs		N
173	Fin: Op	Revenue	Earned	Admissions		N
174	Fin: Op	Revenue	Earned	Int/Div		N
175	Fin: Op	Revenue	Endowment		Y	
176	Fin: Op	Revenue	Endowment	Operating Income		N
177	Fin: Op	Revenue	Endowment	w. Interest Income		N
178	Fin: Op	Revenue	Facility Rentals			N
179	Fin: Op	Revenue	Investments			N
180	Fin: Op	Revenue	In-Kind			N
181	Fin: Op	Revenue	Grants and Contracts			N
182	Fin: Op	Revenue	Memberships			N
183	Fin: Op	Revenue	Non-Operating			N
184	Fin: Op	Revenue	Support Org			N
185	Fin: Op	Revenue	Parent org			N
186	Fin: Op	Revenue	Private	Total	Y	
187	Fin: Op	Revenue	Private	By Category		N
188	Fin: Op	Revenue	Public	Total	Y	
189	Fin: Op	Revenue	Public	By Category		N
190	Fin: Op	Revenue	Public	Grants		N
191	Fin: Op	Revenue	Support (contributed)	Total		N
192	Fin: Op	Revenue	Support (contributed)	Unrestricted/Restr		N
193	Fin: Op	Revenue	Total	Total	Y	
194	Fin: Op	Tax				N
195	Fin: Op	Ticketing			Y	
196	Fin: Op	Ticketing	Admission Charge		Y	
197	Fin: Op	Ticketing	Admission Charge	Adult		N
198	Fin: Op	Ticketing	Admission Charge	Child		N
199	Fin: Op	Ticketing	Admission Charge	Senior		N
200	Fin: Op	Ticketing	Free, Charge or Suggested Donation		Y	
201	Fin: Op	Ticketing	Free		Y	
202	Fin: Op	Web				

**Table D.4 (Part 5 of 6)**

Source: White Oak Institute and the American Association of Museums



31 March 2011

**List of Topics Included and Excluded from 1<sup>st</sup> Cut of Data Elements (continued)**  
IMLS Museums Count

Index	Subject	Topic	Subtopic	Sub-Subtopic or Question	Included in 1st Cut	Excluded from 1st Cut
<b>203</b>	<b>6.0 Finance (continued)</b>					
204	<b>6.2 Capital</b>					
205	Fin:Cap	Campaigns				N
206	Fin:Cap	Capital Projects			Y	
207	Fin:Cap	Capital Projects	Expenses		Y	
208	Fin:Cap	Capital Projects	Facility			N
209	Fin:Cap	Capital Projects	Facility	Year recent expansion		N
210	Fin:Cap	Interest				N
211	Fin:Cap	Investments				N
212	<b>6.3 Balance Sheet</b>					
213	Fin: Bal	Assets	Total		Y	
214	Fin: Bal	Assets	Total	All	Y	
215	Fin: Bal	Assets	Total	Restricted/Unrestr		N
216	Fin: Bal	Assets	Current			N
217	Fin: Bal	Assets	Non-Current			N
218	Fin: Bal	Investments				
219	Fin: Bal	Investments	All Other			N
220	Fin: Bal	Investments	Endowment		Y	
221	Fin: Bal	Investments	Endowment	All		N
222	Fin: Bal	Investments	Endowment	Restricted/Unrestr		N
223	Fin: Bal	Investments	Endowment	Value close of year	Y	
224	Fin: Bal	Investments	Reserve Fund			N
225	Fin: Bal	Liab & Net Assets				N
226	Fin: Bal	Liab & Net Assets	Current			N
227	Fin: Bal	Liab & Net Assets	Net Assets			N
228	Fin: Bal	Liab & Net Assets	Non-Current			N
229	Fin: Bal	Loans & Mortg				N
230	Fin: Bal	Loans & Mortg	All Other			N
231	Fin: Bal	Loans & Mortg	Credit Line			N
232	Fin: Bal	Loans & Mortg	Mortgages			N
<b>233</b>	<b>7. Other</b>					
234	Other	Economic Impact				N
235	Other	Grants and Contracts				N
236	Other	Other				
237	Other	Other		Date form completed		N
238	Other	Other		Biggest Need		N
239	Other	Partnerships			Y	
240	Other	Research				N
241	Other	Web				
242	Other	Web		On the Internet?	Y	
243	Other	Web		On site or other?		N

**Table D.4 (Part 6 of 6)**

Source: White Oak Institute and the American Association of Museums

Based on the review and analysis of the surveys, the Research Team created a 1<sup>st</sup> Cut list that was sent to the Expert Reviewers with instructions to vote for 50 of the 75



31 March 2011

**Recommended Data Elements - 1st Cut**  
IMLS Museums Count

Source 1st Cut Count		Recommended Data Elements (1st Cut)
<b>1. Institution</b>		
Comp	1	Support Organization separately incorporated?
Spec	2	Name by which Museum is known (if different from legal name)
Comp	3	Fiscal Year
New	4	Museum Purpose(s) (categories to choose from)
New	5	Outcomes (categories to choose from)
New	6	Impacts (categories to choose from)
Comp	7	Year opened to the public
New	8	Service Area (market definition) - to allow census to provide population count
New	9	Conduct Evaluation?
New	10	Conduct Performance Assessments?
New	11	Have a Strategic Plan?
<b>2. Engagements</b>		
<b>Attendance</b>		
Comp	12	Attendance Free
Comp	13	Attendance: Gate Admissions
Comp	14	Attendance Off-site
Comp	15	Attendance On-site
Comp	16	K-12 children served in school groups
Comp	17	School children served on-site in school groups
<b>Audience Profile and Target Audience</b>		
Comp	18	Audience Description(s)
New	19	Offer targeted programming for homeschooled students?
New	20	Offer targeted programming for underserved populations?"
<b>Board</b>		
Comp	21	Have a Board?
<b>Community Relationships</b>		
Comp	22	Partnerships with other orgs
<b>Membership</b>		
Comp	23	Offer Memberships?
<b>Open to the Public</b>		
Comp	24	Hours or days open to the public
<b>Programs</b>		
Comp	25	Programs offered
Comp	26	Services to the Public
New	27	Outcomes and impacts
<b>Web and Virtual Engagements</b>		
Comp	28	Is museum represented on the Internet?
Comp	29	Social media
Comp	30	Virtual Visits

**Table D.5 (Part 1 of 3)**

Source: White Oak Institute and the American Association of Museums



31 March 2011

**Recommended Data Elements - 1st Cut (continued)**  
IMLS Museums Count

Source	1st Cut Count	Recommended Data Elements (1st Cut)	
3. Physical Resources			
		Components and Size	
Comp	31	Own or lease facility?	
Comp	32	Have a store?	
Comp	33	Have on-site food services?	
Comp	34	Which of the following facilities are at your institution? (Galleries, GS Thtr, Planet, Perf. Thtr, Pre-School, Charter School, etc.)	
		Environmental Sustainability	
Comp	35	LEED Certification	
Spec	36	Plan to reduce impact on the environment	
		Sites	
Comp	37	Satellites	
Comp	38	Number of Sites	
Comp	39	Accessible by mass transit?	
		Size	
Comp	40	Total Building Gross SF	
4. Collections			
Comp	41	Permanent collections	
Comp	42	Collections By Subject	
Spec	43	Annual budget for collections care	
5. Human Resources			
		Staffing	
Comp	44	Total number full-time	
Comp	45	Total number part-time	
		Volunteers	
Comp	46	Number of volunteers	
Comp	47	Volunteer Hours	

**Table D.5 (Part 2 of 3)**

Source: White Oak Institute and the American Association of Museums



31 March 2011

**Recommended Data Elements - 1st Cut (continued)**  
IMLS Museums Count

Source	1st Cut Count	Recommended Data Elements (1st Cut)	
6. Finance			
		6.1 Finance: Operating	
Comp	48	Year an anomaly?	
New	49	Business Model (revenue sources by audience-tourist, children, etc.)	
		Revenue	
Comp	50	Total Earned Revenue	
Comp	51	Total Private Revenue	
Comp	52	Total Public/Government Revenue	
Comp	53	Total Interest/Endowment Revenue	
Comp	54	Total Revenue	
Comp	55	Revenue Sources by category (admissions, store, etc.)	
Comp	56	Revenue - Grants and Contracts	
Comp	57	Revenue - Admissions	
Comp	58	Revenue - Memberships	
Comp	59	Revenue - Support from Parent Organization	
Comp	60	Revenue - Investment/Interest/Endowment Income for Operations	
		Expenses	
Comp	61	Total Expenses (number)	
Comp	62	Total Personnel Expenses (Salaries and Benefits)	
Comp	63	Building Maintenance Costs	
Comp	64	Expenses by Dept. or Category	
Comp	65	Free, charge or suggested donation?	
Comp	66	Free admissions days?	
Comp	67	Ticket prices	
		6.2 Finance: Capital	
Comp	68	Capital Expenditures - All	
Comp	69	Capital Expenditures - Facilities	
Comp	70	Capital Campaign	
New	71	Capital Needs	
New	72	Construction projected started/completed w/in past year?	
		6.3 Finance: Balance Sheet	
Comp	73	Total Assets	
Comp	74	Total Assets: Restricted vs. Unrestricted	
Comp	75	Have endowment?	
Comp	76	Value of Endowment	
	76	TOTAL COUNT	

**Table D.5 (Part 3 of 3)**

Source: White Oak Institute and the American Association of Museums



31 March 2011

## EXPERT REVIEWER AND STAKEHOLDER SURVEY RESULTS

### ATTACHMENT E

The tables in this Attachment E present summary data from the Expert Reviewer and Stakeholder survey administered through SurveyMonkey February 16, 2011 through March 1, 2011. The most recent (02/11/11) set of 76 proposed questions and definitions for the IMLS *National Museum Census* was included in the survey, and survey participants rated each question for importance and difficulty and made 1,333 comments with specific suggestions, most of which have been incorporated in these recommendations.

Importance was rated for four categories relating to potential users of the Census: Advocacy, the public, museum managers and museum supporters. The scale ranged from 1 (unimportant) to 5 (most important), with 3 as “neutral.”

The ratings regarding difficulty were also based on a five-point scale ranging from 1 (easy to answer) to 5 (very complicated to answer, with 3 being “somewhat complicated to answer). Note: The current draft addressed some of the difficulties.

A rating regarding obstacles to answering the questions was also included with nine possible obstacles to choose from such as: “I’m not sure who has the answer at my museum;” “the question does not seem to apply to our museum;” “we don’t collect the data this way;” to “not sure we should make this information public,” and; “the question as worded is unclear.”

**Rating of Importance by Category – All Questions in the Survey**  
IMLS Museums Count

	Advocacy	The Public	Management	Supporters	Average of All
<b>Average</b> of average ratings	4.16	3.55	4.37	4.24	4.08
<b>Median</b> of average ratings	4.22	3.49	4.38	4.31	4.13
<b>Maximum</b> of average ratings	4.74	4.87	4.81	4.66	4.58
<b>Minimum</b> of average ratings	3.53	2.56	3.5	3.39	3.48

**Table E.1**

Source: Survey administered on SurveyMonkey February 16, 2011 through March 1, 2011, White Oak Institute, American Association of Museums



31 March 2011

**Rating of Difficulty – All Questions in the Survey**  
IMLS Museums Count

Average of average ratings	1.64
Median of average ratings	1.57
Maximum of average ratings	2.41
Minimum of average ratings	1.03

**Table E.2**

Source: Survey administered on SurveyMonkey February 16, 2011 through March 1, 2011, White Oak Institute, American Association of Museums

**Difficulty by Category and Percentage of Respondents – All Questions in the Survey**  
IMLS Museums Count

	Easy to Answer	Somewhat Easy	Somewhat Complicated	Complicated	Very Complicated
Average	60%	23%	12%	4%	1%
Median	62%	22%	10%	2%	0%
Maximum	97%	43%	36%	13%	7%
Minimum	21%	3%	0%	0%	0%

**Table E.3**

Source: Survey administered on SurveyMonkey February 16, 2011 through March 1, 2011

**Obstacles to Answering Questions – All Questions in the Survey**  
IMLS Museums Count

Obstacles to Answering Questions	Average	Median	Maximum	Minimum	Sum - All Questions
<b>Answer Options and Response Percent</b>					
The question does not seem to apply to our museum	25%	25%	77%	0%	1504%
We don't collect the data this way	18%	17%	63%	0%	1100%
We don't collect this data at all	11%	9%	52%	0%	689%
I would need to get approval from someone else before answering	22%	18%	71%	0%	1328%
I'm not sure who has the answer at my museum	30%	28%	68%	0%	1798%
Not sure we should make this information public	17%	11%	67%	0%	1000%
The question as worded is unclear	21%	17%	58%	0%	1244%
The question as worded is incomplete (see comments below)	10%	8%	50%	0%	617%
I don't understand the question at all	1%	0%	11%	0%	89%
<b>answered question</b>	<b>18.2</b>	<b>17.5</b>	<b>35</b>	<b>3</b>	<b>1092</b>
<b>skipped question</b>	<b>53.8</b>	<b>54.5</b>	<b>69</b>	<b>37</b>	<b>3228</b>

**Table E.4**

Source: Survey administered on SurveyMonkey February 16, 2011 through March 1, 2011





31 March 2011

**Questions Rated Most Important by 50% or More Respondents in at Least Three Categories of Importance**  
IMLS Museums Count

Question Number	Type	Question (Excerpt)	Percentage "most important"					# Categories Ranked 50%+ as most important	Difficulty
			Advocacy	Public	Mgmt	Support	avg		
QF3	Finance	Charge Admission?	58.62%	72.41%	65.52%	56.90%	63.36%	4	97%
QA10 (A10.1)	Institutional	Mission Statement	51.79%	57.14%	69.64%	66.07%	61.16%	4	94%
QA4	Institutional	Type	75.41%	67.21%	52.54%	62.71%	64.47%	4	58%
QA2	Institutional	Address	55.56%	90.48%	50.82%	75.81%	68.16%	4	88%
QF2.1	Finance	Personnel Expenses	57.89%	8.77%	80.70%	52.63%	50.00%	3	62%
QB4	Engagements	# Days Open	47.46%	89.83%	55.93%	55.93%	62.29%	3	95%
QA9	Institutional	Purposes	51.72%	43.86%	56.14%	61.40%	53.28%	3	30%
QB11	Engagements	K-12 children served	63.16%	29.82%	58.62%	65.52%	54.28%	3	44%
QB1	Engagements	On-site visits	67.80%	25.42%	76.27%	62.71%	58.05%	3	36%
QB2	Engagements	On-site Participation	56.36%	27.27%	60.71%	64.29%	52.16%	3	25%
QD1	Collections	Own/Manage Collections?	59.65%	43.86%	64.91%	50.88%	54.82%	3	66%
QB3	Engagements	Off-site Participation	50.00%	25.86%	54.24%	54.24%	46.08%	3	33%
QA5	Institutional	Governance	54.84%	30.16%	57.38%	65.08%	51.86%	3	63%
QF1	Finance	Operating Revenue	58.62%	10.34%	81.03%	63.79%	53.45%	3	61%
QF2	Finance	Operating Expenses	54.39%	19.30%	80.70%	64.91%	54.82%	3	67%
QF1.1.3	Finance	Sources of Public Funding	55.17%	20.69%	68.42%	60.34%	51.16%	3	72%
QF1.1	Finance	Revenue Breakdown by Category	52.63%	10.53%	75.44%	56.14%	48.68%	3	37%

**Table E.5**

Source: Survey administered on SurveyMonkey February 16, 2011 through March 1, 2011, White Oak Institute, American Association of Museums



31 March 2011

**SurveyMonkey Results of Voting on Importance by Subject Category (Sorted by the average of all categories.)**  
IMLS Museums Count

Question Number	Type	Question (Excerpt)	IMPORTANCE - ADVOCACY		IMPORTANCE - PUBLIC		IMPORTANCE - MANAGEMENT		IMPORTANCE - SUPPORTERS		ALL CATEGORIES
			Rating Average	Re-sponse Count	Rating Average	Re-sponse Count	Rating Average	Re-sponse Count	Rating Average	Re-sponse Count	Average
QF3	Finance	Charge Admission?	4.52	58	4.69	58	4.59	58	4.50	58	4.58
QF3.1	Finance	Adult and Other Solo Tx Price?	4.35	57	4.61	56	4.58	57	4.35	57	4.47
QA10 (A10.1)	Institutional	Mission Statement	4.25	56	4.32	56	4.63	56	4.66	56	4.47
QA4	Institutional	Type	4.74	61	4.54	61	4.14	59	4.42	59	4.46
QB4	Engagements	# Days Open	4.22	59	4.81	59	4.31	59	4.42	59	4.44
QA2	Institutional	Address	4.24	63	4.87	63	4.00	61	4.60	62	4.43
QA9	Institutional	Purposes	4.40	58	4.21	57	4.53	57	4.54	57	4.42
QB11	Engagements	K-12 children served	4.58	57	3.89	57	4.53	58	4.64	58	4.41
QB12 (B12.1-12.2)	Engagements	Free days?	4.26	58	4.41	58	4.39	57	4.43	58	4.37
QB1	Engagements	On-site visits	4.59	59	3.59	59	4.71	59	4.59	59	4.37
QD1.2	Collections	Online Access?	4.32	57	4.35	57	4.32	57	4.29	56	4.32
QB6	Engagements	Programs offered On-site	4.21	58	4.34	58	4.28	58	4.35	57	4.30
QB2	Engagements	On-site Participation	4.47	55	3.67	55	4.52	56	4.50	56	4.29
QC1	Facilities	Venues and Amenities	4.05	56	4.48	56	4.41	56	4.18	56	4.28
QD1	Collections	Own/Manage Collections?	4.44	57	3.89	57	4.46	57	4.26	57	4.26
QE3	HR	Volunteers and How Many	4.48	58	3.67	58	4.50	58	4.33	58	4.25
QB9	Engagements	Target Audience	4.22	58	4.00	58	4.45	58	4.31	58	4.25
QB3	Engagements	Off-site Participation	4.43	58	3.64	58	4.47	59	4.39	59	4.23
QB8	Engagements	Digital/Virtual Platforms Used	4.19	58	4.34	58	4.31	58	4.09	58	4.23
QB7	Engagements	Programs offered Off-site	4.22	54	4.13	54	4.26	54	4.31	54	4.23
QA5	Institutional	Governance	4.45	62	3.75	63	4.25	61	4.43	63	4.22
QF1	Finance	Operating Revenue	4.53	58	2.98	58	4.81	58	4.55	58	4.22
QF2	Finance	Operating Expenses	4.44	57	3.02	57	4.81	57	4.60	57	4.22
QF5	Finance	Engaged in Capital Campaign?	4.02	57	3.60	57	4.61	57	4.63	57	4.22
QF1.1.3	Finance	Sources of Public Funding	4.45	58	3.22	58	4.60	57	4.53	58	4.20
QF4	Finance	Have Endowment?	4.37	57	3.07	57	4.70	56	4.60	57	4.19
QD3.1 (D3.1.1 -	Collections	Preservation Mission?	4.52	52	3.27	52	4.62	53	4.32	53	4.18
QD2	Collections	Types of Objects/Collections	4.26	54	4.04	54	4.33	54	4.09	54	4.18
QF5.1	Finance	Engaged Cap. Camp: Uses	4.02	55	3.46	56	4.59	56	4.56	55	4.16
QF1.1	Finance	Revenue Breakdown by Category	4.42	57	2.98	57	4.70	57	4.49	57	4.15

**Table E.6 (Part 1 of 2)**

Source: Survey administered on SurveyMonkey February 16, 2011 through March 1, 2011, White Oak Institute, American Association of Museums



31 March 2011

**SurveyMonkey Results of Voting on Importance by Subject Category (Sorted by the average of all categories.)**  
IMLS Museums Count

Question Number	Type	Question (Excerpt)	IMPORTANCE - ADVOCACY		IMPORTANCE - PUBLIC		IMPORTANCE - MANAGEMENT		IMPORTANCE - SUPPORTERS		ALL CATEGORIES
			Rating Average	Re-sponse Count	Rating Average	Re-sponse Count	Rating Average	Re-sponse Count	Rating Average	Re-sponse Count	Average
QE3.1	HR	Volunteer Hours	4.41	56	3.21	56	4.50	56	4.30	56	4.11
QB10	Engagements	Memberships	4.18	60	3.47	60	4.47	60	4.27	60	4.10
QD1.1	Collections	How Many Objects?	4.30	57	3.54	57	4.37	57	4.05	56	4.07
QF2.1	Finance	Personnel Expenses	4.40	57	2.70	57	4.77	57	4.35	57	4.06
QC3	Facilities	# Sites/Locations	3.93	55	3.93	55	4.24	55	4.00	55	4.03
QB8.1	Engagements	Digital/Virtual Content	3.86	58	4.09	58	4.22	58	3.93	58	4.03
QF4.1	Finance	Value of Endowment	4.09	57	2.77	57	4.65	57	4.53	57	4.01
QF1.1.2	Finance	Admissions Revenue	4.19	57	2.86	57	4.63	57	4.34	56	4.01
QF1.1.1	Finance	Support Org Operating Revenue	4.09	57	3.07	57	4.46	57	4.33	57	3.99
QA6 (A6.1)	Institutional	Parent Org?	4.02	58	3.48	58	4.16	58	4.28	58	3.99
QF6.1	Finance	Completed Cap. Camp: Intended	3.87	55	3.40	55	4.27	55	4.27	55	3.95
QD2.1	Collections	Focus of Collection	3.93	55	3.91	55	4.00	54	3.95	55	3.95
QF1.1.4	Finance	Parent Org Operating Revenue	4.22	55	2.89	54	4.35	55	4.33	55	3.95
QE1	HR	Full-time non-seasonal	4.37	57	2.77	56	4.58	57	4.00	57	3.93
QF4.2	Finance	% Endow't for Operations	4.04	54	2.63	54	4.61	54	4.36	53	3.91
QF5.2	Finance	When Cap. Campaign Started?	3.60	57	3.32	57	4.26	57	4.23	57	3.85
QB5	Engagements	# of Venues	3.65	54	3.83	54	4.07	54	3.76	54	3.83
QA8	Institutional	Year First Serving Public	4.05	59	3.49	59	3.75	59	3.92	59	3.80
QB13	Engagements	Partnerships	3.93	58	3.02	58	4.28	57	3.97	58	3.80
QA7 (A7.1)	Institutional	Support Org?	3.70	56	3.41	56	3.95	57	4.14	57	3.80
QE2	HR	Part-time non-seasonal	4.16	58	2.67	58	4.40	58	3.84	58	3.77
QF6.2	Finance	When Cap. Campaign Concluded?	3.70	54	3.11	54	4.17	54	4.09	54	3.77
QF1.2	Finance	Categoires of parent org support	4.04	55	2.69	55	4.27	55	4.00	55	3.75
QF6	Finance	Completed a Capital Campaign?	3.66	56	3.07	56	4.16	56	4.05	55	3.74
QC2.1.2	Facilities	Net Interior Exhibit SF	3.96	57	3.02	57	4.26	57	3.68	57	3.73
QA1	Institutional	Name	3.59	61	3.77	61	3.50	60	3.84	61	3.68
QE2.1	HR	Seasonal	4.03	58	2.57	58	4.17	58	3.74	58	3.63
QC2	Facilities	Gross Sq. Footage	3.78	60	2.93	60	4.13	60	3.62	60	3.62
QA3	Institutional	Fiscal Year	3.53	60	2.56	61	4.15	60	3.97	61	3.55
QC2.1.	Facilities	Developed Exterior Grounds	3.58	59	2.98	59	3.97	59	3.39	59	3.48

**Table E.6 (Part 2of 2)**

Source: White Oak Institute and the American Association of Museums, Survey administered on SurveyMonkey February 16, 2011 through March 1, 2011



31 March 2011

**SurveyMonkey Results of Voting on Difficulty (Sorted by average rating)**  
IMLS Museums Count

Question Number	Type	Question (Excerpt)	Easy to answer	Some-what easy to answer	Some-what complicated to answer	Complicated to answer	Very complicated to answer	Rating Average
QD2.1	Collections	Focus of Collection	12	20	16	5	3	2.41
QC2.1.	Facilities	Developed Exterior Grounds	16	21	12	7	3	2.32
QB9	Engagements	Target Audience	18	21	12	8	2	2.26
QB2	Engagements	On-site Participation	15	21	22	3	0	2.21
QF1.1	Finance	Revenue Breakdown by Category	22	17	12	7	2	2.17
QE3.1	HR	Volunteer Hours	24	15	12	8	2	2.16
QD1.1	Collections	How Many Objects?	25	13	10	7	3	2.14
QC2	Facilities	Gross Sq. Footage	25	14	16	6	2	2.14
QA9	Institutional	Purposes	18	25	11	4	2	2.12
QB5	Engagements	# of Venues	22	15	12	5	2	2.11
QB3	Engagements	Off-site Participation	20	19	20	1	0	2.03
QB8.1	Engagements	Digital/Virtual Content	21	24	15	1	1	1.98
QB1	Engagements	On-site visits	22	21	17	1	0	1.95
QC2.1.2	Facilities	Net Interior Exhibit SF	31	14	9	6	2	1.94
QB11	Engagements	K-12 children served	27	17	12	5	0	1.92
QB13	Engagements	Partnerships	29	12	15	2	0	1.83
QB8	Engagements	Digital/Virtual Platforms Used	30	19	12	1	1	1.79
QB7	Engagements	Programs offered Off-site	23	25	10	0	0	1.78
QF4.2	Finance	% Endow't for Operations	31	16	8	4	0	1.75
QF1	Finance	Operating Revenue	37	13	5	2	4	1.74
QB6	Engagements	Programs offered On-site	26	23	8	1	0	1.72
QF1.1.1	Finance	Support Org Operating Revenue	36	15	5	4	1	1.67
QA4	Institutional	Type	36	13	11	2	0	1.66
QB12 (B12.1-12.2)	Engagements	Free days?	36	14	11	1	0	1.63
QF2.1	Finance	Personnel Expenses	36	12	7	2	1	1.62
QA7 (A7.1)	Institutional	Support Org?	38	14	8	3	0	1.62
QD3.1 (D3.1.1 -	Collections	Preservation Mission?	35	13	10	1	0	1.61
QF2	Finance	Operating Expenses	40	11	4	3	2	1.60
QD1	Collections	Own/Manage Collections?	40	13	4	1	3	1.59
QC3	Facilities	# Sites/Locations	37	11	10	1	0	1.58

**Table E.7 (Part 1of 2)**

Source: White Oak Institute and the American Association of Museums, Survey administered on SurveyMonkey February 16, 2011 through March 1, 2011



31 March 2011

**SurveyMonkey Results of Voting on Difficulty (Sorted by average rating)**  
IMLS Museums Count

Question Number	Type	Question (Excerpt)	Easy to answer	Some-what easy to answer	Some-what complicated to answer	Complicated to answer	Very complicated to answer	Rating Average
QD1.2	Collections	Online Access?	38	12	7	1	1	1.56
QD2	Collections	Types of Objects/Collections	35	18	6	1	0	1.55
QA1	Institutional	Name	41	15	6	3	0	1.55
QF1.2	Finance	Categoires of parent org support	40	9	7	3	0	1.54
QE3	HR	Volunteers and How Many	37	16	6	1	0	1.52
QB10	Engagements	Memberships	41	12	6	1	1	1.51
QF4.1	Finance	Value of Endowment	38	16	2	2	1	1.51
QA8	Institutional	Year First Serving Public	40	18	6	1	0	1.51
QF1.1.4	Finance	Parent Org Operating Revenue	42	11	3	3	1	1.50
QF5.1	Finance	Engaged Cap. Camp: Uses	40	13	5	2	0	1.48
QF1.1.2	Finance	Admissions Revenue	42	12	4	3	0	1.48
QE2.1	HR	Seasonal	41	14	5	1	0	1.44
QF6.1	Finance	Completed Cap. Camp: Intended	41	12	2	3	0	1.43
QA5	Institutional	Governance	40	21	3	0	0	1.42
QF5.2	Finance	When Cap. Campaign Started?	41	14	4	1	0	1.42
QE2	HR	Part-time non-seasonal	43	11	5	0	1	1.42
QF1.1.3	Finance	Sources of Public Funding	44	14	0	2	1	1.39
QE1	HR	Full-time non-seasonal	43	11	4	0	1	1.39
QC1	Facilities	Venues and Amenities	43	14	4	0	0	1.36
QA6 (A6.1)	Institutional	Parent Org?	47	10	4	1	0	1.34
QF6.2	Finance	When Cap. Campaign Concluded?	45	10	2	2	0	1.34
QA3	Institutional	Fiscal Year	49	10	4	0	1	1.34
QF5	Finance	Engaged in Capital Campaign?	45	13	2	1	0	1.33
QF6	Finance	Completed a Capital Campaign?	45	8	2	2	0	1.32
QF4	Finance	Have Endowment?	50	10	0	1	0	1.21
QA2	Institutional	Address	57	7	1	0	0	1.14
QF3.1	Finance	Adult Tx Price?	54	4	1	0	0	1.10
QA10 (A10.1)	Institutional	Mission Statement	58	2	2	0	0	1.10
QB4	Engagements	# Days Open	60	2	1	0	0	1.06
QF3	Finance	Charge Admission?	59	2	0	0	0	1.03

**Table E.7 (Part 2 of 2)**

Source: White Oak Institute and the American Association of Museums, Survey administered on SurveyMonkey February 16, 2011 through March 1, 2011



*17 March 2011*

# SURVEY QUESTION RECOMMENDATIONS

*ATTACHMENT F*

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## Survey Question Recommendations

*Museums Count*

February 11, 2011

### Notes to Stakeholders and Expert Reviewers [this section will not appear in the Census]

Questions are not yet prioritized (except for earlier questions already deleted from previous rounds). One of your key jobs is to help us prioritize and clarify these draft questions. We will use the SurveyMonkey tool as a convenient way for you to comment on the ease or difficulty of answering each proposed question and the importance of the question to various potential users of Museums Count. The following is a link to the online SurveyMonkey tool, which will be active as of February 15, 2011: <https://www.surveymonkey.com/s/WFGL2Q6>.

Please use this hard copy as a review and reference document, but post your comments only on SurveyMonkey, not on this version. The SurveyMonkey version will only include the question numbers and headers but the response details and definitions are only in this version.

We are not asking Stakeholders to fill in any questions with actual data from a museum. Instead, we want you to tell us both how *complicated* you think the question might be to fill out and how *important* you think the answers might be to several key Census constituencies.

Questions are outlined logically in this document and not by priority. They are grouped into several broad categories. Details or questions about specific survey entries may also be grouped together for convenience and clarity.

Once we receive feedback from all of you we will then prioritize the questions. The final Census will most likely have several sections including: a relatively short list of questions with the goal of getting as many museums as possible to respond, followed by one or two additional sets of questions that would be “optional.” Technically, even the short list of questions will be optional, as IMLS has not power (or desire) to compel a museum to provide information.

- Black text is what we propose to include in the National Museum Census Survey
- **Green text** reflects comments from the research team and the Expert Reviewers and will not appear in the Census Survey

### About *Museums Count*, the IMLS National Museum Census

The intent of the Census is to include any entity that declares itself a “museum” and has a physical place accessible to the general public on some basis (we are still debating whether to include museums in the planning stage that do not yet have significant engagements with the public). Question A4 reflects this broad but implicit definition of “museum.” There are other questions that will allow others to filter by, for example, for-profit vs. non-profit, facility size or staffing. The intent of the Census is to be broad and inclusive. However, the Census does not intend to count totally private (i.e. inaccessible to ordinary visitors) or totally virtual museums, nor to include “museum-like areas” within non-museum contexts (collections shown in restaurants or stores, petting zoos at roadside stands, trophy cases, corporate lobby displays, etc.), or museum-like spaces whose primary function is retail (commercial art galleries, antique stores, craft fairs, etc.).



The Census is intended to collect a separate record for each geographically distinct museum (which is especially important for members of the general public, who commonly understand separate sites as separate museums). Contiguous museum campuses, zoos and parks that have several buildings 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.

## A. Institutional

A1. Name(s) by which the museum in this Census record is commonly known:

A1.1 Legal name of this museum or its parent organization (if different from its common name): \_\_\_\_\_

A1.2 The EIN# for this museum (or its parent organization): \_\_\_\_\_

A1.3 The DUNS # for this museum or its parent (not all museums may have a DUNS number): \_\_\_\_\_

A2. Please provide the address of this museum's physical location (use the main public entrance):

[boxes for address, city, state, zip+4]

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

A2.2 Please provide this museum's main phone number: \_\_\_\_\_

A2.3 Please provide this museum's primary public email address: \_\_\_\_\_

A2.4 Please provide this museum's primary website address, if you have one:

A3. Please indicate the final day of the fiscal year for which you are providing data to this Census. Note that all data you provide should come from this fiscal year. [formatted boxes for] DD/MM/YYYY

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

Aquarium  
Arboretum/Botanic Garden  
Art Museum  
Children's Museum  
Corporate Museum  
Ethnically/Culturally Specific Museum  
General or Interdisciplinary Museum  
Hall of Fame (e.g. music, sports, entertainment media)  
Historic House/Site  
History Museum/Historical Society  
Military Museum  
Nature Center  
Natural History Museum  
Science/Technology Center/Museum  
Specialized Museum  
Transportation Museum  
Tribal Museum  
Visitor Orientation Center  
Zoo

Note: Please look carefully at this list for both missing categories and political sensitivities. None of the existing surveys we researched were happy with their set of categories, although this one reflects both AAM's and the OMD's lists. For instance, the Expert Reviewers suggested deleting Anthropological Museum, replacing it with Ethnic/Cultural Museum. Some categories might be large enough to merit separate listings, like African-American Museums and Jewish Museums, but this might create a political need to list many other separate categories. Should Visitor Orientation Centers be included? We do not include an "Other" category, which forces a choice among the rest, leaving "specialized" as the miscellaneous category. In short, this question merits your special attention.

A5. Which of the following **best** describes this museum's governing authority? (Select just one.)

- ☐ For-profit
- ☐ Government (Municipal, County, Regional, State or Federal)
- ☐ Private non-profit
- ☐ Tribal
- ☐ Other: \_\_\_\_\_
- ☐ Dual governance (please indicate governing entities (use letters a through e): letter \_\_\_\_\_ and letter \_\_\_\_\_)

*Definitions:*

- The governing authority is the museum's 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 (see QA6), while in independent museums it may be the board of directors (in non-profits) or the owner (in for-profits).
- If the governing authority is a university or other larger organization, check private non-profit if it is a private non-profit university or organization, and government if it is a public university or organization
- Dual 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 (see QA7) do not count unless they have contractual authority over museum policy, budgets and the director.

A6. Does this museum have a parent organization?

- ☐ Yes      ☐ No

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

- ☐ College/university
- ☐ Corporation
- ☐ Museum or museum system (e.g., private non-profit, state, local, etc.)
- ☐ School system (other than post secondary)
- ☐ Other: \_\_\_\_\_

*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, state, or federal government; state historical societies supervising multiple sites; corporate foundation, 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.

A7. Do you have a separately incorporated support organization? (This may be known as an auxiliary, external support group, friends group, or affiliate organization.)

☐ Yes ☐ No

A7.1 If yes, please provide EIN# \_\_\_\_\_

A8. In what year did this museum first start serving the public (this may not be the same year in which it was founded or incorporated)? \_\_\_\_\_

A9. Museums 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 (least important) through 5 (most important). (Please rank no more than five purposes, even if other categories on the list are also important to your museum.)

\_\_\_\_\_ Building social capital and cultural bridging

\_\_\_\_\_ Community gathering place

\_\_\_\_\_ Contributing to the quality of life

\_\_\_\_\_ Developing workforce skills

\_\_\_\_\_ Economic impact

\_\_\_\_\_ Heritage preservation and collections conservation

\_\_\_\_\_ Individual and family lifelong learning

\_\_\_\_\_ Research and scholarship

\_\_\_\_\_ Responding to neighborhood needs and vitality

\_\_\_\_\_ Support for formal education, i.e., school and teacher programs

\_\_\_\_\_ Tourism

As this is a new area of questioning, please pay special attention to the list, looking for omissions that are not sub-sets of any of the above.

A10. Does this museum have a formally adopted mission statement?

☐ Yes ☐ No

A10.1 If yes, please paste it here:

**B. Engagements**

B1. Please indicate the number of on-site visits to this museum during the fiscal year:

\_\_\_\_\_

*Definitions:*

- Include only those coming to the museum primarily to visit one or more of your on-site visitor venues (see a list of possible venues in QC1). These visits are often called gate admissions, paid attendance, ticket sales, or turnstile counts.

- 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. However, one person who visits on two separate days should be counted as two visits.
- Do not include those who come to the museum primarily for other purposes, such as for attending classes, lectures and function events. These are covered by the next question.

B2. Please indicate total on-site participation in museum programs or services during the fiscal year: \_\_\_\_\_

*Definitions:*

- On-site museum programs and services include classes, workshops, labs, lectures, camp-ins, conferences and meetings, studio sessions, open appraisals, meet-ups and more (see a list of possibilities in QB6), provided they are operated by the museum.
- Do not include participations in programs that are part of or inside a visitor venue, like gallery demonstrations, auditorium shows or audio tours.
- Include only those programs that people can access independently of the museum's visitor venues. In other words, do not double-count with the previous question.
- Do not include 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.

B3. Please indicate total off-site participation in museum programs or services during the fiscal year: \_\_\_\_\_

*Definitions:*

- Off-site museum programs and services include classes, workshops, labs, lectures, camp-ins, conferences and meetings, studio sessions, open appraisals, meet-ups, travel programs and tours, and more (see a list of possibilities in QB7), provided they are operated by the museum and are held at locations remote from the museum location, such as schools, libraries, fairs, senior centers or other off-site physical locations.
- If you do not operate off-site programs and services, please enter "0."
- Do not include media/web/online/virtual participations or estimated viewers of media productions such as TV shows, podcasts, or radio broadcasts. The emphasis of this question is face-to-face engagements between people and your museum. (See QB8 for virtual and media engagements.)
- Do not include attendance at travelling exhibitions produced by you but located at another museum, or incidental engagements such as people reading publications produced by you.

Based on your responses to QB1, B2 and B3, this museum had \_\_\_\_[auto-calculated]\_\_ face-to face engagements during the fiscal year in addition to an uncounted number of media and virtual engagements.

B4. When is this museum 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
- ☐ Open 250 days or more per year

*Definitions:*

- Open refers to public access to at least one of the museum's venues (see QC1 for a list of possibilities).
- Open means that the venue is available for the general public to visit at least four hours in a day and without need of a reservation (sometimes called "on a walk-up basis") and according to the museum's publicly announced admissions policy (see QF3). Admissions may be free or paid or in some combination.
- This question refers to the museum's normal operating schedule, and does not include extra-ordinary periods of closure due to construction or accidents. Funding cuts that curtail hours are not considered extra-ordinary unless the funding cut is clearly temporary (i.e., has a formal end date of less than one year after the initial curtailment).

B5. Please tell us how many on-site, separately controlled visitor venues your museum has at this physical location.

- ☐ One
- ☐ Two
- ☐ Three
- ☐ Four or more

*Definitions:*

- Every museum has at least one venue, sometimes known as "general admission."
- Separate visitor venues typically include museum galleries, giant screen theaters, planetariums, zoo grounds, visible collection storage areas, train rides, simulators, historic houses and artifacts (e.g., a submarine), separate travelling exhibition areas, etc.
- Separately controlled means that a museum's admission policy makes a distinction between different visitor experiences in public access or ticketing, whether paid or free. Frequently, only one venue is free and the others are paid.
- *Do* include areas inside other venues that always require a surcharge, like a planetarium or a 3D movie theater.
- *Do not* include areas that occasionally require a surcharge, like a blockbuster exhibition area that is normally included as part of the general admission, or a children's theater performance inside an auditorium that is normally free.
- *Do not* include programs and services addressed in QB2, even if they are held in dedicated facilities like a learning center or event center.

- B6. Please tell us how many of the following programs, services and other non-visitor offerings you regularly offer on-site: (Check all that apply)
- ☐ Art school
  - ☐ Birthday or other parties
  - ☐ Charter, magnet or other school in the K-12 system (if run by you)
  - ☐ Conferences or corporate meetings
  - ☐ Conservation center commissions
  - ☐ Film series (other than regularly scheduled giant-screen or planetarium screenings)
  - ☐ Learning programs for college/university students
  - ☐ Learning programs for the general public
  - ☐ Learning programs for home-schoolers
  - ☐ Learning programs for school groups
  - ☐ Meet-ups on-site for web-based social communities/groups
  - ☐ On-site citizen action programs
  - ☐ Open public events (e.g. a blood drive or winning sports team homecoming)
  - ☐ Overnight camp-in programs
  - ☐ Pre-school/day care sessions
  - ☐ Private functions on a rental basis
  - ☐ Public access computer labs or terminals
  - ☐ Summer camps
  - ☐ Teacher programs
  - ☐ Volunteer programs (see also QE3)
  - ☐ Other non-visitor programs or services

*Definitions:*

- Do not include those that are part of another service, like programs offered as part of the museum gallery experience.

As this is a new area of questioning, please pay special attention to the list, looking for omissions that are not sub-sets of any of the above. We may want to group these under subheadings or condense the list.

- B7. Please tell us how many of the following programs, services and other non-visitor offerings you regularly offer off-site: (Check all that apply.)
- ☐ Camp-ins off-site
  - ☐ Programs in other youth settings
  - ☐ Programs in schools (for students)
  - ☐ Programs in schools (for teachers)
  - ☐ Speaking/lectures off-site
  - ☐ Travelling exhibitions touring to other museums
  - ☐ Travel programs
  - ☐ Van or bus touring programs
  - ☐ Other types off-site programs: \_\_\_\_\_
  - ☐ We do not regularly offer off-site programs and services

*Definitions:*

- Off-site programs are also sometimes called outreach programs.
- The emphasis here is on face-to-face engagements outside the museum location; for media and virtual engagements. (See QB8)



- Include only programs where the museum has the principal responsibility for content and delivery; do not include programs produced by others where the museum may serve as an advisor or sponsor but is not directly in charge of content or delivery.

As this is a new area of questioning, please pay special attention to the list, looking for omissions that are not sub-sets of any of the above

B8. How many of the following media/web/online/virtual platforms do you use regularly to engage with the public (Please check all that apply, and provide public access information (URL, hashtag, etc.) if you wish.)

<u>Media Platform</u>	<u>Access Information</u>
<input type="checkbox"/> Annual Reports (available to the public)	_____
<input type="checkbox"/> Articles or columns in print publications (newspapers or periodicals)	_____
<input type="checkbox"/> Blogs	_____
<input type="checkbox"/> Distance learning programs (including webinars)	_____
<input type="checkbox"/> Location-based services (such as Foursquare)	_____
<input type="checkbox"/> Mobile application(s)	_____
<input type="checkbox"/> Mobile services (including apps)	_____
<input type="checkbox"/> Podcasts	_____
<input type="checkbox"/> Print periodicals (regular newspaper columns or museum magazine)	_____
<input type="checkbox"/> Print publications (books, catalogues, curriculum materials)	_____
<input type="checkbox"/> Radio segments	_____
<input type="checkbox"/> Social media site(s)	_____
<input type="checkbox"/> Video segments for TV or cable	_____
<input type="checkbox"/> Virtual reality sites (such as Second Life)	_____
<input type="checkbox"/> Web site(s)	_____
<input type="checkbox"/> Wiki site(s)	_____
<input type="checkbox"/> Other _____	_____

*Definitions:*

- The emphasis of this question is on museum/audience engagements that are not face-to-face in the same physical space, but at least one step removed.
- Collectively, these are called “media engagements.”

As this is a new area of questioning, please pay special attention to the list, looking for omissions that are not sub-sets of any of the above

B8.1 Looking across all your media/web/online/virtual presences, what types of content do they collectively include? (Please check all that apply)

- ☐ Audience research questions
- ☐ Content research questions (e.g., crowdsourcing photo tags)
- ☐ Current events at the museum
- ☐ Curriculum guides for teachers
- ☐ Forums on topics related to our mission
- ☐ Games
- ☐ Links to your other virtual sites
- ☐ Marketing and visitor logistics
- ☐ News and current events related to our museum's subjects
- ☐ Online collection database
- ☐ Online database with publications
- ☐ Provenance or other research projects
- ☐ Scheduled educational programs, like webinars and distance learning
- ☐ The ability to purchase (and pay for) admission tickets
- ☐ The ability to purchase (and pay for) program and service fees
- ☐ The ability to purchase (and pay for) a museum membership
- ☐ The ability to make (and pay for) donations
- ☐ The ability to purchase items from the museum gift shop or bookstore
- ☐ Virtual community(ies) for museum users/fans
- ☐ Virtual exhibits
- ☐ Virtual tour(s) of this physical museum
- ☐ Other e-commerce activities (please describe) \_\_\_\_\_
- ☐ Other \_\_\_\_\_

As this is a new area of questioning, please pay special attention to the list, looking for omissions that are not sub-sets of any of the above. There is some overlap between this and QE1.2, which will be resolved in subsequent drafts.

The Expert Reviewers thought that page view counts are unreliable, and that the Census should not start with trying to count virtual engagements. As a result, an attempt to count such engagements has been cut.

B9. Which of the following do you consider the principal target audience for this museum?  
(Select just one)

- \_\_\_\_\_ Adults with children (i.e., families)
- \_\_\_\_\_ Adults 35+ either solo or with other adults
- \_\_\_\_\_ School and youth groups
- \_\_\_\_\_ Teens 13-17
- \_\_\_\_\_ Young adults (18-34) either solo or with other adults
- \_\_\_\_\_ We have a different target audience age/make-up (please describe): \_\_\_\_\_
- \_\_\_\_\_ We do not have a target audience

*Definitions:*

- This question is intended to look at the age of your principal audience; future questions might look at other aspects, like interests, geography, level of education, etc.
- Principal target audience refers to who you appeal to as your core audience and who you market to.
- Principal target audience should also account for the largest share of your engagements.

*As this is a new area of questioning, please pay special attention to the list, looking for omissions that are not sub-sets of any of the above*

- B10. How many active memberships (individual, family, etc., but *not* corporate) did this museum have at the end of the fiscal year? \_\_\_\_\_
- B11. How many K-12 school children in groups 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.
- Do not include teachers, parents and chaperones.

- B12. Does this museum have specific days or times when people can visit one or more of your on-site visitor venues for free?

☐ Yes      ☐ No

B12.1 If yes, how often or how many days per year?

- ☐ Less than 60 days
- ☐ 60 to 119 days
- ☐ 120 to 199 days
- ☐ 201 to 250 days
- ☐ More than 250 days

B12.2 How many people did you serve for free during the fiscal year?  
\_\_\_\_\_

- B13. With which of the following categories among the many potential educational partners and collaborators do you have a written statement of agreement covering on-going mutual responsibilities? (Please check all that apply)

- ☐ Colleges and universities
- ☐ Corporate Community
- ☐ Libraries
- ☐ Other Museums
- ☐ K-12 School System (public and/or private)
- ☐ Public Radio or TV
- ☐ Private foundations
- ☐ Government educational foundations and agencies

*Definitions:*

- The intent of this question is to monitor on-going substantive relationships among organizations that are part of America's educational infrastructure.
- On-going means a) currently in force, b) at least a year old, and c) planning to continue for at least a year more.
- Written statements of agreement include contracts, memoranda of agreement, co-signed letters, purchase orders and other forms of binding documents signed by both parties at an organizational level

### C. Resources: Facilities

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)
- ☐ Large-scale artifact(s) (e.g., a submarine or historic structure)
- ☐ Live animal habitats
- ☐ Live animal shows (e.g., dolphin encounters)
- ☐ Multi-purpose auditorium
- ☐ Historic houses/sites
- ☐ Other performance space(s)
- ☐ Other ticketed theater(s)
- ☐ Outdoor exhibits
- ☐ Outdoor gardens or park
- ☐ Planetarium/Full dome
- ☐ 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: \_\_\_\_\_

#### Facilities and Support Spaces

- ☐ Archives accessible to the public
- ☐ 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 accessible to the public
- ☐ Satellite and remote venues (not counted as separate museums)
- ☐ Space(s) occupied by other tenants
- ☐ Other: \_\_\_\_\_

*Notes from Expert Reviewers:*

- No attempt has been made here to prioritize the lists, which are in alphabetical order.
- The Expert Reviewers rejected several other proposed facilities as ambiguous or too specialized for inclusion. Some of these could be added to a longer list, such as: birthday or other party rooms; commemorative/memorial area; conference center; entrance lobby; members' lounge/library; motion simulator; on-site school; outdoor plaza; production and shop facilities; project studios; volunteer lounge.
- The Expert Reviewers worried that a single long list would deter respondents. They recommended grouping the facilities by type, under headings such as the following: Exhibit and Program Spaces, Education Spaces, Amenities, Support Spaces. A simplified version of this has been used, though some of the distinctions are arbitrary.

C2. What is the **gross square footage** of the museum building(s) at this physical location?  
\_\_\_\_\_ 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 sq ft.
- Note that “net square footage” is a different number, usually about 50–75% of the gross, that refers to the usable spaces within the building. “Public square footage” is even smaller, referring to just those spaces accessible to the public on some basis.
- If your institution has more than one building *at this physical location*, please report combined square footage.
- If your institution is located within a larger, non-museum structure, report only the square footage occupied by the museum.
- Do not include off-site facilities such as warehouses, garages, storage sheds, administrative offices, conservation facilities, etc. that are not generally open to the public.
- Do not include outdoor exhibit areas.

*Notes:*

- Should square footage include off-site facilities? This is especially complicated if the off-site facility includes key museum functions like administrative offices (which would be captured if on-site). The same argument applies to off-site museum shops, storage, conservation areas, etc. Perhaps the key factor should be “are these covered by the operating budget?”

*Notes from Expert Reviewers:*

- Kristen Laise of Heritage Preservation offered a strong alternative, based on the Conservation Assessment Program, which is to include a range of sizes. This defeats the idea of consistent Key Performance Indicators based on size, but may attract a better response rate:
  - ☐ <10,000 sq. ft.
  - ☐ 10,000-25,000 sq. ft.
  - ☐ 25,000-50,000 sq. ft.
  - ☐ 50,001-100,000 sq. ft.
  - ☐ >100,000 sq. ft.

C2.1.1 What is the total area of the **developed exterior grounds** at your museum?  
 \_\_\_\_\_ sq. ft. OR \_\_\_\_\_ acres

*Definitions:*

- Include the portion of your grounds that is developed and actively maintained by the institution. May include parking lots, picnic areas, gardens, exterior exhibits, nature trails, etc.
- Include land that is owned or leased by the museum.
- Do not include land that is not maintained, developed or actively used by the museum. “Active use” *includes* land set aside for living collections that is temporarily fallow or wild and awaiting interpretation. “Active use” *does not include* land that is permanently inaccessible to the public, such as swamps, pond/lake surfaces, restricted conservation lands, remnant private parcels, etc.

*Notes from Expert Reviewers:*

- Expert Reviewers debated whether to use the phrase “developed exterior grounds” or “interpreted exterior grounds.” The advantage of the former is that it would include parking areas, picnic areas, etc. – especially if defined as “exterior spaces regularly open to the public.” However, “developed” might also *exclude* significant spaces; e.g., “wild” areas of an arboretum, which could be an important part of the collection but are purposely left “undeveloped.”
- Despite the challenge of fitting this “one-size-fits-all” definition to various types of institutions (e.g., zoo vs. sculpture garden), at least one Expert Reviewer felt “it will be easy enough to interpret this from the data.”

C2.1.2 What is the total **net interior exhibit space**? \_\_\_\_\_ sq. ft.

*Definitions:*

- “Net interior” refers to the space inside the walls of the public exhibit areas, subtracting column and duct chase footprints, stairs, elevators, etc.
- Count only exhibit space that is “inside” the exhibit venue, not other spaces (like entrance and waiting lobbies, stairwells, board rooms, etc.) where the museum may place exhibits on an irregular basis.
- If your institution has more than one building at this physical location, please report the combined square footage for net interior exhibit space.



- Please include temporary/travelling exhibit space. Do not include other public spaces such as theaters, auditoriums, and classrooms.

C3. Museum sites

- a) Does your museum operate at more than one separate **physical location**? ☐Yes ☐No
- b) If yes, how many different physical locations? \_\_\_\_\_
- c) If yes, do you consider this the **main site**? ☐Yes ☐No
- d) 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.

*Notes:*

- Separate physical locations not open to the public are excluded here in the interest of consistency. In most cases, separate physical locations open to the public should be captured as separate entries.

*Notes from Expert Reviewers:*

- The Expert Reviewers did not have an opportunity to discuss this question in detail during the workshop on January 25, 2011. In general, they considered this a lower priority.
- Other questions in this survey also refer to “satellite and remote venues (not counted as separate museums),” without defining what criteria would make a “site” or “satellite” deserving of its own listing in Museums Count. This should involve some or all of the following: separate operating budget; distinct times of operation; paid staff with primary responsibility for the separate site. One Expert Reviewer suggests that “a separate site would warrant its own [record] in Museums Count if it has a separate budget (or budget line item in the case of a university or other large entity) and separate staff with primary responsibilities for that site. If some of the survey will be pre-populated would it be possible to sort out museums vs. parent institution on the front end?”

## D. Resources: Collections

D1. Does your institution own **collections** (living or non-living) or manage such collections belonging to others on an ongoing basis?

☐ Yes ☐ No

D1.1 Approximately **how many objects** are in your permanent collection (or in your care if on long-term loan)? \_\_\_\_\_

### *Notes from Expert Reviewers:*

- This could be refined with a definition or incorporated phrase that limits the count to registered items.
- Expert Reviewers were deeply divided about whether a question on total collection size is feasible. One argued that asking for a number would be a “shut-down question” for many smaller museums (and also some larger museums). Another said “I recognize the difficulty in collecting this info, but think it should still be attempted.” A third concluded it was “too difficult to ask about the number [of items] in permanent collection and difficult to get quality data. Ask this in a sample survey instead.”
- They also considered but firmly rejected a question about the *percentage* of the collection accessible to the public (on display) versus total collections (including storage).

D1.2 Do you provide **online access** to the content of any of your collections or holdings?

Check all that apply:

- ☐ 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
- ☐ Games featuring collections
- ☐ Other interactive resources
- ☐ Digital art (i.e., created in a digital format)
- ☐ Digitally scanned photographs
- ☐ Digitally scanned documents, books, or other print materials
- ☐ Digitally scanned artifacts
- ☐ Video artifacts (excluding interpretive video of curators, educators, etc.)
- ☐ Audio artifacts (excluding interpretive audio of curators, educators, etc.)
- ☐ Virtual tours of your museum featuring collections (audio and/or video)
- ☐ Curriculum guides
- ☐ Other

*Notes:*

- The online access questions was not part of the list of questions that Expert Reviewers were asked to review at the January 25 workshop. But the Expert Reviewers in the Resources group made a strong case that a simplified version of this question should be included among the questions about collections. Additional categories were provided by researcher team.
- There is some overlap between this question and the question about virtual engagements. This will be sorted out in the final draft of the proposed survey questions.

D2. Please indicate all of the **types of objects or collections** in your museum:

- ☐ Architecture/buildings
- ☐ Archaeological objects
- ☐ Art or other objects on paper
- ☐ Audio-visual materials/recordings/electronic media
- ☐ Books
- ☐ Documents/manuscripts
- ☐ Ethnographic objects
- ☐ Historical objects
- ☐ Industrial/technological/engineering artifacts
- ☐ Living collections (live animals, plants, etc.)
- ☐ Natural science collections
- ☐ Photographic materials
- ☐ Paintings
- ☐ Sculpture
- ☐ Textiles
- ☐ Vehicles (airplanes, automobiles, boats, trains, etc.)
- ☐ Wooden artifacts
- ☐ Other objects not listed above \_\_\_\_\_

*Notes from Expert Reviewers:*

- NB: This incorporates the IMLS rubric of “primary collections” and is closely related to the classification question about museum type.
- One Expert Reviewer recommended a more open-ended question: “What is the focus of your collection? How much of your total collection would you say falls within this focus?” Others in the group felt that this would be too difficult for people to answer in a meaningful way, and that a series of check boxes would be easier.
- A consensus that any classification scheme has to include categories for both subjects and media or “material types (paper, objects, photographs, electronic media, etc.). Whatever is done, be sure electronic, magnetic, and optical media are included.”

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!

*Notes:*

- Museums categorize their collections in diverse ways. Collections management software also places serious constraints on those categories. An open-ended question has the potential to create a better descriptive framework for the community as a whole through crowd-sourcing (i.e., see how people actually describe their collections by type, period, medium, etc., then use this new source of data to create a new question about collections focus for future iterations of Museums Count).

D3.1 Does the mission of your museum include **preservation** of your collections?

☐ Yes ☐ No ☐ Don't know

D3.1.1 Does your institution have a written, long-range **preservation plan** for the care of the collection (a document that describes a multi-year course of action to meet an institution's overall preservation needs for its collection)?

☐ Yes  
☐ Yes, but it is not up-to-date  
☐ No  
☐ No, but one is being developed  
☐ No, but preservation is addressed in an overall long-range plan  
☐ Don't know

D3.1.2 Has a **survey of the general condition** of your collection been done (an assessment based on visual inspection of the collection and the areas where it is 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

D3.2.3 Does your institution have a **written emergency/disaster plan** that includes the collection?

☐ Yes ☐ No ☐ Don't know

*Notes:*

- “Collections Care Items” was a broad category provided by IMLS. What essential data about collections care should fit under this head? Annual budget devoted to collections care is only one possibility (and this was rejected by Expert Reviewers; see below). Others include the number of items under care, the presence of a collections care policy and the areas of most urgent collection care need.
- At the suggestion of IMLS staff, we included this set of questions from the Heritage Health Index. HHI also includes many other useful questions about the *nature* of conservation activities and the staffing and other *resources* assigned to collections care – but these generally fall outside of the limited scope of Museums Count.

- *Notes from Expert Reviewers:*
- Expert Reviewers felt that a question about total expenditures devoted to collections care would be too difficult for many museums to answer, and thus decrease survey participation (at many institutions, it is difficult to disentangle collections care from other operational and staffing costs).
- Eric Pourchot of the American Institute for Conservation was especially forceful about the need for collections care questions: “I think this is a key indicator needed by funding agencies and those setting public policy. I foresee that, as the census is used and re-used, institutions will begin to collect the data to populate the questions. This is such a key (and often neglected) function of museums, that I think leaving it out could be disastrous in future years.”

## E. Resources: HR

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).

### *Definitions:*

- A full-time employee works at least 35 hours a week.
- A seasonal employee works fewer than 9 months per year.

### *Include:*

- employees on paid leave
- employees at satellite or 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 account)<sup>1</sup>
- 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 account)
- employees on unpaid leave

### *Notes from Expert Reviewers:*

- Expert Reviewers recommended dropping FTE (Full Time Equivalent), which is unfamiliar to many in the museum field and has typically yielded inconsistent and inaccurate results in other museum surveys.
- There was some disagreement about the following whether persons or positions should be counted.

<sup>1</sup> Wording from Cultural Data Project.

- Considered but rejected the idea of asking for employment “over the previous year.” Every method of counting is likely to miss some seasonal employees.
- Seasonal employee was fixed at 9 months to include faculty members and others traditionally employed on an academic-year calendar.
- Expert Reviewers rejected the idea of a specific question about outsourced workers as respondents would have difficulty responding; also, it might be a sensitive topic resulting in significant drop-off from the survey.

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.

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). \_\_\_\_\_

*Definition:*

- 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.

E3. Volunteers

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

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. Volunteers may include board members and other unpaid advisors. If none, please write in zero (0).

*Notes from Expert Reviewers:*

- Expert Reviewers recommended adding board members and other advisors to the definition of “volunteer.” This will make it more complicated for some museums to calculate total volunteer hours.
- Number of volunteers was deemed a more useful (and likely to be more accurate) datum than total number of volunteer hours. As one Expert Reviewer writes, “if IMLS can ask only one question about volunteering, my emphatic recommendation would be that the item ask about volunteers rather than the time they’re contributing, even though it would be hugely interesting and valuable information to have.”

E3.1 How many **total hours were volunteered** in your most recent fiscal year?  
\_\_\_\_\_ hours

## F. Financial

Operating data should be entered for the most recently completed fiscal year and any related data, such as attendance and number of staff, requested in other sections of the survey should also be from this fiscal year.

### Finance – Operating Revenue

F1. What was this museum’s total operating revenue for the most recently completed fiscal year? \$\_\_\_\_\_

*Definitions:*

- Do not include capital funds received during the fiscal year.
- Do not include the dollar value of donated/provided in-kind services or materials.
- Do include transfers from endowment or other capital funds intended to cover operating expenses.

F1.1. Please provide a breakdown of your total operating revenue for the most recently completed fiscal year based on the following categories:

- \$\_\_\_\_\_ **Earned** revenue (Do not include endowment income. Report that below.)
- \$\_\_\_\_\_ **Private** support revenue
- \$\_\_\_\_\_ **Public or Government** support revenue (Include local, state, federal, tribal and all other types of government support, whether restricted or unrestricted.)
- \$\_\_\_\_\_ **Endowment or Investment** operating revenue (Only include amount used or available for operations for the fiscal year for which you are reporting data.)
- \$\_\_\_\_\_ **Total Operating Revenue** (Will be automatically calculated. Must match the sum of all four categories of operating revenue listed above.)

F1.1.1 What operating revenue, if any, did you receive from a support organization, such as a “friends” group, external support group or affiliate organization? \$\_\_\_\_\_

F1.1.2 What was your on-site visitor admissions revenue for the reporting 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 travelling exhibitions, theaters, park rides, and more.
- *Exclude* revenue from programs and services such as classes, birthday parties, special events, facility rentals, etc.
- *Do not* include membership revenue from membership programs.



F1.1.3 Please indicate all sources of government funding (restricted or unrestricted) that this museum received during the reporting year.  
☐ Federal ☐ State ☐ County/Regional ☐ City/Municipal ☐ Tribal

F1.1.4 What operating revenue, if any, did you receive from a parent organization? (*Do not* include in-kind.) \$\_\_\_\_\_

*Definitions:*

- Parent Organization: If the organization for which you are filling out this survey is part of or a subsidiary of a larger organization that operates the museum along with other activities, enter any monetary support that you received from that parent on this line. This support may be in the form of a cash transfer or a budget line item. Do not include in-kind support.
- Examples of parent organizations include: colleges or universities; tribal, municipal, state, or federal government; state historical societies supervising multiple sites; corporate foundation, etc. Museums without parents are classified as independent museums.

F1.2 Please indicate the categories of operating support you received from a parent organization during the reporting year. *Include* in-kind support. Check all that apply:

- ☐ Accounting
- ☐ Cleaning/custodial
- ☐ Collections/archives maintenance or storage
- ☐ General building maintenance
- ☐ Grounds keeping and/or snow removal
- ☐ Employees - all
- ☐ Employees - some
- ☐ Human Resources
- ☐ IT support (including web or email hosting)
- ☐ Marketing/Advertising
- ☐ Media support (e.g., recording facilities)
- ☐ Security
- ☐ Utilities
- ☐ Other
- ☐ If other, please clarify: \_\_\_\_\_

**Finance - Operating Expenses**

F2. What were this museum's total operating expenses for the most recently completed fiscal year? \$\_\_\_\_\_

*Definitions:*

- *Exclude* depreciation or amortization expenses.
- *Exclude* in-kind.

F2.1. What was the total operating expense for personnel at this museum, including wages, salaries and benefits?

\$ \_\_\_\_\_ Wages and salaries  
 \$ \_\_\_\_\_ Benefits  
 \$ \_\_\_\_\_ Total personnel expenses (should either equal the sum of the two previous categories of wages and salaries and benefits, or, if data are not broken out for the other categories, enter the total here.)

*Definitions:*

- Include full-time, part-time and seasonal staff for the reporting year.
- Do not include 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 account).
- Benefits include: Payroll taxes, health benefits, disability, workmen's compensation, pension and retirement benefits and other employee benefits.

**Finance – Ticket Prices**

F3. Does your museum charge a general admission fee?

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

*Definition:*

- Answer "no" if your museum is generally free but you occasionally charge for temporary or travelling exhibits.

F3.1 If you do charge for admission, please indicate the current solo ticket prices for the general public to your most frequently visited venue. This is what most visitors would consider the "general admission" price. (Do not include school and other group prices.)

\$ \_\_\_\_\_ Adult  
 \$ \_\_\_\_\_ Senior  
 \$ \_\_\_\_\_ Child

*Definitions:*

- Ticket prices should be current prices and *do not* have to match the fiscal year for which you are reporting finance data.
- Only include the price for solo tickets to your main ticketed venue.
- *Do not* include the price of combination ticket prices for two venues, such as exhibits and theaters.

## **Finance – Capital**

F4. Does your institution have an endowment?

☐ Yes ☐ No

*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 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).

F4.1 If yes, what was the value of your endowment at the close of the fiscal year for which you are reporting data. \$\_\_\_\_\_?

*Definition:*

- Include endowments dedicated to your museum whether held by you or others.

F4.2 What percentage of the endowment was transferred to the operating budget during the reporting year? \_\_\_\_\_%

Stakeholders please comment on the following: Should we be asking for policy regarding the percentage allocated annually instead of asking what was used or transferred in the reporting fiscal year? \_\_\_\_\_

F5. Are you currently planning or engaged in a capital campaign?

☐ Yes ☐ No

F5.1 If yes, you are planning or engaged in a capital campaign, what is/are the intended uses of the funds from the capital campaign? (Check all that apply.)

- ☐ Building expansion
- ☐ Building renovation
- ☐ Collections acquisitions
- ☐ Collections care or preservation
- ☐ Endowment
- ☐ Exhibit renewal
- ☐ Land acquisition
- ☐ New building
- ☐ Travelling or temporary exhibition
- ☐ Other
- ☐ Please indicate what is included in other

F5.2 When did (or will) the capital campaign commence? (Check only one.)

- ☐ Already started ☐ Within 1 year ☐ Within 2-3 years ☐ Within 4+ years  
☐ Don't know

F6. Did you recently complete a capital campaign?

☐ Yes ☐ No

**Stakeholders please comment on the following:** The research team is not sure whether we should ask about both commencing/ongoing and completed campaigns. It could muddy the waters as over multiple years we would be counting both the commencement and the completion and in some cases they might be the same campaign and in other instances separate campaigns.

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F6.1 If yes, you recently completed a capital campaign, what were the uses of the funds from the capital campaign? Check all that apply.

- ☐ Building expansion
- ☐ Building renovation
- ☐ Collections acquisitions
- ☐ Collections care or preservation
- ☐ Endowment
- ☐ Exhibit renewal
- ☐ Land acquisition
- ☐ New building
- ☐ Travelling or temporary exhibition
- ☐ Other

Please indicate what is included in other \_\_\_\_\_

F6.2 When was the capital campaign concluded? (Please check only one.)

- ☐ Within the past year ☐ Within the past 2-3 years ☐ Within 4+ years
- ☐ Don't know