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SUMMARY

STATUS REPORT OF IMS NEEDS ASSESSMENT

October 3, 1991

On May 14, 1991, IMS mailed information about the IMS needs assessment to 90 museum associations, asking for comments on the goals, definitions, and advisors. We also asked them to provide IMS with insitutional membership lists. Seventy-five associations have responded to one or more of the requests. (A few others are anticipated to respond.)

The overwhelming response to IMS conducting this assessment from the associations has been positive. We are very appreciative of their cooperative support.

Among the comments most frequently voiced are the following:

Most associations believe a majority of their membership falls under one or more of the terms defining the assessment target group.

Information about standards of museum operations and about means to achieve those standards is a continuing need of smaller museums.

The professionalism of a museum is independent of the paid or unpaid status of the museum staff.

In July 1991, IMS made site visits to several museums in Nevada that fall within the target group. During the same visit, a specially convened group presented to IMS views of the members of the Western Museum Conference and the Nevada Association of Museums, as well as other small and minority museum representatives.

That group expressed the following views:

The target group for the assessment is much larger than the listing in the Official Museum Directory provides.

Great diversity exists among museums that fall within any of the definitions of small, emerging, minority, or rural and that diversity should be acknowledged.

Rural museums hold collections that have great community value and may also be of value beyond the local community.

Museums in geographically rural or isolated locations may offer high levels of public service and professional operations.

In conducting the needs assessment, IMS should be sensitive to the possibility that the terms small, emerging, minority, and rural may appear to carry a negative connotation.

We received some comments that we should discard one or more of the terms "small, emerging, minority, and rural," or that we should conduct separate assessments for each type. While we recognize the wisdom of these suggestions, we are bound by the language of Public Law 101-512 which authorizes the assessment and do not have the authority to change the language of the law.

We compiled the responses from association representatives, from the group presentation and from other appropriate sources for consideration at the national advisory committee meeting.

The national advisory committee comprised representatives of the museums that are the target of this needs assessment, either as staff members of the museums or in working with a large number of these type museums. They represented many disciplines of museums and all regions of the country. (The list of national committee members is attached.)

Committee members were asked to comment on the proposed definitions and the overall plan for gathering information from the perspective of their own experiences and others with whom they had consulted. We specifically did not ask them to come to a consensus on the definitions or to provide specific wording for any definition. As expected, a variety of views were expressed.

The comments of the national committee members have guided the development of the questionnaire that will be mailed to the museum universe list. We anticipate that the opinions expressed by the national committee will help shape the assessment and the report to Congress.

We will convene a second meeting on October 17, 1991 of advisors from the Washington area. This local advisory meeting will include representatives from the national associations and federal agencies that work with museums, and representatives of congressional and executive branch offices, among others. The local advisory group will discuss many of the same issues discussed by the national advisory committee.

Although IMS has limited funds to conduct the assessment, we have developed a plan to gather information in three different formats:

- mailed questionnaire
- case studies of individual museums
- discussion groups.

Summary, Page 3

We believe these formats will provide different types of information and that the views will be broadly representative of the needs of small, emerging, minority, and rural museums.

IMS is compiling a single list of all museums in the United States, as submitted by the national, regional, and state associations. This "universe" list will be the primary source for identifying museums for the needs assessment. It will also serve as a resource for future outreach programs by IMS.

Following the two advisory meetings, we will circulate and test the questionnaire, which we will subsequently send to museums on the universe list. The questionnaire will be used to identify which museums characterize themselves in terms that conform with the descriptions of the target group and will be used to gather their views of their needs. In addition to evaluating these responses, we will use the returned questionnaires to help in the selection of museums for case studies and discussion group participation.

Twelve museums will be selected for case studies. Twenty-four museums will be represented in discussion groups.

We plan to ask the two advisory groups to review drafts of the report of the needs assessment. Results of the needs assessment will be reported to Congress no later than November 1992. The report will be distributed as broadly as resources permit.

GOALS

IMS will conduct an assessment of the needs of small, emerging, minority, and rural museums. In accord with the language in P.L. 101-512-Nov. 5, 1990, the assessment will include the following subjects:

resources to identify, collect, document, research, preserve and interpret tangible and nontangible collections and to communicate with and involve their own communities and the general public.

personnel staffing and training needs for professional positions and for the community persons employed or utilized by museums who are expert in the history, culture, customs, and other human resources of the communities.

building and construction needs, including impediments to accessing Federal and non-Federal funds for this purpose.

maintenance, operation and repair needs, including impediments to accessing Federal and non-Federal funds for this purpose.

status of the museums' current collections and the museums' interest in accessing, through gift, purchase, repatriation or borrowing, objects now held privately or in public collections.

The final product of the needs assessment will be a report to the Congress, which will assist in the development of public and private policy for these museums.

Other than the overarching goal of reporting to Congress, other goals are:

communicate a Federal interest in the ability of these museums to provide public service

stimulate these museums to identify strengths and weaknesses in their resources and to identify their access to resources which allow them to accomplish their stated missions

provide a means for the museums and their supporters to compare their needs with similar museums

identify potential resources to meet the identified needs of the museums and foster communication among museums and potential resources

consider the needs of these museums in the context of national interests and resources

validate the social and cultural value these museums provide, or have the potential to provide, for their communities

"Resources" includes people, time, knowledge, skills, facilities, and collections, as well as financial support.

DEFINITION: MUSEUM

For the "assessment of certain museums" authorized by Congress, the definition of museum shall conform closely with the current IMS definition of museum as given in 45 CFR 1180.3(a)(1-3):

"Museum" means a public or private nonprofit institution which is organized on a permanent basis for essentially educational or aesthetic purposes and which: (1) Owns or uses tangible objects, either animate or inanimate; (2) Cares for these objects; and (3) exhibits them to the general public on a regular basis.

and as given in 45 CFR 1180.3(b):

"Museum" includes (but is not limited to) the following institutions if they satisfy the provisions of this section: (1) Aquariums and zoological parks; (2) Botanical gardens and arboretums; (3) Nature Centers; (4) Museums relating to art, history (including historic buildings), natural history, science and technology; and (5) Planetariums.

and as given in 45 CFR 1180.3(d)(1-2):

an institution exhibits objects to the general public for the purposes of this [assessment] if such exhibition is a primary purpose of the institution.

As the purpose of the needs assessment specifically includes small and emerging museums, IMS will not exclude any museum from the assessment based on the following three criteria used by IMS to establish eligibility for receiving IMS funds [1180.3(a)(3)(i-ii), 1180.3(c), and 1180.5(a)(b)] having to be open at least 120 days a year, to employ a professional fulltime, and to be open for two years.

The assessment will include museums within all fifty States of the Union and the District of Columbia. The assessment will exclude museums that are owned or operated by a department or agency of the Federal Government.

For related institutions, museums will be counted as independent organizations when they demonstrate autonomy as described in 1180.6(b):

(1) The institution has its own governing body; (2) The institution has budgetary autonomy; (3) The institution has administrative autonomy.

DEFINITION: SMALL MUSEUM

"Small" may be the most relative of all terms for this assessment. Whether a museum is small generally depends on the size of the operating budget and the number of staff. Other factors, such as the size of the physical plant or of the collection, are generally not criteria, although they, like the number of staff, are undoubtedly dependent on the size of financial resources.

The most commonly offered criterion is the size of the operating budget. Unfortunately, there is little common agreement as to how large a museum's budget must be before it is no longer a small museum. The attached lists of different budget breaks and their designations will help you see the degree of variation. The most striking differences appear in comparing disciplines. For example, a small historic house may have a \$30,000 budget, but a zoo is considered small if it operates on \$500,000.

We find more agreement about staff. With one exception, all comments said a small museum had no more than 5 full-time, paid staff members. Many comments indicated that a small museum would be one with fewer than five staff members.

The Small Museums Administrators Council provides the following functional guideline in their membership brochure:

Membership is available to any museum person who functions in several professional capacities, managing duties that are often assigned to specialized staff in larger institutions.

For the purposes of the needs assessment, we propose the following definition:

A small museum is one :

- that has five or fewer full-time paid or unpaid staff, or
- that has an annual operating budget of under \$100,000.

1991 GOS BUDGET CATEGORIES WITHIN EACH DISCIPLINE

AQUARIUM

reviewed with zoo applications

ARBORETUM/BOTANICAL GARDEN

\$19,073 - \$304,364
\$332,116 - \$679,841
\$683,200 - \$1,112,840
\$1,178,090 - \$2,120,219
\$2,204,880 - and over

ART

\$6,729 - \$178,932
\$179,416 - \$328,596
\$337,167 - \$579,345
\$588,857 - \$939,537
\$940,242 - \$1,626,474
\$1,646,542 - \$3,445,469
\$3,447,479 - and over

CHILDRENS/JUNIOR

\$82,348 - \$196,837
\$201,322 - \$292,114
\$318,278 - \$480,374
\$511,184 - \$899,985
\$903,220 - and over

GENERAL

\$24,709 - \$185,434
\$187,324 - \$356,708
\$361,561 - \$576,896
\$581,202 - \$900,813
\$908,506 - \$1,947,199
\$2,037,426 - and over

HISTORIC HOUSE/SITE

\$11,362 - \$108,406
\$108,551 - \$178,933
\$188,650 - \$264,908
\$266,848 - \$386,384
\$387,108 - \$682,175
\$746,614 - and over

HISTORY

\$7,017 - \$80,850
\$81,255 - \$142,417
\$142,980 - \$196,416
\$197,016 - 280,099
\$284,837 - \$506,710
\$518,078 - \$1,166,275
\$1,181,771 - and over

NATURAL HISTORY/ANTHROPOLOGY

\$56,839 - \$182,810
\$198,121 - \$504,092
\$543,735 - \$971,883
\$1,018,330 - \$1,784,261
\$1,917,121 - \$4,756,647
\$5,430,719 - and over

NATURE CENTER

\$56,279 - \$160,131
\$161,382 - \$238,803
\$242,522 - \$392,017
\$398,139 - \$580,320
\$611,573 - \$849,581
\$867,584 - and over

PLANETARIUM

reviewed with science and technology applications

SCIENCE & TECHNOLOGY

\$19,159 - \$406,477
\$472,272 - \$793,369
\$811,580 - \$1,467,385
\$1,527,490 - \$2,387,711
\$2,438,394 - \$6,300,532
\$6,327,417 - and over

ZOO

\$81,244 - \$426,609
\$516,026 - \$1,109,020
\$1,133,200 - \$1,611,277
1,830,055 - \$3,279,452
\$4,441,088 - \$6,522,511

SPECIALIZED

Because of the diversity of types and sizes, these museums were assigned to different field review panel groups. Consequently, the budget sizes for each of these groups varied for each.

TYPE AND OPERATING BUDGET SIZE CATEGORIES USED FOR STRATIFICATION

<u>Type</u>	<u>Estimated Operating Expenses</u>	<u>Size Code</u>
Aquarium	\$3,000,000 and over	L
	\$1,000,000 to \$3,000,000	M
	Under \$1,000,000	S
Arboretum/ Botanical Garden	\$1,000,000 and over	L
	\$200,000 to \$1,000,000	M
	Under \$200,000	S
Art Museum	\$1,000,000 and over	L
	\$200,000 to \$1,000,000	M
	Under \$200,000	S
Children's Museum	\$1,000,000 and over	L
	\$200,000 to \$1,000,000	M
	Under \$200,000	S
General Museum	\$1,000,000 and over	L
	\$350,000 to \$1,000,000	M
	\$100,000 to \$349,999	S
	Under \$100,000	V
History Museum/ History Site/ <u>House</u>	\$1,000,000 and over	L
	\$350,000 to \$1,000,000	M
	Under \$350,000	S
Natural History/ Anthropology Museum	\$1,000,000 and over	L
	\$250,000 to \$1,000,000	M
	Under \$250,000	S
Nature Center	\$800,000 and over	L
	\$250,000 to \$800,000	M
	Under \$250,000	S
Planetarium	\$1,000,000 and over	L
	\$250,000 to \$1,000,000	M
	Under \$250,000	S
Science Museum/ Technology Center	\$5,000,000 and over	L
	\$1,000,000 to \$5,000,000	M
	Under \$1,000,000	S
Specialized Museum	\$1,000,000 and over	L
	\$350,000 to \$1,000,000	M
	\$100,000 to \$349,999	S
	Under \$100,000	V
Zoo	\$3,000,000 and over	L
	\$1,000,000 to \$3,000,000	M
	Under \$1,000,000	S

DEFINITION: EMERGING MUSEUM

Not surprisingly, we received the fewest offers for a definition of emerging museums. The two criteria offered centered around 1) how long the museum had been operating and 2) the degree and kind of growth.

Some supported the IMS eligibility criteria for its competitive programs, that is, having been open less than two years. (Museums open less than two years are eligible to receive MAP and CAP grants, however.) A botanical garden, on the other end of the spectrum, is considered "new" if it is less than 10 years old. Three, five, and eight years were also offered as benchmarks for having emerged.

The other criterion may involve a museum of any age that is either a small museum expanding its operation--the "grow as you go" museum; an older museum that is just beginning to adopt professional standards of operation, or a museum that has recently had a fundamental change in its mission.

For the purposes of this assessment, we propose the following definition:

An emerging museum is one that:

-has within the last two years hired the first professional staff member, or

-has within the last two years hired its first staff member whose sole responsibility is curatorial or educational activities, or

--has within the last two years fundamentally revised its mission statement or method of operation.

(any of the above)

When is a museum no longer emerging?

embryonic?
incipient?

professional vs. volunteer - important distinction for volunteer groups

DEFINITION: MINORITY

For the purpose of defining racial and ethnic categories for this assessment, we propose to use those established by the Office of Federal Statistical Policy and Standards (See attached Directive No. 15). The basic racial and ethnic categories for Federal statistics and program administrative reporting are defined as follows:

- a. American Indian or Alaskan Native. A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliation or community recognition. (Pursuant to the Indian Self-Determination and Education Assistance Act (25 U.S.C. 450b(b))
- b. Asian or Pacific Islander. A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands. This area includes, for example, China, India, Japan, Korea, the Philippine Islands, and Samoa.
- c. Black. A person having origins in any of the black racial groups of Africa.
- d. Hispanic. A person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race.
- e. White. A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

As the 1990 Census data indicate that the population of the United States is 80% White, all other racial and ethnic groups will be considered minority populations for the purposes of this needs assessment (See attached 1990 Census Data, Tables 1, 6A-C). Minority means the racial and ethnic groups that have a smaller representation than the dominant White ethnic group in the U.S. population.

DEFINITION: MINORITY MUSEUM

For the purposes of this needs assessment, we propose the following definition:

A minority museum is one which has significant representation in both its operation and governance by persons of one or more of the minority populations of the United States, and:

- the majority of its constituency is one or more of the minority populations of the United States, or
- for which the stated mission is to collect, preserve and interpret the culture of one or more of the minority populations of the United States.