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## Museum Services Act (1984): Newsletter 01

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# ACCESS

Institute of Museum Services

FEBRUARY 1992 / VOLUME III, NUMBER I

## Director's Report

Susannah Simpson Kent

The past few months have presented several opportunities to join with Congress and the Administration in advancing issues of importance to the museum community. I am pleased to announce that the Administration has recommended \$29,000,000 for the IMS FY 1993 budget, an increase of 7%. I will be appearing before the House Appropriations Subcommittee on Interior and Related Agencies on March 19 to support this increase.

On February 10, I offered testimony to the House Committee on Ways and Means in support of making gifts of tangible property, as well as securities and real estate, deductible for alternative minimum tax purposes to the extent allowed under the regular tax law. I am keenly aware of the impact of these gifts on the services provided by American museums. These gifts enhance museums' educational and public services; we all benefit.

In November, I sent a letter with Lamar Alexander, Secretary of Education to over 6000 museums encouraging them to take part in AMERICA 2000: a strategy to revitalize thinking about systematic education reform. On November 14 the National Museum Services Board focused attention on museums' educational role by inviting five experts to share their perspectives on learning in the museum environment:

- Harold Skramstad, Henry Ford Museum & Greenfield Village
- Bonnie Pitman, University Art Museum at Berkeley
- Lynn Dierking, Science in American Life Curriculum Project at the Smithsonian
- Rowena Stewart, Afro-American Historical & Cultural Museum
- Portia Hamilton-Sperr, Museums in the Life of the City Project

Willard Boyd, Chairman of the NMSB remarked, "America's museums have contributed much to public learning. They can and must contribute much more. Museums must be active participants in educational activities at all levels of government and at all levels of learning."

I look forward to reporting on IMS activities and hearing from the IMS museum constituency. ♦

## The Results Are In...

In 1990, IMS hired an independent consultant to evaluate the General Operating Support (GOS) program. Information was collected using the following sources:

- Survey of 200 museums representing a stratified, random sample of American museums.
- 179 individual responses to a public invitation for comments.
- Final reports filed by FY 1989 GOS grantees.
- AAM Interim Report: 1989 Museum Survey.

### Who Applies?

Support for general operating expenses is essential for museums and is difficult to raise. IMS is the only federal source of general operating support for all types of museums.

Results continued on page 2

## Your Comments Are Requested

The National Museum Services Board has decided to consider changing the way General Operating Support (GOS) grants are distributed. **This proposed change would not affect museums that submitted GOS applications for the fiscal year 1992 competition in November, 1991.**

The General Operating Support program makes grants totalling over \$20 million each year to all types and sizes of museums that are judged by their peers to provide high quality museum services. Currently, the award amount is equal to 10% of the museum's prior year operating budget to a maximum of \$75,000. The proposed change would extend the grant cycle from one to two years and increase the amount of the award to 15% of the museum's budget to a maximum of \$112,500. All awards would be for a two year period. IMS would continue to offer a competition annually, but a museum that received a grant in one year could not compete in the following year. Applicants who did not receive a grant could compete in the following year's competition.

The proposal would:

- increase, over time, the number of museums that will

Your Comments continued page 2



Your Comments continued from page 1

receive GOS awards.

- allow grantees to spend funds over a two-year period.
- allow grantees to forego completing a grant application form each year.

*How many of the GOS grantees are repeaters?*

Currently two-thirds of GOS grantees in one year are likely to be grantees in the next year. About 100 museums have been successful in the program for the last four consecutive competitions.

*The current GOS program distributes funds to museums of all budget sizes and disciplines. Would this change under the proposed program?*

Changing to a two-year, 15% grant would have almost no effect on the average size of museums receiving grants. It would not change the distribution of GOS grants to favor larger or smaller museums.

*How will this affect museums that currently receive consecutive awards?*

Museums who are currently successful will receive the benefit of support for a two-year period and be relieved of

the task of completing the General Operating Support application each year, but they will receive slightly less money from the program than if they received two consecutive awards as under the current system.

*How many more museums will IMS be able to fund, over time?*

Many variables affect the exact number; however, we predict that only museums that are currently just outside the funding range would have a better chance of receiving a grant.

*When would this change go into effect?*

At this point IMS is requesting that the museum community provide comments on the effect of this proposed change. The National Museum Services Board will review all comments and make a decision, in April 1992, about whether to implement this change for the Fiscal Year 93 competition (deadline November, 1992).

Please send your comments, by April 10, 1992, to: Susannah Simpson Kent, Director, Institute of Museum Services, 1100 Pennsylvania Ave., NW., Washington, DC 20506. ♦

Results continued from page 1

Of all eligible museums in the US:

- 52% applied to GOS at least once.
- 29% applied at least once in last three years.
- 53% of museums that have applied in the past say that the reason that they will not apply next year is that the chance of funding is too small.
- fewer than 25% apply in any given year.

**Applying to GOS**

Museums report that the GOS application is commonly used as a tool for self-evaluation. Of museums that applied to GOS in the last three years:

- 71% indicated that the self-evaluation involved in preparing the application is useful.
- 77% would not have performed the same sort of self-evaluation if they had not completed the application.
- 51% reported that the process of completing the application revealed needs for improvement within the museum.
- 48% used the completed application to represent the museum to its governing authority.
- 30% used the application to help describe the museum to other funding sources.

The benefits of applying do not come without hard work. Applicants reported an average of 78 hours of professional time and 34 clerical hours to complete the form. This time includes learning about the program, doing self evaluation,

and writing and assembling the application form. The application form itself received high marks for clarity of instructions and for allowing applicants to adequately describe their museums.

**Feedback**

Museums that applied in the last three years reported using reviewer comments as follows:

- 47% to improve future GOS applications.
- 35% to improve the museum.
- 21% to help identify areas that need improvement.

Applicants were asked for feedback about the quality of reviewer comments:

- 69% said the comments demonstrated that reviewers understood the application.
- 62% said the comments adequately explained reasons for scores.
- 55% reported that the comments indicated understanding of size and type of museum.

*To reduce the burden of completing the GOS evaluation and improve the quality of feedback to applicants, IMS is:*

- Proposing a change to make the GOS award a two-year grant. Successful applicants would receive a larger grant and would not compete in the following year's competition. (See **Your Comments Are Requested** on page 1)
- Investigating alternative methods of providing feedback to the applicants.

Results continued on page 3



## 1992 GOS REVIEWER TRAINING WORKSHOPS

**Issues for IMS GOS Reviewers — The Three E's: Evaluating Educational Effectiveness:** This GOS reviewer training workshop is designed to assist reviewers in evaluating applicants' responses to questions dealing with collections and public programs (exhibitions and education). Specific issues to be discussed include evaluating responses as they relate to the museum's Statement of Purpose and evaluating responses of non-collecting institutions. Related topics will include:

- allocation of resources in relation to a museum's statement of purpose and
- IMS guidelines for GOS review.

**A Standard Problem: Issues for GOS Reviewers:** a participatory discussion focusing on key issues relating to the evaluation of GOS applications. The primary focus will be understanding varying museum administrative structures. Discussion topics include:

- the policies and procedures governing the GOS grant program,
- the relationship of field review to the overall application and funding process,
- evaluating administrative structures (private non-profit, public and university museums),
- how administrative structures affect the gathering and expending of resources, and
- sharing strategies for effective and efficient review.

**Figuring It Out — the ABCs of GOS Financial Forms:** a participatory discussion led by a museum financial officer and GOS reviewer. The primary focus will be relating GOS financial forms with the narrative sections of the application. Discussion and activity topics include:

- the policies and procedures governing the GOS grant program,
- the relationship of field review to the overall application and funding process,
- detailed analysis on reading GOS financial statement forms and audited statements and
- using these forms to evaluate an application for use of available resources.

All workshops will include elements that focus on a simulated review of relevant narrative sections from a sample application. The simulated review will take place in a small group format. Past participants found the opportunity to discuss the review process and their concerns with fellow reviewers to be a valuable and enlightening experience.

**Registration Form on Reverse  
Please Copy and Circulate**

# 1992 GOS Reviewer Training Workshops Registration Form

*Check the workshop(s) you would like to attend:*

REGIONAL WORKSHOPS	LOCATION	DATE/TIME*
<input type="checkbox"/> Midwest Museums Conference <i>Figuring It Out-the ABCs of GOS Financial Forms</i>	Milwaukee, WI	TBA Sept 30 - Oct. 3
<input type="checkbox"/> Western Museums Conference <i>Figuring It Out-the ABCs of GOS Financial Forms</i>	Riverside, CA	TBA Oct 13 - 16
<input type="checkbox"/> Mountain Plains Museum Assoc. <i>Figuring It Out-the ABCs of GOS Financial Forms</i>	Lincoln, NE	TBA Oct. 14 - 17
<input type="checkbox"/> Southeastern Museums Conference <i>Figuring It Out-the ABCs of GOS Financial Forms</i>	Columbia, SC	TBA Oct. 21 - 25
<input type="checkbox"/> Mid-Atlantic Assoc. of Museums and New England Museum Association <i>Figuring It Out-the ABCs of GOS Financial Forms</i>	Albany, NY	TBA Nov. 8 - 11

NATIONAL WORKSHOPS	LOCATION	DATE/TIME
<input type="checkbox"/> American Association of Museums <i>Issues for IMS GOS Reviewers — The Three E's: Evaluating Educational Effectiveness</i>	Stouffer Harborplace Hotel Baltimore, MD	April 25, Sat. 1:00 - 4:30 pm
<input type="checkbox"/> Amer. Assoc. of Botanical Gardens & Arboreta <i>A Standard Problem: Key Issues for GOS Reviewers</i>	Columbus, OH	June 13, Sun. 8:30 am - 12:00n
<input type="checkbox"/> Amer. Assoc. for State & Local History <i>Issues for IMS GOS Reviewers — The Three E's: Evaluating Educational Effectiveness</i>	Miami, FL	Sept. 15 or 16 time TBA

**\* Dates & times have not yet been set for Regionals; conference dates are shown**

NAME \_\_\_\_\_ PHONE \_\_\_\_\_

TITLE \_\_\_\_\_

INSTITUTION \_\_\_\_\_

MAILING ADDRESS \_\_\_\_\_

Discipline of museum in which you work:

- |   |  |
|---|--|
| <input type="checkbox"/> 01 Aquarium<br><input type="checkbox"/> 02 Arboretum/Botanical Garden<br><input type="checkbox"/> 03 Art<br><input type="checkbox"/> 04 Children's/Junior<br><input type="checkbox"/> 05 General<br><input type="checkbox"/> 06 Historic House/Site<br><input type="checkbox"/> 07 History | <input type="checkbox"/> 08 Natural History/Anthropology<br><input type="checkbox"/> 09 Nature Center<br><input type="checkbox"/> 10 Planetarium<br><input type="checkbox"/> 11 Science/Technology<br><input type="checkbox"/> 12 Zoo<br><input type="checkbox"/> 13 Specialized |
|---|--|

Annual operating budget of museum in which you work: \$ \_\_\_\_\_

Museum Governance:  Federal  State  Municipal  County  Private  Other

University Control:  Yes  No

Please return this form to: Institute of Museum Services      ATT: Betty Brewer  
 1100 Pennsylvania Ave., NW  
 Washington, DC. 20506  
 202/786-0539

**Register no later than one month before the workshop. Participation is limited.**

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### Reviewers

All GOS reviewers are required to have at least five years of museum experience and current museum employment. In fact, three-fourths of the reviewers have ten years or more of museum experience. Museum directors who had reviewed were asked about benefits they received from serving:

- 78% learned more about museum operations.
- 68% learned more about competing for GOS.
- 67% learned more about evaluating museum operations.

Currently, field reviewers work independently. According to the survey, 84% feel that the accuracy and usefulness of their feedback to applicants would be improved by contact with other reviewers.

*To improve the benefits of reviewing and the quality of scores and comments, IMS is testing alternative review methods to evaluate their cost and effectiveness.\**

IMS will evaluate these tests by comparing the scores and comments of the reviewers participating in the tests with those of reviewers who participate in the actual competition. IMS will also ask the reviewers to evaluate their experiences.

### Telephone Conferencing for Field Reviewers

IMS has asked several groups of four museum professionals to participate in this test. Each group will review a set of applications. Before writing comments and scores each group will discuss the applications during a telephone conference.

### Panel Meetings

For a test national panel meeting IMS has asked eight natural history museum professionals to discuss natural history museum applications during a meeting in Washington, DC.

For a test regional panel meeting, IMS has asked nine museum professionals from the Mountain/Plains region to discuss a representative sample of applications from that region at a meeting in Denver, CO.

### How museums use their GOS money

IMS receives final reports from grantees that provide very general information about how funds are spent. They show that museums use their GOS funds for the "meat and potatoes" of museum operation — to pay employees to conduct educational programs, to perform curatorial functions and to develop and maintain exhibits. Most of the funds (83%) are used to pay salaries. Grantees report the following uses of grant funds:

- 87% used the awards to create, improve or continue education programs.

- 65% reported that receiving the grant led to useful publicity.
- 44% said the grant helped attract funding from other sources.

*To improve information about the impact of the GOS award, IMS will:*

Revise the final report form.

### Is the review process fair?

The perception of fairness is closely tied to the museum's success in getting a grant. 83% of recent applicants who were not funded feel that the decision did not accurately reflect the quality of their institution. Indeed, field reviewer scores indicate that many more high quality museums apply than the current appropriation allows us to fund. Unfortunately, the limits of federal support do not allow IMS to fund all deserving applications. However, we are very concerned that unfunded applicants have questions about the fairness of the grant distribution.

To address this, we asked the consultant to thoroughly examine the grant distribution. The research confirmed that the IMS GOS evaluation and review process does result in the fair distribution of grants intended by IMS. We feel that more clear information about the IMS definition of a "fair distribution of grants" may be useful.

*To improve the perception of fairness, IMS will communicate more clearly about the goals of GOS :*

The overall goal of GOS is to use the funds available to support museums of all disciplines and budget sizes. We do this using several assumptions:

- All museum disciplines and budget sizes are equally worthy of funding. That is, groups of small history museums, large art museums, medium sized youth museums and so on are equally deserving of GOS recognition.
- A direct comparison of museums of different sizes or disciplines is neither possible nor desirable.
- GOS awards should be made to all types of museums based on quality. For the GOS review, quality is measured by how the museum uses its available resources.
- A fair distribution of GOS funds results when awards are distributed to museums of different disciplines and budget sizes in approximate proportion to the number of applications received from each group. (i.e. if 10% of the applicant pool are from one discipline, approximately 10% of the awards should go to museums of that discipline.)

The evaluation confirmed some of our perceptions and

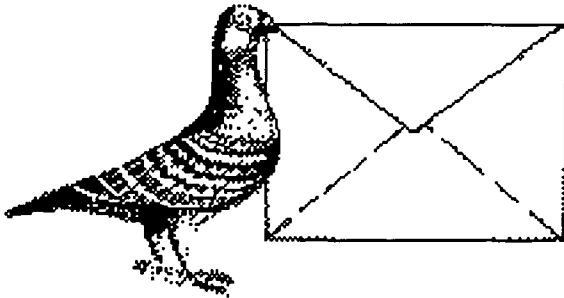
Results continued on page 4



Results continued from page 3

challenged others. The findings will help us to make improvements, describe the program more accurately, and continue aspects of the program that are successful. We look forward to maintaining an open dialogue with the museum community and we will be further examining the results of this evaluation as we prepare for the reauthorization of IMS in 1993.

\*The tests will not affect the funding decision for any museum that applied to the 1992 GOS deadline on November 8, 1991. All FY 92 GOS grant applications will be reviewed using the same process that has been used in the past. Each application will be reviewed by four independent museum professionals who are familiar with the applicant's discipline and budget size. IMS staff will read reviewer comments and refer problems to a panel of 13 museum professionals who will meet in Washington. Funds will be distributed after scores are standardized to assure proportionate distribution of funds to museums of all disciplines and budget sizes. ♦



Welcome On Board

We are pleased to welcome four new members to the National Museum Services Board:

**Robert G. Breunig** of Phoenix, Arizona. Dr. Breunig is the Executive Director of the Desert Botanical Garden in Phoenix. He served as Chief Curator and Deputy Director of the Heard Museum from 1982 - 1985. He is a Member of the Board of Directors of the Arizona Native Plant Society and a Member of the Executive Committee of Forestry for Phoenix.

**Lisa A. Hembry** of Dallas, Texas. Ms. Hembry serves as Marketing Coordinator with the Staubach Company. She was appointed to the Texas Commission on the Arts in 1989 and is a Board Member of the Dallas Symphony Association, the Museum of African-American Life and Culture and the Greater Dallas Youth Orchestra.

**Ruth K. Watanabe** of Manhattan Beach, California. Ms. Watanabe is President of RDW Enterprises. She is a Member of the California Council for the Humanities. She is a Member of the Board of Governors of the Japanese American National Museums, the Advisory Council of the Association of Asian Pacific American Artists, and the Board of Governors of the Japanese American National Museum.

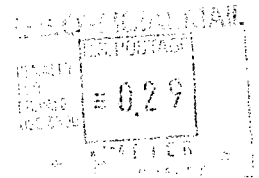
**Eunice B. Whittlesey** of Scotia, New York. Mrs. Whittlesey is a Legislative Associate for the New York State Select Committee on Interstate Cooperation. She was Executive Assistant for the New York State Legislative Commission on Public-Private Cooperation and Executive Director of the New York State of Liberty Celebration Foundation, Inc. ♦



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