

EdCom Task Force Update

Core Document Survey Results & Next Steps

February 2019

Context

In 2018, the American Alliance of Museums (AAM), in conjunction with its [Education Professional Network](#) (EdCom), created a [Task Force](#) to explore whether or not there should be an education specific Core Document required for museum accreditation. The centrality of education to the larger work of museums is not a new concept. In 1992, AAM published *Excellence and Equity: Education and the Public Dimension of Museums*. The first of three key ideas in this landmark report states, “The commitment to education as central to museum’s public service must be clearly expressed in every museum’s mission and pivotal to every museum’s activities.”

The Task Force builds on that idea and posits that museums at their core are education institutions. EdCom believes that a museum’s educational service to its community is strengthened when there is a document and set of practices in place that help guide decisions about how institutions develop programs and fulfill their educational role.

The Question

The question before the Task Force is fairly simple: ***Should there be a new Core Document, specific to education (applicable to every museum), or only required for accreditation?*** The follow up questions are less simple. If so, what should that look like? What should it be called? What elements should be included? What examples or standards exist to help guide institutions in the creation of such a document? How might this document serve a diverse range of institutions—from small historic homes to art galleries to science centers and more—with vastly different resources, missions, and communities?

The Process

In order to answer these questions, the Task Force divided up into three groups. One group conducted a literature review to explore what sorts of scholarly and professional literature exists on this topic. A second group gathered dozens of examples of education and/or interpretive plans and examined them for common elements and best practices. A third group surveyed the field at large to better understand where we currently stand as a field.

The Survey

In the fall of 2018, AAM and EdCom issued a survey to better understand the question being asked of the Task Force from the point of view of those in the field. What follows is an initial high-level summary of the information received through this survey. **Of the nearly 1000 museum professionals who responded**, the majority worked directly in an education role, were from either a history or art-based institution, and worked at museum with a staff of 25 or fewer and with a budget of somewhere between \$300,000 and \$5M. Some other interesting takeaways include:

- 48% of respondents said their organizations had an existing education and/or interpretive plan
- Of the respondents who do not have a plan, 85% believed they should have a plan.
- 77% of respondents felt there should be a sixth core document, but only 60% felt it should be required for accreditation.
- For those organizations that have plans in place, more than half include:
 - Goals and/or objectives
 - Set of Core Beliefs
 - Connection to the larger organizational strategy
- In general, the majority of respondents felt extremely strongly that Education Plans SHOULD include:
 - Core Beliefs
 - Explicit connection to organizational strategy
 - Strategic Plan
 - DEAI Focus
 - Key Messages

Next Steps

Empowered with the results of the field-side survey, a collection of more than 70 example education and/or interpretive plans, and a review of the relevant thought work from scholars and practitioners, the Task Force will bring these various elements together in New Orleans in May 2019 to decide collectively how best to move forward and what to propose to AAM as a deliverable(s) that will best help museums carry out their educational role and serve the museum field as a whole. Over the remainder of 2019 the Task Force will embark on next steps towards creating the agreed upon product, including offering additional input opportunities by the field.



**American
Alliance of
Museums**

Deciding to Create a Sixth Core Document **EdCom and AAM Survey of the Field**

Fall 2018 Survey Analysis Report
Survey Committee of the Task Force

Executive Summary

Key Highlights from the Study

Who Responded

- 993 respondents
- Majority were from historical and art-based museums or cultural
- Majority work in education
- Majority were from small museums (25 or less staff)
- Majority were from medium sized budgets (\$300,000 - \$5,000,000)
- 39% of respondents were from AAM Accredited museums.

Education and Strategy

- Nearly 4 out of every 5 indicated education is in their organization's mission statement.
- 3 out of every 4 indicated education is a part of their organization's strategic plan.

Education/Interpretation Plans

- 1 out of every 2 have an education or interpretation plan.
- There is a good mix of museums that have education plans and those that have interpretive plans.
- While most believe an education plan supersedes an interpretive plan, there is not a consensus about this. Those that have an interpretive plan believe an interpretive plan supersedes.
- Most plans are called "Plans", but other words such as framework, goals, guide and document are also used to describe the plans.
- Most respondents who said they did not have a plan believe their organization should have a plan.
- Current plans are more likely to focus on goals, core beliefs, connection to the organization's mission and strategy, and core connect.
- Participants believe core beliefs, connection to the organization, DEAI plans, and key messages are *extremely* important in a plan.

Respondents refer to the work that we do as **engage, educate, facilitate, interpret and/or teach.**

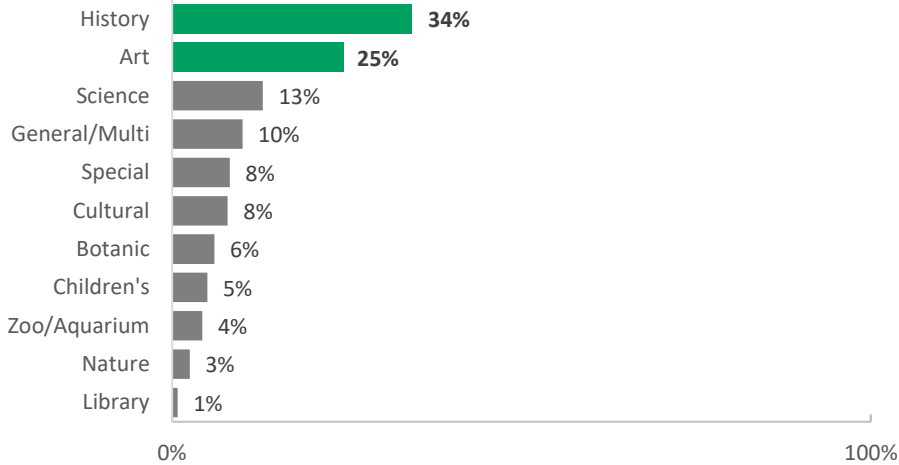
3 out of 4

support AAM creating a sixth core document, but many less believe the document should be required for accreditation.

Who Responded to the Survey

History and art-based organizations represented **over half** of the respondents.

Multiple organizations selected more than one response option. This list of 11 was combined from a larger list of 21 options.

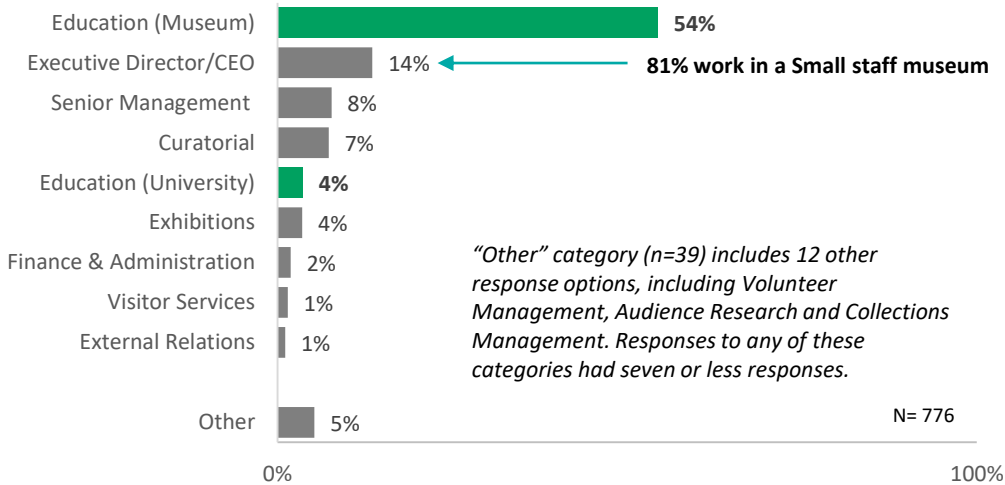


993

respondents to the EdCom Core Document survey

Not surprisingly, a majority of respondents work in **Education**.

59% of respondents work in museum, cultural or university education departments.

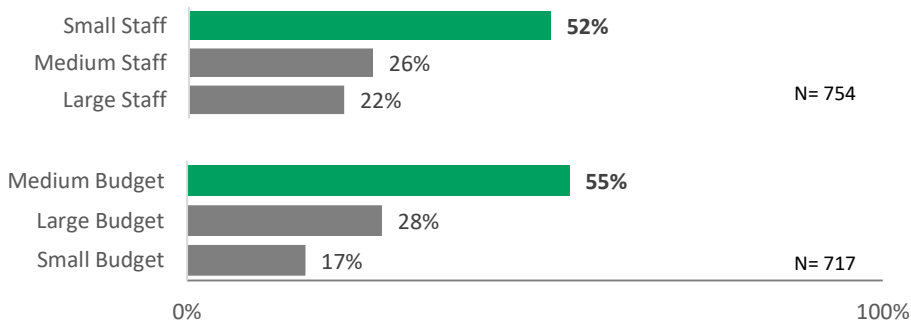


39%

respondents said their organization is AAM accredited. 47% said they were not and 14% were unsure

N=761

Respondents were heavily from museums with **small staff** and those with **medium size budgets**



STAFF

- Small - 0-25 staff
- Medium - 26-100 staff
- Large - 101+ staff

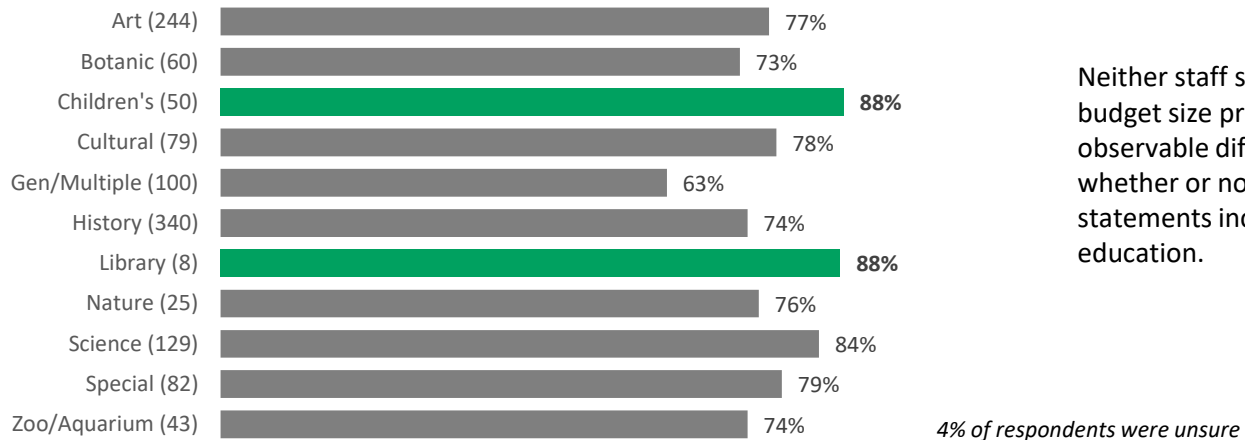
BUDGET

- Small = <\$300K
- Medium = \$300K-\$5 million
- Large = >\$5 million

Inclusion of Education in Mission/Strategy

Overall, 79% of respondents said their organization includes education in its mission statement.

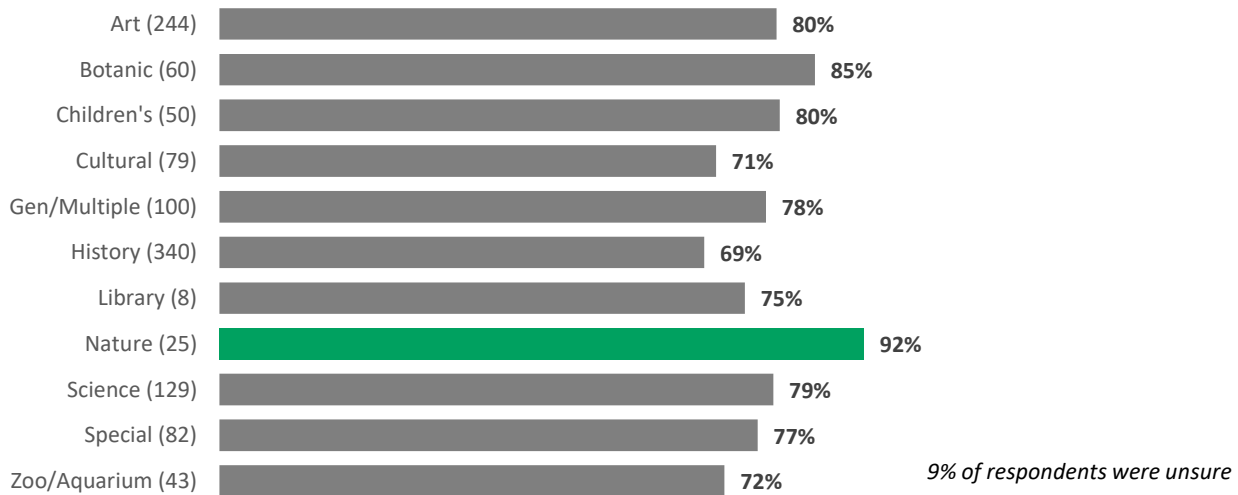
Children's museums (n=50) and libraries (n=8) were more likely to include education in their mission, while those with more diversity in their content (Gen/Multiple – n=100) were least likely to include education in their mission.



Neither staff size nor budget size provided observable differences in whether or not mission statements included education.

Overall, 76% of respondents said their organization references education in its strategic plan.

Nearly all nature centers (23 out of 25) include education in their strategic plan; museums that focus on history or culture, and zoos and aquariums are less likely to include education in their organizational strategic plan.



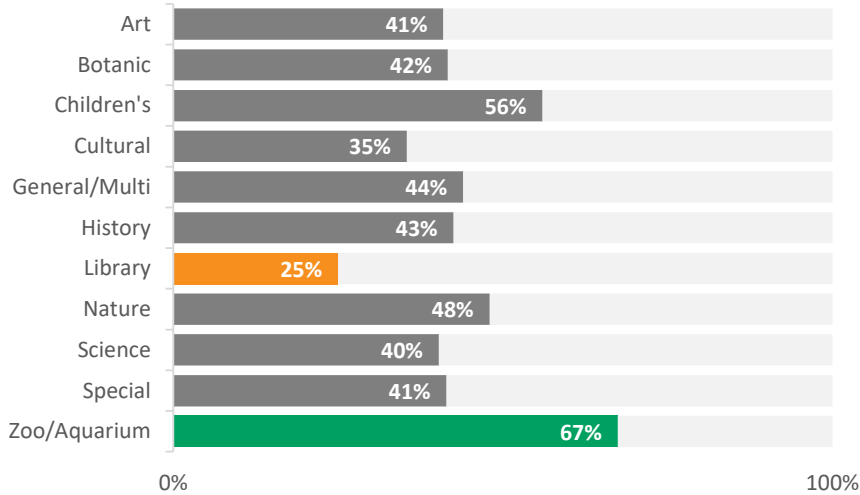
The larger the organization, the more likely it is to reference education in a strategic plan. A small staff (<25 people) reduces the chance of education being in a plan.



Who Has Education Plans

Overall, 48% of respondents said their organization has an education and/or interpretive plan.

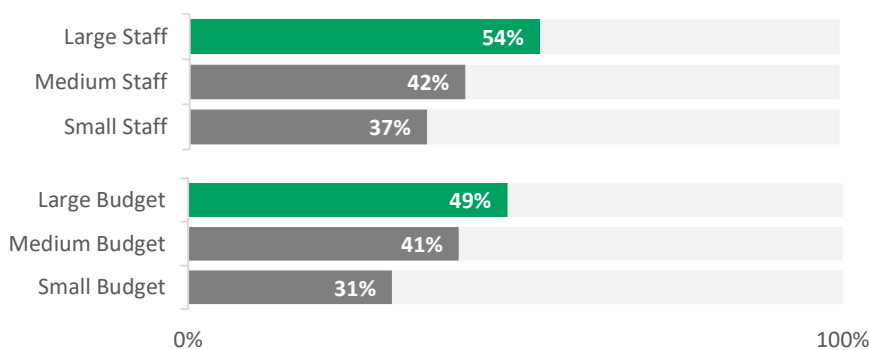
Zoos and Aquariums (n=43) are most likely to have an education plan. Libraries (n=8) are least likely to have one.



Dark grey bars include Yes responses to either education, interpretive, or both plans.

Light grey bars include No and Unsure responses.

Organizations with larger staff numbers and larger budget are more likely to have an education and/or interpretive plan.



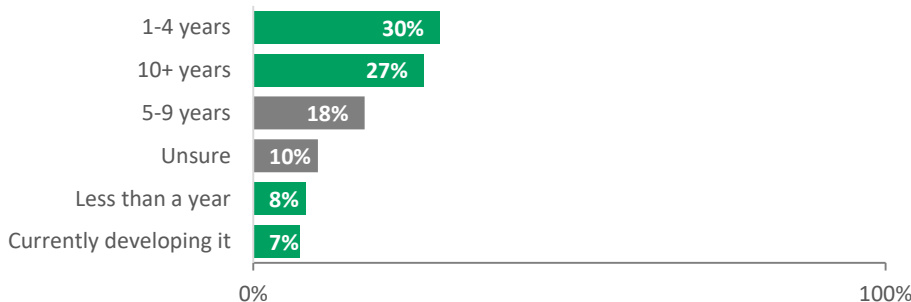
Of those that have an education plan...

53% said at least one other department uses the education plan.

75% said at least one other department/ leadership helped to develop the plan.

Over half of the plans are either relatively new, being developed or being revised.

This may indicate the priority museums are placing on developing, maintaining and revising plans.



24% say they update it annually. 21% have not updated their plan yet.

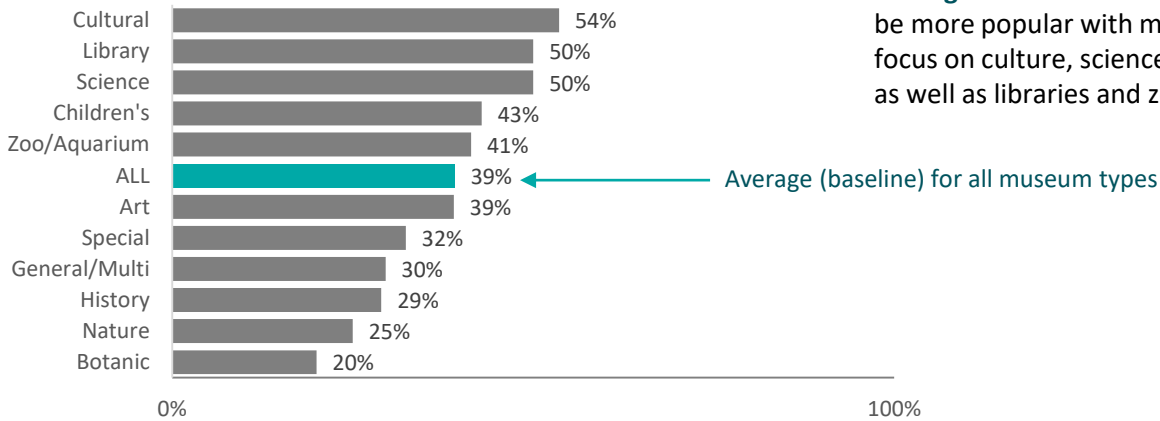
39% of those currently developing their plan say they update the plan, which may mean they are not creating a plan, but updating it.

N=752?

Who Has Education Plans

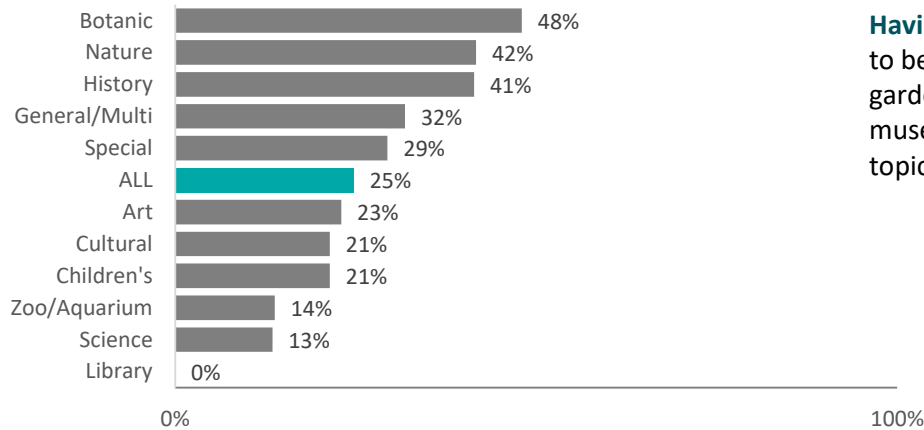
Of those that said they had a plan (48%), there are some types of museums that prefer education plans over interpretive plans.

Those who have **education** plans



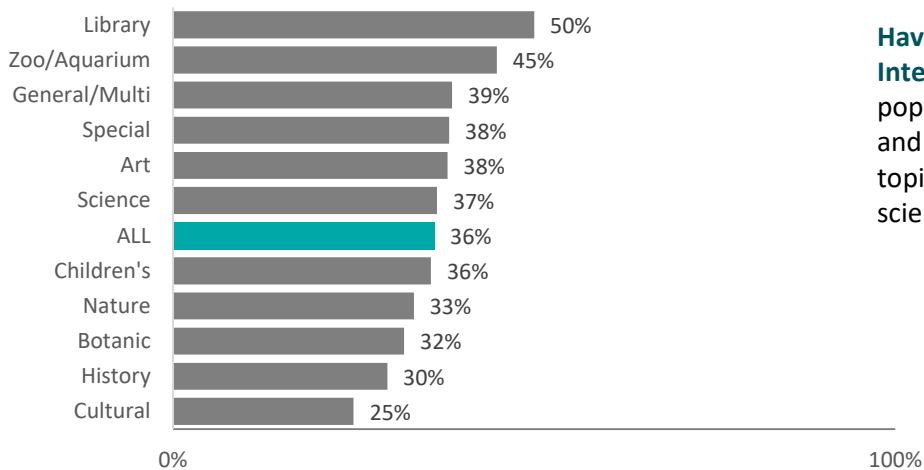
Having **ONLY Education Plans** appear to be more popular with museums that focus on culture, science, and children, as well as libraries and zoos/aquariums.

Those who have **interpretive** plans



Having **ONLY Interpretive Plans** appear to be more popular with botanic gardens and nature centers, and museums that focus on history, multiple topics and specialized topics.

Those who have **both** plans



Having **BOTH Education and Interpretive Plans** appear to be more popular with libraries, zoos/aquariums, and museums that focus on multiple topics, specialized topics, art and science.

Museums with large or medium budgets mostly have just an education plan or both, while small budget museums are more likely to have an interpretive plan.

Museums with large staff are more likely to have both plans; medium and small staff museums are equally likely to have just an education plan, just an interpretive plan, or both.

What Education Plans are Called

A Screenshot of the most commonly used words to title a plan

Strategy Living Document Guide Science Experience Formal Name Mission
Values Learning Education Policy Programs Guidelines
Education Plan Manual Interpretive Plan
Not Named Strategic Plan History
Museum Education Outreach Framework Tour
Education Department Education Curriculum Statement
Education Philosophy

Plan

What most plans are called.

Framework, Document, Goals, Guide, Philosophy, Vision, Statement and Manual are also used.

Education

Interpretive

Strategic

What most plans are qualified as in their title.

What Education Departments are Called

A Screenshot of the most commonly used words used to describe departments that oversee education/interpretation plans.

Visitor Experience Administration Team Content Engagement Volunteers
Exhibits Center Director Historic Learning Conservation
Programs Visitor Services Department
Education Committee Interpretation Operations Plan
Education Dept Curatorial Preservation Museum Research and Education
Curator Cross Departmental Division

Education

What most depts are called.

Interpretation, Learning, Curatorial, Exhibits, Public and Engagement are also titles of departments that oversee education/interpretation plans.

Benefit of Having a Plan

A Screenshot of the most commonly used words to describe the benefits of having a plan. (See appendix for all open ended responses.)

School Accountability Forward Place New Programs Big Ideas
Decision Making Teachers Focus Docents Guide Prioritize
Education Activities Plan Explain Goals Benchmarks
Interpretive Promote Audiences Measurable Outcomes
Consistency Children Guidelines Applying for Grants Projects History

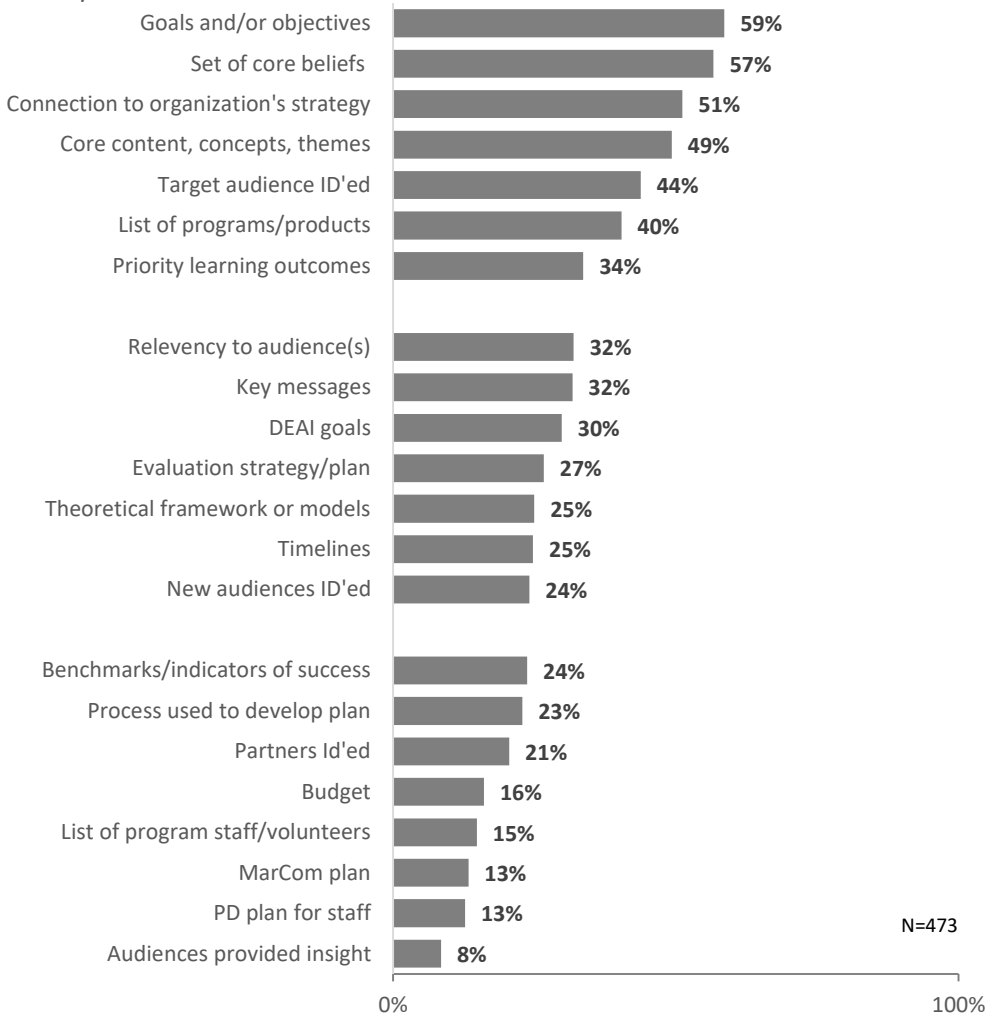
Why Want a Plan – those that don't have one

A Screenshot of reasons participants would like to have a plan.

Formal Document Long Range Common Education Plan in Order
Necessary Expand Guidance Sounds
Education Department Understood Mission
Guidelines Museum Policies Interpretive Plan
Turnover Programs Theories Strategic Plan Ongoing
Activities Ideal Future Core Values Level Current Practices Absolutely

What is Included in the Education Plans

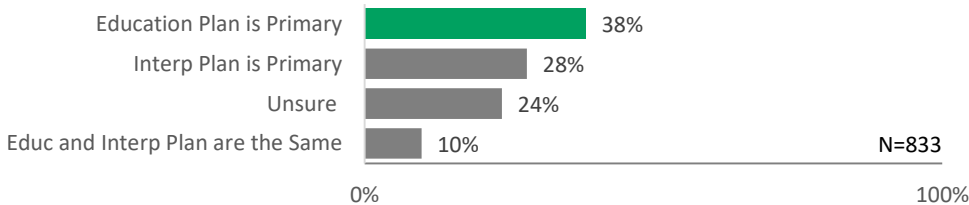
Current plans prioritize goals and core beliefs, connection to an organization's strategy, core content, and identified target audiences.



85%

Percentage of the 517 respondents that said they **did not have a plan**, that indicated they believe their organization **SHOULD have a plan**.

While a larger segment of respondents believe an **Education Plan is primary** to an Interpretive plan, there is still much debate and uncertainty over which plan supersedes which.



Museums with an education plan, both plans, or no plan believe an **education plan supersedes an interpretive plan**.

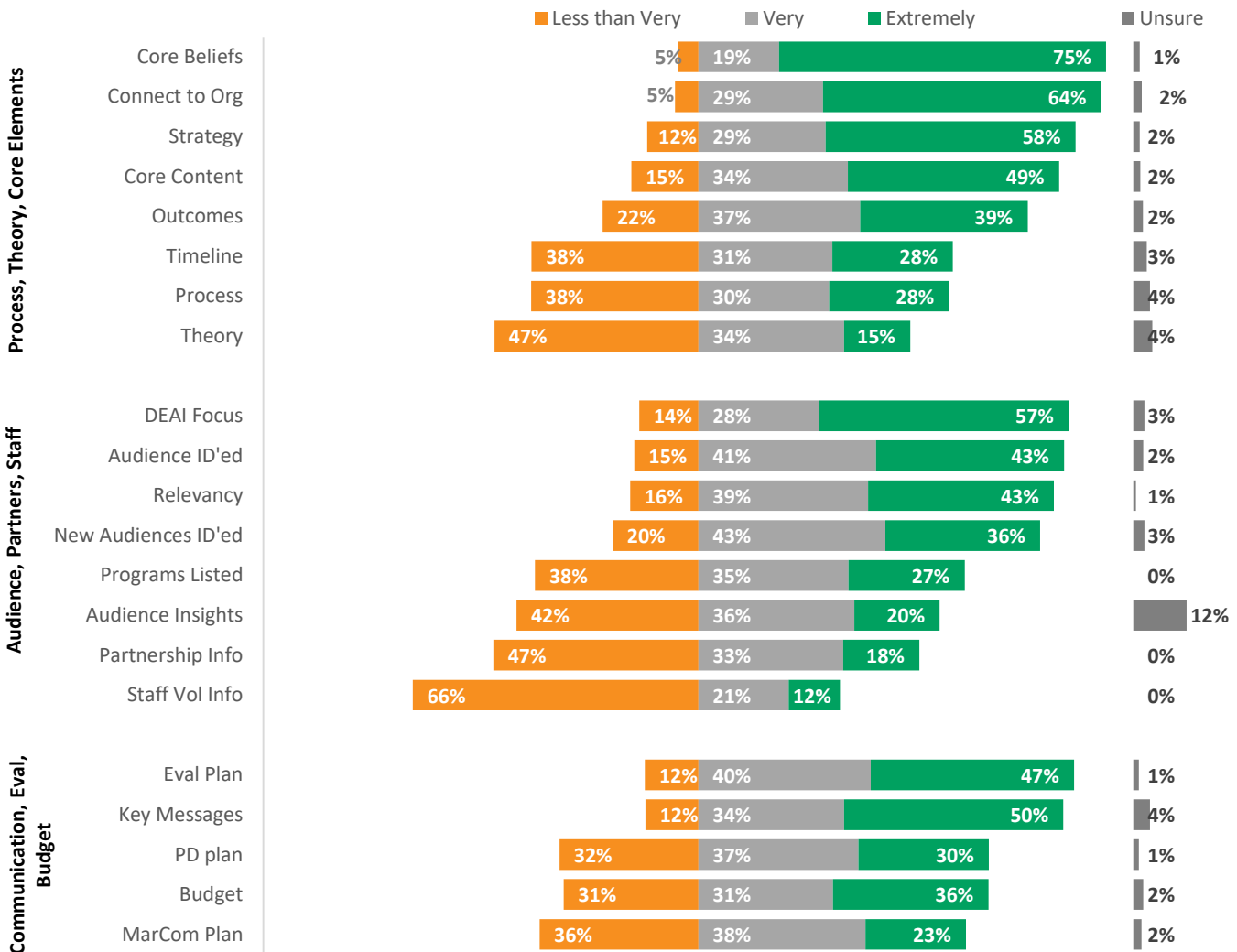
Museums with an interpretive plan believe an **interpretive plan supersedes an education plan**.

What Should Be Included in Education Plans

In general, respondents prioritized process, theory and core elements as **extremely** important to an education or interpretive plan.

Less than Very includes those respondents that selected Not at All, Slightly and Moderately

Please indicate how essential you believe each item is to an organization's education or interpretive plan?

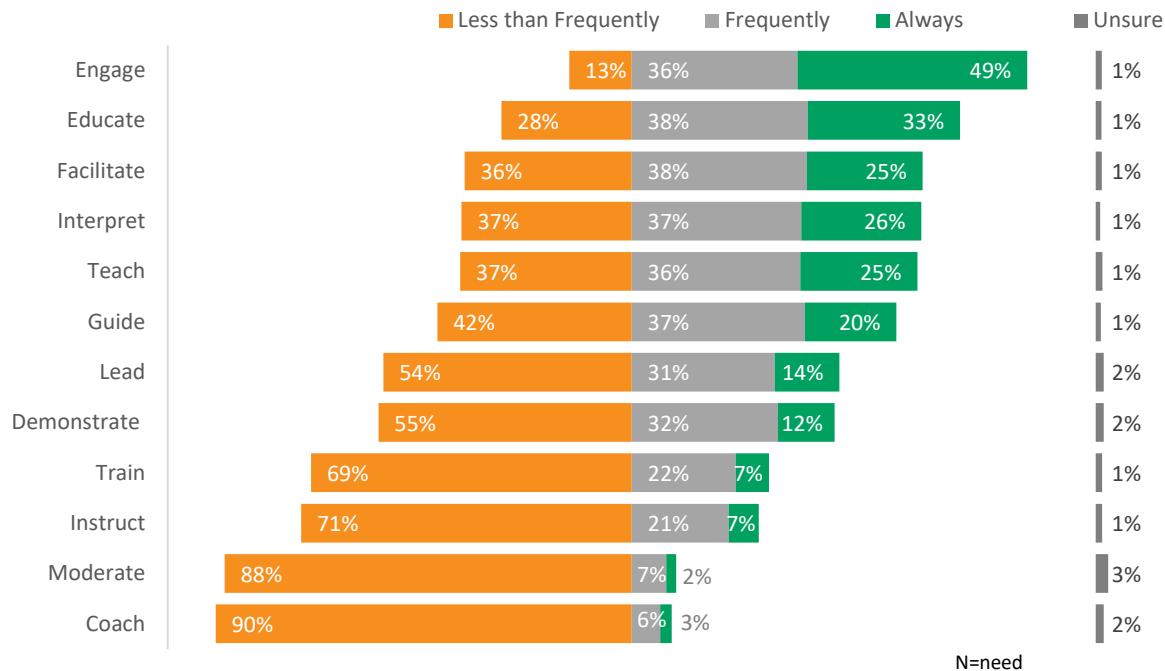


N = between 770 and 803, depending on the item

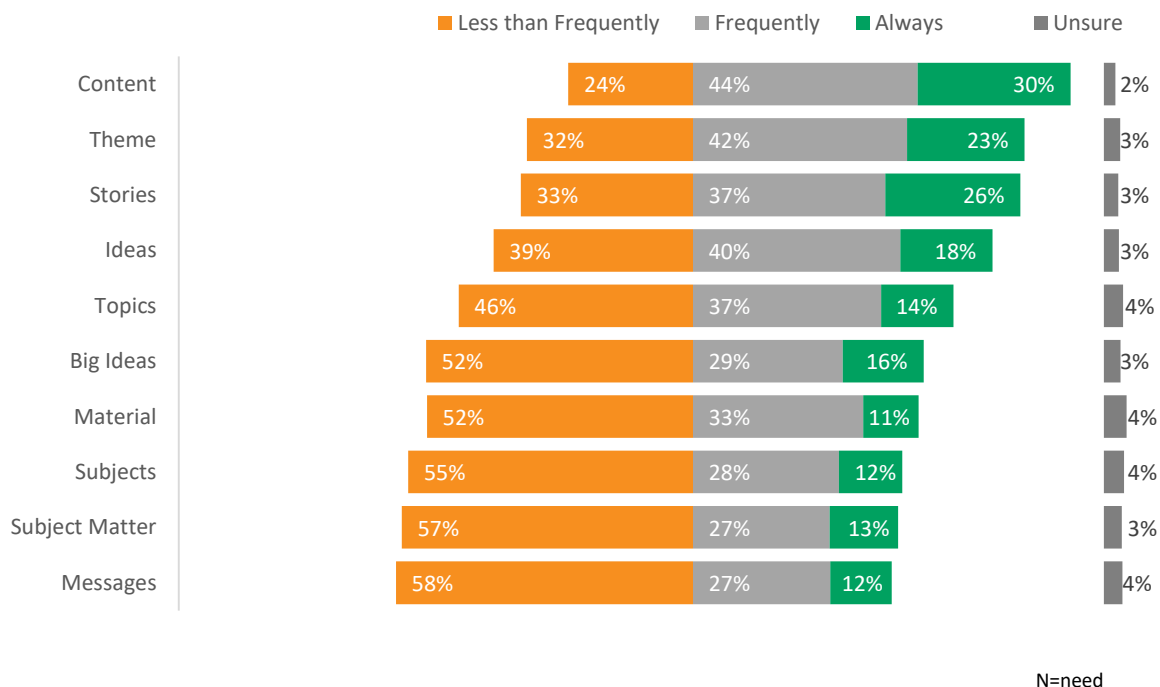
What to call “Education”

When asked what words staff use to describe the education work done in museums, Engage and Educate take top spots. This indicates a norm in the museum world to think of education as learner-centered.

Facilitate, Interpret and Teach all scored similarly, with approximately ¼ of museums **Always** using those words.



When asked what words staff use to describe the ideas we teach in museums, Content came out on top, followed by Theme and Stories.



Attitude Toward Creating a Core Document

77% of survey respondents agree or strongly agree that a sixth core document should be created, but less agree it should be required (60%) and that they'd adhere to the document (62%).

■ Strongly Disagree
 ■ Disagree
 ■ In the Middle
 ■ Agree
 ■ Strongly Agree

Create a sixth Core Document



Require it for Accreditation



Organization would adhere to it



How Can Alliance be of Support?

Review Case Studies Learning Variety of Institutions Core Document Adapt
 Outline Sources Sample Plans Able Developing
 Research Museum Nice Education Interesting
 Examples Set of Guidelines Template Continue Model MAP
 Sample Documents Guiding Questions Funding AAM Conference
 Practices and Standards

59%

respondents said
 their organization
 is interested in
 maintaining or
 acquiring
 accreditation
 through AAM. 10%
 said No, and 31%
 were Unsure.