

# Checking your pulse

## How to track and apply user statistics

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Think of all the ways your organization generates statistical information – membership rosters, museum visitation, program attendance, research requests, donor lists and more. When accurately tracked and applied to decision making, this information becomes an important tool that will aid you and your board in managing your business functions and operating your museum.

Statistical information can also be used to communicate about the benefits of your organization. Consider how valuable those numbers will be in writing grant requests, talking to reporters, preparing annual reports or laying the groundwork for a fundraising campaign.

All of this information gives you some objective data about a very subjective endeavor – collecting, preserving and interpreting your community's history.

### What to track

There are many aspects of your operation that can be tracked, as the following lists show. Don't think of the statistics generated as just numbers. They convey meaningful information about your organization, your museum and your programs.

**Program statistics** document various activities related to museum use and programming:

- Attendance at exhibits, interpretive programs, workshops and classes.
- Membership numbers by category, and member retention rates.
- Donor information.
- Number of volunteers and volunteer hours.
- Research requests.
- Phone calls.
- Web hits.
- Outreach activities.

**Operations statistics** and related information tell others something about your operation:

- Physical-plant information: number of buildings and square footage, acreage, parking lot capacity, fire and safety data, ADA compliance.
- Museum features, including space for exhibits and services.
- Collections holdings, storage and resources.
- Building acquisition information: property title, year acquired.
- National Register or Landmark status.

**Financial statistics** help your board track your organization's budgeting and financial health:

- Revenue: sales, admissions, rental or event fees, membership income, food service, donations, grants, gifts and endowments.
- Expenses: fixed costs such as utilities, lease or rent, salaries and insurance; variable costs such as marketing,

seasonal and part-time wages, program materials, equipment and cost of goods sold.

- Capital campaigns.

### Why it's important

Tracking statistical and operational information helps you evaluate both your strategic plans and your program performance. When you use objective data to back up subjective program evaluation and anecdotal evidence, your decisions about program direction will become clearer. Use statistical data to:

- Test the viability of your programming. Does it align with your mission, goals and objectives? Is it valued by your membership, funders and other stakeholders? Does it meet the needs of your community?
- Determine program efficiency and effectiveness. Do programs draw new and varied audiences? Are expenses in line with budgets? Assessing program results and costs will help you wrap organizational performance into your planning process.
- Evaluate your program support. Is it strong enough to sustain your programming over time? Knowing this will enable you to advocate more effectively for funding.
- See where your museum stands compared with other, similar organizations.

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### The data collection model

To be an effective program management tool, the collection of statistics and data must be an integral part of your operation. Establish an information-gathering system with the following components:

- **Procedures** that collect data and measure performance in a routine manner.
- User-friendly **processes** to ensure regular use.
- A **consistent reporting format** for both recording and disseminating your data.
- **Training** for staff and volunteers on your data collection procedures and standards.

However you gather your data, the primary goal of data collection should be consistency and accuracy. This makes your data trustworthy. The best way to achieve an accurate, consistent data

collection system is to use a computer with database and spreadsheet software. This will save time, offer greater reliability and create clear, easy-to-read reports.

A workable model for data collection should have the following structure:

- **Daily tracking** of statistical information – attendance, admissions, sales, revenue, expenses, program use, etc.
- **Monthly reports** based on the information gathered daily.
- An **annual report** summing up the monthly data.

Each step creates its own baseline of information. You can then pinpoint milestones or benchmarks to use for comparative analysis over time, enabling you to detect shifts and identify trends in usage of your museum, programs and site.

### Collecting visitor information

There is no better way to know your audience than to collect visitor information. Basic audience demographics gathered by survey help you understand who visits your museum and uses your programs. This data in turn informs your decisions about allocating marketing and program resources. Here's some of what a survey of your museum visitors, program audiences and members can tell you:

- Who visits? Gather demographic information on age, place of residence, income, gender and ethnicity.
- When and with whom did they come? Track day of the week, first visit, group type and size, presence of children.
- Why did they come? Special program? Leisure activity? Tourism?



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- How did they hear about your organization? Highway sign? Newspaper or radio publicity? Mailing or brochures? Word of mouth?
- How are they connected to your site or museum? Have survey takers note membership or affiliation with other organizations.

To create a context for your results, compare your findings to published surveys available through the University of Minnesota Tourism Center, Explore Minnesota Tourism or your local chamber of commerce or convention and visitors bureau.

### Gathering descriptive statistics

The term *descriptive statistics* is a bit of a misnomer. It represents not numbers but impressions – what people think and say about your museum. Descriptive statistics can be collected

in a variety of ways – from comments in guest registers, by informal visitor survey, through focus groups, even by on-site or in-gallery observation.

These visitor impressions offer yet another way to gauge program effectiveness and guide your decision making. You can use descriptive statistics just as you would use other kinds of statistics – for marketing and fundraising, in annual reports and membership drives, for program evaluation and retail sales decisions.

### Reporting your results

Written reports provide a good way to analyze and summarize your collected data and statistics. There are several components to good reporting. **Tables** are effective for summarizing base data. **Graphs** visually demonstrate trends and key points. Be sure to provide a **summary** of the data, typically shown

in percentages, that allows for easy comparison and contrast. Finally, include a **narrative** that interprets the data and reinforces key points.

### Using statistics

Armed with sound statistical information, you're ready to apply it in a variety of ways to improve all aspects of your operation:

- **Administration:** Write better annual reports. Ensure efficiencies of operation. Manage volunteers. Compare with peers.
- **Membership:** Analyze levels of membership. Recognize trends. Increase repeat visitation. Generate lists of potential members.
- **Marketing:** Make branding decisions. Allocate funds. Shape marketing campaigns.

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- **Development:** Identify donor prospects. Set fundraising goals. Analyze results. Do long-range planning.
- **Programs:** Gauge program effectiveness. Track audience trends. Poll visitors to identify their interests and generate new programming ideas. Assess risks.
- **Sales:** Track seasonal trends. Determine what to stock. Set appropriate pricing.

### A program management tool

Here's how to translate your newfound facility for gathering data into a tool for evaluating museum programs. Use this hierarchy of questions and the knowledge gained from your statistical analyses to guide your decision making about programs under consideration or review. The process will help you understand program impact, strengths and shortcomings.

1. Is the program central to your mission? If the answer is yes, move on to consider additional criteria for success.
2. Does the program meet acceptable standards for quality? Does it reflect industry best practices (for example, fostering civic engagement)? Does it achieve the goals and objectives it was designed to reach?
3. What level of comparative advantage does the program provide? Does it position your organization ahead of others in terms of attendance, revenue, resource acquisition or public perception?

4. Does the program create synergy within your organization? Does it generate partnerships and community collaborations or reach new and varied audiences? Measure attendance, gather information about participants and document a history of financial support for the program to answer this question.

5. What is the demand for the program? Are there resources available to sustain it? By evaluating a program on the basis of current and projected demand, costs and availability of resources, you can predict, at least in the short term, the likelihood of success or failure – an important step in your budgeting and planning process.

6. Is the program efficient and effective? Does it meet the goals you set for program performance? To help determine this, analyze costs and revenue per visitor and compare those figures to original projections.


7. Does the program effectively leverage existing resources and/or create new sources of support? You should be able to demonstrate how your program uses resources, achieves set goals within existing resources or generates new resources.

### A sound business model

Continued changes in governmental support are forcing museums to rely more heavily on earned income while keeping expenses in check. In the face of that reality, the value of using a sound business model for museum operations and program delivery is more apparent than ever before. And at the heart of any successful business model is

statistical data – accurate, targeted and designed to answer questions about your organization.

So help your museum survive these uncertain economic times by gathering good statistical information as part of your museum program management. Then use the data to shape your strategic plans, evaluate your performance and advocate for funding and support. When you can demonstrate the value of your museum to the community, you help ensure that your organization – the keeper of your community's history – will thrive for generations to come. ■



### What statistics do you track?

Do you gather and analyze statistics to help you make programming decisions? On Jan. 7, join the discussion on the Minnesota Historical Society's Local History weblog (<http://discussions.mnhs.org/MNLocalHistory>) to share your experiences with your colleagues.