



Economic Effects of Montana's Museums and Historic Sites

Results of the 2011 Survey

Prepared by: Cossitt Consulting
Finalized by: Museums Association of
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PURPOSE OF THIS STUDY

In order to understand the role of Montana's museums and historic sites in the Montana economy, the Museums Association of Montana (MAM) initiated an update to a similar survey conducted in 1999. The purpose of this 2011 survey is to assess the economic impact in 2011 and to compare results between the 1999 and 2011 surveys. MAM contracted with Cossitt Consulting, which conducted the 1999 survey, to prepare the 2011 study.

Economic effects to the state of Montana are determined by the amount of money that comes into the state from elsewhere (direct effect). As the institutions spend those funds to make purchases, pay staff, build exhibits, etc., the money circulates in various businesses and locations in Montana (indirect and induced effects).

This study examines the amount of funding received from outside of Montana in the form of federal funding, private donations and grants, and earned income, as estimated by the respondents to the survey. It does not include a survey of visitors whose primary purpose for visiting the state was to attend a museum or historic site. The money those persons spend could also be attributed to the museum's economic effect, but such a study was outside the scope of this effort.

Although only funds coming into the state create new jobs, revenues obtained from within the state support existing jobs. Consequently, this study also looks at total revenues (including funds received from within the state) because those funds circulate as payroll and purchases and support the existing economy in Montana. In some respects, museums function as small businesses serving local needs, with the obvious difference that some of the operating funds come from the public. Still those with a payroll are providing paid jobs and all are making some purchases for their operations. These expenditures are important to local economies.

This study also examines other benefits of museums and historic sites. These institutions produce strong societal benefits, such as preserving history and providing education, which also play a role in the overall health of a community and its economy. There are, however, no standardized mechanisms to translate the societal benefits into dollars and cents. For example, there is no dollar value on the number of children who participate in a field trip to an historic site such as Little Big Horn Battlefield.

EXECUTIVE SUMMARY

Montana has a wealth of museums and historic sites. In 2008, the Institute for Museum and Library Services counted 170 museums in Montana or 17.7 museums per 100,000 persons. Nationally, there are 5.9 museums per 100,000 persons. Montana has 25 National Historic Landmarks, 1,084 National Register of Historic Places Listings, and 891 archeological sites in national parks.

This study examines the economic effect of the 100 museums and public historic sites that responded to the survey. In all, 203 museums and public historic sites received the survey. The 2011 study considers not only economics in dollars and cents, but the societal benefits that contribute to the overall health of communities and their economies.

Based on the 2011 survey, 100 Montana museums and historic sites:

- Directly spend \$24 million on goods and services in Montana each year
- Directly account for \$5.8 million each year in out-of-state revenues that create additional new jobs in Montana
- Directly spent \$24.4 million on major construction or renovation projects in the past five years
- Employ 529 paid staff
- Serve 1.23 million visitors each year
- Serve 96,204 school children each year
- Typically charge no admission – 63% charge no admission; only 8 charge more than \$5

On a national scale, museums and historic sites are economic engines:

- Museums employ 400,000 Americans, according to the American Association of Museums.
- U.S. museums contribute \$21 billion to the American economy each year (2008 estimate), encouraging economic growth in their communities.
- Museums rank among the top three family vacation destinations.
- Trips including cultural and heritage activities comprise one of the most popular and significant segments of the travel industry, accounting for over 23% of all domestic trips.
- Visitors to historic sites and cultural attractions, including museums, stay 53% longer and spend 36% more money than other kinds of tourists.
- Quality of life issues contribute significantly to decisions businesses make in choosing to relocate, including access to cultural resources that includes a dynamic museum community. In fact, according to research by the National Governors Association, “It has been shown that the nonprofit arts and culture industry generates over \$166 billion in economic activity annually, supports over 5.7 million full time jobs, and returns over \$12 billion in federal income taxes

annually. Governments which support the arts on average see a return on investment of over \$7 in taxes for every \$1 that the government appropriates."

- In 25 years, the national "Main Street" program, which is based on a foundation of preserving and re-using historic buildings, has cumulatively resulted in \$23.3 billion invested in physical improvements, 67,000 net new businesses, 308,370 net new jobs, 107,179 building rehabilitation and construction projects, and a leverage of public funds of \$26.67 to \$1.00.
- Montana has had \$42.6 million of historic rehabilitation projects stimulated by tax incentives since 1995.
- Compared to new construction, every \$1million spent on rehabilitation produces
 - \$120,000 more dollars that will initially stay in the community
 - Five to nine more construction jobs
 - 4.7 more new jobs will be created elsewhere in the community
 - Household incomes in the community will increase \$107,000 more

The national recession has affected Montana museums and public historic sites:

- In 1999, revenues exceeded expenses by about 11%. In 2011, expenses exceeded revenues by about 5%.
- Government financial support declined from 37% of all reported revenue in 1999 to 19% in 2011. The biggest declines were federal (from 23% to 8%) and state (10% to 5%).
- Decreases in federal and state funding have been offset by increases in local government support (from 4% of total budget in 1999 to 6% in 2011), private contributions (9% to 14%), private/non-government grants (10% to 19%), and special events (7% to 14%).

SUMMARY OF RESEARCH METHOD AND PROCESS

A MAM survey committee reviewed the 1999 survey and made some modifications to shorten the survey to two pages and add some additional questions. Prior to finalizing the survey, the committee considered a review of literature on methodology for similar economic analyses.

The MAM committee updated the list of organizations that would receive the survey. The list included all museums with a collection, archives available for public research, and historic sites. The list continued to be edited as information was received throughout the survey process. This included deleting organizations from the list that were no longer in existence or that had temporarily closed their doors. The finalized list included 203 organizations.

Originally the survey was intended to be sent only via the U.S. postal system, but the MAM study committee requested an on-line survey as well.

An advance notice postcard was sent to all on the list approximately two weeks prior to sending out the survey. The postcard notice, signed by the MAM Chair, told recipients that the MAM 1999 study was being updated and to look in the mail for the survey. The same notice was sent via email to all those who had email addresses. Two weeks later, the survey was sent to all postal service recipients and a notice sent to all those with email that the survey was available on-line. Approximately two weeks after that a follow-up notice was sent via postal service and email to all on the list reminding them to complete the survey. Follow-up phone calls began approximately one week after the deadline date for the surveys.

There were issues with the on-line surveys that did not become apparent until the follow-up phone calls began. There were many individuals who indicated they had completed the on-line survey, but MAM had not received these surveys. Eventually, the on-line surveys were addressed, but it is possible that the on-line issues negatively affected the response rate. MAM sincerely thanks all those who responded patiently to the requests to re-submit their survey.

Phone call follow-up continued several weeks past the original schedule. Messages were left up to four times. The target was 50% response rate, and nearly two months after the original survey date, a response rate of 49% (100 surveys returned out of 203 on the list) was reached.

With 100 responses, the survey is generally representative of the population with a 95% confidence level and a margin of error of approximately 10%. This means that there is a 95% probability of being within 10% of the answers that all institutions (not just those who responded to the survey) would give. For example, if 65% of the survey respondents said "yes" as the answer to a question then it is highly probable (95% chance) that between 55% and 75% (+ or - 10%) of all 203 institutions would have also answered "yes".

The margin of error increases as the number of responses declines for specific questions. Not all of the 100 respondents responded to each specific question, consequently there are many questions with a

much higher margin of error. Therefore, with a few specific exceptions, the following analysis does not attempt to extrapolate survey results to the entire population of 203 institutions. In other words, this study reports only what was collected in the survey.

Neither the 1999 nor 2011 studies include computations of indirect and induced economic effects. Neither study included a survey of visitors to determine the spending patterns. These analyses are recommended in any future study.

OVERVIEW: ROLE OF MUSEUMS AND HISTORIC SITES IN THE ECONOMY

“Cultural attractions are at the forefront of those programs designed to stimulate private investment, create jobs, and promote tourism.”

Roger Kemp and Marcia Trotta: Museums, Libraries and Urban Vitality

Museums, cultural attractions, and historic preservation efforts are playing a significant role in community economic development. These entities and activities are part of what make communities unique and reflective of local culture and traditions. Retaining, renovating and giving new life to historic buildings is a fundamental part of reinvigorating our public spaces and community centers in a way that builds on local history and culture. Museums and libraries have been proven anchors for downtown revitalization in many areas of the country, including Denver, Boston, Baltimore, Little Rock, Portland, and more including smaller towns and rural areas. Consider how development of the Lewis and Clark Interpretive Center in Great Falls functions as a stand-alone institution and also integrally connected to the city’s river trail system and Giant Springs State Park. Although efforts of an individual entity can be a starting point, community development works best as a multi-pronged approach with an overall vision. When museums, performing arts, and other public spaces are part of a larger picture of pedestrian-friendly space, access to commercial and retail cores, pleasant outdoor space and visually-pleasing design the result has been significant economic development in many communities.

In Montana, museums function in some ways as small, local businesses. Like private businesses, they bring in revenues, they employ staff, and they are often located in downtowns or areas with retail business. Museums, like private businesses, generate revenues from fees and sales. Unlike private business, they also rely to some extent on donations and government funding, at least some of which is generated from out-of-state and is a net influx of “new” money to Montana. As a “small business,” museums’ contribute to local economies with their expenditures for staff, purchases for operating supplies, and construction/renovation projects.

On a broader scale than individual communities or downtowns, museums, historic sites, and cultural and special events are a major part of Montana’s tourism economy. Montana is blessed with amazing scenery, mountains, wildlife and outdoor recreation, but the history and culture is also a significant attractant for many visitors. Museums are integral to the learning experience of visitors who engage in paleontological field digs, canoe trips down the Missouri, follow the Lewis and Clark expedition trail, pan for gold, visit national and state parks, or any other of the many out-of-museum experiences that leads to a thirst for more information.

And how do we know that these efforts produce good economic returns? Over the past 20 years there has been a growing body of research on this topic. Studies on economic impacts of museums, historic preservation, and arts and cultural organizations have significantly increased in sophistication over the past decade. Partners in Tourism, a coalition of national organizations and agencies, specializes in researching cultural heritage tourism. Travelers who engage in cultural tourism design their trips to include art galleries, theater, museums, historic sites, cultural events, ethnic communities and neighborhoods, and architectural and archaeological treasures. The American Association of Museums, National Assembly of State Arts Agencies, National Trust for Historic Preservation, and the national

“Main Street” program (with its preservation-based strategy) all provide information on economic benefits of their respective interests. A growing number of individual states are conducting studies. The website for the National Conference of State Historic Preservation Officers has links to economic analyses in 17 different states. Similar studies for museums and arts agencies have been conducted by individual institutions and by various state-wide organizations.

Montana also has a growing body of research on this topic. It includes this study and its 1999 counterpart; the Montana Arts Council 2003 study, “The Role of the Nonprofit Arts in Montana’s Economy” (2003); and the Montana State Parks study, “2010 Economic Impact Survey of Visitors to Montana State Parks.” Montana does not yet have a study of historic preservation benefits, despite the fact that it has a significant number of historic sites and buildings of national significance. The Montana Preservation Alliance is working to obtain funding for such a study. Montana’s Institute for Tourism and Recreation Research has not yet completed a study specifically focused on cultural heritage tourism. Their research provides a wide variety of data on Montana visitors, such as spending patterns, primary purpose of the trip, etc., but to date have not conducted a study of those visitors whose primary reason for coming to Montana is for cultural-heritage tourism.

Some of the findings from these national and state studies include:

- Museums employ 400,000 Americans, according to the American Association of Museums.
- U.S. museums contribute \$21 billion to the American economy each year (2008 estimate), encouraging economic growth in their communities.
- Museums rank among the top three family vacation destinations.
- Trips including cultural and heritage activities comprise one of the most popular and significant segments of the travel industry, accounting for over 23% of all domestic trips.
- Visitors to historic sites and cultural attractions, including museums, stay 53% longer and spend 36% more money than other kinds of tourists.
- Quality of life issues contribute significantly to decisions businesses make in choosing to relocate, including access to cultural resources that includes a dynamic museum community. In fact, according to research by the National Governors Association, “It has been shown that the nonprofit arts and culture industry generates over \$166 billion in economic activity annually, supports over 5.7 million full time jobs, and returns over \$12 billion in federal income taxes annually. Governments which support the arts on average see a return on investment of over \$7 in taxes for every \$1 that the government appropriates.” (Mountain Plains Museum Association)
- From 1980 to 2010, the Main Street Program, which is based on a foundation of preserving and re-using historic buildings, has cumulatively resulted in \$51.1 billion invested in physical improvements, 99,508 net new businesses, 436,909 net new jobs, 221,775 building rehabilitation and construction projects, and a leverage of public funds of \$16 to \$1.00. (National Trust for Historic Preservation)

- Compared to new construction, every \$1million spent on rehabilitation produces:
 - \$120,000 more dollars that will initially stay in the community
 - Five to nine more construction jobs
 - 4.7 more new jobs will be created elsewhere in the community
 - Household incomes in the community will increase \$107,000 more (Rypkema)
- Total grants made to Montana museums by the four major federal government museum granting agencies totaled \$2.3 million for the seven year period from FY 2000-2006. The four granting agencies are Institute for Museum and Library Services (IMLS), National Science Foundation (NSF), National Endowment for the Arts (NEA), and National Endowment for the Humanities (NEH). An additional amount of \$3.5 million was received in earmarks for a total of \$5.7 million over the seven-year period. Total national amount of grants and earmarks was \$1,142 million. (Institute of Museum and Library Services, 2008)
- Montana has a much higher per capita number of museums than the nation as a whole. In 2008, the Institute for Museum and Library Services counted 170 museums in Montana or 17.7 museums per 100,000 persons. Nationally, there are 5.9 museums per 100,000 persons. (Institute of Museum and Library Services, 2008)
- Montana has 25 National Historic Landmarks, 2 World Heritage Sites, 1,084 National Register of Historic Places Listings, and 891 archeological sites in national parks. (National Park Service, 2011)
- Montana has had \$42.6 million of historic rehabilitation projects stimulated by tax incentives since 1995. (National Park Service, 2011)
- Non-resident visitors to Montana’s State Parks (which include historic sites and interpretive centers) spent \$122.3 million in 2010. Sixty-three percent (63%) of nonresident visitors visited a historical site, museum or scenic site while in Montana. (Bureau of Business and Economic Research - University of Montana, 2010)
- 137 Montana non-profits arts organizations had total direct expenditures of \$22 million in 2002. Combined they accounted for 260,000 out-of-state visitors. Accounting indirect and induced economic effects, the total impact was 1,949 full-time jobs, \$35.8 million in payroll income, \$13.5 million in tax revenues. (Arts Market, 2003)

It is clear from these studies that museums, historic sites, cultural events and organizations have a positive effect on local, state, and national economies. However, developing and sustaining a strong economy requires looking beyond just dollars and cents.

“Triple Bottom Line” analysis provides an accepted context and methodology for measuring these other benefits. More private corporations and non-profits are using this type of analysis to identify and explain their worth. Although many institutions may have considered non-monetary benefits and costs in overall performance analysis for years, the concept was to some extent institutionalized when the

term Triple Bottom line was first coined in 1994 by John Elkington, the founder of a British consultancy called SustainAbility. Triple Bottom Line analysis examines the traditional bottom line of profit-loss, but also gives measure to social and environmental performance. These three bottom-line items are referred to as the three “Ps”—Profit, People, and Planet. The measures for “Profit” are economic and include revenues, expenditures, and jobs. Social variables, the “People” part of the Triple Bottom Line, include measures of individual and collective health and well-being. Examples of social measures that can be applied to museums include numbers of school children visiting museums, number of outreach program, etc. Environmental variables, the “Planet” part of the Triple Bottom Line, address the effects on the natural environment—air and water quality, energy consumptions, solid waste, natural resources, and land use/land cover. Examples of environmental measures that can be applied to museums include use/re-use of existing and historic buildings, energy-efficient lighting/heating, etc.

Museums and historic sites provide a wide-range of benefits that are often not incorporated into economic analyses. Although museums and historic sites clearly do provide financial benefits to their communities and the state overall, they also provide much more than that. Because Triple Bottom Line is becoming more widely accepted as an analytical tool, it provides a good basis for examining the multiple benefits of museums.

Consider the strong social effects of museums and historic sites. They preserve the past, educate and entertain children and adults, sponsor local events, and provide venues for public gatherings. Museums are clearly supported by their many volunteers. This report on the 2011 survey of museums and historic sites provides information on educational programs, special events, cataloging methods, and volunteers.

Many museums and historic sites are also participating in actions to sustain or improve the environment. Historic preservation embodies the renewables of sustainable development. Donovan Rypkema, author of *Economics of Historic Preservation*, states: “When you preserve a historic building, you are preserving land. When you rehabilitate a historic building, you are reducing waste generation. When you reuse a historic building, you are increasing recycling. In fact, historic preservation is the ultimate in recycling.” (Preservation Action Council of San Jose)

Another aspect of environmental performance might be how museums fit within the surrounding physical environment of their facility. Criteria for measuring this variable might include how museums integrate with pedestrian linkages to other cultural facilities, and retail and commercial businesses; use and re-use existing historic buildings, and participate in community and regional planning efforts to create dynamic places for residents and visitors alike. This 2011 economic study of museums and historic sites only begins to touch on the topic of environmental variables by asking a question about whether facilities use buildings eligible for the national register.

Museums and historic sites provide clear benefits to our economies, our societies, and our environment, all of which are dynamic parts of healthy communities with strong economies.

SURVEY RESULTS

Comparability of Results: 1999 and 2011

Although the total population to be surveyed was numerically quite similar for the 1999 and 2011 surveys, there are several key differences. These include:

- ✓ Differences between the survey populations
- ✓ Differences between the response rates
- ✓ Different types of institutions that responded
- ✓ Differing proportions of responding institutions categorized by their annual revenues

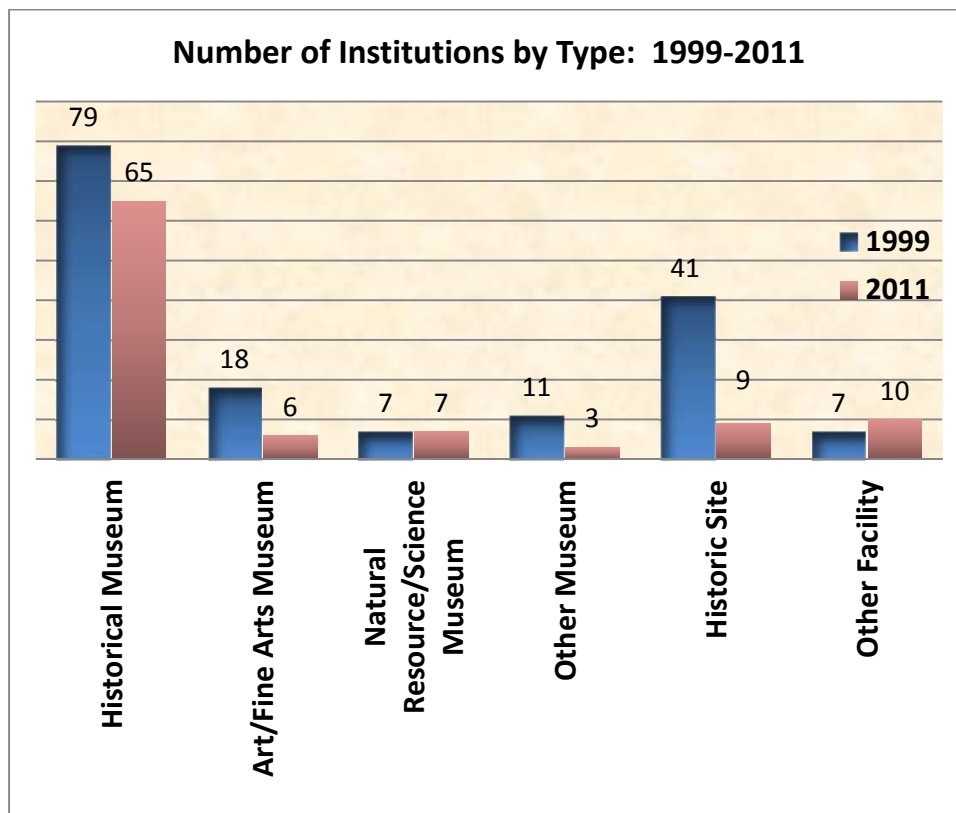
Surveyed Population and Response Rates

The population surveyed in 1999 consisted of a total of 207 institutions, compared to 203 in 2011. The difference was not just a reduction of four institutions, instead some institutions were added to the list and others dropped off. The change was due in part to a slight change in the criteria for what institutions would be surveyed – in 1999, for example, zoos were included in the broad definition of museums but in 2011 they were not. Overall, most of the 203 institutions who received the 2011 survey were the same as those for the 1999 survey.

Many of the institutions who responded in 1999 also responded in 2011, but others responded to only the 1999 survey or the 2011 survey. The percentage of the total population that responded was quite different between the surveys. In 1999 a total of 128 responses, representing a total of 133 institutions, were received. In 2011, 100 surveys were received. Based on the number of institutions represented, the response rate was 66% in 1999 and 49% in 2011. In both 1999 and 2011, some of the returned surveys did not include answers to all of the questions. Detailed information in this report attempts to identify number of respondents for each particular question.

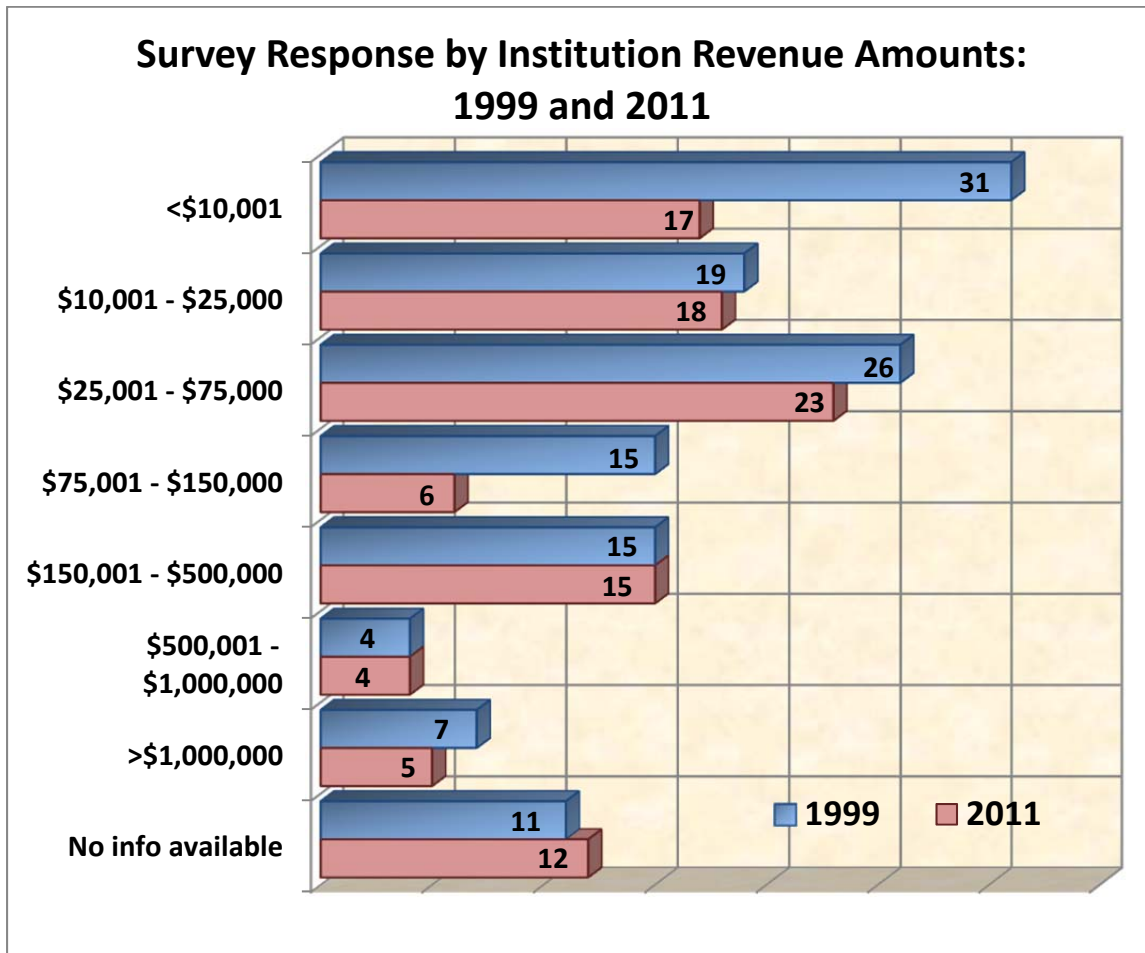
Type of Institutions That Responded

The proportion of historical museums, natural science museums, and other facilities were generally similar in the two surveys. Noticeably different were the proportion of historic sites responding (41 in 1999; 9 in 2011). To a lesser degree there were differences in number of responses from art museums (18 in 1999; 6 in 2011). The types of other facilities were not listed in the 1999 report. Other museums in 2011 were described as “open air living history,” “historical and art,” and “history/natural history.” Other facilities in 2011 were described as “Historical Society,” “visitor center and dam,” “collections, storage and research facility,” “City-County Archives,” “Visitor center - Makoshika state park,” “Cultural Center,” “historic, fine arts, archives, historic site and conference center,” “Interpretive Center,” “national forest visitor center,” and “artist residency and education program.”



Type of Institution by Size of Revenue

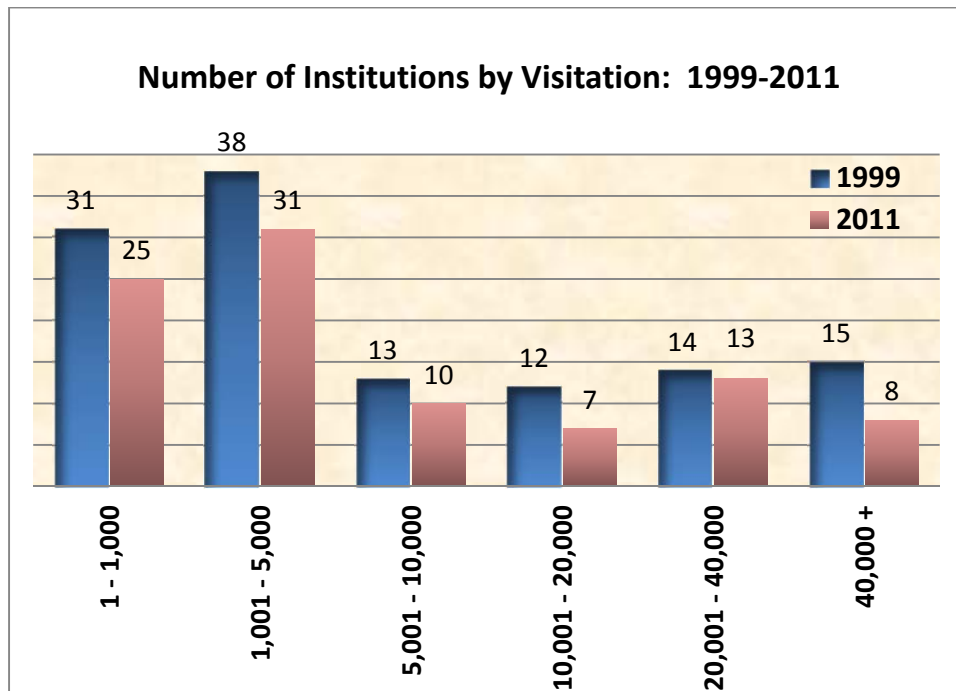
In all but two instances, institutions categorized by the size of their annual revenue were generally comparable between the 1999 and 2011 surveys. Noticeably different was the number of institutions responding to the survey that had budgets of equal to or less than \$10,000. This category included 31 respondents in 1999, but only about half that amount (17 respondents) in 2011. Fifteen (15) institutions with revenues of \$75,001-\$150,000 responded to the 1999 survey, but less than half that amount (6) responded to the 2011 survey.



Type of Institution by Visitation Numbers

The proportion of responses by categories of institutional visitation is generally comparable between the 1999 and 2011 surveys, with the exceptions of those institutions with annual visitation greater than 40,000.

Similar to 1999, the top two highest ranking categories were institutions with annual visitation of 1,001-5,000 and 1-1,000.



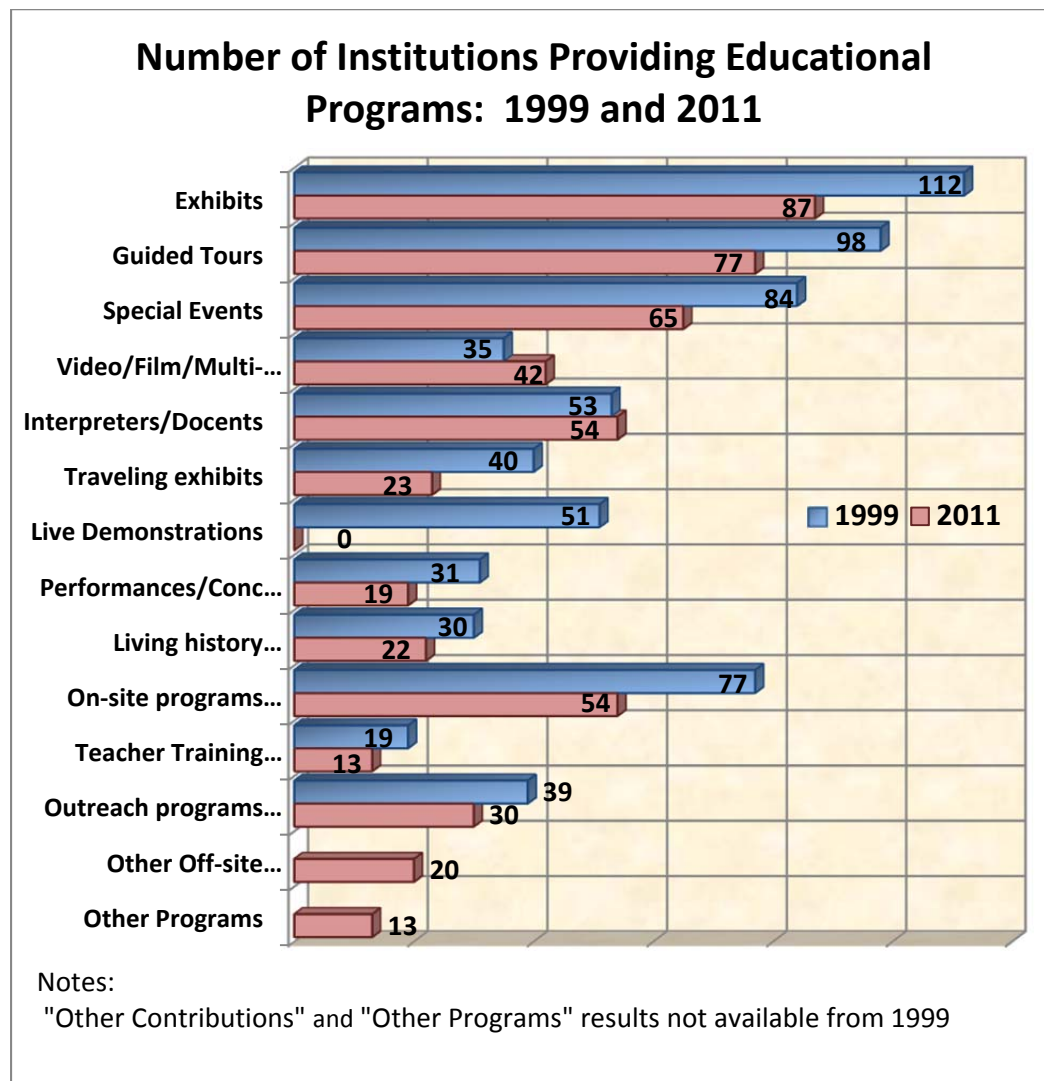
Conclusions about Comparability

The total number of the survey population was nearly the same for the 1999 and 2011 surveys. The response rates were high for both – 66% for 1999 and 49% for 2011. There is variability among the responding institutions by type, annual revenue amounts, and visitation numbers. Especially noticeable differences for 2011 were fewer respondents with budgets at the low end (less than \$10,000) and mid-range (\$75,001-\$150,000) and far fewer historic site respondents.

Educational Programs

Of the 100 respondents to the 2011 survey, 93 answered the question about programs. Respondents could select as many choices as applicable. The top four programs according to the 1999 and 2011 surveys were 1) exhibits, 2) guided tours, 3) special events, and 4) interpreters/docents. In 1999, 51 identified “live demonstrations” as a program they provided, but in 2011 no one selected this item. “Video/film/multi-media” was listed by more institutions (42) in 2011 than in 1999 (35 institutions). In 2011, “travelling exhibits” were nearly half of what they were in 1999. Lists of what was included in “other” categories were not included in the 1999 report. In 2011, “other off-site programs” included tours; presentations at special events, senior centers, festivals, community organization meetings, art fairs, and adult education activities; elder hostel, and “digs” and field crews. “Other programs” included university course, summer camps, weekend family programs, tour bus, garden, convention and conference facilities, planetarium, student interns, and history book club lectures series.

What kind of educational programs do you provide? Check all that apply.



Visitor Statistics

The 2011 survey results for total visitors differed significantly from the 2009 survey. Total visits of 2.27 million were reported by 123 institutions in 1999. In 2011, total visits were down nearly half to 1.23 million as reported by 94 institutions. Out-of-state visitors comprised nearly half of all visits in 1999 as reported by 110 of 123 institutions. In 2009, only 72 of 94 institutions provided information on out-of-state visitors and the count was less than a quarter of the total visits. Visits by schoolchildren were nearly the same for the two different surveys, on average visits per responding institution. Attendance at special events was down significantly in 2011.

	1999		2011	
		Responses		Responses
Total Visitation	2.27 million	123	1.23 million	94
Visitation by Out-of-State Visitors	1.09 million	110	262,871	72
Total Visits by Schoolchildren	125,598	105	96,204	83
Total Attendance at Special Events	227,101	83	138,576	76

Historic Structures

The 2011 survey included a new question about historic structures:

Is any part of your operation located within or does it include an historic structure in or eligible for listing in the National Register of Historic Places?

Yes	48
No	52
Don't Know	16
Total # of Historic Structures*	378

*Total # includes some that were counted but respondent did not know if they qualified for national register

Seasons of Operation

More of the institutions responding in 2011 were open year-round compared to the 1999 survey responses. Data from the 2011 survey were compiled by different categories than was the 1999 survey (as noted by the “NA” in all categories besides “All Year”).

	1999		2011	
		Responses		Responses
Operating Season		126		97
All Year	40%		49%	
Summer Only	NA		36%	
Summer/Fall	NA		6%	
Spring/Summer/Fall	NA		4%	
Other Seasonal Combination	NA		4%	

Volunteer Participation

Volunteer participation remained high in 2011. On a per institution average basis, it was approximately the same as the 1999 study.

	1999 Survey		2011 Survey	
		Responses		Responses
Total # of Volunteers	4,956		3,678	
Year-Round	2,683	68	2,595	58
Seasonal	1,273	54	1,083	49
Total # of Volunteer Hours	233,052		213,281	
Total Value of Volunteer Time*	\$2,999,379		\$3,175,754	

*Value of Volunteer Time. For 2009, value was calculated at a rate of \$12.87/hr. per Hodgkinson and Weitzman, “Giving and Volunteering in 1996.” For 2011, value was calculated at \$14.89/hr. per Independent Sector at http://independentsector.org/volunteer_time based on 2009 data, most recent year data available. The 2009 hourly rate is specific to Montana; the national rate in 2009 was \$20.85.

Staffing

A total of 529 paid staff positions were reported in 2011, compared to 787 in 1999.

	1999 Survey		2011 Survey	
		Responses		Responses
Total # of Paid Staff	787		529	
Full-Time Year-Round	229	64	239	61
Full-Time Seasonal	225	29	50	31
Part-Time Year-Round	162	37	114	49
Part-Time Seasonal	171	46	126	50

Revenues and Expenses

Admission Fees

Proportion of institutions charging admission was basically the same between the two surveys. The number of institutions charging more than \$5 for regular admission was exactly the same (8) for both surveys.

	1999		2011	
		Responses		Responses
% of Institutions Charging Admission	38%	48	36%	36
% of Institutions with No Required Admission Fee	62%	78	63%	63
Number charging more than \$5 regular admission	8		8	

Revenues and Expenses

In 2011, there was a difference in response numbers for revenues (88) and expenses (91). Three respondents reported only expenses and no income. Another respondent reported only income and no expenses. The amounts for these four surveys account for less than one percent (1%) of revenues and less than one percent (1%) of expenses. The following tables include all information as it was reported, including these four surveys.

In 1999, revenues exceeded expenses by about 11%. In 2011, expenses exceeded revenues by about 5%. The 2011 cumulative total revenue from 88 respondents was \$26,584,384. Total expenditures were \$27,875,764.

Accounting for the difference in response rates for 1999 and 2011 by averaging (total amounts divided by number of respondents) and by adjusting for inflation, revenues were up slightly (6%) and expenses were up by about one-fifth (21%).

The proportion of expenses spent in Montana was about the same for 1999 and 2011. Out-of-state revenues declined significantly from 35% of the total amount reported in 1999 to 22% in 2011.

	1999 Survey Results		2011 Survey Results		
	1999 \$	Responses	2011 \$	Responses	1999 \$*
Total Revenue	\$24,624,692	117	\$26,584,384	88	19,672,444
% of Revenues from Out-of-State	35%		22%		
Total Expenses	\$21,874,412	117	\$27,875,764	91	20,628,065
% Spent In-State	88%		86%		
% of Non-Salary Expenses Spent In-State	81%		77%		
Total Amount Spent on Construction, Renovations, and Major Repairs Past 5 Years	\$34,359,880	68	\$24,355,611	59	18,023,152

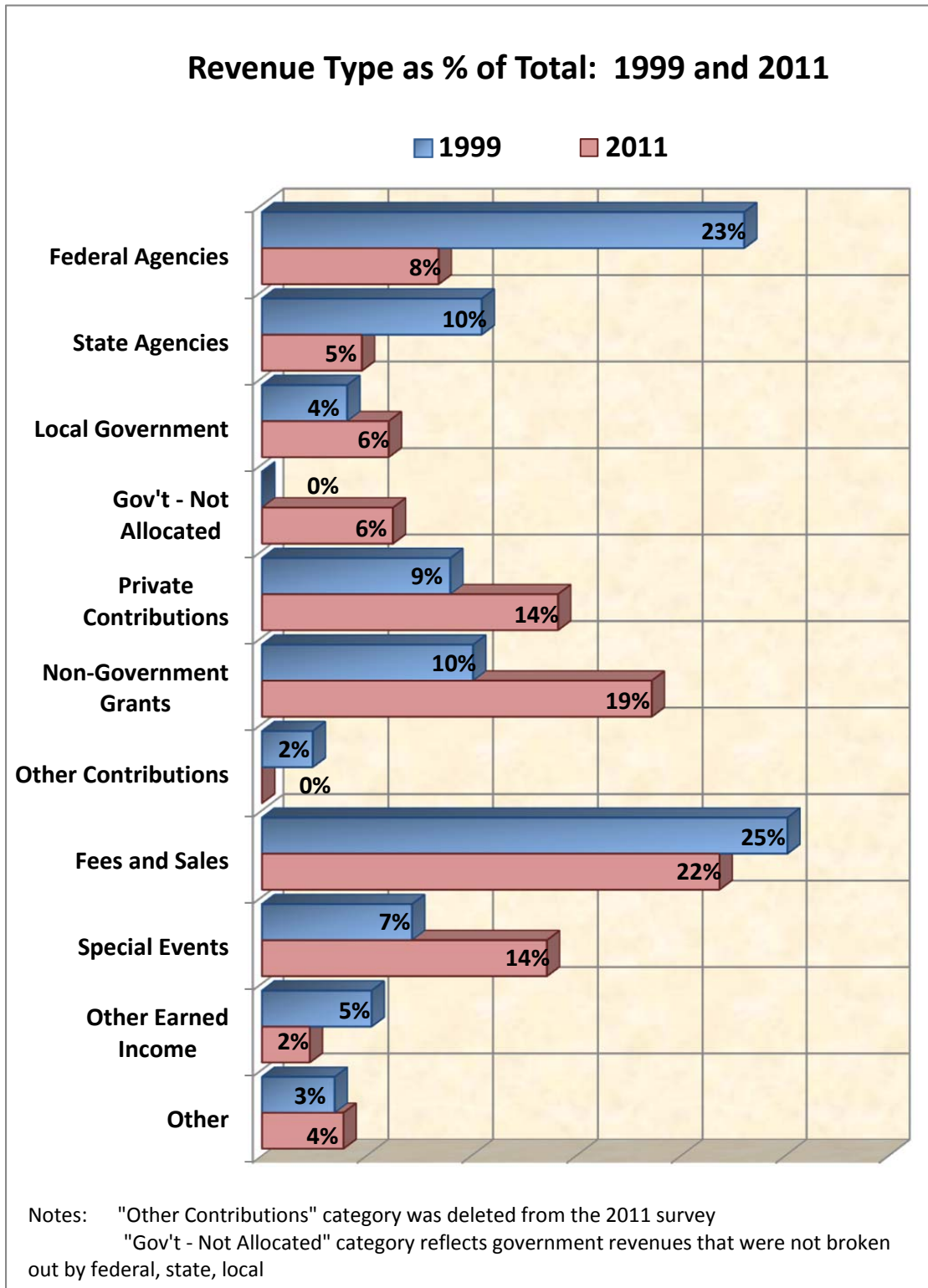
*Dollars reported in 2011, adjusted for inflation, using U.S. Bureau of Labor Statistics, Consumer Price Index (CPI) Inflation Calculator at http://www.bls.gov/data/inflation_calculator.htm.

Total amount spent on construction over the past five years was also significantly lower in 2011. Using averaging techniques again, amounts spend on construction were about 40% less in 2011 compared to 1999, when adjusting the 2011 dollars for inflation.

Revenues by Type

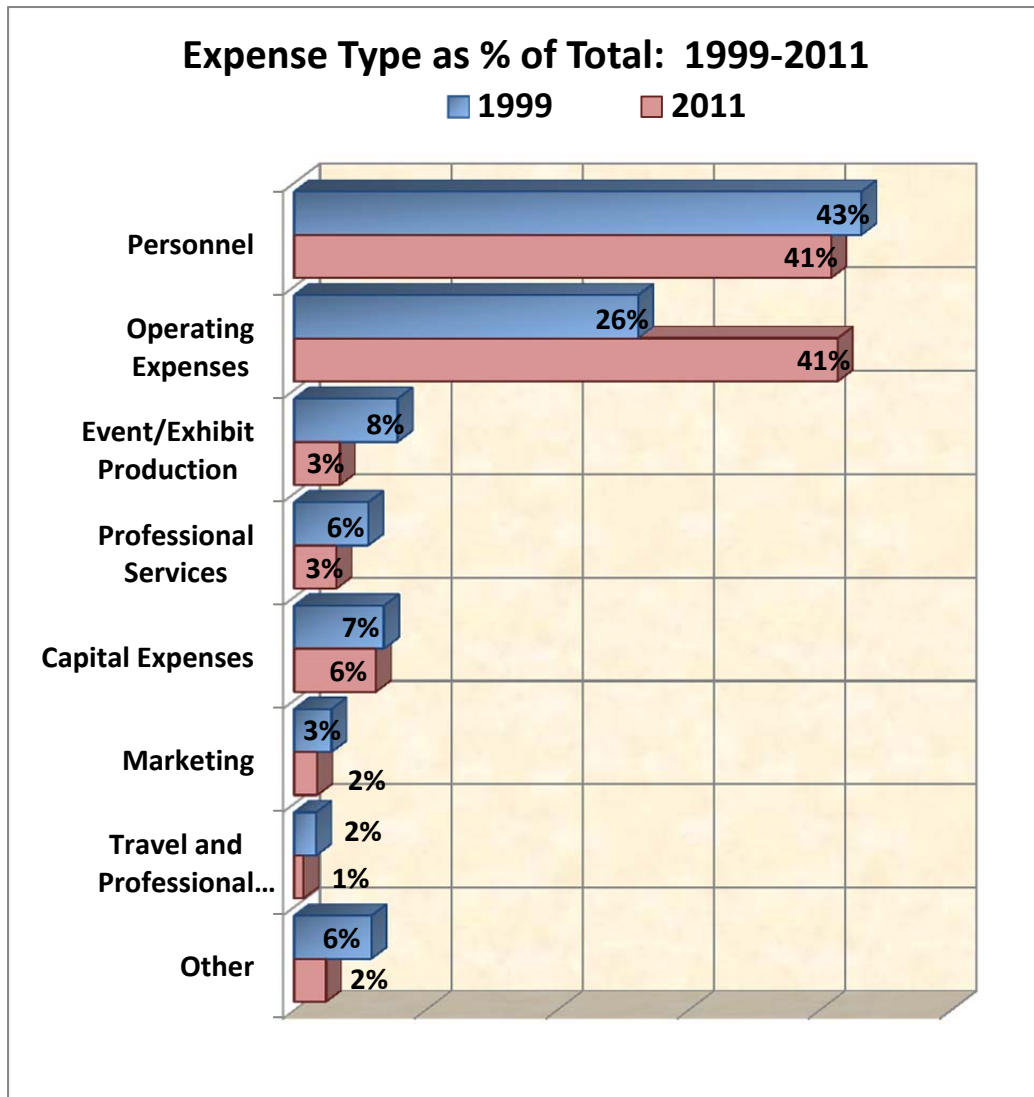
Based on the results of the 2011 survey, revenue sources from federal government declined by about two-thirds; state government revenue declined by about half. It is possible that some of the difference between the 1999 and 2011 survey are related to the number of government-administered programs. A number of these programs either did not include any budget information at all or did not include the value of staff and operations as in-kind revenue/expense. The significant reductions in state and federal

revenues were offset by increases in local government revenue, private contributions (individual and corporate), non-government grants, and special events.



Expenses by Type

The major difference between expenses in the 1999 and 2011 surveys is the dramatic rise in operating expenses, from 26% of total expenses in 1999 to 41% in 2011. This increase appears to be offset by decreases in all other categories.



Collections

The 2011 survey included three new questions regarding collections:

- **What is the greatest asset in your collection?**
- **What are the greatest needs for your asset at this time?**
- **Is there an asset (including sites and structures) not currently in your collection, but within the community or your area of interest, that should be saved, and, if so, what?**

In response to the first question, many of the respondents could not identify a single most important asset. Many listed the “entire collection” or a comparable response as their greatest asset. Others listed very specific items.

Responses to the second question generally indicated building needs (roofing, windows, renovation, universal accessibility, etc.), conservation needs, cataloging, exhibits, and more space for storage and exhibits.

There were far fewer total responses to the last question (58 responses), of which nearly 20 were “No” or “NA.” Other respondents listed very specific items.

The entire list of responses is included in the appendices.

Research and Cataloging

A new question was added to the 2011 survey about research and catalogs. Of 95 that responded, 88% indicated they do have documents available for public research. Of those, 42% indicated their documents were not cataloged. Many respondents indicated they have both manual and computerized systems. Nearly 40% indicated they need help organizing documents and images.

Does your collection include documents and images (maps, photos, etc.) available for historic research? If yes, please check all that apply.

	#	% of those responding
No Responses	5	
# Responses	95	
No documents for public research	11	12%
Yes - documents for public research	84	88%
Manual catalog or filing system	55	58%
Computerized catalogue system	47	49%
Documents not catalogued	40	42%
Need help organizing documents and images	37	39%

KEY FINDINGS AND CONCLUSIONS

Montana's museums and public historic sites are significant contributors to the Montana economy. The survey results indicate that the museum and public historic sites have been affected by the national economic recession. Although the recession in Montana lagged in time and severity compared to the national recession, it has affected the state. The hardest hit locations were those that had booming real estate markets and western Montana generally (with sagging national demand for timber products). The following identifies key findings from the 2011 survey and draws some conclusions about the context for changes between the 1999 survey and the 2011 survey.

- Cumulative total revenue in 2011 was \$26,584,384. Approximately 22%, or \$5.8 million, of the total revenue was from out-of-state. This is a net gain for the state's economy.
- Total expenditures were \$27,875,764, of which 86% was spent in state. That is \$24.0 million that stayed in the state's economy as staff wages and expenditures in the local economy. This money then circulates in the state as indirect and induced expenditures as staff spend their wages and other businesses benefit.
- Accounting for the difference in response rates for 1999 and 2011 and adjusting for inflation, revenues were up slightly (6%) and expenses were up by about one-fifth (21%).
- In 1999 total revenues exceeded expenses, but in 2011 expenses exceeded revenues. Although the Montana economy was somewhat insulated from the national recession that began in 2007, it eventually hit this state as well, affecting unemployment rates, business viability, and state and local governments. This in turn, has affected the non-profit sector.
- Survey respondents spent a cumulative \$24.4 million on major construction or renovation in the previous five years. Although this amount is considerably less than what was reported in 1999, it is significant given the downward spiral in the construction industry in Montana. Montana's construction employment peaked in May of 2007 with 33,000 jobs. As of November 2011, that workforce had been reduced by nearly a third to 21,900 construction jobs, the hardest hit labor sector in Montana. (U.S. Bureau of Labor Statistics)
- Government financial support declined from 37% of all reported revenue in 1999 to 19% in 2011. The biggest declines were federal (from 23% to 8%) and state (10% to 5%). Local government support increased slightly (from 4% to 6%).
- Decreases in government funding were offset by increases in private contributions (from 9% of total budget in 1999 to 14% in 2011), private/non-government grants (10% to 19%), and special events (7% to 14%). The proportionate rise in philanthropic gifts for this study group is significant--nationally, foundation grant-giving declined by double digits between 2007 and 2009, reflecting the recession's effect on foundations' assets. (The Foundation Center, 2009)
- Total number of visits to all responding institutions was 1.23 million in 2011. Total visits were down by approximately 1 million between 1999 and 2011. This may be accounted by fewer institutions responding in 2011 with visitation greater than 40,000 and decrease in out-of-state

visitors. There were approximately 830,000 fewer visits from non-residents in 2011 compared to 1999. Nationally, with the onset of the recession in 2007-2008, fewer persons were travelling out-of-state.

- There were 96,204 visits by children and 138,576 persons attending special events.
- The responding institutions have a wide variety of educational programs and continue to provide out-reach programs off-site.
- A total of 378 historic buildings are associated with the institutions that responded to the survey.
- Volunteerism is strong. Total volunteer hours were very little different between 1999 and 2011, although the number of responses was lower in 2011.
- Responses to the questions about collections and needs indicated that perhaps the question was too narrowly phrased. How different would have been the responses if the question had asked about the five most important assets instead of just one? The lack of definitive responses, however, may also reflect a need for strategic planning and assessment of collections for long-term conservation priorities, etc.

RECOMMENDATIONS

- Individual institutions should meet with local community leaders and share the results of this report. Emphasize economic effects include not only the dollars that museums bring into a community, but the full realm of social benefits – the educational aspects, the preservation of local culture, the importance of these institutions as a major feature in many downtowns. These social benefits make museums and historic sites important to locals and visitors alike. Museums and historic sites contribute to the social fabric of a community and the context for a diversified and stronger economy.
- MAM and individual institutions should encourage the Montana Institute for Tourism and Recreation Research to conduct a study of the spending patterns and amounts of cultural-heritage visitors to Montana. Encourage other cultural-heritage tourism facilities (such as art fairs, special events, performing arts, etc.) to partner with MAM to fund the study. Results can then be used by a variety of institutions to show the value of their services in bringing new money to the State.
- Individual institutions should consider strategic planning to help institutions plan their future, to identify what are the priorities in the collection, and to identify their particular unique feature that distinguishes them from other facilities.
- Individual institutions should consider and participate in where feasible, collaborative efforts to better understand and build on the interconnected relationships among the institutions and their visitors among museums, historic sites, libraries, arts organizations, performing arts, historic preservation efforts, and special events.
- Where feasible, museums and historic sites should participate in downtown planning, Main Street programs, and/or regional planning efforts.
- MAM should work with the Montana State Library and State Historic Preservation Office on actions that can be taken to address the needs identified in the Montana “Connecting to Collections” project, which was completed in 2011. The survey for that project included a number of museums and identified several issues that directly relate to collections, cataloging, and staff training that surfaced in this 2011 MAM study.
- MAM and individual institutions should support the efforts of a state-wide study of the economic impacts of historic preservation, such as proposed by the Montana Preservation Alliance. Nearly half of all the respondents to MAM’s 2011 survey indicated that they were housed in or had responsibility for a structure listed or eligible for listing on the national register.
- Future economic studies should include calculations of indirect and induced economic effects of direct expenditures, using standardized methodology such as IMPLAN.

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APPENDICES

Appendix A: Responses to Questions About Collections

Appendix B: Survey Questionnaire

APPENDIX A

Responses to Questions about Collections

Note the number that precedes each statement corresponds to the number assigned to a specific survey.

10. What is the greatest asset in your collection?

1. Not a specific item – entire collection
2. Photographs and documents. Our entire collection of artifacts is important to our mission.
3. No single item.
4. Original furniture. Roughly 80% original family items.
5. Old Jail Museum Building
6. World War II Alien Detention Camp Headquarters Building and courtroom
7. C.M. Russell Collection of Art
8. Largest collection of modern vertebrates (skins, skulls, skeletons, hides, etc.) in Montana; and largest between Minneapolis and Washington State
9. Fire arms
10. Unknown
11. Volunteers!! Local history of area – saving the paper. Great collection on the MT State Orphans Home, mining-agriculture, the Round Barn, history of Spokane. Photo collection is fantastic and grows every year.
12. Historical items from area – dinosaur bones – cars
13. Photographs and project histories
15. Indian stone artifacts, catalogued with Smithsonian Institute – Items on loan
16. Maisaura and paleo artifacts; Metis cabin and oral history
17. Our property at 120 Hickory
18. Gibson guitar, gun collection

19. Cameron pictures and diaries
20. The actual information about Beaverhead County, its people and lifestyle
21. Historic photos
22. The beadwork and leather costumes/headdresses, regalia of the early 1900s Indians. Sioux-Assiniboine
23. Just peoples personal pictures, clippings and stories
25. Gun collection
26. Collection of Thomas Moran field sketches, sketchbook and journal from 1871 Hayden Expedition
27. Extensive Native American artifacts
28. Historic artifacts and documents
29. Mann Gulch DC-3, Johnson Flying Service TBM, hundreds of artifacts
30. Historic structures
32. Leonard the most complete mummified dinosaur
33. Yucca Theatre
34. Our exhibits, space – ½ city block
35. Diversity
36. Brisque doll
37. No single item, rather the 40,000 plus collection of 28,000 photographs, negatives and slides and more than 10,000 artifacts, records, maps, and documents
38. Original Virginia City artifacts
39. Artifacts, photographs, documents and published material that document the national history of forest conservation and the US Forest Service
40. Building
42. 9 local historic buildings moved to the site
43. Local history
44. Western Art
45. Cobblestone City-1907 replica of Big Timber

46. Just getting acquisitions – Dr. OA Kenck (dentist) items
47. Multimedia by Sister Mary Trinitas
48. Glacier Park Art collection
49. Dinosaur
50. No collection
51. Multi-media presentation “Forty Miles from Freedom” tells the history of the Battle of the Bear Paw. In includes three large paintings and sculptures by artist Lorenzo Ghiglieri.
52. Our building, Livingston’s 1902 historic depot, the 3-building complex and adjacent historic park, built by the Northern Pacific Railroad. The Museum also holds many historical collections specific to the Northern Pacific Railroad, Yellowstone National Park
53. Our art collection is impressive and under-utilized, with over 100 pieces by regional artist JK Ralston.
54. No collection
55. Paleontology displays
56. The permanent Russell collection, house and studio. Collection includes oil and watercolor paintings, illustrated letters, bronzes, models, sketches, photographs, rare books, Russell’s personal collection of Indian artifacts.
57. Exhibits
58. Purpose of question unclear. Our Montana Collection is key to collection identity and our mission. Artists considered “greatest” outside Montana include Deborah Butterfield, John Buck, Peter Voulkos, Richard Notkin, Jaune Quick-to-See.....
59. Archives/artifact storage area
60. Personal histories (including over 1,000 obituaries) and historical photographs
62. 50 B&W photographs that are core of our historic collection
63. Barbed wire collection (~\$20k)
64. Native American artifacts, archives of MT Indian missions, conservation of museum artifacts
65. Artworks
66. The museum’s greatest asset is staff and their knowledge. Hesitate to name a collections object is an “asset” as we do not capitalize our collections; semantics aside, it is difficult to name a single “most important” object

67. Blackfoot Polywog shirt
68. Ninepipes pipe-other artifacts
69. All of it
70. T-Rex replica
71. Collection of outbuildings
72. Clark's signature on the actual pillar
73. We have new exhibits and a great staff to run them
74. We believe we have a Rough Rider uniform worn by Fred Herrig.
75. Historical records and documents
76. The recently acquired and moved Northern Pacific Railroad depot
77. Original, oldest building in Montana—Hudson's Bay Trading Post (1846)
78. Unassembled gold stamp mill from the Lincoln Valley, first year-round Ranger station in the Blackfoot Valley (circa 1920s)
79. Architectural features of buildings that housed officers on Fort Missoula; picture postcard collection
82. Stagecoach and gun collection
83. Photos by owner of local creamery 1910-1930s
85. Aircraft
86. The historic building
87. 3 large exhibits
88. All items in our museum are all assets to our community as most are from our local area dating back to the late 1800s. I cannot pick out just one as there are many.
89. Dinosaur collections
90. Historic photographs after 1959 Hebgen Lake Earthquake
91. Pierre Wibaux Town Office building
92. Historic uniforms, equipment
93. Have good, if dated, displays

94. Scale model professionally produced, of USN Transport Ship "USS Missoula"
95. The greatest assets to our collection would have to be the buildings
96. Historic artifacts from the Mann Gulch fire, 2 fully intact historical lookouts
97. Original brand bar building with new 20x30 addition with heat and security.
98. Does not apply to us
100. Emphasis on regional artists through collection of sculpture, painting, prints and ceramics

11. What are the greatest needs for this asset at this time?

1. Catalogue in Past Perfect.
2. Completion of our climate controlled building.
4. Proper storage.
5. Up-to-date heating/cooling system that is energy efficient and affordable.
6. Mortgage on Alien Detention Camp Headquarters
7. Conservation, exhibit space, storage space
8. Desperately need more space for collections
9. Lighted cases
10. Unknown
11. New windows
12. New building to house exhibits
13. Proper archiving of photographs and documents
16. Curators, capital improvements
17. Face lift exterior; improve energy efficiency, build a large ... classroom and lecture area
18. Humidity control
19. Building repairs
20. Better display space and re-organizing
23. More space I'm up to 15,000 pieces of information and pictures
25. Roofing
26. Need conservation
27. Interpretation and exhibits
28. Handicapped accessible bathrooms
29. To fly the DC-3
30. Stabilization

31. Cataloguing
32. Operating capital.
33. New roof
34. Dollars to put floor in shed with doors
35. Increased endowment
36. Nothing
37. Operations funds to keep the doors open to allow us to continue to preserve, protect, and catalogue and make available our collection of NW Montana history
38. Preservation money and volunteers or staff for building issues to house collections
39. Complete fundraising and construct museum building which will include repository space
40. Stabilization of exterior-bricks, trim, roof
42. Preservation -3 roofs need replaced
43. Protection
44. Preservation
45. None
46. Display cases
48. Conservation and facility upgrade
49. Making people aware of the museum; promotion of local history
50. NA
51. Video portion of program needs to be updated.
52. The Livingston Depot Foundation needs to develop and diversify the organization's support base to increase and stabilize funding, for on-going and future building, exhibition and program needs to sustain the organization for the future.
53. Our art collection is in need of conservation and archival housing
54. NA
55. Long-term care and upkeep

56. A conservation assessment survey needs to be done on the collection works on paper most urgent. Upgrade of the HVAC system to include humidity controls and proper air handling for these delicate objects.
57. More care
58. Operating support through endowment
59. Volunteer archivist
60. We need a handicap ramp to the museum and money to buy photographs
62. Making them accessible on-line
63. Display area
64. Transferring archives to digitizing
65. A facility to showcase, house and protect the MMAC/UM 117-year-old and nearly 11,000-strong Permanent Collection which has never had an appropriate home
66. Money, money, money....so that we could have enough staff, space, equipment and supplies
67. None
68. The museum has leased the building built for this purpose – now must buy building. Need \$250,000 – have \$110,000
69. Display cases
70. More room
71. Relocation of outbuildings
72. Regular protection and maintenance/replacement of the boardwalk
73. We need an education specialist
74. Authentication proper display
75. Inventory, cataloguing, and digitization
76. Funding for renovation
77. General renovation
78. Buildings need log oils and need to get some artifacts in from the outside; need interpretive signage
79. Money to keep them up, buildings are 100 years old and with insufficient repair

83. Computer documentation and cataloging
85. None at this time.
86. Additional staff, new interpretation, additional land for parking
87. NA
88. Even though we have a six building complex we have no space left for more displays or to rearrange.
89. Space—our own building.
90. Proper storage – cataloged.
91. Curtains, awnings, security system, statuary
92. Proper conservation
93. Upgrade/update old (over 25 years) displays. Improve lighting
94. Marketing
95. They house all of our collections as far as archives artifacts and research materials.
96. Secure storage free from hazards such as floods, fire and theft
97. Finish landscaping and an outside storage shed.
100. Improved storage and software for inventory and documentation.

12. Is there an asset (including sites and structures) not currently in your collection, but within the community or your area of interest, that should be saved and, if so, what?

4. Original carriage house across the street
5. Black Bear Hotel in downtown Thompson Falls has been looked at by Society to renovate would be very expensive.
6. No
8. We have ability to acquire many important scientific specimens and collection, however no room to store them
10. Unknown
11. We try to save them all. MT orphans home dated back to late 1800s. The Round Barn housed Spokane (MT's only Kentucky Derby Winner). Madison County Fairgrounds – lots in Towin Bridges on the historic register.
12. No
15. Two historic buildings
16. No
17. None that directly relate
20. The wonderful old buildings and homes in Dillon
23. The local cemetery is in much need of help – this is where famous scouts and warriors are buried
26. Our historic vehicle collection is storage in a warehouse in Gardiner that has no environmental controls, lots of critters, etc. Collection needs better storage space so visitors can access it.
27. The stone foundation of the “Range Rider of the Yellowstone” monument needs to be reconstructed and the old steam locomotive at the YCM needs to be painted and the wood components replaced
29. NA
30. No
33. No
35. We are more worried about staffing after we die – only 200,000 saved up
36. No

37. Oral histories before they're gone. We have collected over 200 --- there are hundreds more that will soon be lost forever
38. Stonewall Hall, next door to Content Corner, crumbling to ground
39. YES – there are extensive historic items across this country that need to be in a museum repository
40. Dry Creek School
42. H. Earl Clack Station in the Fortine area
49. Breeding Bulls Trading Post (c1880); sits on county land but no longer want it; museum will probably get it. Museum paid \$6k to conduct inventory study of it. Only building left that Nez Perce stopped at (part of Nez Perce NHT).
50. NA
51. Bear Paw Battlefield 16 miles south of Chinook. The community would like to see a Memorial Center ½ mile south of the site. The NPS has yet to be convinced of this plan.
53. Yes, there is a mural by JK Ralston in a former US Post Office building in dire need of conservation and preservation.
54. NA
55. NA
57. Unsure
58. Not aware of any significant art asset in our area that is at risk.
59. NA
60. Yes. We have an historical school that was donated and needs to be relocated to the museum site.
62. Saddle harness collection
65. NA
66. Undoubtedly people bring them in all of the time! No single thing jumps out though
- 67 Holt museum and Visitor's Center at Traveler's Rest State Park
68. Building housing collections
73. NA
75. Yes a number of historical sites and structures related to the Railroad district

76. Henslee Auditorium currently owned by Toby Sorensen
77. Some of the buildings at Fort Missoula because they are important
78. Virginia City collection; Indian artwork; petroglyphs/pictographs being vandalized; collection of old land abstracts, Old Indian Trail (used by Merriwether Lewis)
79. Parts of the Fort are threatened from new development
83. Yes, the old metal "cage" jail (100+ years old) sitting in the woods by the river. Owner wants to sell it on E-Bay, but we cannot afford the cost.
85. Unaware of any
87. NA
88. The original "Barber Shop" sits in the middle of our complex but is in really bad shape. Needs total renovation.
89. Yes. Clack House. Fort Assiniboine structures.
91. Yes. Hodges Dance Hall, Old Lutheran Church, Old Catholic Church
92. 163rd Regimental kitchens and Fort Harrison, NG Bath Houses, Serviceman Club, Post Theater, Firing Ranges, Cemetery
93. NA
94. WWII Internment Structures at UM Biological Station on Flathead Lake
95. There is a building on the Winnecook Ranch we have been trying to get moved into town and added to our collection. It houses a general store and miniature museum. It will be more accessible to the community and it is an important part of the Upper Musselshell Valley.
96. Yes, the DC-3 aircraft that dropped Smokejumpers at Mann Gulch
97. None at this time.
100. Representative works by contemporary regional artists

APPENDIX B

Survey Questionnaire



MUSEUMS OF MONTANA ASSOCIATION 2011 SURVEY

Organization Name: _____
Contact Person: _____ Title: _____
Phone: _____ Fax: _____ Email: _____
Address _____

Please complete this survey using most recent completed annual information.
Please check the accounting period used for this survey:
Calendar year 2010 Fiscal Year (specify) Other (specify):

- 1. Please check the ONE category that best describes your organization's purpose:
Historical Museum
Art/Fine Arts Museum
Natural Resource/Science Museum
Other Museum
Describe:
Historic Site
Other Facility, Describe:

- 2. Is any part of your operation located within or does it include an historic structure in or eligible for listing in the National Register of Historic Places?
Yes, # of Historic Structures:
No
Don't know if structures are eligible

- 3. How many visitors did you have over the past year?
Total # of visitors
% of visitors NOT residents of Montana
of children participating in school tours
Total # of persons at special events (festivals, workshops, lectures, etc.)

- 4. How many staff positions did you have over the past year?
Year-Round/Seasonal
full-time employees
part-time employees
volunteers
Total # of HOURS by Volunteers

- 5. Does your facility charge admission fees?
Yes
Regular Admission Fee
Child/Youth Fee
Senior Fee
Other:
No fees
Admission fees are voluntary

- 6. Which best describes the operating season of your facility? (check all that apply)
Summer
Fall
Winter
Spring

- 7. What kind of educational programs do you provide? Check all that apply.
exhibits
guided tours
special events
video/film/multi-media
interpreters/docents
traveling exhibits
live demonstrations
performances/concerts
living history programs
on-site programs (at facility)
teacher training workshops
outreach programs in schools
Other Off-site programs
Other programs

THANK YOU FOR COMPLETING THIS SURVEY!
PLEASE RETURN THE SURVEY BY SEPTEMBER 27.

8. Budget Information

REVENUES	Amount
Government- Federal Agencies	\$
Government - State Agencies	\$
Government - City and County Government	\$
Private - Corporate and Individual Contributions	\$
Private - Grants	\$
Estimate % of total PRIVATE contributions from sources outside of Montana	_____ %
Earned Income - Fees and Sales (admission, membership, gift shop sales, etc.)	\$
Earned Income - Special Events	\$
Other Earned Income	\$
Estimate % of total earned income from sources outside of Montana	_____ %
Other (specify):	\$
TOTAL REVENUE - ALL SOURCES	\$

EXPENDITURES	Amount	Estimated % Spent in Montana
Personnel (including fringe)	\$	
Operating Expenses (rent, utilities, supplies, postage, printing, depreciation, etc.)	\$	
Event/Exhibit production	\$	
Professional Services (e.g. hiring consultants)	\$	
Capital Expenses (e.g., major renovation or construction)	\$	
Marketing	\$	
Travel and Professional Development	\$	
Other Please Specify:	\$	
TOTAL EXPENDITURES	\$	

9. Has your facility been constructed or had major renovations/repairs in the past five years? If yes, please complete the following.

Estimate Cost: \$ _____ Estimated % Spent in MT (e.g., to MT companies) \$ _____

10. What is the greatest asset in your collection?

11. What are the greatest needs for this asset at this time?

12. Is there an asset (including sites and structures) not currently in your collection, but within the community or your area of interest, that should be saved and, if so, what?

13. Does your collection include documents and images (maps, photos, etc.) available for historic research?

No Yes If Yes, please check all that apply:
 manual catalog or filing system computerized catalogue system
 documents not catalogued need help organizing documents and images

Museums Association of Montana
 PO Box 1451
 Helena, MT 59624

Deb Mitchell, Organization Coordinator
 Museums Association of Montana
 PO Box 1451
 Helena, MT 59624