# Market Analysis and Opportunity Assessment of Museum Capacity-Building Programs

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# Appendix A: Interview and Virtual Focus Group Guiding Questions

* What types of capacity-building funding and services are currently available to organizations in the museum sector?
* How do museums’ capacity needs compare to the capacity needs of nonprofits writ large? Are museums’ capacity needs unique?
* What is the end goal for building museums’ capacity? What does increased mission fulfillment look like in museums?
	+ - How widely should PPG cast its data collection net to obtain a full appreciation of currently available capacity building opportunities, who participates, the usefulness of capacity building in the museum sector, and where IMLS and other funders can play the most impactful role? Who and what factors determine whether a museum participates in capacity building? Which museum characteristics influence this?
		- What are the drivers and barriers to capacity building participation? What factors prevent museums from engaging in capacity building?
		- How do museums and funders determine a museum’s readiness for capacity building?
		- To what extent are museums able to adopt capacity-building plans? What are the characteristics of successfully implemented plans?
		- To what extent are museums able to institutionalize and sustain increased capacity? To what do museums attribute the ability to sustain this work?
		- How do funders and museums successfully demonstrate capacity building impact? What types of monitoring and evaluation are most effective in measuring impact?

# Appendix B: Survey Instrument

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| **Intro & Directions:Thank you in advance for completing the following survey. This survey tool collects information on your institution’s experience with and perspective of capacity building. This study will culminate with a report on opportunities for more effective capacity building investment, increased access to capacity building resources, and key factors that impact capacity building adoption and sustainability in the museum sector.For the purpose of this survey, we are defining capacity building as any resource or support intended to help your institution enhance its ability to fulfill its mission or purpose- in other words, any support that is focused on the health and sustainability of the museum rather than on specific exhibitions or programs.This survey is estimated to take approximately 20 minutes to complete. Please note that your survey responses are completely confidential. You will not be identified in the analysis or reporting of survey data. Survey responses will only be reported in aggregate.** **If you have questions with this survey or have trouble accessing it, please contact Olivia Ensley at oensley@tccgrp.com.****OMB Control # and Date** |

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| Section 1: Organizational Characteristics |

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| **1.** | **Role or title of lead person completing or coordinating survey: (Select one option)**  |

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|  |  | CEO/ President/ Executive Director |  |
|  |  | Senior Leadership (e.g. Chief Financial Officer (CFO)/Director of Finance, Chief Operating Officer (COO)/Director of Operations, Chief Program Officer/ Program Director, etc.) |  |
|  |  | Staff responsible for Capacity Building/Training Activities |  |
|  |  | Volunteer |  |
|  |  | Board Member (e.g. President, Trustee, Member) |  |
|  |  | Other (Please specify)  \_\_\_\_\_\_\_\_\_\_ |  |

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| **2.** | **Which of the following most closely describes your type of institution? (Select one option.) (If your institution has a parent institution or organization, please answer only for your institution.)**  |

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|  |  | Arboretum, Botanical Garden, or Nature Center |  |
|  |  | Art Museum |  |
|  |  | Children’s Museum |  |
|  |  | General Museum |  |
|  |  | Historical Society, Historic Preservation Organization |  |
|  |  | History Museum |  |
|  |  | Natural History or Natural Science Museum |  |
|  |  | Science and Technology Museum or Planetarium |  |
|  |  | Zoo, Aquarium, or Wildlife Conservation Organization |  |
|  |  | Other (Please specify)  \_\_\_\_\_\_\_\_\_\_ |  |

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| **3.** | **What is the total annual operating budget of your institution for the most recently completed fiscal year? If your institution has a parent institution or organization, please provide only the operating budget for your institution. (Select one option)**  |

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|  |  | $0 |  |
|  |  | $1 to $9,999 |  |
|  |  | $10,000 to $24,999 |  |
|  |  | $25,000 to $99,999 |  |
|  |  | $100,000 to $499,999 |  |
|  |  | $500,000 to $999,999 |  |
|  |  | $1,000,000 to $4,999,999 |  |
|  |  | $5,000,000 to $9,999,999 |  |
|  |  | $10,000,000 or more |  |

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| **4.** | **How many staff currently work at your institution, both paid and unpaid? If you have no staff in a category, indicate zero (“0”).** |

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| (a) | Number of full-time paid staff  |

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| (b) Number of part-time paid staff  |

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| (c) | Number of full-time volunteers/unpaid staff (not including Board) |

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| (d) Number of part-time volunteers/unpaid staff (not including Board)  |

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| **5.** | **How many on-site visitors or users did you serve last year? (Please select one category.)**  |

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|  |  | Fewer than 100 visitors |  |
|  |  | 100 – 499 visitors |  |
|  |  | 500 – 999 visitors |  |
|  |  | 1,000 – 9,999 visitors |  |
|  |  | 10,000 – 49,999 visitors |  |
|  |  | 50,000 or more visitors |  |

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| **6.** | **In which region is your institution located? (Select one option)**  |

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|  |  | New England (CT, MA, ME, NH, RI, VT) |  |
|  |  | Mid-Atlantic (DC, DE, MD, NJ, NY, PA) |  |
|  |  | Southeast (AL, AR, FL, GA, KY, LA, MS, NC, SC, TN, VA, WV) |  |
|  |  | Midwest (IA, IL, IN, MI, MN, MO, OH, WI) |  |
|  |  | Mountain Plains (CO, KS, MT, ND, NE, NM, OK, SD, TX, WY) |  |
|  |  | West (AK, AZ, CA, HI, ID, NV, OR, UT, WA) |  |

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| **7.** | **How would you describe the area where your institution is located? (Select one option)**  |

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|  |  | Urban |  |
|  |  | Suburban |  |
|  |  | Rural |  |

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| **8.** | **Which of the following most closely describes your institution? (Select one option)**  |

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|  |  | Nonprofit, non-governmental organization or foundation (not a college, university, or other academic entity) |  |
|  |  | For-profit entity |  |
|  |  | College, university, or other academic entity |  |
|  |  | Federal government entity |  |
|  |  | State government entity |  |
|  |  | Local (county or municipal) government entity |  |
|  |  | Tribal government entity |  |

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| Section 2: Organizational Capacity Assessment**The next set of questions is designed to better understand your institution’s current strengths and challenges.**Please note: if you feel a particular question does not apply to your institution, or if you do not have sufficient information, please select “Don’t know / Not Applicable”.  |

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| **9.** | **Adaptive Capacity is a museum’s ability to monitor, assess, respond to, and create internal and external changes. Please indicate the extent to which you agree or disagree with the following statements on adaptive capacity.** |

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|   | **Strongly Disagree** | **Disagree** | **Neither Disagree nor Agree** | **Agree** | **Strongly Agree** | **Don't Know/Not Applicable** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|  |   (a) | Our museum has a written strategic plan that includes a clear, specific, and measurable set of goals and objectives that will ensure success.  |

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|  |   (b) | When appropriate, decisions made by museum leaders are guided by program evaluation data and organizational assessment data.  |

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|  |   (c) | When appropriate, decisions made by museum leaders are guided by visitors/community needs assessments.  |

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|  |   (d) | Our museum keeps informed of national / regional / local trends that may affect our visitors, services/programs, collections, or funding.  |

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|  |   (e) | Our programs, services, and collections have changed over time in order to meet new or emerging needs and interests of our visitors/community.  |

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|  |   (f) | Our museum formally shares progress on the strategic plan’s goals and objectives with appropriate staff members on a regular basis (mark “strongly disagree” if your museum does not have a strategic plan).  |

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|  |   (g) | Our funding streams are diversified.  |

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|  |   (h) | Our museum needs to hire more people or engage more volunteers so that current workloads are more manageable.  |

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|  |   (i) | Our museum conducts frequent and regular assessments of our visitors’ needs and interests.  |

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|  |   (j) | Our museum has a clear set of agreed upon criteria and specific measurement tools to determine whether our programs, services, and collections are effective.  |

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| **10.** | **Leadership Capacity is the ability of all organizational leaders to create and sustain the vision; inspire; model; prioritize; make decisions; provide direction; and innovate, in an effort to achieve the mission. Please indicate the extent to which you agree or disagree with the following statements on leadership capacity.** |

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 |
|   | **Strongly Disagree** | **Disagree** | **Neither Disagree nor Agree** | **Agree** | **Strongly Agree** | **Don't Know/Not Applicable** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|  |   (a) | Our museum has a clear mission and vision.  |

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|  |   (b) | Staff members are appropriately involved in organizational decision-making.  |

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|  |   (c) | Museum leaders and staff have regular interaction and a strong working relationship.  |

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|  |   (d) | Museum leaders are willing to make major changes if what they are currently doing is not working.  |

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|  |   (e) | Organizational decisions are reflective of the mission and vision of the museum.  |

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|  |   (f) | Museum leaders (e.g., Executive Director, CEO, COO, etc.) are able to motivate others to achieve the vision.  |

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|  |   (g) | When necessary, organizational leaders have been able to effectively persuade stakeholders including board members, partners, visitors, and staff to change their attitudes and behavior.  |

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|  |   (h) | Our museum has a clearly articulated plan for replacing leaders when they leave the museum.  |

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|  |   (i) | There’s one leader at our museum who, if she/he left, would temporarily slow down our progress towards achieving its mission.  |

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|  |   (j) | Board members show up for meetings and events and follow through on helping the museum as much as possible.  |

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|  |   (k) | Board members have the knowledge they need about the museum and current issues relevant to our museum to make effective decisions.  |

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|  |   (l) | The board fully meets its role and responsibilities, including planning, assessing the CEO, fiduciary oversight, giving/getting money, etc.  |

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|  |   (m) | Many of our board members are effective at getting others in the community to invest time, money and/or other resources in our museum.  |

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| **11.** | **Management Capacity is a museum's ability to ensure the effective and efficient use of organizational resources. Please indicate the extent to which you agree or disagree with the following statements on management capacity.** |

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|   | **Strongly Disagree** | **Disagree** | **Neither Disagree nor Agree** | **Agree** | **Strongly Agree** | **Don't Know/Not Applicable** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|  |   (a) | We have a clear set of benchmarks from which to evaluate staff performance.  |

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|  |   (b) | Staff are consistently given positive feedback on a regular basis.  |

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|  |   (c) | Museum leaders and managers are generally open to negative feedback from staff.  |

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|  |   (d) | Policies and written documents are regularly updated to reflect changes in the museum.  |

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|  |   (e) | Our museum does a good job of managing its finances (i.e. balanced books, on-time accounts payable, etc.).  |

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|  |   (f) | Managers have realistic expectations for employees (time, resources, workload).  |

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|  |   (g) | Program staff have the required knowledge, experience and skills to implement our programs/services in a manner that will achieve the greatest impact.  |

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|  |   (h) | Our museum eliminates staff members who do not consistently perform their roles and responsibilities in a manner that contributes to the success of the museum.  |

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|  |   (i) | Managers appropriately address interpersonal conflicts in a sensitive and timely fashion.  |

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|  |   (j) | Managers consistently do an effective job of coaching, mentoring and facilitating employees’ learning.  |

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|  |   (k) | Staff are given the resources they need to effectively carry out their job (e.g., professional development, supplies, administrative assistance, technology, direction, etc.).  |

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|  |   (l) | Staff have the necessary tools, systems, manuals, technology, and other resources to do their job consistently, efficiently, and effectively.  |

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|  |   (m) | Our museum effectively recruits and retains volunteers.  |

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| **12.** | **Technical Capacity is a museum’s ability to implement all of the key organizational and programmatic functions. Please indicate the extent to which you agree or disagree with the following statements on technical capacity.** |

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 |
|   | **Strongly Disagree** | **Disagree** | **Neither Disagree nor Agree** | **Agree** | **Strongly Agree** | **Don't Know/Not Applicable** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|  |   (a) | Our museum has the right facilities for our services (space, equipment, etc.).  |

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|  |   (b) | We have enough people with the ability to manage and maintain all of our collections (e.g., staff, board, consultants, partners, volunteers, etc.).  |

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|  |   (c) | We have enough people with the ability to manage and maintain all of our facilities and equipment (e.g., staff, board, consultants, partners, volunteers, etc.).  |

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|  |   (d) | We have enough people with excellent financial management knowledge, experience and skills (i.e., staff, board members, consultants, partners, volunteers, etc.).  |

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|  |   (e) | We have enough people with the ability to raise funds from individuals (e.g., staff, board, consultants, partners, volunteers, etc.).  |

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|  |   (f) | We have enough people with the ability to raise funds from corporations, foundations and/or the government (i.e., staff, board, consultants, partners, volunteers, etc.).  |

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|  |   (g) | We have enough people who have the legal expertise our museum needs (i.e., staff, board, consultants, partners, volunteers, etc.).  |

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|  |   (h) | We have enough people with marketing knowledge, skills and experience (e.g., staff, board, consultants, partners, volunteers, etc.).  |

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|  |   (i) | We have enough people who have the skills, knowledge and experience to conduct public outreach, organizing, and/or advocacy efforts (i.e., staff, board, consultants, partners, volunteers, etc.).  |

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|  |   (j) | We have enough people with the ability to conduct high quality program evaluations (i.e., staff, board, consultants, partners, volunteers, etc.).  |

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|  |   (k) | We have enough staff with appropriate knowledge related to service delivery for our programs.  |

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|  |   (l) | Our museum has the technology to run efficiently and effectively (e.g., ability to track and store all important information, to analyze financials, etc.).  |

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|  |   (m) | We have enough people who are excellent at running and managing our technology systems (i.e., staff, board, consultants, partners, volunteers, etc.).  |

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|  |   (n) | We have enough people with the ability to use the types of communication software (e.g., word processing, presentation software, web development software, Internet, e-mail, etc.) that our museum needs (i.e., staff, board, consultants, partners, volunteers, etc.).  |

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| **13.** | **Organizational Culture: Please indicate the extent to which you agree or disagree with the following statements about your experience at your institution.** |

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|   | **Strongly Disagree** | **Disagree** | **Neither Disagree nor Agree** | **Agree** | **Strongly Agree** | **Don't Know/Not Applicable** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|  |   (a) | Our museum takes time to acknowledge staff's personal triumphs.  |

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|  |   (b) | We support a culture of learning through regular feedback, professional development, etc.  |

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|  |   (c) | Our museum has staff retreats or time set aside for reflection and planning.  |

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|  |   (d) | There’s often information and/or knowledge that should be shared that some staff keep to themselves.  |

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| Section 3: Organizational Capacity Building**As a reminder, for the purpose of this survey, we are defining capacity building as any resource or support intended to help your institution enhance its ability to fulfill its mission or purpose- in other words, any support that is focused on the health and sustainability of the museum rather than on specific exhibitions or programs.** |

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| **14.** | **Has your museum participated in a capacity building engagement in the last 2 years? (Select one option)**  |

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|  |  | Yes 🡪 Continue – Please answer question #15 |  |
|  |  | No 🡪 Skip to Question #21 |  |

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| **For questions #15-20, please provide information about ONE of your institution’s formal capacity building engagements over the past 2 years. Answer all of these questions only about this particular engagement.**  |

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| **16.** | **What was the primary focus of the capacity building engagement?** **(e.g. board development, collections management, strategic planning, etc.)** |

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| **17.** | **Funding Source (Select one option)**  |

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|  |  | Board member contributions |  |
|  |  | Civic organization support (e.g. faith-based organizations, social clubs, etc.) |  |
|  |  | Corporate/business support |  |
|  |  | Earned revenue |  |
|  |  | Endowment funding |  |
|  |  | Foundation support |  |
|  |  | Government support |  |
|  |  | Individual donation(s) |  |
|  |  | Pro bono support |  |
|  |  | Other (Please specify)  \_\_\_\_\_\_\_\_\_\_ |  |

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| **21.** | **In general, what motivates you to participate in capacity building? (Check all that apply)**  |

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|  |  | Leadership/staff seeking out capacity building support |  |
|  |  | Suggestions and encouragement from Board |  |
|  |  | Funding opportunities |  |
|  |  | Requirement as a prerequisite for funding |  |
|   |  | Other (Please specify)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

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| **22.** | **On average, how successfully has your organization adopted and sustained the learnings from capacity building investments over the last five years? (Select one option)**  |

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|  |  | Very unsuccessfully |  |
|  |  | Somewhat unsuccessfully |  |
|  |  | Somewhat successfully |  |
|  |  | Very successfully |  |

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| **23.** | **Which of the following contributed to the success of your capacity building engagement(s)? (Check all that apply)**  |

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|  |  | Leadership buy-in and support |  |
|  |  | Leadership and/or staff transitions |  |
|  |  | Board buy-in and support |  |
|  |  | Staff buy-in and support |  |
|  |  | Assigning a responsible party to oversee the capacity engagement |  |
|  |  | Having a clear and detailed plan to achieve capacity building goal |  |
|  |  | Having the staff and/or volunteers with the skills, knowledge and resources to achieve our capacity building goal |  |
|  |  | Funding and resources available to implement goal |  |
|  |  | Visitor, audience, and/or member buy-in and support |  |
|  |  | Non-financial support from funders |  |
|  |  | Long-term financial support |  |
|   |  | Other (Please specify)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

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| **24.** | **Which of the following hindered the success of your capacity building engagement(s)? (Check all that apply)**  |

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|  |  | Lack of leadership buy-in and support |  |
|  |  | Leadership and/or staff transitions |  |
|  |  | Lack of board buy-in and support |  |
|  |  | Lack of staff buy-in and support |  |
|  |  | Failure to assign a responsible party to oversee the capacity engagement |  |
|  |  | Lack of a clear and detailed plan to achieve capacity building goal |  |
|  |  | Insufficient staff and/or volunteers with the skills, knowledge and resources to achieve capacity building goal |  |
|  |  | Lack of visitor, audience, and/or member buy-in and support |  |
|  |  | Difficult power dynamics with funders |  |
|  |  | Lack of long-term financial support |  |
|   |  | Other (Please specify)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

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| **25.** | **Generally, what factors limit or prevent your institution’s engagement in capacity building? (check all that apply)**  |

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|  |  | Lack of access to capacity building opportunities |  |
|  |  | Lack of awareness of opportunities for capacity building support |  |
|  |  | Limited staff time and availability |  |
|  |  | Limited board buy-in |  |
|  |  | Limited leadership buy-in |  |
|  |  | Lack of funding |  |
|  |  | Lack of relevant opportunities for our organization |  |
|   |  | Other (Please specify)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

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| **26.** | **What type of capacity building do you most need for your institution to be successful?  (Please select at most 5 options.)** |

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|  |  | Board governance and engagement |  |
|  |  | Collections management |  |
|  |  | Community and/or visitor relationship building and engagement |  |
|  |  | Connecting and collaborating with peers and thought leaders |  |
|  |  | Diversifying revenues |  |
|  |  | Diversity, equity and inclusion |  |
|  |  | Donor relations |  |
|  |  | Executive coaching |  |
|  |  | Facilities management |  |
|  |  | Financial management |  |
|  |  | Internal communications |  |
|  |  | Leadership succession planning |  |
|  |  | Legal |  |
|  |  | Messaging and marketing |  |
|  |  | Organizational chart, reporting, and role delineation |  |
|  |  | Program evaluation |  |
|  |  | Remaining informed of national / regional / local trends and best practices |  |
|  |  | Staff management systems training |  |
|  |  | Staff performance review systems |  |
|  |  | Strategic planning |  |
|  |  | Technology (e.g. website, social media, CRM systems, knowledge management software) |  |
|  |  | Vision and mission refinement |  |
|  |  | Volunteer management |  |
|   |  | Other (Please specify)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

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| **27.** | **Have you participated in the Museum Assessment Program (MAP)? (Select one option)**  |

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|  |  | Yes 🡪 If yes, please answer question #28 |  |
|  |  | No 🡪 If no, please skip to question #29 |  |
|  |  | I don’t know 🡪 If don’t know, please skip to question #29 |  |

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| **28.** | **What was your experience like, and how could it have been improved?** |
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| **29.** | **Have you participated in the Collections Assessment Program (CAP)? (Select one option)**  |

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|  |  | Yes 🡪 If YES, please answer Q #30 |  |
|  |  | No 🡪 If No, Skip Question #30 and go to question #31 |  |
|  |  | I don’t know 🡪 If Don’t know, Skip Question #30 and go to question #31 |  |

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| **30.** | **What was your experience like, and how could it have been improved?** |
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| **31.** | **If interested, please share names of other capacity building programs your institution has participated in.** |
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| **32.** | **PPG’s final report may include a list of participating organizations as an appendix. Do you wish to include the name of your organization in this list?**  |

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|  |  | Yes  |  |
|  |  | No  |  |

# Appendix C: Data Collection Communications

## Draft Survey Communications

*Initial Introduction Email:*

Subject: Invitation to Participate in IMLS Research: Capacity Building in the Museum Sector

Dear [FIRST NAME],

The Institute of Museum and Library Services (IMLS) is partnering with Partners for Public Good (PPG) to conduct a *Market Analysis and Opportunity Assessment of Museum Capacity-Building Programs* to understand the full scope of existing capacity building opportunities available to the museum sector. Through focused research and analysis, the project will provide a holistic view of the museum “market” and need for capacity building support, identify potential gaps in the suite of current offerings, and identify new opportunities and areas for growth.

Within the next day or so, you will be receiving an email with a link to a brief survey on the strengths and challenges of your institution, your engagement in capacity building, and the types of capacity building you need for your organization to be successful. We hope that either you (or someone who has knowledge of your institution’s recent capacity building engagements and/or capacity needs) will take some time to complete the survey within the next few weeks. Upon completion of the survey, you will receive a link to a repository of various capacity building resources that may be helpful as you continue to strengthen your institution.

Please be on the lookout for a survey link from Partners for Public Good (PPG) within the next 24 hours, keeping in mind it may go directly to your spam/junk folder. If you have any questions about this survey, or if you do not receive the email, please contact Olivia Ensley at oensley@tccgrp.com.

Thank you in advance for your participation and for your support of this process!

Sincerely,

PPG

IMLS

*Survey Link Email:*

Subject: IMLS Survey: Capacity Building in the Museum Sector

Dear [FIRST NAME],

Thank you in advance for completing the following survey. As we mentioned in our initial email, The Institute of Museum and Library Services (IMLS) is partnering with Partners for Public Good (PPG) to conduct a *Market Analysis and Opportunity Assessment of Museum Capacity-Building Programs* to understand the full scope of existing capacity building opportunities available to the museum sector. This survey will be integral to our development of a report with opportunities for more effective capacity building investment, increased access to capacity building resources, and key factors that impact capacity building adoption and sustainability in the museum sector.

This survey is estimated to take approximately 20 minutes to complete. Please note that your survey responses are completely confidential. You will not be identified in the analysis or reporting of survey data. Survey responses will only be reported in aggregate. Upon completion of the survey, you will receive a link to a repository of various capacity building resources that may be helpful as you continue to strengthen your institution.

Access your survey here: [SURVEY LINK]

Please complete this survey by Thursday, April 16th. If you have questions with this survey or have trouble accessing it, please contact Olivia Ensley at oensley@tccgrp.com.

Thank you in advance for your participation and for your support of this process!

Sincerely,

PPG

IMLS

*Reminder #1: Email from PPG (via SoGoSurvey)*

Subject: REMINDER: IMLS Survey: Capacity Building in the Museum Sector

Dear [FIRST NAME],

Last week, we sent you an invitation to complete a survey as part of a *Market Analysis and Opportunity Assessment of Museum Capacity-Building Programs* being conducting by the Institute of Museum and Library Services (IMLS) and Partners for Public Good (PPG). This survey will be integral to our development of a report with opportunities for more effective capacity building investment, increased access to capacity building resources, and key factors that impact capacity building adoption and sustainability in the museum sector.

This survey is estimated to take approximately 20 minutes to complete. Please note that your survey responses are completely confidential. You will not be identified in the analysis or reporting of survey data. Survey responses will only be reported in aggregate. Upon completion of the survey, you will receive a link to a repository of various capacity building resources that may be helpful as you continue to strengthen your institution.

Access your survey here: [SURVEY LINK]

Please complete this survey by Thursday, April 16th. If you have questions with this survey or have trouble accessing it, please contact Olivia Ensley at oensley@tccgrp.com.

Thank you in advance for your participation and for your support of this process!

Sincerely,

PPG

IMLS

*Reminder #2: Email from Museum Associations/Networks*

Subject: Request to complete IMLS Survey: Capacity Building in the Museum Sector

Dear [FIRST NAME],

As you may know, the Institute of Museum and Library Services (IMLS) is partnering with Partners for Public Good (PPG) to conduct a *Market Analysis and Opportunity Assessment of Museum- Capacity Building Programs* to understand the full scope of existing capacity building opportunities available to the museum sector. This is a random survey and we expect that some of our member institutions will have received a request to participate. If you received the email communication from PPG, we encourage you to complete the survey, as this will be a great opportunity for you to voice your perspective on your institution’s capacity needs. Upon completion of the survey, you will receive a link to a repository of various capacity building resources that may be helpful as you continue to strengthen your institution.

If you have any questions on how to access your survey, please contact Olivia Ensley at oensley@tccgrp.com. The survey will close on Thursday, April 16th.

Thank you in advance for your participation and for your support of this process!

Sincerely,

[ORGANIZATION NAME]

*Reminder #3: Phone call from PPG (if needed)*

Script:

Hello [FIRST NAME], my name is [NAME] with Partners for Public Good. We are partnering with the Institute of Museum & Library Services to conduct capacity building research in the museum sector. I believe you received an email invitation from us to complete the online survey. Do you have any questions about the survey or the study in general?

[ANSWER QUESTIONS]

We’d really love it if you could complete the survey by Thursday, April 16th. If you have any additional questions, please do not hesitate to reach out to me at [phone number] or [email address].

Thank you, [FIRST NAME]!

Reminder #4: Email from PPG (via SoGoSurvey)

Subject: ONLY 2 DAYS LEFT TO COMPLETE!

Dear [FIRST NAME],

The deadline to complete our capacity building survey is in 2 days! We hope you’ll take some time to provide your valuable perspective on your institution’s capacity needs.

Access your survey here: [SURVEY LINK]

This survey will close Thursday, April 16th. If you have questions with this survey or have trouble accessing it, please contact Olivia Ensley at oensley@tccgrp.com.

Thank you in advance for your participation and for your support of this process!

Sincerely,

PPG

IMLS

*Thank You Email from PPG*

Subject: Thank you!

Dear [FIRST NAME],

The Institute of Museum and Library Services (IMLS) and Partners for Public Good are pleased to share with you their Market Analysis and Opportunity Assessment of Museum Capacity-Building Programs final report. Please access the report here: [LINK TO REPORT].

Your contribution to this report is greatly appreciated!

Sincerely,

PPG

IMLS

## Draft Interview Communications

*Landscape, In-Depth, and Vetting Interviews: Initial Communication from IMLS*

Dear [NAME]:

The Institute of Museum and Library Services (IMLS) is pleased to make you aware of an important project we have embarked on for the Office of Museum Services. For many years, IMLS has supported technical assistance and capacity building programs for the sector, mainly targeted at small and mid-sized museums. As a learning organization, IMLS believes in constantly keeping abreast of learnings from outside the sector and augmenting our program offerings so that our museums can better serve communities. We have recently launched a *Market Analysis and Opportunity Assessment of Museum Capacity-Building Programs* to understand the full scope of existing capacity building opportunities available to the museum sector. Through focused research and analysis, the project will provide a holistic view of the museum “market” and needs for capacity building support, identify potential gaps in the suite of current offerings, and identify new opportunities and areas for growth.

As a funder who invests in capacity building, your insight is extremely valuable to this process. We are contacting you today to ask if you would consider speaking with a representative from our cooperating project partner, Partners for Public Good, within the next few weeks. The conversation would be conducted either via Zoom video conference or on the phone and would involve about 45 minutes of your time.

If you are not familiar with us, IMLS is the primary source of federal support for the nation's libraries and museums. Our mission is to advance, support, and empower America’s museums, libraries, and related organizations through grant-making, research, and policy development. Our work helps libraries and museums deliver valuable services that make it possible for communities and individuals to thrive. Please visit our website to learn more about our work, and we look forward to hearing from you.

Please respond with your interest to Tim Hausmann at thausmann@tccgrp.com by [DATE] to schedule.

Sincerely,

[NAME]

## Draft Focus Group Communications

Dear Mr./Ms./Mrs. [LAST NAME]:

The Institute of Museum and Library Services (IMLS) is pleased to make you aware of an important project we have embarked on for the Office of Museum Services. For many years, IMLS has supported technical assistance and capacity building programs for the sector, mainly targeted at small and mid-sized museums. As a learning organization, IMLS believes in constantly keeping abreast of learnings from outside the sector and augmenting our program offerings so that our museums can better serve communities. We have recently launched a *Market Analysis and Opportunity Assessment of Museum Capacity-Building Programs* to understand the full scope of existing capacity building opportunities available to the museum sector. Through focused research and analysis, the project will provide a holistic view of the museum “market” and needs for capacity building support, identify potential gaps in the suite of current offerings, and identify new opportunities and areas for growth.

As a funder who invests in capacity building, your insight is extremely valuable to this process. We are contacting you today to ask if you would consider participating in a focus group facilitated by a representative from our cooperating project partner, Partners for Public Good, within the next few weeks. The session would be conducted via Zoom video conference and would involve about 90 minutes of your time.

If you are not familiar with us, IMLS is the primary source of federal support for the nation's libraries and museums. Our mission is to advance, support, and empower America’s museums, libraries, and related organizations through grant-making, research, and policy development. Our work helps libraries and museums deliver valuable services that make it possible for communities and individuals to thrive. Please visit our website to learn more about our work, and we look forward to hearing from you.

Please respond with your interest to Tim Hausmann at thausmann@tccgrp.com by [DATE] to schedule.

Sincerely,

[NAME]

# Appendix D: Post-Survey Capacity Building Resources

Upon completion of the survey, respondents will be provided with the following links to additional capacity building resources:

* <https://support.tccgrp.com/en/collections/1730129-ccat-capacity-building-resources>
* <https://documentcloud.adobe.com/link/track?uri=urn%3Aaaid%3Ascds%3AUS%3Addfc0478-8f9c-4c82-9f1f-e4232b88a012>