

Museum management: Emotional value and community engagement

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Abstract

A version of this paper was presented to the Museums Australia national conference in 2005, addressing the theme of museums, change management, and emotional engagement. Extending the theme, this paper for the INTERCOM 2006 conference in Taiwan describes working partnerships with three very different museums in the United States (size, collection, location, mission, and approach). Drawing on *Leading with Passion*, the case studies describe how museums approached audience development using emotional value to get on the cultural consumer's 'social radar screen'. The perception of emotional value influences the way families decide to invest time, energy, money, membership, and donations into the museums. The hospitality industry has used emotional value for some time, creating strong customer bonds for long-term economic sustainability. Research suggests that nurturing trust relationships with key stakeholders does create emotional value so museums maintain and sustain a position in the heart of a community.

Keywords: Trust, emotional value, audiences, community engagement

Introduction

Why do some museums win our hearts and others don't? What's the criterion that puts one museum on a cultural consumer's social radar screen while another remains invisible? What is it that makes a cultural consumer recommend a museum to their friends? What draws a visitor back again and again to a certain museum--while avoiding others? What creates that elusive trust relationship called social capital? What motivates some families to volunteer time and hard-earned dollars to one museum and not another? Why would a family chose one museum over another when deciding to donate precious heirlooms? What transforms cultural consumer indifference into long term commitment? Emotional value, nurtured through trust relationships, influences the museum's ability to connect and build community engagement.

Emotional value, social capital, and community engagement were common themes in three very different museum projects completed in the United States between 2004 and 2006. The three museums differed in size, collection, location, mission, and approach to community engagement. While the museums differed, all three shared an interest in understanding cultural consumers and emotional value. As an advocate for museums and a cultural consumer, sensing whether a museum is trustworthy enough to warrant an investment of economic and social capital is necessary due to competing claims on time, money, and relationships. From a museum's point of view, using emotional intelligence skills to create social capital is a good investment. Social capital is the foundation for economic exchange. The connection between social capital and emotional intelligence or EQ skills was introduced in *Leading with Passion*, where EQ was defined as the ability to sense, understand and effectively apply the power and acumen of emotions as a source of

human energy, information, trust, creativity, and influence (Suchy, 2004A, p.32-34).

This paper explores the perception of emotional value and community engagement, from a change management consultant and cultural consumer's perspective, with three very different museum case studies. The first case explores emotional value with a small, local history museum where a donation became the catalyst for a visitor experience survey and a change management project. The second case explores how a medium-sized natural history museum responded to and used feedback on emotional value to change their approach to audience development. The third case study describes the need for leaders sensitive to emotional value in a large privately owned museum. In many respects, all three case studies heighten awareness about the relationship between emotional value, intangible heritage (social relationships, stories, oral history, and spiritual beliefs), and the changing role of museums (Pocius, 2006).

Defining emotional value

As an informed cultural consumer and advocate for museums, I have spent the last forty years visiting hundreds of museums around the world, reflecting on what creates an emotionally rewarding museum experience. A positive visitor experience includes and builds on the perception of welcome, warmth, pleasure, trust, safety, challenge, and believability that creates a fundamental bond with a museum over the long term. There are many, many factors that lead to a sense of emotional engagement, described in *Leading With Passion* through stories from nearly one hundred museum directors. The directors represented a variety of museums (art, natural history, science, and kids), various sizes (large metro to small regional), and in vastly different locations (England, Australia, Canada, and the United States). They all described the same four-fold

leadership role. The leader's first role is to represent the museum's story to various audiences (internal and external) guided by personal passion. Second, leaders create contexts where others (staff and volunteers) can give their best, to each other and to visitors. Third, they act as ethical entrepreneurs, assessing and shaping opportunities into viable economic outcomes to ensure the museum's future. Fourth, they nurture relationships of trust with key stakeholders around the museum (staff, boards of trustees, visitors, local community, and government) for long-term sustainability.

All four roles depend on emotional intelligence competencies: intentionality, interpersonal connection, empathy, intuition, and trust. Research suggests that lack of trust in human relationships can be attributed to nearly 50% of workplace based inefficiency (Cooper and Sawaf, 1997; Orioli, 1998, p.14). Deciding whether an emotional connection *feels* trustworthy, or not, taps into what researchers call the limbic or emotional brain (Orioli, 1998). Sensing and deciding is a lightning quick process. The left brain takes in and weighs up facts and figures. The right brain senses the emotional impact and *meaning* to decide whether any given opportunity represents pleasure or pain. The final decision is made through the emotional right brain.

While neuroscience and the study of emotions is a relatively young discipline (twenty years), finding ways to influence consumer decisions has been around for awhile. Marketing analysis focused on emotional value measures the product and service characteristics that consumers feel are important. Characteristics of emotional value commonly cited include trustworthiness, reliable information, flexibility, no-hassle service, unique value-adds, truthfulness, speed, knowledge of the consumer, entertainment, and education (Barlow and Maul, 2000). There are

similarities between museums, which one director called the intelligent leisure industry, and the hospitality industry (Capon, 1996). The Hilton Hotel Corporation has been training their staff for some time in a mission dedicated to emotional intelligence skills in the hospitality industry. Their aim was to sustain competitive advantage with a focus on emotional competency by giving emotional value to guests.

Emotional value is assessed by cultural consumers when they make decisions about how to invest leisure time, physical energy, money, and a social conscience. The choice between a film, dinner out, or a museum visit costs roughly the same; the choice depends on the consumer's perception of what might feel good. As an experienced cultural consumer (museum visitor), I sense museums for feel using a cultural consumer connection tool (Suchy, 2006, p.53-54). The tool has seven criteria: context (the process of physically locating the museum), communication (navigating through the museum), creativity (connecting with exhibits), collection (memories made around exhibits), celebration (appreciating cultural diversity), cuisine (resources to sustain energy), and community (insights about the local culture).

In theory, the perception of emotional value puts a museum (any size or type) on a cultural consumer's social radar screen. In practice, emotional value paves the way for community engagement reflected in repeat visits, donations, membership, and volunteer labor. The following case studies share insights about emotional value with three museums located in Oregon, a state in the Pacific Northwest region of the United States.

Case study: small-sized county museum

The Hood River County Historical Museum is a small local history museum located in Hood River, Oregon. Hood River County has a population of 21, 284 and is about 75 miles

east of the city called Portland along the Columbia River. Hood River holds two world records: largest producer of Anjou pears and wind surfing capital. The museum has one paid staff member supported by a team of dedicated volunteers. The museum's mission is to tell the 'story' of Hood River. Their collection reflects the community's local history and is housed in a purpose built facility maintained by county funds.

The connection with the museum evolved in 2004, when the public was invited to an 'evening of elegance' where the museum showcased their collection of five generations of dresses. Guests were asked to wear elegant outfits from private wardrobes that may have emotional or historical significance. In an era of disposable consumer goods, it was surprising to witness how many women wore dresses that were over fifty years old, many of which had been worn by or made by their mothers and grandmothers. As a participant in the event, my dress was last worn in 1970 to a high school graduation dance in Hood River. Stored in a cedar chest in my family's home, the dress had emotional, personal, cultural, and historical significance. It was handmade by my mother, who lived out her life in the Hood River valley. Returning to the community after my father's death in 2003, my mother's friends encouraged me to donate the dress and its story to the Hood River County Historical Museum, in memory of my mother who passed away in 1998.

Making that decision took time. Prior to making the commitment, the museum was sensed for trustworthiness using the cultural consumer connection tool: context, communication, creativity, collection, celebration, cuisine, and community. How well the museum managed the seven criteria would either make or break an emotional connection. Connection was positive. The decision to donate sparked a whole series of events, transforming a simple donation into a deeply enriching family-museum bond.

Documenting provenance for the dress evolved into a family memory-making workbook called *An Artistic Touch*. That research project became the catalyst for *Family Memory Making*, a workshop designed for families on how to capture stories about heirlooms as provenance for future generations (Smith, 2005, p.4). The museum's ability to provide emotional value prompted one of my family members, a reluctant and resistant museum visitor, to loan a quilt made by our great-grandmother for an exhibition. Emotional value also influenced our family's decision to donate dresses to the museum that had been made or worn by our mother between 1945 and 1995.

The use of a cultural consumer connection tool to make decisions about whether to donate to the museum or not, intrigued the museum. Their interest prompted a visitor survey project to see if other visitors experienced a similar sense of emotional connection and engagement with the museum. The survey was administered by volunteers with visitors representing five generations: Veterans (1923-45), Baby Boomers (1946-64), Generation X (1965-78), Generation Y (1980-2000), and Post Modern (2000 onward). Researchers working on generation differences describe transformational changes in family life and social patterns over the last twenty years (Hanamura, 2004; Alexander, 2006, p.3). For example, Baby Boomers and Generation X have a different perception about participation in community activities and volunteer work. Being mindful of generalizations, it appears that members of Generation X actively participate in virtual communities (email, web sites, and blogs) but are less inclined to participate in the physical communities directly around them.

Survey results at the Hood River Museum suggested that Veterans and Baby Boomers both experienced emotional connection with

the museum, triggered by exhibits that aroused personal memories of long-lost relationships and family stories. Museums are keepers of other people's stories, according to the International Council of Museums who describe the organization as both preserving the memory and consciousness of society (Baghli, 2004, p.16). A museum story that resonates with a visitor's life story creates a little bit of magic. Reminiscence brings fresh emotional meaning into someone's life, helping visitors find the heart of their community and a sense of belonging; an experience many people long for.

For example, one survey participant described his delight in discovering a relative's name in archived historical records. The discovery triggered memories of home and prompted a significant financial donation to the museum for purely emotional reasons. Supporting the museum financially was the visitor's way of keeping family memories alive. Another visitor commented on emotional value gained through an exhibition on a local park, which had triggered fond memories of family picnics in the park over fifty years ago. Several survey participants said the most significant contributor to their sense of emotional value was the warm personal welcome offered by museum volunteers at the reception desk. Every respondent said they would come back to the museum to experience that warm personal attention. Note, there are no computer touch-screens in this museum; human touch makes meaningful memories.

In April 2006, the museum's board requested a change management update, exploring feedback about how to enhance the museum's presence on the community's 'social radar screen' (Suchy, 2004B). The review process encouraged the museum to consider creating a context for community healing, a safe place for personal histories with sections of the community who may feel they do not belong. For example, the

County's Hispanic population plays a major role in the agricultural economy, but no role in the museum. The museum has a precious collection of Native American Indian artifacts, and members of the local Indian community have not told their stories in the museum context. During 2006, a context for healing and community engagement is being explored by offering Japanese-American residents an opportunity to share personal stories about life in internment camps during the Second World War (Stubbs, 2006). No doubt, the museum's next change review will include rich reflections on emotional value and trust relationships with key stakeholders.

Case study: medium-sized regional museum

Successful museum directors manage change through relying first and foremost on energy or resilience. They live their passion, love their organizations, and encourage staff and volunteers to give their best through contagious enthusiasm. This interpretation of the director's four-fold role, described earlier, was the starting point for a change management project with the lead team at the High Desert Museum in Bend, Oregon. Bend is located in central Oregon, a four to five hour drive south east of Portland. With a population of 70,328, Bend is a popular center for sporting activities such as hiking, rafting, skiing, and fishing. Central Oregon is a region where ecology and history converges with stories about Native American Indians, pioneer cattle ranchers, Hispanic horsemen, and the founder of the High Desert Museum, Donald Kerr, who was passionate about natural history. The High Desert Museum is a twenty-minute drive outside of Bend and combines an extensive collection of Native American Indian culture, local history, art, a wildlife park, a mustang rehabilitation program, and conservation research as an extension campus for one of the State universities. The deceased founding

director's environmental education vision is upheld and balanced with changing needs reflected in regional development.

There were three stages in the museum's change management project. Stage one sensed the museum's presence and perception of emotional value using the cultural consumer connection tool. The second stage introduced the lead team to various change management tools, so they could sense, shape, and shift the museum toward more effective audience engagement. The third stage made use of an emotional intelligence map, coaching members of the lead team on the relationship between individual emotional intelligence competencies and organizational change.

The museum identified a number of external and internal triggers that signaled the need for change: attendance figures were continuing to fall, fundraising efforts were stalling, and employee moral was very low. Using Stratified Systems Theory, described in *Leading With Passion*, the lead team identified an appropriate level of complexity for the museum and set about bringing the organization into alignment, identifying core objectives and how best to move towards achieving them (Suchy, 2004, p.60-82). Stratified Systems Theory also allowed them to identify what they needed to let go of. The museum conducted a gap analysis to identify the difference between its current state and its ideal vision, identifying what changes needed to be shaped to shift the museum over an eighteen-month period. The Director of Human Resources at the High Desert Museum (Antonson, 2006) described the three most powerful changes for the museum between 2004-2006:

Shifting personnel and getting the "right people on the bus and in the right seats." Revising our Mission, Vision, and Statement of Purpose, which allowed us to focus our efforts on the visitor with a shared understanding of who we are, what we do

and how we do it. Increasing program vitality by taking a more integrated approach and applying the fun, engaging and evocative guideline to all programs. We created a new division called Audience Development in an attempt to align program development with program promotion. It also includes guest services to ensure frontline staff are aware of programs and can effectively promote them. We also created an Audience Development Committee made up of one representative of each functional area of the museum: natural/cultural interpretation, graphics, promotions, volunteers, wildlife, visitor programs, school programs, exhibits, living history, and facilities. This committee exists to ensure the success of the High Desert Museum by building gate revenue through collaboratively brainstorming innovative visitor experiences and promotional opportunities based on visitor evaluation and research. The committee serves as the guiding decision-making body to ensure that the focus in all museum-wide decisions is on putting the visitor first while furthering the mission and vision. And, it serves as an avenue for sharing relevant information interdepartmentally. We ensure we are staying on target by tracking change through admissions statistics, visitor research, and employee feedback.

The President of the High Desert Museum was pleased to convey the news that September 8th, 2006 marked the opening of the museum's new downtown Gallery on Wall Street in a space formerly occupied by the Sunbird Gallery, across from the Bella Tazza Coffee Shop (Rodgers, 2006). While people outside of Bend, Oregon will not be familiar with these geographic markers, they represent milestones in the museum's change management program. The area was identified as the geographic heart of Bend in 2004, using the cultural consumer connection tool. The organization was advised to establish a presence in this area, showcasing

various ways the museum provided emotional value for cultural consumers. Over the next twelve months, the museum will be carefully tracking how their investment shifts the museum onto a more family 'social radar screen' with a measurable increase in social and economic capital.

Case study: large private museum

The final case study illustrates the importance of creating emotional value within a museum, before it can be authentically used to create community engagement. In this case, the cultural consumer connection tool was used to sense a museum's trustworthiness prior to donating precious tangible and intangible aviation memorabilia from my family's estate. My father was a pilot in the United States Air Force. Our family wanted to honor his patriotic service as a veteran by ensuring his record of achievement was maintained in a safe, public place dedicated to the promotion and preservation of aviation history.

The Evergreen Aviation Museum in McMinnville, Oregon was chosen based on a match between our family's intention and the museum's mission. The museum is owned by Evergreen International Aviation, a commercial enterprise founded by entrepreneur Del Smith. Captain Michael King Smith, Del Smith's son, whose vision was to inspire people to be the best they can be, launched the museum and educational institute. Tragically, Captain Smith was killed in an accident leaving his father to realize the vision. The complex houses a significant collection of air planes, including Howard Hughes' famous flying boat referred to as the Sprucegoose. The museum is located about two hours south of Portland in a university town with a population of 26,499. Community engagement depends on an active volunteer program with roles for veterans from the local community, lavish evening entertainment programs to entice visitors down from

Portland, and educational programs designed to cater to schools in the surrounding area.

The Director of Collections at the Evergreen Aviation Museum had a deep understanding of the importance of honoring loved ones and the role oral history and reminiscence plays in the creation of provenance (Huit, 2004-2005). While museums skillfully manage oral history projects, reminiscence is an emotionally charged challenge (Kavanagh, 1999, p.25-47). Donating our father's cherished memorabilia required extensive research to establish provenance for over 100 items. Based on the family's memory of our father's reminiscence, the research created another family memory-making workbook titled *Wind Beneath Their Wings*, an exhibition case in the museum lobby designed to teach families about memory making, and an opportunity to offer the *Family Memory Making* workshop through the museum.

Although the initiatives generated positive feedback from the public, there were a number of challenges. Educational projects focused on community engagement were a new initiative for the museum. While museum members and visitors were prepared to pay US\$100 for lavish evening fund-raising banquets at the museum; they were less willing to pay US\$90 for a one-day educational workshop on family heritage management. A speaker (Kurin, 2004, p.7-9) at the 2004 ICOM conference acknowledged that:

While museum curators and professionals understand that objects (tangible heritage) tell stories, it is the object that is fetishized...whereas with intangible cultural heritage, it is the social practice or lived traditions around the object that are important (rather than the material object, recordings, photographs, or videotapes)...museum workers are not really trained in such an effort...in order to deal with intangible cultural heritage, museums must have an extensive,

fully engaged, and substantive dialogue and partnership with the people who hold the heritage...such a partnership entails shared authority for defining traditions, and shared curation for their representation.

During 2006, a book designed to promote dialogue on intangible heritage management through the family-museum partnership was completed (Suchy, TBA). Based on extensive research, the book incorporates stories from the *Family Memory Making* workshops and includes over one hundred interviews with specialists and others interested in family heritage management. It is designed to teach about the link between family memories, provenance, and museums—using museums as role models. There is a risk in advocating museums as role models. Museums have to live up to standards advocated to families as best practice. For example, when asked to comment on the most powerful changes in museum management between 2004 and 2006, the Director for Collections (Huit, 2006) at the Evergreen Aviation museum said, “In my opinion, the most powerful changes include rapid growth, loss of personnel, and an increase in management that are not educated in professional museum practices and ethics.”

As a key member of the Oregon Museum Association, Huit shared concerns about changes triggered by private museum directors who see their museums as a “legacy” and do not adhere to best practices and ethics when it comes to care and preservation of the artifacts acquired by the museum. She described how the directors' desire to create a “legacy” , rather than address the needs of the staff to grow the museum in a professional and ethical manner, results in large financial outlays for museum facilities with no consideration for the artifacts, staff, or working environment. Museums rarely engage change strategists to help sense, shape, and shift their organizations toward an

ideal vision, nor do they provide staff with long-term plans to use as a roadmap. When private museum owners have a vision, it may not be shared with those who carry on the day to day operation of the museum or those who must address the future with exhibits, education programs, and events. In one museum, where major changes occurred between 2003-2006, there were no systems in place to track the change. Huit concluded her comments by describing how two young men, aged 22 and 24, were appointed as acting co-executive directors in one museum based on their experience as veterans of the action on terror in Iraq and Afghanistan. They were not qualified in museum management and had no experience as directors. As co-executive directors, they were not in a position to make necessary decisions for a professionally run museum e.g. best practices in environmental controls, ownership, and non-profit practices.

As a change management consultant, Huit's candid comments provide clues about leadership challenges and the need to create a context where others can give their best. While many museums invest heavily in creating the physical context for collections, this must be balanced by creating a supportive emotional context for the human beings who provide museum services. Emotional value has to be built *within* the museum, first, before it can be used as a tool for audience development and community engagement.

Conclusion

As a bridge builder between different domains of expertise (museums, management, and organizational psychology), the three case studies reflect a range of museum management challenges. They highlight the role emotional value plays in creating and sustaining trusting social relationships with stakeholders around the museum. Social relationships are included in

the definition of intangible heritage offered by the International Council of Museums. And, as a keynote speaker (Kurin, 2004, p. 8) at the 2004 ICOM conference suggested: "Clearly the skills needed by museum professionals to work with people and communities in this type of engagement are much more akin to community development than to materials conservation. You have to specialize in diplomacy, local history, and psychology more than you do in glass, wood or metal."

While visitor experience may be a well-researched area, providing emotional value through family-museum partnerships may create new twists and challenges for museums (MAM, 2006, p.18). While many museums are brokering community-museum partnerships, they are cautioned to--take care, because trust can be easily shattered. For example, trust relationships become severely stressed when museums claim intellectual property rights over personal stories and photographs shared within the museum context. According to one community heritage specialist, the intellectual property issue is a minefield (Giese, 2006). Museums presume that when someone dies their material reverts to the public domain, without the family's permission. If families had known personal stories and images were going to be used on museum web sites, a very public domain, they would have

negotiated closed access with strict levels of permission. If families had known they would need to ask permission from the museum or library to reprint family photographs donated and that they would be charged for use, they would have only donated 2-3 images.

Emotional connection, like social capital, is built over time by nurturing trust relationships. Trust takes a long time to grow and can be destroyed in a nanosecond.

As always, case studies raise questions. How are museums opening up and out to create collaborative community engagement? Are museums prepared to focus on ways to offer and measure emotional value and service characteristics that consumers feel are important? Such as trustworthiness, reliable information, flexibility, no-hassle service, unique value-adds, truthfulness, speed, knowledge of the consumer, entertainment, and education? Would providing emotional value help shift the museum experience onto the family's 'social radar screen'? Would this also shift the perception of museum as sites for storage cases to sites for community healing, nestled in the heart of a community? Based on experiences reflected in the case studies, the answer is--Yes. Emotional value, nurtured through trust relationships, influences the museum's ability to connect and build community engagement.

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Dr. Sherene Suchy is an independent scholar, educator, change management consultant, and writer. Author of *Leading with Passion: Change Management in the 21st Century Museum* (2004), a book based on Dr. Suchy's international Ph.D. research at the University of Western Sydney in Australia and over 25 years of experience with leadership development programs in public, private, and nonprofit organizations. Dr. Suchy was invited to contribute a chapter to *Museum Philosophy for the 21st Century* (2006) describing experience with family heritage projects and museums in the United States. She is currently completing a book on intangible heritage management, designed to build bridges between families, museums, and estate management professionals. Dr. Suchy taught change management for over ten years in the MBA program at the University of Technology and has over sixteen years experience coaching expatriate managers on international assignments, advocating museums as sites for cultural orientation. Based in Sydney, Dr. Suchy maintains a private practice and keen interest in emotional intelligence, leadership, and change management. Qualifications include a Bachelor of Social Work (Psychology), Graduate Diploma in Communication Management, Master of Art Admin, Ph.D. (Philosophy). Memberships include the Australian Association of Social Workers and the International Council of Museums.