Public Values, Values Inquiry, and Strategic Planning in Art Museums

By Kathleen Glass

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ABSTRACT

The objective of this master's research project was to investigate the concepts of public value, values inquiry, and strategic planning as they relate to the work of art museum managers. Through a review of research literature from the museum and public management sectors, I sought out evidence of public value and strategic planning theories most useful for addressing the changing relationships that museums have with the public. An exploratory case study was conducted at the Jordan Schnitzer Museum of Art to investigate the concept of public value as it manifests in the strategic management of an art museum. The project concludes by considering the possibilities that public values inquiry presents to museums undergoing strategic planning and institutional change.

Keywords:

LIST OF FIGURES

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CHAPTER ONE: INTRODUCTION TO THE STUDY
1.1   PROBLEM STATEMENT & CONCEPTUAL FRAMEWORK

In light of recent trends in the nonprofit sector as a whole, an urgent need

exists for nonprofit art museums to reassess their programming and strategic

planning methods in order to better meet the needs of their existing and

potential constituents and stakeholders. Broadly, these trends include increased

competition, changes in public support for the arts, and fundamental shifts in

the museum field towards outward and socially oriented planning, and away

from an inward-focus on collections (Wyszomirski, 2002). Compounding these

issues is the broad perception that the museum field is not regarded with the

same level of authority as it once was. Therefore, from both a professional and

political standpoint, museums are increasingly concerned with proving their

worth to society, and maintaining a greater level of public trust. The museums'

delicate relationship with and responsibility to various members of the public

signifies that they are "operating in a system where political oversight and

popular opinion are [both] important…each of these three evaluative

perspectives—professional, political, and popular—has implicit values that are

not necessarily congruent" (Wyszomirski, 2002, p. 198). Furthermore,

research shows that the shift towards socially oriented planning is reflective of

"increased democratization and public involvement in cultural decision-

making" (Scott, 2008, p. 30). It is at this juncture that managers of public art museums must make an effort to understand, address, and articulate public values as they relate to their institutions and strategic planning processes. As illustrated in the following Conceptual Framework (Fig. 1), this theory will be explored in greater detail through an extensive literature review focused on identifying the definitions and theories of public value most relevant to art museums. Lastly, this theory is grounded in its direct application to an exploratory case study of the Jordan Schnitzer Art Museum (JSMA), a public university art museum located at the University of Oregon's campus in Eugene, Oregon.
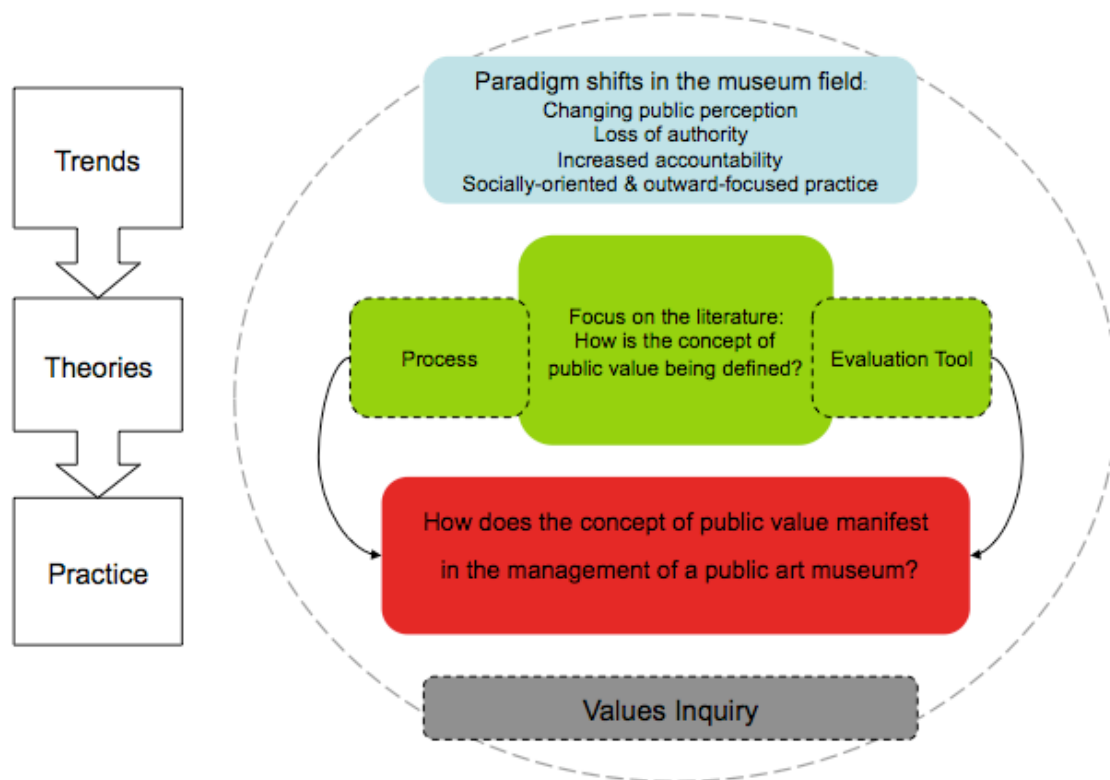
FIG. 1: Conceptual framework

1.2 PURPOSE STATEMENT AND RESEARCH QUESTIONS

The ultimate purpose of my research is to explore the concept of public value in relation to art museums. The intention of the exploratory case study is to examine how public value is defined, articulated, and addressed (i.e. how it manifests) in a public art museum, and to determine its utility in the strategic planning process. To that end, the following research questions have guided this study:

A. What values are defined as most relevant to public art museums in the context of major paradigm shifts towards greater public accountability and socially oriented museum purposes?

B. How are museum professionals currently articulating the concept of public value, and how does it manifest in the strategic planning of public art museums?

   ➢ What are the potential strategic planning and policy implications that public values inquiry holds for museum managers?

1.3 RESEARCH METHODOLOGY

Theoretical Lens

Because of the highly subjective and theoretical nature of measuring and assessing values as they relate to art museums, I have adopted a constructivist worldview, or lens, through which to focus this study. According to Creswell (2009) the goal of constructivist research is "to rely as much as possible on the participants' views of the situation being studied" (p. 8). This worldview also allows the researcher's own opinion and experience to shape the interpretation of the findings. Thus, it accepts the reality of my own biases towards positive valuation of the arts and art museums due to the nature of my education and

personal interest in the field. Most importantly, it also acknowledges the theoretical assumptions underpinning the study: the belief that public art museums have a unique mandate to serve public needs, and that a basic understanding of these needs and how to address them should start with an examination of underlying public values.

Role of Researcher

Through an overarching review of the literature surrounding value definitions most relevant to the museum field, my role as the researcher is to paint a broad picture of how value definitions are constructed and organized, highlighting overlapping ideas or contrasting points as they emerge. My examination of broad value definitions serves as a starting point for a discussion of public value as it relates to museum management. In using the exploratory case study, my intent was not to prescribe or recommend specific public value definitions, but instead to examine the language being used to articulate the notion of public value within an art museum and to investigate the function of values inquiry as a tool for museum planning. To meet the University of Oregon's research standards of ethics, the case study and resulting research project were conducted only after being granted official approval by the University's Office of Human Subjects Compliance in February 2009.

Strategy of Inquiry

My study begins with the aforementioned literature review, which I have chosen to divide into four distinct sections. In the first section, I examine the primary issues and trends in the nonprofit sector and museum field pointing to the need for understanding values most closely associated with art museums and their publics, synthesizing across the findings to highlight interconnections, similarities, and differences in the definitions. This is followed by a synopsis of those value definitions that have most relevance to the public purposes of museum work. Next, the study focuses on a holistic view of *public* value definitions, with an aim to examine how public value is articulated within the museum field, and to explore how the process of values inquiry may be used to inform and improve the strategic management and decision-making of art museums.

Finally, my study concludes with the exploratory case study of Jordan Schnitzer Museum of Art. Through the case study I was able to investigate how public value manifests in the art museum setting. By interviewing staff and advisory board members, I was able to gain important insights from both management and advisory perspectives on the concept of public value as it relates to their institution. The study also involved document analysis, which

included a review of the Museum's strategic planning documents. Through

semi-structured interviews with staff and board members, as well as a review of

the strategic planning documents, the case study, which assures the reliability

and validity of the study, serves to ground the highly theoretical findings

described in the review of the research literature in chapter two. Case studies

involve careful selection of a case to "illustrate an issue and analytically study

it...in detail", and furthermore, help "researchers connect the micro level with

the macro level" (Neuman, 2006, p.41). Because the design of my research

focuses in part on theoretical value definitions that vary from one individual or

group to another, it is useful to incorporate such an application of the micro-

level analysis to the larger whole or process that occurs in the museum field.

The case study used for this project is designed to be instrumental in nature,

which is useful for gaining a general understanding of what is not immediately

clear at first glance (Tellis, 1997). Finally, the study has allowed me to gain a

better grasp on the highly contextual and subjective nature of value definitions

as they relate to art museums.

Delimitations, Challenges, and Definitions

As the process of values inquiry is the underlying basis of my research,

definitions of this process as well as those value definitions of greatest concern

must be delineated. Values inquiry is defined in the literature as the "systematic investigation of values relevant to a program, including understanding those outcomes most prized by stakeholders (Bourdeau & Render, 2004, p. 39), and furthermore can be used to identify "values relevant to social programs and policies and to infuse them into evaluations" (Mark, 2003, p. 40). Many researchers then use this values inquiry process for purposes of improving program evaluation techniques. The use of values inquiry for the purposes of my study does not reside in program evaluation methods. Instead, the values inquiry process is delimited to the purpose of exploring definitions of value, and more specifically, public values as they manifest in the more holistic strategic functions of art museums. Furthermore, although there are many groups who may determine the value of art (Geursen & Rentschler, 2002), this line of inquiry is delimited to a primary focus on the JSMA's internal stakeholder groups including museum staff, members of the leadership council, and university personnel.

Finally, the following definitions have been provided so that the reader of this research will better understand the intended meaning of these terms used throughout the study:

Public: Any individual or group residing outside of the museum who is directly or indirectly impacted by the museum's collections, programs, and services. It is not my intention to assign any specific boundaries, geographic or otherwise, to this body.

Public Museum: According to the ICOM Code of professional ethics, a public museum is "a non-profitmaking, permanent institution in the service of society and of its development, and open to the public, which acquires, conserves, researches, communicates, and exhibits for the purposes of study, education, and enjoyment, material evidence of man and his environment" (ICOM, as cited in Edson and Dean, 1994, p. 11). Likewise, the use of the terms *art museum* and *museum field* throughout the study adhere to this definition of *public* museums.

CHAPTER 2: LITERATURE REVIEW
2.1 Art Museums and the public

Over the past few centuries, the role of art museums and their relationship with the public has changed drastically. It has been observed that art museums have evolved from a far more superior position as arbiter of high taste and scholarship, to a position increasingly governed by the needs and interests of the greater public (Weil, 1997). Weil goes so far as to suggest that increasingly it will be the community members themselves who guide and shape their relationship with the museum. Recent research shows evidence that "the relationship between museums and the public has altered appreciably in recent years, from a situation where the public had little say in museum affairs to one where the sense of public is an overriding factor…[and that] the meaning of the collection has also altered accordingly, from objects collected for their own sake by an individual, to one where choice and display of the objects is shaped by public concerns" (McClean, 1994, p. 244). From a marketing and public relations standpoint, it has been observed that exhibitions are increasingly regarded as vehicles for justifying community support, which has led to two important innovations in museology: increased public accountability in all aspects of museum work and the rise of museum education as a primary programming area (Edson and Dean, 1994).

An underlying issue of these trends is the loss of the museum's authority, which has been defined as it relates to museums as "the power to influence or command thought, opinion or behavior" (Wood, as cited by Cuno, p. 21, 2004). According to Weil (1997), this loss of authority is in part due to changes in museum funding the over the years. Once supported by few wealthy private patrons, a more diversified mix of private and public funding now most often supports art museums. Public funding, including government grants, places unique demands on museums, necessitating greater justification for public support through direct measurement and articulation of the museums' impact on the public. This apparent shift of power to the hands of the public, and the demand on museums for public accountability is part of a systemic change in the nonprofit sector as a whole. Museum professionals caution, "in the world of the future, every [nonprofit] institution, including art museums, will be judged on its distinctive ability to provide value to its society in a way that builds on unique institutional strengths and serves unique community needs" (American Association of Museums, as cited in Skramstad, 1996, p. 37).

Now more than ever, art museums are expected to provide measurable outcomes of their positive impact on the public. With this expectation has come a growing pressure to better "articulate the value of the arts to society"(Malatest & Associates, 2007, p. 11). Here lies the debate over how

to define values and determine the best definitions and measures on which to focus our attention. The very difficulty of measuring value in order to sustain public support and accountability in public institutions (such as art museums), is exacerbated by the inconsistent and diverse value definitions. This marks the primary need for both a broad exploration of which definition, or combinations of definitions, are most relevant to public art museums, as well as a need to focus on the role of public value in strategic planning.

Finally, the debate over which value definitions or types of values most accurately relate to or inform museum work is long standing and widely varied in approach. Therefore, in order to narrow the scope of my study, my review of the literature is framed within a context that considers: (1) the concrete language and definitions being used in the field; (2) the utility and need for values inquiry to inform strategic museum planning and evaluation processes; and similarly, (3) the particular relevance of identifying public values from a public management perspective.

2.2 Values inquiry and broad value definitions

Value has been defined as a "single belief that transcendentally guides actions and judgments across specific objects and situations, and beyond immediate goals to more ultimate end-states of existence…[and] is an imperative to

action…[and] a standard or yardstick to guide actions, attitudes, comparisons, evaluations, and justifications of self and others" (Rokeach, as cited in Thyne 2001, p. 120). The process of values inquiry is defined as the "systematic investigation of values relevant to a program, including those outcomes prized by stakeholders" (Bourdeau & Render, 2004, p. 39). Using these two definitions as the lens through which I focused my review of the research literature, my intent is to gain a broad perspective of how art museum professionals currently articulate individual and societal values ascribed to their institutions. Furthermore, my intent is to identify those definitions or inquiry processes that may inform strategic museum management in an effort to better fulfill their public service role in light of the aforementioned challenges affecting the museum field.

A wide range of value definitions that broadly relate to the public's interest in the arts has been identified by experts in the museum field, including "existence value, option value, education value, bequest value, and prestige value…existence value [being defined as] derived solely from the asset's existence…option value [as] the value of having the option to use the [cultural] assets at some point in the future…and bequest value [as] the utility derived from the expected enjoyment of an asset by future generations" (Malatest & Associates, 2007, p. 29). Another popular contribution to the values

discussion is the definition of *cultural value* which is defined by one researcher as separate from economic value because it is "derived broadly from cultural discourse but [has] no standard unit of account" (Throsby, 2008, p. 4) and can be deconstructed into various components including social values, aesthetic values, symbolic values, authenticity value, historical value, and spiritual value (Throsby, 2001). While these components provide an important starting point in examining value as it relates to art museums, they go beyond the scope of primary value issues concerned with the public dimension of art museums' roles and responsibilities which are the focus of my research. What follows is an assessment of the values that fall within the public-service realm of museum work from both an individualistic and societal perspective.

As addressed in the introduction of my research, I have adopted a broad view of museums' public, which may include public citizens and officials, community members, school groups, museum visitors or members, and non-visiting public. With this group in mind, my focus has been on determining both the individualistic and societal (or collective) value definitions, and the varying manifestations of the trend towards greater public awareness informing the values debate. On the individual level, one such manifestation is the increasing interest in studying visitor experiences to ascertain the individualistic values and needs that the public is seeking to have fulfilled by visiting a museum. This has

led to a refocusing of visitor evaluation studies on individual values. One researcher positions such individual values as *experiences* that are classified as "object experiences...cognitive experiences...introspective experiences...[and] social experiences" which contribute to individual values such as personal knowledge or understanding, social interaction, creativity or imagination, personal reflection, or connection to other individuals or ideas (Doering, et al, as cited in Packer, 2008). Furthermore, Packer (2008) posits that meaning for visitor experiences emerges at the level of benefits, or underlying individual values, fulfilled by the museum-going experience.

While a focus on individual values in audience research provides evidence of one process by which values inquiry occurs, current visitor research may be limited in its ability to interpret the complexities of larger societal or community values attributed to art museums' public programs and services. Such limitations in visitor research and audience evaluation methods point to a second manifestation of the trend of public-awareness on the part of public art museums: museum managers are responding to the growing pressure for public accountability and justification for public investment with an increasing use of output measures that quantifiably demonstrate their ability to engage and positively impact the public.

But research suggests that while the intent of audience research and impact studies is to demonstrate a museum's positive impact on the greater public, they are often narrowly focused on the individual level and do not fully take into account the underlying values and intrinsic benefits that can be used to foster healthy relationships between museums and their communities (Korn, 2008). Instead, the studies only elicit measurable or quantifiable evidence of public service, such as visitation numbers of targeted interest groups. Korn (2008) warns that this focus on outputs is "missing the mark in describing the true value of museums" (p. 2). From the public policy and management perspective then, values inquiry plays a valid role in determining what the needs and interests of the public are on a broader societal level. Indeed, as Scott (2007, p. 9) suggests, "articulating the worth of museums in terms of the values identified by the public may offer the language we have been seeking". It is at this juncture that a focus on the general public, as defined in chapter one, points to a particular definition of value that may be most relevant to managers of art museums—that of *public value*.

2.3 Focus on public value: definitions and theories

Though it has been suggested that so-called *cultural* value plays across three dimensions—institutional, instrumental, and intrinsic (Holden & Jones 2006)—Carol Scott (2008) repositions this idea of cultural value as an important underlying function of a larger holistic definition of *public value*. She proposes that public value can manifest in the form of institutional value when museums "contribute to citizenship by fostering democratic debate, the perception that their presentation of information is balanced and fair, through public confidence flowing from the maintaining of professional standards...[and] from a perception that museums represent stability and permanence...and provide equitable access to collections" (2008, p. 34). Scott's study (2008) also reveals that instrumental value describes governments' "expected return on public investment related to evidence of the achievement of social and economic policy objectives...", including benefits such as "learning...personal well-being...social cohesion...community capacity-building...and economic [benefits]" (p. 34-35). Lastly, Scott notes that intrinsic value definitions "provide us with useful insights, particularly with regard to the *symbolic, emotional,* and *intangible* aspects of museums and what they stand for in community" (2008, p. 37).

Scott's observations of public value were developed with the incentive of positioning museums' value as an argument for government and public support. The current dialogue concerning public values has been of particular interest to public policy researchers in both the US and UK. Keaney (2006) notes that the favorable policy climate in the UK—one that prefers an approach to public service that incorporates underlying public values and benefits—has led to the UK's particular interest in public values research, as seen in policy-based research conducted by the British Broadcasting Corporation, the Prime Minister Strategy Unit, and The Work Foundation. It has been suggested that two interpretations of public value in relation to public policy have been developed in the public policy field. As Keaney (2006) observes, the first interpretation uses public value as a management process and tool for strategic planning, as evident in the work of Harvard management theorist, Mark Moore and the UK-based nonprofit public sector research firm The Work Foundation. The second uses public value as a measurement tool, as it has been for the UK's Prime Minister's Strategy Unit research for public policy (2006).

The seminal work of public policy scholar Mark Moore, often considered to be the founder for public values research in the policy arena, essentially proposes that public managers can actually create public value by "establishing and operating an institution that meets citizen's desires for

properly ordered and productive institutions" (Moore, 1995, p. 53), and can furthermore do so through strategic vision and innovation. Moore's strategic triangle (fig. 2) focuses the efforts of public managers "out to the production of public value in communities...up towards those in positions of authority who can provide legitimacy and support to the organization...[and] down into the set of actors the organization relies on to achieve the desired results" (Keaney, 2006, p. 11). This strategic position suggests then that public art museum managers must balance the values of their constituents, stakeholders, public funding agencies or regulatory bodies, such as those who accredit the institution, and their internal support system of staff and volunteers who provide public services. Moore (1995) posits that achieving this strategic balance among divergent environments and perspectives is essential to the ability of managers to truly create public value. In the case study design that follows in chapter three of my research, I propose that the crux of this balancing act is the need, first and foremost, for museum managers to better articulate and address those different values which collectively can be termed *public* values.

The Strategic Triangle
(3 environments)

Operating Environment:

Capacity in terms of Scope,
Resources, Partners, Infrastructure

Authorizing Environment:

Groups & Individuals
who provide Legitimacy & Support

Policy Environment:

Mission, Vision, Goals, Objectives
that Express Public Value
Of Agency
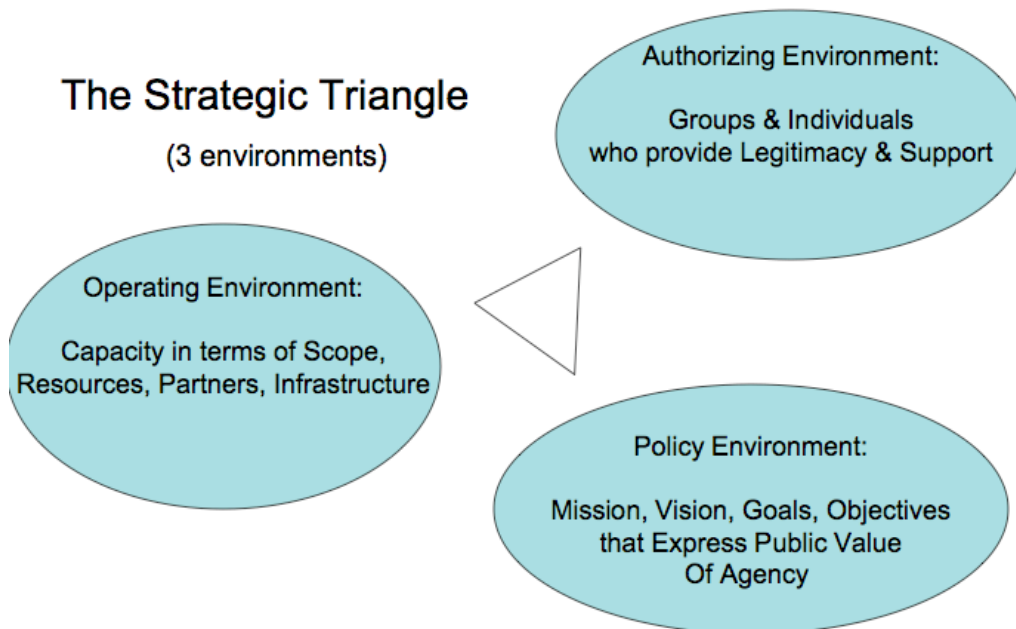
Fig. 2: Adaptation of Mark Moore's strategic triangle for public value (as cited

in Katz, 2008, p. 3)

The public value theory proposed in the research conducted by the

Prime Minister's Strategy Unit (PMSU) builds upon one part of Moore's

triangle (see above)—that of the need for understanding public values of

regulatory bodies or authorizers in order to maintain authority as public

institutions (Keaney 2006). The PMSU categorizes the components of public

value into four areas: user services, outcomes, and public trust (Kelly et al,

2002). In terms of user services, the perception that public institutions are

equitably distributing their services to a wide range of public constituents "in

itself creates value" (2002, p. 14). The PMSU report also adopts the position that public trust in an institution is essential for the creation of value.

The report's recommendations for managing the components of public value echoes Moore's view that managers must ensure that their internal values are consistently in line with those of the outside public, but goes beyond Moore's point, further charging managers to be actively responsive to the changing needs of the public in order to maintain satisfaction and trust in the services provided (2002). Lastly, the report states that it is imperative that public managers improve upon existing measurement tools and techniques used to "clearly captu[re] the value created by...intangible factors" (2002, p. 33). This oft-mentioned criticism of current output-oriented measurement tools again, points to the need for better evaluation and articulation of underlying intrinsic values of public constituents.

Another proponent of public value as a management process is the policy research conducted by the UK firm, The Work Foundation. The Foundation proposes an adaptation of Moore's strategic triangle that posits three managerial dynamics of public value (Keaney, 2006, p. 14): (1) the measurement of public value as an evaluation method; (2) the authorization of public value through a balancing of management and public mandates; and (3) the creation of public value as a strategic goal used to justify resource

allocation, public funding, and to manage the public's expectations. But as Keaney (2006) notes, the Foundation's approach departs from Moore's view in their central argument that the public should be actively engaged and consulted in the process of seeking out values and rather sees it as a role of public managers themselves to create or foster the values for the public.

While it has been argued that the public values perspective is most useful in developing more effective accountability measures and evaluation tools, and in the creation of advocacy messages for public arts institutions (Scott, 2008), Moore's suggested use of strategic visioning to actually create public value marks the utility of the values inquiry process in the strategic management of art museums. To that end, arts administrators have many potential roles to fill—that of explorer of public value (Moore, 1995), and that of a coordinator who should "identify the value structures of the different interest constituencies and to study and understand these individually and in great detail" (Geursen and Rentschler, 2002, p. 12-13).

2.4   Strategic planning and management considerations

Building upon Mark Moore's incorporation of public values into the planning process in public institutions, Ladkin (2008) proposes that strategic planning offers an important instrument by which public institutions can navigate a

changing institutional or external environment. As assessed in the introduction of this report, the museum field as a whole is shifting in its position and relationship with the public, which has been described as a "movement to expand the vision of museums' purpose and possibilities and [to] connect them with their communities...[and] in art museums, the fundamental connection between art and people is at the heart of this change", (Hirzy, E. & Pitman, B., 2004, p. 1). As the environmental context in which museums operate today continues to evolve, and in many cases, is becoming increasingly focused on the public, it makes sense that art museums' goals and strategies should likewise consider and respond to their publics' changing needs and expectations.

To that end, Ladkin (2008) purports that strategic planning is most useful when "translated into strategic management...[which] requires an institution to formulate a mission and vision for the future, develop a strategy to achieve the mission and vision, and create an institutional structure to successfully carry out the strategy"(p. 9). Reussner (2003) similarly supports museums' focus on "goal-oriented, but flexible and comprehensive strategic management" (p. 99) as an alternative to traditional strategic planning alone. One of the most important characteristics of strategic management is that it calls for a commitment to a cohesive strategic orientation and direction throughout all

levels, departments, and functions of the institution (Fig.3, Reussner, 2003). As

Reussner describes, "strategic management consists of organizing, planning,

leading and monitoring all areas of museum work, such as collections,

research, exhibitions, public programs, administration, and marketing, in view

of the museum's primary goals...and provides goal-directed, value-guided and

future-oriented thinking" (2003, p. 99).
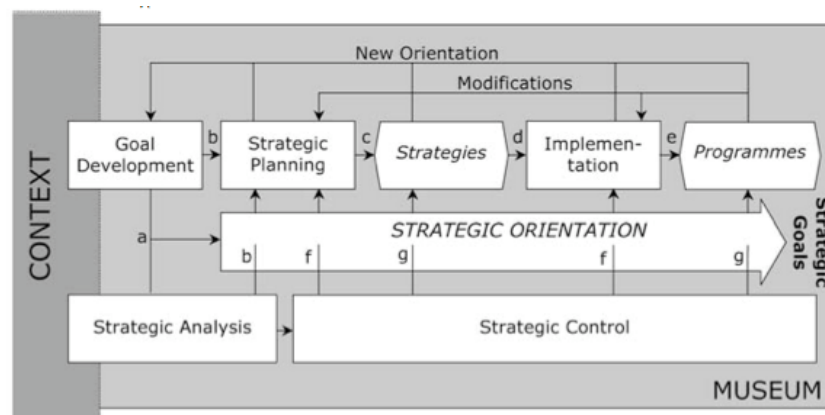
FIGURE 1   Basic elements of the strategic museum management process.

Fig. 3: Basic elements of the strategic museum management process
(Reussner, 2003, p.98)

Strategic planning and strategic management offer an interesting point of

discussion about the potential opportunities and implications for museum

managers who are grappling with the ever-changing public context in which

they operate. This concept will be explored in the closing chapter of this

document.

Finally, Geursen and Rentschler (2002) suggest that there are different value drivers for four distinct groups: audience, sponsors, government, and management. In order to narrow the scope of my research, I chose to focus on the manifestations of public value in the managerial functions of the art museum. Thus, through an exploratory case study of the Jordan Schnitzer Museum of Art (JSMA), I focused my study on the so-called 'value drivers' of the Museum staff and board. A description of the case study, emergent themes, and major findings is offered in the following chapter.

CHAPTER THREE: CASE STUDY DESCRIPTION
3.1 Case study purpose

The purpose of the case study used for this project was to examine how the concept of public values is currently articulated and addressed in regard to strategic planning and management within a public art museum. To this end, an exploratory case study of the Jordan Schnitzer Museum of Art (JSMA) was conducted. The study included interviews with museum staff and board members, as well as document analysis of the strategic planning materials currently being drafted by the Museum. Through the study I was able to examine the internal perspective of the concept of public values as it naturally manifests within the strategic management of the museum by its primary internal stakeholder group—the museum staff and advisory board members. Findings and themes that emerged in the study were then used to frame the recommendations and strategic planning implications found in the final chapter of this document.

Currently, the Jordan Schnitzer Museum of Art is involved in the early stages of a strategic planning process and has recently hired a new executive director, Jill Hartz. This time of change and transition for the museum presented an ideal research opportunity for me to more thoroughly explore the concept of public value as it manifests in the real-life context of a museum undergoing strategic planning and change. Furthermore, I found that my questions sparked

meaningful conversations with the research participants that resonated with their visions for the future of this museum.

3.2 Case study description: the site, situation analysis, participants, and limitations

The Jordan Schnitzer Museum of Art, located in Eugene, Oregon, is the official art museum of the University of Oregon. While the museum remains duty-bound to the parent organization to whom it reports—the University—it also serves as the sole formal art museum for the city of Eugene, and as such plays a vital role of providing quality visual arts to the local community. The JSMA first opened its doors on the University of Oregon's campus in 1932 under the name of the University of Oregon Museum of Art, and officially adopted its current name in 2004. The Museum was founded to house the Murray Warner Collection of Oriental Art, which is comprised of over 3,000 works of art donated to the University by Gertrude Bass Warner in 1921. In early 2005 the Museum finished a large-scale building expansion that took several years to complete. The expansion nearly doubled the museum's size, thus allowing for the JSMA to accommodate a growing collection of American, European, Korean, Chinese and Japanese art, as well as rotating temporary exhibitions.

In late 2007, the University of Oregon's president, Dave Frohnmayer, made the decision to have the director of the Museum, who had previously reported to the provost, report directly to the vice president of the University office of advancement. This change prompted community concerns that non-university outsiders would be put in a position to exert undue influence on the museum (Redden, 2007). However, both University representatives and former JSMA interim director, Robert Melnick, have expressed their confidence that the decision to report to University advancement is appropriate and has posed no threats to the academic mission of the Museum (2007).

Based on my conversations with JSMA staff and advisory board members, there has been no evidence to suggest that the reporting relationship has disrupted the leadership of the Museum. But this issue exemplifies one of the many unique challenges that university art museums face that are distinct from those affecting traditional public art museums. University museums are most often tied to their parent institution's mission, which in most cases is focused on education ahead of cultural purposes (Rentschler, 2001). While my conversations with the Museum's staff and advisors yielded evidence that the JSMA, not unlike similar institutions, faces this challenge of balancing needs of the internal (university community) and external (broader) public, what is important to point out is that the Museum sees this not just as a challenge, but

welcomes it as an opportunity for growth.

Other changes have occurred within the JSMA that have shaped the findings of my study. In recent years, the Museum has undergone several changes in leadership and key staff roles. Within the last two years, new program directors have been hired for both the marketing and development departments. Last year the University hired a new executive director to lead the museum, who brings more than two decades of university museum leadership experience to the position. As a truly visionary leader, Ms. Hartz embodies the promising opportunities for positive growth of the Museum's programs and exhibitions.

As suggested in earlier passages, the museum field as a whole has shown much evidence of a shift towards greater public awareness and orientation over the past few decades (Weil, 1997; McClean, 1994; Edson and Dean, 1994). One informant of my study, long-time JSMA member and advisory council member Hope Pressman, described a similar transformation that JSMA has undergone over the 60 years since she was first a student at the University of Oregon. During my conversation with Mrs. Pressman, she spoke of the way in which the Museum has changed from having very restricted accessibility, limited to special scholarly endeavors, to its current expanded level of accessibility and its outward-focus on educating and outreach to a wider

public. This fact, along with the aforementioned changes that the JSMA has experienced over the years, has provided an intriguing and important backdrop against which to frame the findings of my case study.

As the primary goal of the case study was to gain insight into the internal managerial perspective on the concept of public value as it relates to the JSMA, I felt fortunate to have the opportunity to interview both members of the Museum's advisory board—the leadership council—as well as key staff members from the administrative, development, marketing, curatorial, and exhibitions planning departments. One limitation of the case study was the unforeseen issue of time constraints, which prevented me from interviewing representatives from every department within the museum. However, the interviews I was able to conduct were met with much positive anticipation and cooperation on the part of the museum staff and leadership council. I also had the opportunity to interview the vice president of University advancement, Gregg Stripp, to whom the executive director of the museum reports.

Over the course of about six weeks, I conducted ten half-hour to hour-long interviews with museum staff and Council members to examine how the concept of public value is approached and/or addressed in the context of strategic planning and institutional change. From the outset, I approached the study with the consideration that individual responses to my questions about the concept

of public value could potentially reveal variances between personal views and considerations of the institution as a whole. To this end, I purposefully designed my research questions to address both the individual perspective and organization-wide culture in regards to public value and planning with the hopes of gaining a robust range of responses from which to draw my conclusions and recommendations. Finally, the case study also included a brief review of the Museum's preliminary strategic planning documents. The major findings and emergent themes from both the interviews and document analysis are described in the following passage.

3.3 Approach, findings, and emergent themes

As illustrated in my review of the body of literature surrounding public values, one of the challenges of my topic of study of public values and values inquiry is that the nonprofit arts and museum fields provide little evidence of focused efforts among museum professionals to come to a consensus on the definitions or usefulness of the concept of public value. Furthermore, being based on highly theoretical notions of values and public impact, there is limited existing data to support a practical application or connection of the theory of public value to museum practice. From a pragmatist's point of view, as the leadership council's vice president Greg Fitz-Gerald suggests, a discussion of public values

is not very productive without an action plan of how to meet those values that are identified. I concur with Mr. Fitz-Gerald's position that defining the concept of public value alone does not finish the job. To this end, I've focused my efforts in the final chapter of this report on grounding theory of public value in the practice through an application of these findings and Mark Moore's public value theory to strategic planning.

As data was collected and analyzed, I grouped findings according to emergent themes, concepts, and issues as follows:

3.3(a) Evidence of and opportunities for public value orientation

3.3(b) Opportunities and challenges that come with change

3.3(c) Possibilities for public values inquiry to inform strategic planning and aid in creating a balance between diverse needs and expectations

3.3(a) Evidence of and opportunities for public value orientation

Though one of my central concerns with the case study was to gain a clearer understanding of the language museum professionals are using to define and address the concept of public value, my interviews provided me with little evidence of a straightforward definition of the concept. As previously stated,

this is most likely due to the highly theoretical and subjective nature of the term "values". However, an important finding that emerged in my interviews, was that while the JSMA staff and advisors are not articulating public value in such a concrete way (in terms of the language that is used), the Museum is very much concerned with and positioned in an orientation toward the public.

As a university art museum, the JSMA has a unique position of providing services to two related but distinct public groups or constituencies. All of the case study participants agreed that the Museum serves both a university public made up of faculty, staff, students, and alumni, and a broader outside public on a local, national, and international scale. This presents unique challenges for the Museum in terms balancing dual purposes as both an educational institution and community art museum. It also presents a potential challenge in balancing the core values that will guide the Museum in its strategic planning process.

My analysis of the preliminary strategic planning documents and interview responses provided evidence that, under new leadership, the Museum is forging new relationships and commitments to a broader and more diverse public. This focus on the broader public certainly parallels the aforementioned trend seen in the museum field as a whole, and seems to be a natural progression for the JSMA as it is developing new strategies for the future. The

case study participants agreed that the founding core value of the institution remains rooted in the fundamental belief that, as the strategic planning documents articulate, "knowledge of art enriches people's lives", and is rooted in the preliminary drafted mission to "educate people in the visual arts". While the current mission statement from the Museum's website has a lengthier description of this belief and value, the core purpose of the museum remains the same—rooted in education and enrichment through visual art.

But the value of education is not limited to the University public alone. It is also regarded as an avenue for producing value for a broader and diverse public as well. Jill Hartz states that this expanded view of the Museum's focus "goes back to the core values of Gertrude Bass Warner...[to] use the visual arts to build peace and understanding...[and] to make the world a better place" (February 25, 2009). Central to this aim, as Ms. Hartz described, is fostering a dialogue and understanding among groups and individuals of culturally diverse backgrounds. The Museum's Director of Communications, Erick Hoffman, echoes this sentiment:

> "...one of the museum's core values is to promote understanding of the human condition, and to use art as a way of understanding others, and possibly through that understanding allow for acceptance on a more global scale...I definitely believe that the arts hold that kind of power or ability to communicate on a level that is more intuitive on some level than the written or spoken word. As you interact with the art you start forming your own personal opinions and perspectives not just on what you're seeing but on how you relate to it, your place in the

world...[and] it helps you to set a different context for yourself"
(March 11, 2009).

Another important finding was that while public value is not articulated at the Museum in a singular concrete way, it is seen as the collective responsibility of the institution as a whole to create a positive impact on the public through their core values of education, understanding, and enrichment through the visual arts. This suggests to me that the Museum has adopted a more societal or collective orientation towards public value and impact rather than a focus on individual perspectives. Furthermore, my findings suggest that the JSMA sees this responsibility to serve broader public needs as an equal responsibility across the Museum's departments and managerial functions. This is an important finding because it is supportive of the theory suggested by Reussner (2003), that strategic management and planning are most successful when they occur across an institution, rather than being seen as distinct action plans within each department or museum function.

This point though, does not detract from the recognition by museum staff members that different departments in the Museum can and do take into account public values in distinct ways. For example, as Lawrence Fong, curator of American and regional art for the Museum, states, "it is important to consider how arts exhibitions can play a role in addressing and fostering

certain values...but also to be careful not to neglect the values of those voices whose work is being represented and presented" (March 11, 2009). From a public programming and marketing standpoint, the Museum has gone to great lengths to address public needs and expectations by engaging with the public in the planning and ongoing evaluation of the museum's programs and exhibits. The Museum has done so by forging relationships with members of the constituencies that the museum is actively trying to reach and represent through its programs. The JSMA does this in part by eliciting input and feedback from individuals on the programs targeted to meet their particular needs, and does so through the use of focus groups and by developing community partnerships. What is significant about this is that these processes, which are already in place, have put the Museum in a good position to deepen their knowledge of why the public values their institution (i.e. public values inquiry).

3.3(b) Opportunities and challenges that come with change

The second emergent theme for my findings revolves around the idea that with change comes new challenges and opportunities for museums to consider in the days ahead. From an external perspective, the JSMA, like other public art museums, is operating in an environment where public opinion and perception are affecting their viability and financial stability. Ladkin (2008) notes, "the

modern university museum is not only about individual curatorial goals but also is about meeting an institutional mission and vision that places the museum at the heart of service to society and its development" (p. 12). Museum professionalism has followed suit, adopting new standards and guidelines that affect the way in which museums are approaching their responsibilities to the public. Part of the American Association of Museum's Accreditation assessment focuses on the desired characteristics of museums that are related to planning, stating that there should be evidence that the museum "engages in ongoing and reflective institutional planning that includes the involvement of its audiences and community [and is] inclusive of all stakeholders: staff, governing authority, audiences, and community" (AAM, 2005, p. 2). This is particularly relevant to the JSMA because they will soon be applying for AAM re-accreditation in the upcoming months.

This reality of changing professional standards and the external operating environment in which all museums—not just university art museums—operate also presents a challenge to the JSMA because of the pressure to meet external public needs while simultaneously meeting internal academically-focused needs of their university constituency. This also presents a challenge in deciding how to adapt the Museum's own goals, strategies, values, and mission according to the changing needs of their diverse stakeholders and constituencies.

3.3(c) Possibilities for public values inquiry to inform strategic planning and aid in creating a balance between diverse needs and expectations

As I conducted the case study, I personally began to question the degree to which public opinion can or should influence the direction a museum's programs, collections, and exhibitions take. This issue of adapting to changing pressures and demand on the part of museums, led to my discussions with participants about the direction that the JSMA is headed in with the strategic plan, and the degree to which they felt that values inquiry (an investigation of the values that their public constituents attribute to the museum) could play an effective role in informing their decision-making during times of growth and transition. The general response from the participants was an acknowledgement that when change occurs in the needs of a museum's core constituency and stakeholders, some degree of change, flexibility and responsiveness to those needs is both unavoidable and necessary. Kurt Neugebauer, associate director of administration and exhibitions, commented on the issue of museum responsiveness and change, stating "…nothing is sacred…you have to constantly be evaluating you environment" (March 10, 2009). This responsiveness and inclusiveness of the public in the strategic

planning process, was welcomed by most of the staff and was seen as an

opportunity to further engage with and foster stronger relationships with their

growing constituency. However, as communications director Erick Hoffman

wisely recommends:

> "eliciting public values [should[come in later [in this process] because
> you need to have your foundation in place and consensus with people
> who are very close to you, starting with the staff and Leadership Council
> as the core constituents, and then moving [outward] to the members and
> partner organizations, and then the different key groups in the
> community....but I don't think you can really go out into the community
> with a blank slate...you still want to gain input [from the public, but you
> need to give them something to respond to." (March 11, 2009).

Leadership council vice president Greg Fitz-Gerald advised that rather

than starting with the public's values to inform decision-making and strategic

planning, museums should "start with its core values and mission...[all the

while] remaining cognizant of the public so that you are not offending their

value systems" (March 28, 2009). Furthermore, he noted that any changes the

Museum undergoes must be rooted in the mission and should realistically take

into account the availability of resources to achieve its goals. Mark Moore

(2000) similarly notes the importance of staying grounded within the mission

when clarifying core values to pursue, stating, "the mission of a nonprofit

organization...defines the value that the organization intends to produce for its

stakeholders and for society at large" (p. 190).

For the JSMA, the strategic planning process signals a time of growth and forward thinking, especially in terms of the museum's regard for public value. But this, as illustrated, presents many opportunities and challenges that the Museum may potentially face on the road ahead. With these challenges come certain considerations of balance that must be taken into account when planning: the balance of internal and external values, needs, and expectations; the balance of the choice of certain opportunities with the constraints of the museum's core mission and resources; and in general, a balance of the JSMA's two publics—its broad public and the university community. The final chapter of this report briefly illustrates the potential implications of and opportunities for applying Mark Moore's public value theory to an alternative to the traditional strategic planning process—strategic management—in a public art museum.

CHAPTER 4: CONCLUSION
4.1 Public values and values inquiry: opportunities and implications for strategic planning and management

The opening passages of this report identified important trends in the museum field that mark the growing necessity for museum managers to better meet the needs and expectations of a diverse and growing public constituency. The context in which public art museums now operate is one where public issues and concerns increasingly influence the decisions that public museums make when designing public programs and services. It is also one in which museums are broadening their reach to take into account increasingly diverse backgrounds, perspectives, and values of the public. Over the years, museums' commitment to public service has gradually taken on new meaning and now requires a greater level of flexibility in order to maintain their public service missions.

As cited in the second chapter of this study, Rokeach posits that value is a "belief that...guides action...beyond immediate goals to more ultimate end-states of existence...", and, "is an imperative to action and a standard or yardstick to guide actions, attitudes, evaluations, and justifications of self and others" (Rokeach, as cited in Thyne, 2001, p. 120). Having adopted this call to action and the fundamental belief that valid possibilities exist for museums to

regard public value as imperative to their public service missions, the implications and possibilities for public art museums found herein were guided by my careful examination of the following public value and museum planning theories.

Public policy scholar, Mark Moore, offers a unique perspective on the ability of nonprofit managers to achieve strategic balance through the creation of public value. According to Moore (1995 & 2005), in order to achieve a balance within an environment of diverse evaluative perspectives—including public funders, authorizing stakeholders, and public constituents—and to create public value as an institution, the values and expectations of these groups must first be thoroughly assessed. A starting point for this lies in engaging the core constituents and audience members. As research suggests, for a museum to be truly visitor-oriented by nature, seeking out "the audience's perceptions and motivations [is] critical to achieving [that] focus" (Hirzy & Pitman, 2004, p. 4). But it is not just the audience's perceptions that affect the public service focus of museums. Moore's approach to strategic balance means adopting an outward-focus on the needs of a variety of stakeholders and constituents. Strategic planning and strategic management offer one mechanism by which this strategic balance can be achieved, as well as a prime opportunity to address and articulate the public value of an art museum.

Moore's theory that public value can be created, and strategic balance achieved, illustrates a real possibility for museum managers to play a vital role as explorers of public value (1995). There are two important beliefs that shape this possibility. First is the view of strategic management as a valid alternative to classical strategic planning in the museum field (Ladkin, 2008 & Reussner, 2003). Second, is the belief that museum planning and strategic management should remain rooted in core institutional values and a mission that are crafted with public values in mind, which first and foremost, will require a clearer and more robust articulation and investigation of the concept of public values by museum managers. What can also serve to harness the possibilities of incorporating public values into the strategic management process, is a firm understanding of institutional mission and core purpose in relation to public service. Furthermore, this possibility requires a realistic understanding of the resources available to serve changing public needs effectively and efficiently.

As previously discussed (Reussner, 2003), strategic management differs from strategic planning by incorporating the planning phase as only one facet of the total management process, and by adopting a managerial belief that museum work "as a whole must be committed to the overall strategic direction" (p. 97) and must be pursued across all departments and functions of an institution. Reussner (2003) describes this strategic direction as a 'strategic

orientation' or "value-guided, goal-referenced and future-oriented [way of]

thinking" (p.101) that guides the planning process across the entire institution.

This concept points to the great potential that exists for museum managers to

better meet public needs and expectations and to achieve strategic balance.

Most importantly, this can be achieved by placing the conversation of public

value as the central thrust of the strategic management process offered by
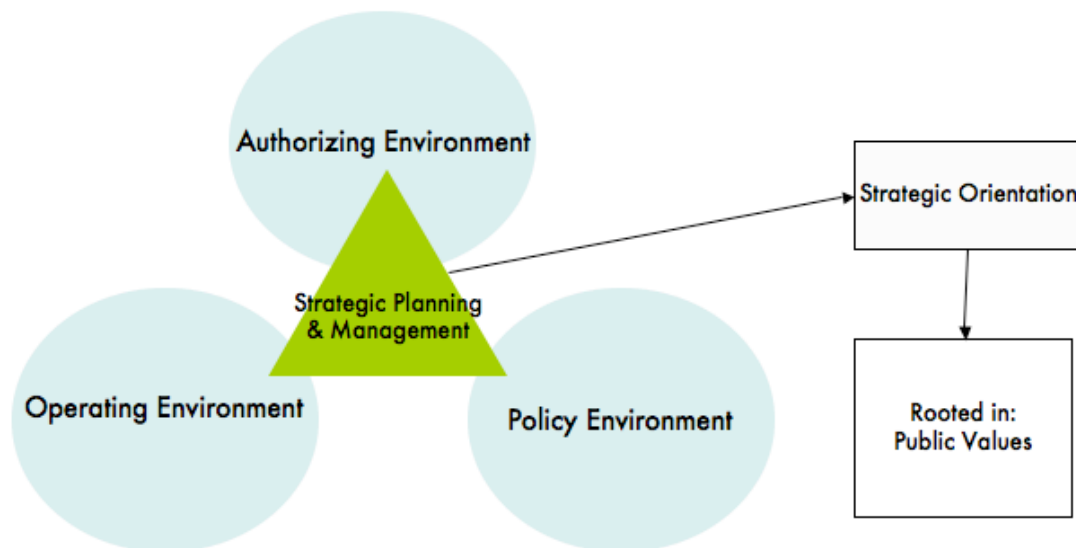
Reussner (Fig. 4).

Fig. 4: Incorporation of public values orientation into strategic management to achieve strategic value balance

What follows is the possibility that those museums truly seeking a public value-orientation in their programs and services may be able to utilize a deeper knowledge and understanding of public values to strategically guide and strengthen institutional planning. For museums serving a diverse core public constituency, the ability to truly understand and address those needs can be facilitated by gaining a clearer understanding of what the public truly values about their institution. As confirmed by the responses of the case study participants, values inquiry also offers a useful means for reaching and serving the public with more depth and substance.

Finally, let us not forget that while art museums may vary greatly in size, core audience, programming, and even mission, what they do have in common, as the AAM code of ethics describes, is their "nonprofit form of organization and commitment of service to the public" (AAM, 2009, p.1). This ethical principal has stood the test of time. Indeed, the current code of ethics echoes the original 1925 version, which stated that "museums, in the broadest sense, are institutions which hold their possessions in trust for mankind…[and] their value is in direct proportion to the service they render the emotional and intellectual life of the people…[t]he life of a museum worker is essentially one of service" (AAM, 2009, p.1). Used as a guide for strategic management, public values inquiry offers museum managers a unique perspective and

legitimate process by which to plan for the future—one in which service to the public is paramount to their survival. In conclusion, the museums of the future that not only survive, but also thrive, will be those that endeavor to be publicly responsive and flexible institutions. Public values inquiry offers a valid means by which public art museums may achieve this end.

Appendix A: RECRUITMENT LETTER

Date
Name
Address

Dear <Potential Interviewee>,

You are invited to participate in a research project titled *Public Values, Values Inquiry, and Strategic Planning in the Art Museum,* conducted by Kathleen Glass from the University of Oregon's Arts and Administration Program. The purpose of this study is to explore various value definitions most closely related to public art museums in the context of changing trends in the nonprofit museum and arts sector. Through this case study, I will focus my investigation on the notion of public value, assessing how it manifests in the strategic management of the Jordan Schnitzer Museum of Art.

Over the past few decades, major paradigm shifts have occurred in both the museum and nonprofit art sector. Increasing demands for public accountability, increased competition for public subsidy of the arts, and more socially-oriented museum practices have led to a growing need for clear definitions and measures of values associated with these public institutions. Here lies the debate over how to define values and determine the best definitions and measures on which to focus our attention. This marks the primary need for both a broad exploration of which definition, or combinations of definition, are most relevant to public art museums, as well as a focus on the role of public value in strategic planning and innovation in navigating these paradigm shifts in the field towards a focus on the museum's role and responsibility to the public it serves.

Using the JSMA as the subject of an exploratory case study, I will be able to better define how public value plays out in the managerial functions of a public arts institution, and to examine how and why similarities or differences may occur in the definitions and assessment of "public values" both from viewpoint of internal museum stakeholders (such as practitioners), and those definitions of researchers in the field.

You were selected to participate in this study because of your leadership position with the JSMA and your experiences with and expertise pertinent to the museum field within the community of Eugene, Oregon. If you decide to take part in this research project, you will be asked to provide relevant organizational materials and participate in an in-person interview, lasting approximately half of an hour, during the early spring of 2009. If you wish, interview questions will be provided in advance for your consideration. Interviews will take place on the University of Oregon campus, preferably at the JSMA, and will be scheduled at your convenience. I will use notes and a tape recorder for transcription and validation purposes. You may be asked to provide follow-up information through phone calls or emails.

If you have any questions, please feel free to contact me at ███████████ or ███████████ or Dr. Phaedra Livingstone at ███████████ or ███████████ Any questions regarding your rights as a research participant should be directed to the Office for the Protection of Human Subjects, University of Oregon, Eugene, OR 97403.

Sincerely,
Kathleen Glass

Appendix B: RESEARCH PARTICIPANT CONSENT FORM

<div align="center">

Arts & Administration Master's Project:
**"Public Values, Values Inquiry, and
Strategic Planning in the Art Museum"**
Kathleen Glass, Principal Investigator
University of Oregon Arts and Administration Program

</div>

You are invited to participate in a research project titled *Public Values, Values Inquiry, and Strategic Planning in the Art Museum*, conducted by Kathleen Glass from the University of Oregon's Arts and Administration Program. The purpose of this study is to explore various value definitions most closely related to public art museums in the context of changing trends in the nonprofit museum and arts sector. Through this case study, I will focus my investigation on the notion of public value, assessing how it manifests in the strategic management of the Jordan Schnitzer Museum of Art.

Over the past few decades, major paradigm shifts have occurred in both the museum and nonprofit art sector. Increasing demands for public accountability, increased competition for public subsidy of the arts, and more socially-oriented museum practices have led to a growing need for clear definitions and measures of values associated with these public institutions. Here lies the debate over how to define values and determine the best definitions and measures on which to focus our attention. This marks the primary need for both a broad exploration of which definition, or combinations of definition, are most relevant to public art museums, as well as a focus on the role of public value in strategic planning and innovation in navigating these paradigm shifts in the field towards a focus on the museum's role and responsibility to the public it serves.

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You were selected to participate in this study because of your leadership position with the JSMA and your experiences with and expertise pertinent to the museum field within the community of Eugene, Oregon. If you decide to take part in this research project, you will be asked to provide relevant organizational materials and participate in an in-person interview, lasting approximately half of an hour, during the early spring of 2009. If you wish, interview questions will be provided in advance for your consideration. Interviews will take place on the University of Oregon campus, preferably at the JSMA, and will be scheduled at your convenience. I will use notes and a tape recorder for transcription and validation purposes. You may be asked to provide follow-up information through phone calls or emails. There are minimal risks associated with participating in this study, particularly since this phase of the research is exploratory in nature.

Any information obtained in connection with this study will be carefully and securely maintained. Your consent to participate in this interview, as indicated below, demonstrates your willingness to

have your name used in any resulting documents and publications and to relinquish confidentiality. Prior to the publication of any information or findings identifiably connected to you, member checks will be provided upon request as indicated at the end of this document. If you wish, a pseudonym may be used with all identifiable data that you provide. It may be advisable to obtain permission to participate (where appropriate) in this interview to avoid potential social or economic risks related to speaking as a representative of your organization. Your participation is voluntary. If you decide to participate, you are free to withdraw your consent and discontinue participation at any time without penalty. Any information that is obtained in connection with this study and that can be identified with you will remain confidential and will be disclosed only with your permission.

If you have any questions, please feel free to contact me at ███████████ ████████████ or Dr. Phaedra Livingstone at ██████████████████████ Any questions regarding your rights as a research participant should be directed to the Office for the Protection of Human Subjects, University of Oregon, Eugene, OR 97403.

Please read and initial each of the following statements to indicate your consent:
_____ I consent to the use of audiotapes and note taking during my interview
_____ I consent to my identification as a participant of this study
_____ I consent to the potential use of quotations from the interview
_____ I consent to the use of information I provide regarding the organization with which I am associated.
_____ I wish to have the opportunity to review and possibly revise my comments and the information that I provide prior to these data appearing in the final version of any publications.

Your signature indicates that you have read and understand the information provided above, that you willingly agree to participate, and that you may withdraw your consent at any time and discontinue participation without penalty, that you have received a copy of this form, and that you are not waiving any legal claims, rights, or remedies. You have been given a copy of this letter to keep.
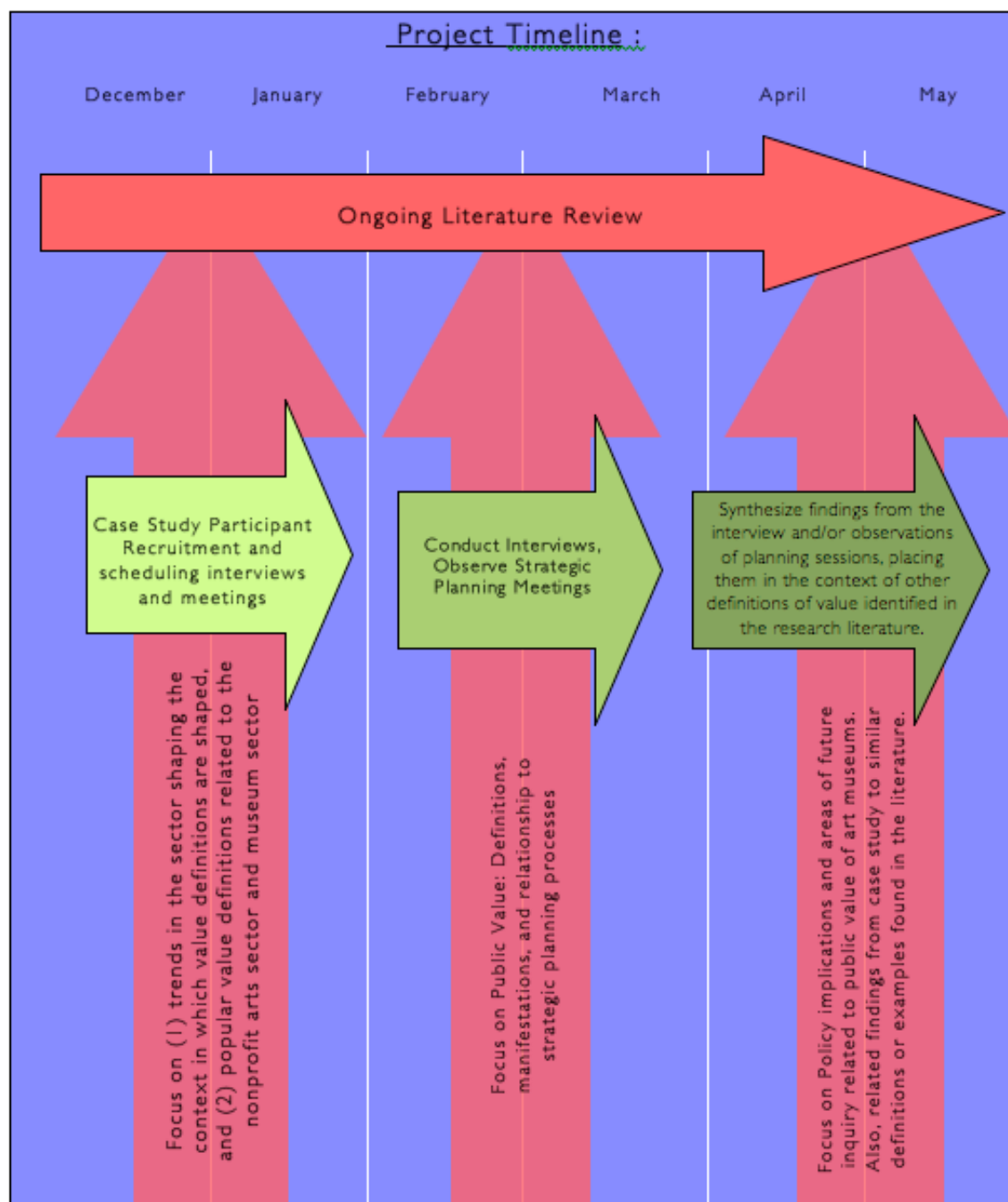
Print Name: _____

Signature: _____ Date:_____

Thank you for your interest and participation in this study.

Sincerely,

Kathleen Glass

Appendix C: RESEARCH TIMELINE

Project Timeline :

December   January   February   March   April   May

Ongoing Literature Review

Case Study Participant Recruitment and scheduling interviews and meetings

Conduct Interviews, Observe Strategic Planning Meetings

Synthesize findings from the interview and/or observations of planning sessions, placing them in the context of other definitions of value identified in the research literature.

Focus on (1) trends in the sector shaping the context in which value definitions are shaped, and (2) popular value definitions related to the nonprofit arts sector and museum sector

Focus on Public Value: Definitions, manifestations, and relationship to strategic planning processes

Focus on Policy implications and areas of future inquiry related to public value of art museums. Also, related findings from case study to similar definitions or examples found in the literature.

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