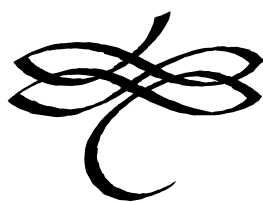


# Cultural Valorisation

A comprehensive and pondered perspective for  
the evaluation of small museums



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## **Conclusion – Museums must care of both canvas and chassis**

*Turn! Turn! Turn! (To Everything There Is A Season)  
(Book of Ecclesiastes/ Pete Seeger)*

*To everything (turn, turn, turn)  
There is a season (turn, turn, turn)  
And a time to every purpose under heaven.*

*A time to be born, a time to die  
A time to plant, a time to reap  
A time to kill, a time to heal  
A time to laugh, a time to weep.*

*A time to build up, a time to break down  
A time to dance, a time to mourn  
A time to cast away stones  
A time to gather stones together.*

*A time of love, a time of hate  
A time of war, a time of peace  
A time you may embrace  
A time to refrain from embracing.*

*A time to gain, a time to lose  
A time to rend, a time to sow  
A time for love, a time for hate  
A time for peace, I swear it's not too late.*

This folk-rock song became the epitome of an “anti-war song” in the version The Byrds released in late 1965 as the Vietnam War escalated. The melody was composed by Pete Seeger in 1959, but the lyrics were drawn almost verbatim from the Book of Ecclesiastes,

which according to tradition, was written by King Solomon towards the end of his reign. Ecclesiastes 3:1-8 provides us a list of 14 “oppositions” or “complementary couplets”: born – die, plant – reap, kill – heal, laugh – weep, indicating two extremes of the same dimension.

In the conclusion of this Ph.D. dissertation, I may disclose to the reader how important this Biblical passage was for me (and as a consequence, these song lyrics). In a poetic way, King Salomon demonstrated not just the importance of time frames and life cycles, but also the duality of various aspects of things.

Some may take this knowledge for granted, but with my “technical” background – first studying and working in geology, then with my three masters before turning to the cultural sector: business administration, marketing, and logistics –, seeing the “other side” is an acquired practice.

The duality of things permeates my study, as much as the importance of seeking an equilibrium between them. Let me illustrate this point. The very first book I read that deal with this aspect of my research was the volume edited by the Italian sociologist Domenico De Masi<sup>337</sup>. In *“L'emozione e la regola – i gruppi creativi in Europa dal 1850 al 1950”* (The emotion and the rules – the European creative groups from 1850 until 1950), De Masi (2000) investigated thirteen *avant-garde* movements, such as the Vienna Secession (Austria), the Bauhaus (Germany), and the Central Restoration Institute of Rome (Italy), that were successful in reconciling apparently disparate internal aspects: their collective creativity and their internal structure, and the need to maintain the (dynamic) equilibrium between the extremes.

At the time, in 2002, I was still working for the strategic planning department of the world’s largest mining corporation, so this book opened my eyes to new horizons. It was the first time I learned concepts that contradicts the stereotypes: “artistic anarchy” versus “Taylor efficiency”, advocating for the possible compatibility of both archetypes.

In the same year, my interest in museums awakened when I worked as volunteer in fundraising at the Lasar Segall Museum (São Paulo, Brazil). For the first time, I saw the internal procedures and difficulties of a cultural organisation, and how important the balance between the cultural and business aspects of these organisations is. That volunteer work showed me the path that changed my life: first towards cultural management, then cultural economics. This Ph.D. dissertation celebrates the end of the first learning cycle, when I present the ideas and concepts I developed through these years.

When asked about my studies I usually replied *“I am developing an evaluation method for small museums, considering the balance between their cultural and support aspects”*. Although the description is now complete and accurate, the story of this study was not straightforward, going through a series of... turns. Let me try to make sense of them.




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<sup>337</sup> Who later would be known by his studies on ‘creative idleness’.

When I had to decide what to study, I was quick to answer: museums. Then, I naturally had in mind the large museums that enchant everyone with their grandiose buildings, exquisite collections and elaborate exhibitions. Those are the places that the contemporary philosopher Alain de Botton proposed to be the places where we currently display what we most delight and revere (de Botton, 2012). He might have had in mind the large and superstar museums (e.g., Louvre, MoMA, Uffizi or Rijksmuseum) when he declared that museums should be regarded as the “new cathedrals”.

However, in 2012 I was already developing this research on museums when I visited the Coffee Museum (Ribeirão Preto, Brazil), with my supervisor and a fellow Brazilian professor, described in the very first pages of this volume. There we faced a rich and relevant but degraded collection, in a wonderful but poorly preserved venue<sup>338</sup>. That visit opened my eyes to the archetype that contrasts with Alain de Botton’s cathedrals – as chapels, small museums attract attention and gain relevance offering an intimate, cosy and focused perspective of specific themes. The lack of grandiose buildings, exquisite collections and elaborate exhibitions may lead small museums to remain unnoticed – the fanfare that plays loudly for the large museums’ endeavours, plays softly for small museums.

Soon, I realised that the literature on small museums is scarce, so my research aimed to close this gap. Authors on economics and management seems to care more about larger organisations than the smaller<sup>339</sup> ones. Although scholars in cultural economics and cultural management are more inclined to study small cultural organisations (such as individual artists or small creative groups), investigations on successful artists and the larger cultural organisations appear to attract more attention. The museum sector is no different.

However, in general practitioners do not care about these academic characterisations, even though there are those who should be more interested in these matters. They are: foundations, associations such as ICOM and its North-American counterpart AAL, or governments, who invest, study, support and organise the cultural sector. These players left open this gap, and should realise that, even though they are fulfilling analogous purposes, small museums are structured and operate differently from their larger counterparts.

Small museums are usually focused on one main theme, e.g., one region, one artist, one collection, or one historical event. A small museum is run by few staff members, who perform multiple tasks, with low budgets (usually barely breaking-even), in a rather informal structure. The staff uses the help of a larger number of volunteers, who also perform key functions at the organisation. Finally, as small businesses, small museums usually have the constant and influential figure of their “initiators” or “owners”: an individual or organisation that started the museum, and usually still commands their actions.

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<sup>338</sup> This complete story is available in the very first pages of this volume.

<sup>339</sup> Though some research is available on small businesses, family and personal matters, larger part of the literature deals with corporations.





From the very beginning, my intention was to contribute to the museum sector, helping to develop stronger museums, and to be part of the academic conversation on cultural economics and cultural management. But why developing an evaluation method? While I am far removed from being an inquisitor, I advocate that evaluation programmes are positive pursuits for any organisation. It brings not just the benefit of connecting organisations' purposes and values to their actions and results, but offers the opportunity to identify and separate achievements from failures, promoting the first and correcting the second.

Back to my corporate years, I worked with evolution methods for quality. During this time, I learned that evaluations are systematic investigations of an evaluand's worth and merit. This concept uses three key terms: systematic, worth and merit. To be 'systematic' implies that evaluations follow fixed plans, methods or systems<sup>340</sup>. 'Worth' denotes relevance: "what is valuable or important?", "what is necessary?" or "what is useful?". 'Merit' denotes achievement: "are you doing well, what you should be doing?" or "can it be improved?".

'Worth' and 'merit' are complementary, but different and independent of each other. The ideal situation is when worthy activities are realised meritoriously, while the worst scenario is when an activity is unworthy, and being performed without merit. The first should be promoted, while the second may be terminated (its is a completely waste of resources). Certainly, other combinations are also possible.

In this dissertation, I stress the 'worth' and 'merit' of small museums' activities, proposing perspectives and structures of analysis that might help small museums to remain relevant and healthy organisations, while fulfilling their own purposes – whatever they might be.

Having museums in mind, I investigated the current evaluation methods in the cultural sector. I learned that most evaluation methods are nowadays taking care of just one "side of the story", i.e., either the educational aspect of a museum, or its economic side: "Informal Learning" versus "Contingent Valuation". Disappointed with what I found, I asked myself "how come this sector does not account for the two sides of their object-of-study?" – it is evident that the balance is missing.

Evaluators play an important role in this matter, so I became interested in this character. An evaluator might be a "judge" (the one who separates successes from failures), a "methodologist" (the one who understands and follows a method, eliminating biases and establishing causal inferences about the object-of-study), or a "facilitator" (the one who explains the results and helps the organisation to overcome their issues). However, more than these three roles, assessors are expected to be fair, but not necessarily impartial. Let me explain this apparently strange statement: as a physician who aims for good health while examining the patient, or a court judge who aims for justice while examining the evidences, if I am evaluating a museum, I do want it to flourish culturally and become a sustainable organisation, while fulfilling its own purposes. Restating the quote attributed

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<sup>340</sup> As the Cultural Valorisation Method this study introduces.

to Johann Wolfgang von Goethe that corroborates and summarises this point: *"I can promise to be sincere, but I cannot promise to be impartial"*.



To evaluate, assessors ought to know their object-of-study. To understand an organisation, it is necessary to know its very essence – its *raison d'être*. Economists and management scholars studying corporations insist on stressing the strategic definitions 'vision' and 'mission'. However, since I started to learn about the cultural sector, these two statements sounded unfit for a cultural organisation: 'vision' and 'mission' address "where you intend to reach" and "what will you do", rather than the essential "who you are" – a question that led me to investigate their 'purposes'.

But how to investigate 'purposes'? The alternative I follow here is to go after stakeholders' values, as "purposes reflect values". But, just as individuals have difficulty articulating their values, organisations also struggle to communicate their purposes. To structure the understanding of values, I used Arjo Klamer's Value Based Approach. Although it was published recently (Klamer, 2016), and to this date few other authors have applied it, I have been following its development since 2010, participating in frequent conversations, seminars and lectures with the author.

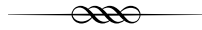
I stress the use of 'purposes' and 'values' instead of 'vision' and 'mission', but the critique of the latter two is not my contribution. What I do propose to the academic conversation, and do suggest practitioners to carefully consider, is the threat of decisions that might divert organisations from their purpose, i.e., 'purpose-drift'. In my investigation, I examined and compiled three possible causes that might lead to 'purpose-drift': managerialism (i.e., misuse of managerial practices), bureaupathology (i.e., misuse of bureaucracy), and marketisation (i.e., misuse of marketing practices).

It is important to highlight here that 'misuse' refers both to 'overuse' as much as to 'underuse' – e.g., in the investigation of the Scales Museum, I identified marketisation as a cause of purpose-drift – but instead of the usual 'overuse', when commercialisation is everywhere, in this museum it is clear that the 'underuse' of marketing leads to all the detriments that this could cause. The notion of 'purpose-drift' and the three threats are proposed first in this study, so to gain relevance they ought to be known, debated and accepted by a broader audience, especially practitioners and scholars.

As mentioned, like an airplane that temporarily deviates from its route to avoid a storm, but resumes its planned track as soon as it overcomes the hurdle, managers in cultural organisations may rationally and intentionally lean momentarily towards decisions that will reflect in the use of more or less managerial-, bureaucratic- or market-oriented practices. The deviation from the museum's purpose – i.e., "divergence from museum's *raison d'être*" – is the ultimate threat for the organisation, so the constant care of every museum is to seek balance.

Scholars must consider these threats while developing their studies and courses. A poorly-informed small museum manager, who in good faith seeks education in schools, in academic literature or hands-on textbooks, ought to be alerted that using managerial

methods developed for corporations unadjusted to cultural organisations may produce more harm than benefit to the museum. My study is a starting point.



While studying cultural management during my Master's programme, I learned from cultural economists the importance of what they called the "essential tension" between the cultural and economic (or managerial) sides of the cultural sector (or cultural organisations). This "opposition" or "complementary couplet" influenced my research.

The "essential tension" is a characteristic of a hybrid organisation – here I propose that this is the only way to understand and analyse museums as organisations. Following the poetry of King Salomon, let me differentiate the two sides. On the one side is the normative identity (or ideological, aesthetic, artistic or cultural), related to the purpose of the organisation, praised by the 'culturalists' who care about culture and creativity, and behave according to Gareth Morgan's 'brain metaphor'. On the other side is the utilitarian identity (or economic, managerial or pragmatic), related to the functioning of the organisation, represented by the 'utilitarians', who behave according to Morgan's 'machine metaphor'. Both identities are important for a museum to realise its purposes (whatever they might be).

I advocate museums as hybrid organisations, and that the (dynamic) balance between the sides is essential – notions that are still neglected in the cultural sector. I question studies that disregard this hybrid characteristic. I challenge the literature on cultural economics and cultural management because they influence practitioners in the way they run their museums, and disregarding the existence of these two archetypes of activities does not do justice to the reality of museums.

The illustration of this balance is at the very cover image of this study. On the left side of that image, the larger pebble represents the very purpose of the museum, i.e., the normative (or ideological, aesthetic, artistic or cultural) elements. They are related to the purpose of the organisation – here I cluster them as Cultural Activities, i.e., those mainly developed by curators, museologists, researchers and educators. On the right side of the image, the four smaller piled pebbles represent the utilitarian (economic, managerial or practical) elements. They are related to the functioning of the organisation – here I bundle them as Support Activities, i.e., those mainly carried out by managers, marketers, accountants, and clerks.

By no means the Cultural Activities and the Support Activities are mutually exclusive. They are strictly linked to each other, and ought to be well balanced. In this sense, a museum may have a great collection and develop magnificent exhibitions, but when its roof caves in, or its security is flimsy, or financial resources become scarce, or volunteers are demotivated, the museum may have to close the doors anyway. Likewise, its organisation can function splendidly, but when the content does not lure its audience to valorise their embodied cultural capital with their production, the museum could close just as well. Balance matters.

Museums' Cultural Activities are based on their collections, and the correlated tasks are linked to their meanings. But the sole displaying of these artefacts may not determine that a museum is achieving its purposes. Leading museums go beyond objects – they use them to create an environment where amateur-visitors may embrace the museum's exhibitions, becoming co-owners of the artefacts (as shared-goods), co-creating meanings and valorising their culture – hence the title of my Ph.D. dissertation: Cultural Valorisation.

Amateur-visitors are not passive in a museum. Although enjoyment is important, museum-going is not as ordinary as walking in a park. Museums are places where informal education happens: amateur-visitors' embodied cultural capital may be created or changed, i.e., it is valorised. The desirable outputs of a successful museum visit are changes in knowledge, attitude, or awareness towards the very topic of the exhibit, providing the visitors the ability to co-create afterwards new values and meanings.

Imagine the case where a museum strives to “inspire people towards art”. All the Cultural Activities of this museum should lead their visitors to step out the museum “inspired towards art” – an expected change in either knowledge, skills, attitude, motivation or awareness. If the museum is successful in doing so, the activities responsible for this positive result are successful, deserving to be praised – the museum should apply evaluation methods properly developed to determine this success.



However, the Cultural Activities are not self-sustaining. The example of an art piece presented before makes clear my point: in an oil-on-canvas painting, the aesthetics, meanings and messages are set at the surface of the canvas. But, behind the canvas, there is a wooden-frame that stretches and supports it, making possible the enjoyment of the art – the reason of existence of the chassis is to keep the canvas open and accessible. By itself, the canvas is unable to disclose its art, likewise by itself the wooden-frame is pointless – it is the coexistence of both that makes artistic appreciation possible. The Cultural Activities are similar to the canvas, while the Support Activities operate as the chassis.

Inspired by a proposition from Stephen E. Weil (1985), in this study I re-propose the division of the Support Activities of a small museum into four clusters:

- Collection-related activities – those related to the conservation of the collection, based on standards.
- Non-collection-related activities – encompassing the management activities of the museum, including strategy and marketing, but also maintenance and operation of the building and its facilities.
- Finance-related activities – responsible for budget control and fundraising. In this study I advocate for balancing it among various sources of income.
- Stakeholders-related activities – concerned with the identification and motivation of the stakeholders of small museums:

- Internal stakeholders – the producers of content: Board of Trustees, initiator, cultural-professionals (i.e., the producers), support-professionals, and volunteers.
- External stakeholders, I divide them in two groups:
  - Co-producers – those who provide and assist the producers: policy-makers, sponsors, donors, and the society.
  - Audiences – based on their characteristics, they are divided into two groups: expert-visitors and amateur-visitors.

I foresee the potential surprise it may cause in some when I propose “collection-related activities” as part of Support Activities, but this is a rational and conscious distinction. An artefact of the collection plays a dual role: it will “perform” a Cultural Activity when it is placed in a gallery for exhibitions or being studied, i.e., when it is used to convey values, ideas and meanings, fulfilling cultural or artistic purposes. However, when the museum staff is considering the conservation of the same artefact, they are performing Support Activities.



All the perspectives, theories and considerations reviewed previously in this conclusion address my second research question “*How to understand a small museum as a cultural organisation?*”. However, as this Ph.D. dissertation is also about the design of an evaluation method for small museums formalised in the research question “*How to evaluate a small museum?*”, the ultimate claim answering this question is my creation.

Each museum is unique. Although similar, museums differ and should always be treated accordingly. I question methods that apply the same set of criteria and general benchmarks for different organisations – in particular when they assume the same purposes for all museums. A meaningful evaluation method ought to be flexible and adaptable enough to encompass various distinct purposes individually, but be structured and predictable enough to assess the worth and merit of the different activities in a defensible manner. The Cultural Valorisation Method aims to be such a method, and is divided into six steps.

- Step A is the investigative step of the museum’s purposes, values, and worthy activities. The conclusion of this step is the creation of the ‘values-map’, grounded on the Values Based Approach.
- Step B is the investigative step of the Cultural Activities. It assesses whether the values, purposes and worthy activities identified in Step A are performing as expected, i.e., if they are meritorious. Step B shall address the question: “is this museum realising its own (cultural) purposes?”
- Step C is the investigative step of the Support Activities, assessing whether museum managers are able to guarantee organisational sustainability. The investigation will be divided into four categories of resources-related activities, as guidelines.

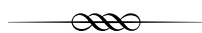
- Step D is the analytical step, when the evaluator combines all the findings from the previous steps, accounting for their 'worth' and 'merit'. The final product of this step is the development of a table and a diagram that will combine the Cultural Activities with the Support Activities in a single list, proposing the prioritisation of certain actions.
- Step E is a closing step, it is about the development and presentation of the Final Report for Internal stakeholders.
- Step F is a closing step, it is about the development and presentation of the Final Report for External stakeholders, aiming to close any information gap between the small museum and its stakeholders, demonstrating how worthy and meritorious the museum's activities are.

I am aware that the Cultural Valorisation Method is still in its youth. To reach its maturity, it requires further criticisms, contributions, and applications (in particular, by different evaluators than me). I acknowledge that although it is functional, evaluators other than me may propose adjustments and developments based on their own experiences and skills. However, my method provides a logical basis with which evaluators may begin their investigations of small museums, leading ultimately to their improved organisational health.

After having completed the development of the method, I used it once in a Dutch small museum, as a metaevaluation. Being the matter "balance" so important for my entire research, ironically, I applied it at the... Scales Museum (*Weegschaalmuseum*), in Naarden, the Netherlands. In an informal follow-up conversation, I was informed that my final report led to some changes, such as the accounting control and the nomination of a volunteer to lead marketing. Other activities, such as the necessary remodelling of the exhibition, were delayed due to lack of resources.

The evaluation of the Scales Museum demonstrated that the perspectives and frameworks I proposed for the Cultural Valorisation Method work, and that they may bring benefits for the museums. All aspects of a small museum are covered and organised into Cultural Activities and Support Activities (these into its four clusters of activities), and all must be balanced to prevent the deviation from the museum's purposes.

An important learning from this single exercise refers to the role of evaluators applying the Cultural Valorisation Method. They ought to master the models and structures of the method. During the investigation, interviews provided scattered information that evaluators should translate in terms of the method to make sense of them. Evaluators' training and engagement is key, after all, they are "judges" while they are assessing the worth and merit of activities, "methodologists" while they are systematically applying the method, and "facilitators" while they reflect on the image of the small museum in their analysis, helping them to see themselves in the struggle for organisational sustainability and cultural relevance.



In addition to the benefits to small museums, the propositions of my study are a blueprint that may be adapted to a variety of cultural organisations, such as the performing arts, libraries or cultural centres. With their own specificities, the structure that I propose here may promote their organisational sustainability, giving justice to their purposes. Moreover, though small museums are central to this dissertation, medium- and large-sized museums may also gain while adopting the concepts proposed here.

While developing this study I had two main audiences in my mind: scholars and practitioners. I expect practitioners to be more interested in my first research question *"how to evaluate a small museum?"*, while scholars may be keener to discuss the second research question, *"how to understand a small museum as a cultural organisation?"*. However, since my investigation is really about *"a comprehensive and pondered perspective for the evaluation of small museums"* – the subtitle of this Ph.D. dissertation –, I would like to invoke King Salomon's poem again and state that the main takeaway I expect to leave both scholars and practitioners with is that there are two sides to every matter and it is critical to consider the (dynamic) equilibrium between these two sides to ensure the health of the organisation.

For scholars in general – cultural economists and cultural managers in particular –, more than a positive review of this study, I expect to have contributed to the scholarly conversation, which will make me accepted in the academic community.

Practitioners are pragmatic, being more interested in what may be useful for their own organisations. They ask *"what can work?"*. For them, there is a sense of urgency, since small museums are struggling for survival on a daily basis – they have no time to lose – the method that benefited the Scales Museum, could have also benefited the Coffee Museum and many others.

Funders<sup>341</sup> are also pragmatic. They want to know whether their funds have been well spent. But, they ought to care about the museums' organisational sustainability as much as the production of content and, may benefit from the Cultural Valorisation Method because it addresses both.

The museum sector, represented by associations such as ICOM, besides being interested in ways to make museums stronger organisations, may benefit from the Cultural Valorisation method in its characterisation of small museums, recognising them as an important part of the sector, and giving them their due worth and consideration.

In essence, I developed this Ph.D. dissertation to be an inspiration for small museums, going beyond evaluation – it also aimed to make small museums aware of various aspects of the organisation in a structured manner. Museum managers must perceive their museums as hybrid organisations, and constantly consider the balance between the Cultural Activities and Support Activities, continuously preventing 'purpose-drift'.

Small museums that care about the concepts, frameworks and perspectives described in this study will be more likely to develop a strong organisational structure that will allow them to fulfil their purposes.

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<sup>341</sup> I.e., governments with subsidies, foundations with grants, corporations with sponsorships, and philanthropists with donations.