Tools you can use
Values assessment revisited

A Quick Review

Values assessment action steps

TO Summarize
These assessments appear well worth doing... but please know this is an organic, growing process allowing us to test what works and what doesn't along the way.

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Tools you can use

Values

assessment revisited

A Quick Re
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Values assessment action
please note the inspiration for this style of assessment sources out of the risk assessment work begun by Rob Waller and Sally Shelton, 1989 and Rob Waller, 1994 and “Assessing the Values of Cultural Heritage” research report by Marta de la Torre and Randall Mason, 2000.
A Quick Review

Values assessment action steps

Step one. Determine your Value Categories.

Step two.

Step three.

Step four.

Step five.

Step six.
Step one. Determine your Value Categories.

- Irreplaceable) Primary value objects - Replacement is not possible.
- Significant) Secondary value objects - Replacement is costly or difficult, but results in minimal loss of the intended value or values of an object or specimen.
- Replaceable) Tertiary value objects - Replacement is possible, but results in the loss of some of the objects or specimens inherent value or values.
- Consumable) Quaternary value objects - Replacement is possible and there is minimal loss to the objects or specimens value or values. Remember quaternary value objects are often situation or use driven.
- Unassessed) Unknown value objects - Assessment has not been undertaken; often due to lack of staff or other resources.

Examples of values include; historic, educational, aesthetic, scientific, genealogical, health and human safety.
"Collections categories were first proposed by Judith C. Price and Gerald T Fitzgerald, 1996."
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Step Two – Define your user groups.

Who uses your collections and why?

Remember the quickest way to define present user groups is to keep a log book of all visitors with a notation as to why they are visiting. Then try to brainstorm any potential users you are overlooking. This is a good place to borrow from your neighbor. Many of our institutions have similar users for similar reasons.

Example of user groups include exhibit visitor, genealogist, researcher, educator.
Step Three – List out your user groups and assign them to one of the five user relationship categories.

- Type I users - Mission driven,
- Type II users - Value added,
- Type III users - Special interest,
- Type IV users - Non-targeted,
- Type V users - Un-assessed.

Once you have completed this task you may find it helpful to go back and ask yourself...

Would the institution and collections benefit if we changed our relationship with any of these user groups?
Step Four – Look at your value categories and define their scope of influence.

Remember this can be as straightforward as noting they have local, regional, national, or international scope or you can nuance this step to reflect any potential mitigating circumstances, (for example: given to us by “the town’s”, most prominent family).
Step Five – Determine institutional relevance.

For institutional relevance a ranking system may be most appropriate

(highly relevant -1, moderately relevant - 2, relevant - 3, or slightly relevant - 4, to be repeated for each value category.), or you can use a more verbal explanation, or a combination of the two.

(a) part of the institutions founding purpose, b) directly mission related, c) meets the needs of a defined user group, d) secondary, but easy to accomplish, e) secondary, and a staff time sink).
Boots on the Ground

These assessments are as easy to do as having a conversation.
Regardless of kind of institution, initial assessment times have taken under half a day to flesh out.
Although these assessments initially target collections, the discussion of value(s) becomes much more encompassing.
The assessments have been fun, but more importantly insightful.
For every institution assessed to date, there are examples of potential “immediate payout”.

Ah-ha moments that would allow for a “quick win” or immediate change in thinking that can make a difference.
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Diverse, completely unrelated types of institutions appear to find value in the process.

- General museums
- History museums
- Natural History
- Zoos
- Living history centers
- Libraries
- Archives
- Arboretums
- Aquariums
The assessments seem to change the conversation and help prioritize institutional choices.
There have been surprising outcomes.
Certain similarities have begun to stand out

User groups and their institutional relationships

Mission driven
- students k-12
- home schoolers
- alumni
- adults

Value added
- college
- students
- teachers
- researchers
- scientists
- historians

Special interest
- clubs/scouts
- genealogists
- enthusiasts

Non-targeted
- unscheduled tourists
- walk-ins
- website (also mission related)

Un-assessed
- most institutionally unique
- seen as high potential area for targeted growth
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Value added

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Special interest

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Un-assessed

- most institutionally un
- seen as high potential
Defining Scope of influence

Scope appears to actively help an institution determine how widespread funding opportunities may be, as well as explore the level of partnering which may be available to raise a project/institutional need to the next level of funding.
Institutional Relevance

Determining institutional relevance clearly does help an institution set priorities - but priorities along a spectrum of choices.

The most effective approach for doing this was using a sliding scale between ease of accomplishing the task and relevance to the fund-raising goal and/or institutional mission (e.g. important and easy to do versus important but will take a year of planning to accomplish).
To Summarize

These assessments appear well worth doing...but
Summarize

These assessments appear well worth doing...but please know this is an organic, growing process...allowing us to test what works and what doesn’t along the way.
To that end

- we consider this workshop vital to making this tool work for you.
- we have tried to make the VPW workbook a simple, well illustrated guide that allows for self guided assessment or pre-assessment by your unique institution, regardless of size or focus.
- Appendices and vocabulary at the back of the workbook are meant to include concrete examples and useful reference.
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Finally if you would like to have a PDF color version of the VPW workbook please provide me with either a flash drive or email address before you leave here today.