ONTARIO'S MUSEUMS 2014 PROFILE

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FOREWORD BY THE ONTARIO MUSEUM ASSOCIATION

There are approximately 670 museums in Ontario, located in every region of the province. These museums are incredibly diverse — from not-for-profits run by volunteers, to professionally staffed provincial agencies. They include art galleries, pioneer villages, science centres, archives and historic sites. The Ontario Museum Association (OMA) is the province's only professional association dedicated to these museums and to those who work and volunteer in them.

Ontario's museums are significant economic drivers. Museums spend $758 million in communities across the province; they employ 10,765 Ontarians.[1] Museums are also intertwined with other sectors — they are part of the tourism industry and contribute to the $28-billion cultural GDP.[2] As we continue to shift from industrial economies built on manufacturing and resource extraction to knowledge-based economies built on knowledge, skills, and innovation, museums can play an even greater role as powerhouse institutions contributing to strong societies and economies.

These same museums face increasing pressure to demonstrate their value and impact, influenced in part by the shifting economic, cultural, and social realities. Embracing these changes as critical opportunities, the OMA launched a sector-led initiative to develop greater public relevancy with the following goals:

- Informed relevant museum strategies that foster accessibility and participation for Ontarians.
- Improved sector capacity and communication.
- Improved sector accountability and transparency.

To undertake this work, research was needed on the current status and health of Ontario's museums and the social and economic impacts of the sector. Although museums currently generate extensive data and information on their operations and activities, this information is not shared broadly. Data is primarily used to inform and improve the museum's own work, and it is reported to funders to demonstrate accountability in the use of public monies and other funds. On a sector-level, little system-wide research and analysis has been available.[3]

Recognizing this, an important focus of our work was the consideration of the type of data that would provide an accurate, ongoing assessment of the impact and potential of museums. To begin this work, we developed an institutional survey that was completed by 184 of Ontario's museums. With data analysis by Hill Strategies Research, the results are reported here as ***Ontario's Museums 2014 Profile***. These results have already informed the development of ***Ontario's Museums 2025: Strategic Vision & Action Plan***. *Ontario's Museums 2025* recognizes that museums need to better demonstrate why they matter — and they need the data to prove it! A new rigorous research and assessment system is needed, resulting in a sector-wide culture of outcome-based evaluation. Importantly, ***Ontario's Museums 2014 Profile*** also identifies the realities of operating museums in Ontario today.

Ontario's Museums 2014

This report provides a snapshot of Ontario's museums in 2014. A picture emerges of a sector that is present throughout Ontario's communities, and that is working on becoming central to community life. The majority of Ontario's museums (as represented by the 184 respondents) provide free access to the public at select times (88%). The nearly 5 million visitors (146 reporting museums) comprise both local residents (55%) and tourists (45%). For these visitors, museums provide a variety of programs (5,500 total), and temporary exhibits (850 total).

Museums also hold large and valuable collections in the public trust (52% have more than 10,000 objects in their collections). They are places of learning,

[1] Canadian Heritage, *Government of Canada Survey of Heritage Institutions: 2011*
[2] Statistics Canada, *Provincial and Territorial Culture Indicators*, May 11, 2016, http://www.statcan.gc.ca/pub/13-604-m/13-604-m2016081-eng.htm

[3] Released in 2008, the OMA's *CMOG Snapshot 2000-2004* was the last public report to provide information on provincial level funding through the Community Museum Operating Grant program.

aligned with the curriculum of Ontario's formal education system (77% provide curriculum-based programming; 72% provide online education resources). Museums are also places of substantial volunteer engagement with more than 13,000 volunteers contributing 777,300 hours in 2014.

The 2014 Profile results also suggest opportunities and areas of growth. While museums have large and important collections (from the 26 reporting museums alone, the estimated collection value totals $125.7 million), resources are needed for their conservation and storage (33% of collections are stored in areas considered to be inadequate). New models are needed for greater and more meaningful public access to collections through exhibition and programming (50% of museums display 20% or less of their collections). Innovative approaches should be considered to address these challenges, including the use of digital technologies and provincial-level coordination for collecting, collections' care, and conservation.

Many museums must also maintain their facilities, many of which are historically significant and designated heritage sites (43%). These places, already community landmarks, have community or public programming spaces (64%) and provide a great opportunity to serve as gathering places or community hubs. They also require ongoing investment for their maintenance, as most are 76 years of age or older (68%) and many need significant renovations or additions (56%).

Other than the operating funding provided for provincial agencies, provincial support for the majority of Ontario's museums comes from the Community Museum Operating Grant (CMOG) program. This funding is nominal at about 6% of total revenues (82 reporting museums). This Provincial support is significant for the 173 museums that receive it, translating to greater capacity and impacts for these museums and strengthening their ability to leverage municipal support and other funding. The 2014 Profile demonstrates that most of the public sector funding comes from municipalities (84%), and that this funding is highly inconsistent and varies across regions. These results indicate the need for a renewed funding model, as well as for provincial leadership in leveraging investments in education, municipalities and tourism.

As the above highlights demonstrate, the 2014 Profile sets the stage for the OMA's work with museums, funders and partners to realize the opportunities noted; to:

- Establish museums as integral to community hubs;
- Develop a provincial-level collecting approach;
- Renew the museum funding model.

The OMA plans to revisit the profile in subsequent years for regular updates. As such, the *Ontario's Museums 2014 Profile* will serve as the foundation for building a comprehensive sector-wide profile that demonstrates the ongoing economic, social, and cultural impact of Ontario's museums. This will serve the OMA — as well as museums and stakeholders — in decision-making, planning and advocacy.

Acknowledgements

The *Ontario's Museums 2014 Profile* would not have been possible without the work and generous participation of museums across Ontario. The OMA wishes to thank the museum professionals and volunteers who completed a long survey with due care and attention. We greatly appreciate the dedication and significant time involved.

The OMA would also like to extend our appreciation to ArtsBuild Ontario for entering into a data sharing agreement in 2015. Both organizations are committed to sharing data for the sector's benefit, working towards a robust and dynamic solution to ongoing data collection needs. For this report, we used valuable information collected by ArtsBuild to inform our report on the status of museum facilities.

Of note, the OMA thanks the Department of Canadian Heritage for the provision of provincial-level data for Ontario from their *Government of*

Canada Survey of Heritage Institution: 2015. This data was reviewed by the OMA in completing our work on the 2014 Profile.

The *Ontario's Museums 2014 Profile* also benefited from 2014 performance measures data provided by the Ontario Ministry of Tourism, Culture and Sport (MTCS) on the 173 museums funded under the Community Museums Operating Grant (CMOG) program. We thank MTCS for this contribution. We also thank MTCS for their financial support of *Ontario's Museums 2014 Profile*.

The OMA looks forward to continuing its work with funders, partners, and members to ensure that sector data needs are met. This data will enhance public accountability, support the creation of rich museum experiences for the benefit of our visitors across the province, and inform the ongoing implementation and continuing assessment of *Ontario's Museums 2025*.

The New Community Museum

***Ontario's Museums 2025* describes the role of museums in the 21st century. This vision includes a new understanding of community museums as social institutions integrated and embedded in the communities they serve — on local, provincial, national, and international levels.**

Under this new definition, museum work is focused on its social impacts, with museums contributing to the health and well-being of their communities. Museums prioritize engagement with their communities* (however defined). Through their facilities and work, they function as gathering places and community hubs. They are diverse, inclusive and accessible places.

In describing community museums throughout this report, we use this definition of the term.

****The term communities is understood to apply broadly — to comprise both geographic communities and groups with shared interests and affiliations.***

METHODOLOGY & NOTES FOR *ONTARIO MUSEUMS 2014 PROFILE*

This report summarizes the submissions of 184 Ontario museums to a survey designed and conducted by the Ontario Museum Association (OMA) in 2014-2015, and analyzed by Hill Strategies Research.

The report would not have been possible without the hard work and generous participation of museums across Ontario. Respondents were told that the "information collected will only be published in an anonymous and aggregate form." Although, this report does not name the organizations or individuals responding, the OMA wishes to thank the 184 museum professionals and volunteers who completed a long survey with due care and attention.

The survey, which was largely conducted online, included questions regarding:

- Basic information about the museum
- Museum structure and governance
- Admissions, website, and social media activity
- Museum policies, programs, and partnerships
- Collections
- Human resources
- Operating revenues and expenses
- Current challenges and future concerns

Some museums skipped a few questions. The percentages in this report are based on the number of respondents to each question, which might not equal the total number of respondents (184).

In some cases, a municipality or other body that manages many museums responded on behalf of multiple museums. These organizations are counted as one respondent.

In general, the data in this document relate to museums' fiscal years ending in 2014 or early 2015.

Other Data Sets

Some key elements from two data collections were also analysed for the 2014 Profile: statistics from the 2014-2015 Community Museum Operating Grant (CMOG) program of the Province of Ontario (excluding detailed financial data); and museum-relevant data from ArtsBuild Ontario's Bricks&Mortar survey.

Although not used for the 2014 Profile analysis, the work of the Department of Canadian Heritage on the *Government of Canada Survey of Heritage Institutions: 2015* was referenced and provincial-level data for Ontario was reviewed. While this national survey covers more museums in Ontario, the value of the OMA survey is in providing a much more detailed view of the operations and community connections of Ontario's museums. There is a richness and depth to the 2014 Profile results that cannot be found elsewhere.

Solid Response Rate

Overall, the *Government of Canada Survey of Heritage Institutions* estimated that there were 667 heritage institutions in Ontario in 2011. Of these, 134 were primarily zoos, aquariums, or archives. These organizations were beyond the scope of this survey (except for a small number of archives that responded to the OMA survey). That leaves 533 museums, art galleries, and historic/heritage sites in the *Survey of Heritage Institutions*. The 184 OMA survey respondents represent 35% of these 533 organizations. Many of the largest museums located in Ontario responded to the survey, with the exception of some provincial and national agencies.

While this is a solid response rate, the survey respondents were not randomly selected to participate. As such, a margin of error cannot be applied to the response rate. (This is normal for a survey of this type, where respondents self-select whether to complete the survey.) If the respondents had been selected via a random sample, the 184 submissions would have provided a maximum margin of error of plus or minus 5.9 percentage points, 19 times out of 20. This is close to the typically desired margin of error in a randomized sample (plus or minus five percentage points, 19 times out of 20).

In general, the term "museums" will be used in this report to describe respondents.

EXECUTIVE SUMMARY

In late 2014 and early 2015, the Ontario Museum Association (OMA) designed and conducted its first-ever survey of Ontario museums, receiving 184 responses from across the province. This report would not have been possible without the hard work and generous participation of museums across Ontario.

The survey, which was largely conducted online, contained questions concerning the situation of the museum, its structure and governance, admissions policies and fees, attendance, finances, collections, human resources, education activities, and more.

Some key elements from two related surveys are also included in this report: statistics from the 2014-2015 Community Museum Operating Grant (CMOG) program of the Province of Ontario (excluding financial data); and museum-relevant data from ArtsBuild Ontario's Bricks&Mortar survey.

Although not used for the 2014 Profile analysis, the work of the Department of Canadian Heritage on the *Government of Canada Survey of Heritage Institutions: 2015* was referenced and provincial-level data for Ontario was reviewed. While this national survey covers more museums in Ontario, the value of the OMA survey is in providing a much more detailed view of the operations and community connections of Ontario's museums.

Wide range of museums

A wide range of museums from all areas of the province responded to the survey. Among respondents, community museums are the most common (39%), followed by history museums (25%). Eighty-four percent of respondents reported a secondary activity. Archives, history museums, and historic/heritage sites were most common in this regard.

All 184 museums responding to the survey are not-for-profit organizations, but not all are separately incorporated as such. Nearly three-quarters (73%) of the respondents are incorporated, including the 50% that are registered charities. Another 36% of responding museums are government agencies or quasi-government organizations. Four of the respondents are provincial and federal agencies with budgets in excess of $40 million. The survey was not restricted to OMA members: 31 museums (17% of all 184 respondents) are not current members of the Association.

The vast majority (94%) of the 184 responding museums have regular hours during which they are open to the public. Sixty-eight percent of these museums are open all 12 months of the year (110 out of 162 museums reporting).

Nearly 5 million onsite visits

Total attendance at the 146 museums reporting visitor data was 4.75 million, with paying visitors accounting for the largest share (3.23 million, compared with 1.52 million non-paying visitors).

Based on 85 museums that estimated the provenance of their visitors, the report estimates that, of the 4.75 million paid and unpaid visitors, about 2.63 million are local (55%), 1.23 million are from other parts of Ontario (26%), 0.44 million are from the rest of Canada (9%), and 0.45 million are international visitors (10%).

Free and low cost museums

Over one-half (56%) of the responding museums charge an admission fee, but the vast majority (79%) of these museums have dates and times when the public can visit for free. Admission is always free in 22% of the responding museums. The remaining 23% of museums accept donations, some with a suggested amount (16% of museums, average suggested amount of $3.63, ranging from $2 to $5) and some with no suggested amount (7% of museums).

A combination of the above statistics shows that, at least at some times, it is possible to enter 88% of Ontario museums for free. Even if the museums with an admission-by-donation policy are excluded, free admission is possible (at least at select times) in about two-thirds of Ontario museums (65%).

The average admission fees for the museums with a mandatory charge were reported in a number of different categories:

- Standard: $5.71 average (from $2 to $18)
- Adult: $6.80 average (from $2 to $28)
- Child: $4.01 average (from $0.50 to $13)
- Youth: $4.80 average (from $1 to $14.50)
- Student: $4.95 average (from $1 to $14.50)
- Senior: $5.59 average (from $1 to $16)

More than 500,000 student visits

About three-quarters (77%) of responding museums provide educational programming tied to Ontario's curriculum. The most common educational programs include guided or unguided visits (73% of all 184 museums), staff visits to schools (47%), and curriculum guides or lesson plans (27%). In terms of school visits to museums, 123 museums (67% of respondents) received a total of 15,300 school groups and 572,800 students.

Major collections in Ontario's museums

Ninety-five percent of responding museums own or manage a collection on an ongoing basis. Many museums are responsible for the care of large collections: over one-half (52%) of responding museums with a collection have more than 10,000 items in their collection.

Typically, only a small proportion of museum collections are on public display during a given year. During the fiscal year covered by the OMA survey, almost one-half of museums displayed 20% or less of their collections.

Some of these items are at risk. Responding museums indicated that, typically, about two-thirds of their collections are stored in areas that museum representatives "consider to be adequate (i.e. in secure premises with appropriate environmental conditions)."

Revenues of $292 million exceeded expenses

The 118 museums that provided details about their operating finances had total revenues of $291.9 million and total expenditures of $284.9 million, resulting in a collective surplus of $6.9 million (2.4% of total revenues). The revenues of the four largest museums alone account for $223.9 million (77% of the total revenue).

A breakdown of the $291.9 million in total revenues for all 118 museums reporting their finances shows that:

- $167.5 million (57%) from government sources;
- $74.4 million (26%) was earned;
- $34.5 million (12%) from private sector sources;
- $15.5 million (5%) was from other sources.

The 57% received from public sector sources includes funding from various levels of government: municipalities (12%, or $34.5 million), the province (18%, $53.2 million), and the federal government (27%, $79.8 million).

Revenue sources vary by size of museum

Museums of different budget sizes have substantially different revenue components. As a percentage of total revenues:

- Earned revenues are highest for larger museums.
- Private sector revenues show no consistent pattern by size of museum.
- Government revenues are lowest for the second-largest group of museums (budgets between $2 million and $6 million): 40%. *Note: All other museum groups receive over one-half of their total revenues from government sources.*
- "Other" revenue sources are quite consistent among the six groups of museums.

Municipalities are main public sector funder for most museums

There are significant differences in the sources of public sector funding by budget size. The four largest museums are provincial and federal museums. They receive almost all of their government funding from provincial and federal sources. They account for 92% of total provincial funding and 97% of federal funding for all 118 museums reporting their financial data. When these four museums are removed from the analysis, municipalities provide 84% of the public sector funds for the remaining 114 museums.

Community Museum Operating Grant (CMOG) funding: 36 cents per Ontarian

In 2014-2015, 173 community museums received a total of $5 million in provincial funding through the Community Museum Operating Grant (CMOG) program. On a per capita basis, this CMOG funding represents $0.36 per resident of the province.

49% of respondents receive CMOG funding

Ninety-one survey respondents received provincial government funding through the CMOG program in 2014-2015. This is almost one-half of the responding museums. Thirty-nine survey respondents may have been eligible for CMOG funding according to criteria, but did not receive a grant.

The 91 CMOG recipients were asked about desired changes to this funding program. The qualitative analysis shows that more funding was the No.1 desired change.

Staff costs account for one-half of museums' expenditures

Staff expenditures are by far the largest component of museums' expenditures, accounting for 49% of the expenditures of all 118 museums reporting their operating finances ($139 million of $284.9 million). Staff costs are highest for smaller museums. For those museums with less than $2 million in revenue, staff costs represent 60% or more of total expenses. In comparison, staff costs account for just under one-half of the expenditures of larger museums.

About two-thirds (65%) of responding museums have both full-time and part-time staff, while 13% have full-time staff only, 13% have part-time staff only, and the remaining 9% have no paid staff at all.

Volunteers outnumber staff members by 4:1

Slightly more than 3,000 staff members work at responding museums, whether on a full-time (1,797) or part-time (1,329) basis. In comparison, more than 13,000 volunteers worked with Ontario museums during their last fiscal year. This number is more than four times the total staff level at Ontario museums.

Volunteers worked an estimated total of 777,300 hours (157 responding museums). This is the equivalent of 405 full-time, full-year jobs. Using the average hourly wage in Canadian arts, entertainment and recreation industries in 2014 ($17.55), the 777,300 volunteer hours at these 157 museums can be valued at $13.6 million.

Facility Ownership

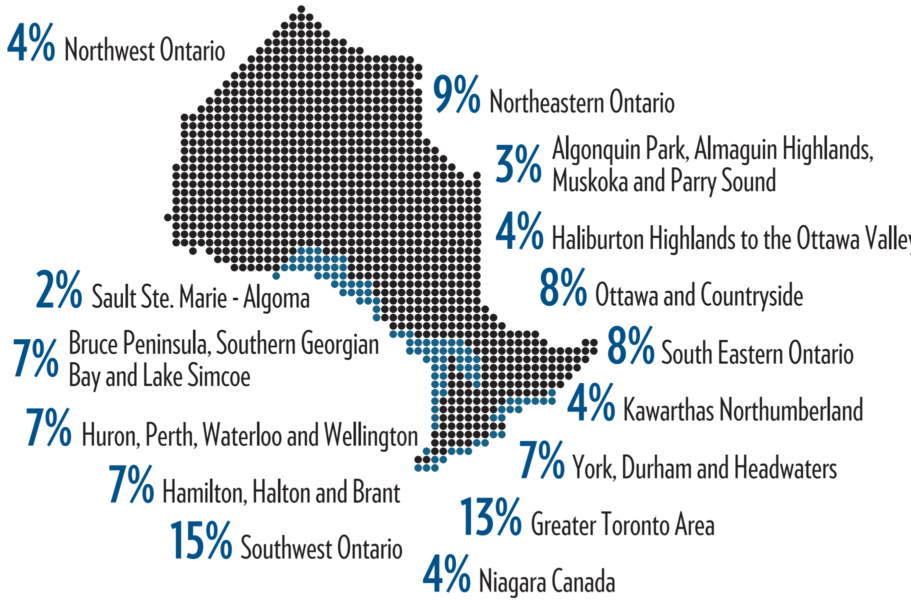
Sixty percent of responding museums own their own facility. From ArtsBuild Ontario, we know that for the 96 museum respondents in their Bricks&Mortar database, many of these facilities are older (68% are at least 75 years old) and are heritage buildings (43% are registered or listed). For many of the 2014 Profile museum respondents, their facilities are a source of revenue generation: 67% of museums that own their facilities also rent them out for non-mission-related purposes.

Whether or not they own their facilities, about two-thirds (64%) of responding museums have public use spaces such as community or progamming spaces.

Note: The full report provides additional depth concerning the above findings as well as additional analysis by budget size and region of the province.

MUSEUM LOCATIONS, TYPES AND STRUCTURES

184 responding museums from all regions of Ontario



A wide range of museums from all corners of the province responded to the OMA's 2015 survey. The map above provides a percentage of the 184 museums by tourism region of Ontario.

On average, the museums were 43 years old in 2015 (i.e., average year of establishment = 1972). The youngest responding museum was established in 2012, while the oldest was established in 1900.

Association memberships

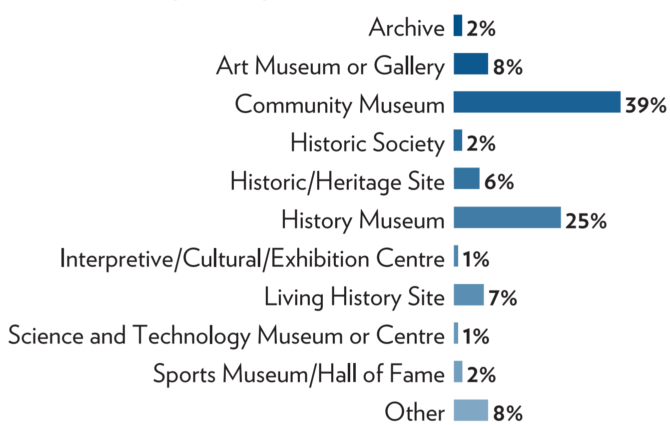
A strong majority of responding museums (83%) are members of the Ontario Museum Association, and 61% belong to the Canadian Museums Association. Other associations are less common among respondents, including:

- Ontario Historical Society (33%)
- Archives Association of Ontario (16%)
- Ontario Association of Art Galleries (10%)
- Heritage Canada The National Trust (9%)

Museum types

Among respondents, community museums are the most common, followed by history museums (see Chart 1). It should be noted that many museums have a secondary focus as well. In fact, 84% of respondents reported a secondary activity. Archives, history museums, and historic / heritage sites were most common in this regard.

Chart 1: Primary Activity of Museums (184 respondents)

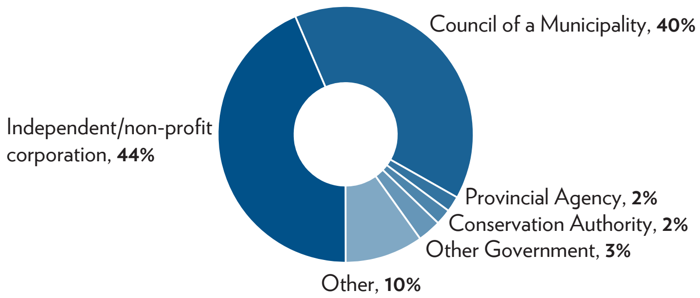


Museum structures, governance, and plans

All 184 museums responding to the survey are not-for-profit organizations, but not all are incorporated as such. Nearly three-quarters of the respondents are incorporated (73%), including the 50% that are registered charities. Another 36% of responding museums are government agencies or quasi-government organizations, and the remaining 14% have another status.

Chart 2 shows that many museums are governed as independent not-for-profit organizations or by a municipal council.

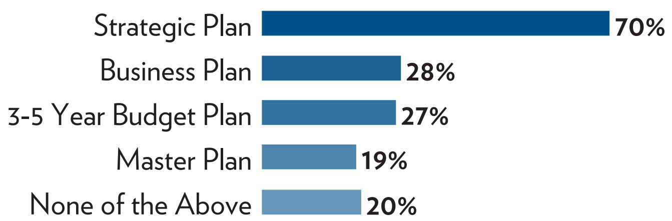
Chart 2: Governing Authority of Museums (184 respondents)



Of the 184 museums, 173 held at least one board meeting (including Annual General Meetings) during their last fiscal year. The average number of board meetings per museum was nearly 10 (for each of the 173 museums that held at least one).

A strong majority of the museums (70%) have a strategic plan in place, but only a minority have a formal business plan (28%), a three- to five-year budget plan (27%), or a master plan (19%). These statistics are presented in Chart 3.

Chart 3: Written/Approved Plans of Museums (184 respondents)

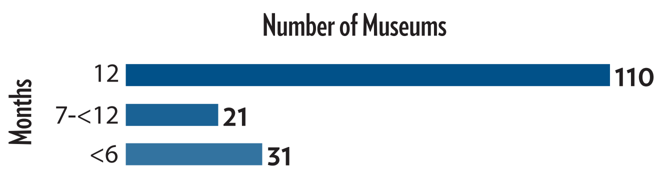


PUBLIC HOURS, ADMISSION POLICIES, VISITORS, AND MEMBERSHIP

The vast majority (94%) of the 184 responding museums have regular hours during which they are open to the public. Most of the museums with regular hours are open all 12 months of the year (110 out of 162 museums reporting, or 68%), as shown in Chart 4. There are also many seasonal museums: 31 of the 162 museums with regular hours (19%) are open for six months or less.

A typical museum is open for 271 days (1,785 hours) each year. Two responding museums are open all 365 days. The 133 museums responding to the question about hours were open for a total of 236,200 hours in the past year.

Chart 4: Months Open During the Year (162 respondents)



Admission policies and fees

Just over one-half of the museums (56%) charge an admission fee. On the other hand, admission is free in 22% of the responding museums. The remaining 23% of museums accept donations, some with a suggested amount (16% of museums, average suggested amount of $3.63, ranging from $2 to $5) and some with no suggested amount (7% of museums).

The vast majority of the museums with a mandatory charge (79%) have dates and times when the public can visit for free. This equates to 44% of all museums.

A combination of the above statistics shows that, at least at some times, it is possible to enter 88% of Ontario museums for free. Even if the museums with an admission-by-donation policy are excluded, free admission is possible (at least at select times) in about two-thirds of Ontario museums (65%).

The average admission fees for the museums with a mandatory charge were reported in a number of different categories:

- Standard: $5.71 average (from $2 to $18)
- Adult: $6.80 average (from $2 to $28)
- Child: $4.01 average (from $0.50 to $13)
- Youth: $4.80 average (from $1 to $14.50)
- Student: $4.95 average (from $1 to $14.50)
- Senior: $5.59 average (from $1 to $16)

Attendance

Of the 146 museums reporting visitor data[4], 77% have paid visitors (113 museums), while 23% have unpaid visitors only. A large number of museums – 92, or 63% of the 146 museums reporting visitor data – have both paid and unpaid visitors.

Total attendance at the 146 museums reporting visitor data was 4.75 million (an average of 41,500 per reporting museum). Median attendance was 6,600. *Note: One-half of museums have attendance below the median value, while the other half have attendance greater than the median. Median values are less influenced than the average by a small number of museums reporting very large attendance figures.*

As shown in Chart 5, paying visitors account for the bulk of the visitors (3.23 million, compared with 1.52 million non-paying visitors).

Chart 5: Paid & Unpaid Visitors (146 respondents)

[4] 38 museums did not provide visitor data or do not keep visitor statistics.

Just over one-half of Ontario museums' visitors are from their local areas (55%), with 26% coming from other parts of the province. The combination of these two statistics means that 81% of museum visitors come from within Ontario. The remaining visitors come from other areas of Canada (9%) or from other countries (10%). (These statistics are based on 85 museums that estimated the provenance of their visitors.)

An estimate based on these percentages shows that, of the 4.7 million paid and unpaid visitors, about 2.63 million are local, 1.23 million are from other parts of Ontario, 0.44 million are from the rest of Canada, and 0.45 million are international visitors.

Services in different languages

Fifty-eight percent of reporting museums provide public services in English only. Among the other languages offered, French is by far the most common (67 museums, or 37% of all museums). Other languages are only offered by a small number of museums: German (eight museums), Spanish (five museums), Chinese (four museums), Italian (three museums), Japanese (two museums), Portuguese (one museum), Punjabi (one museum), Polish (one museum), Urdu (one museum), and Arabic (one museum).

Memberships

Of 184 museums, two-thirds (66%) reported having a membership program. Individual memberships were most common, with 111 museums reporting nearly 71,000 members (average of 638 and median of 64 per museum reporting this type of membership). Eighty-five museums reported nearly 58,000 family memberships[5] (average of 678 and median of 48 per museum reporting this type of membership). Institutional memberships were reported by just 56 museums (total of 1,200 memberships, for an average of 411 and a median of nine for each museum reporting this type of membership).

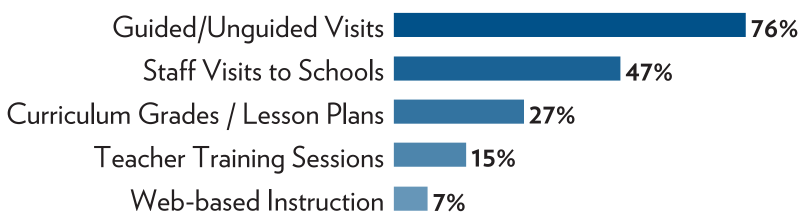
[5] These figures represent the number of memberships, not the number of **members** covered by them.

EDUCATION ACTIVITIES

About three-quarters of responding museums (77%) provide educational programming tied to provincial curriculum requirements.

The most common educational programs are shown in Chart 6, including guided or unguided visits (73% of all 184 museums), staff visits to schools (47%), and curriculum guides or lesson plans (27%).

Chart 6: Educational Programs (184 respondents)



In terms of school visits to museums, 123 museums (67% of respondents) received a total of 15,300 school groups and 572,800 students (average of 124 school groups and median of 21 groups per reporting museum; and an average of 4,500 students and median of 769 students per reporting museum).

OMA Note:

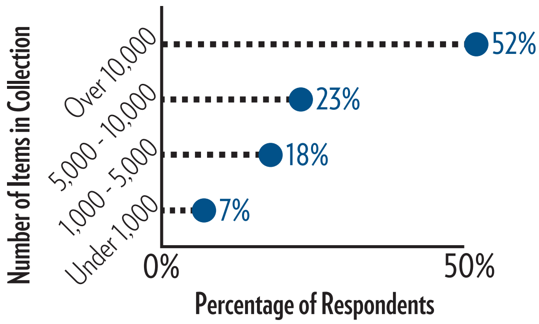
The majority of survey respondents provide educational programming and online educational resources aligned with Ontario's curriculum. There is significant visitation by elementary and secondary level students. The 570,000 students reported in the 2014 Profile is the total number reported by 18% of Ontario's museums. This suggests actual visitation in excess of one million (at least half of the total student population in Ontario).[1] These results indicate the important educational role played by Ontario's museums, which would benefit from provincial-level leadership to better leverage investments in both museums and education, and a more coordinated approach with and support from the Ministry of Education.

[1] Education Facts, 2014-15, Ministry of Education, http://www.edu.gov.on.ca/eng/educationFacts.html

A major focus of Ontario's museums is on their collections: 95% of responding museums own or manage a collection on an ongoing basis.

Many museums are responsible for the care of large collections: over one-half of museums with a collection (52%) have more than 10,000 items in their collection, as shown in Chart 7.

Chart 7: Collection Size (173 respondents)



While a specific estimate of the overall collections size cannot be provided from these ranges, it is clear that many millions of items are in the care of Ontario museums.

Of the museums with collections:

- 87% have a collections management policy; including documentation, care & handling etc.
- 83% have a collections development policy; including acquisition/collection priorities etc.
- 69% have a conservation policy
- 65% have a research policy

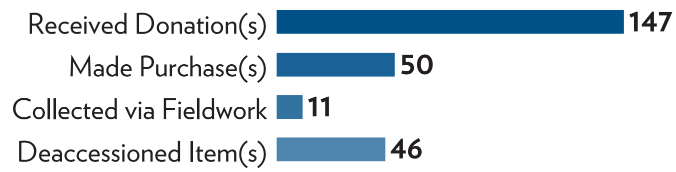
Other collections-related spaces in museums with collections include:

- Archives: 80%
- Research/study area: 69%
- Collection preparation area: 49%
- Conservation lab: 11%

Collection additions, deaccessions, and value

Ontario's museums add to their collections via donations, fieldwork, and occasional purchases of items. Chart 8 shows the number of museums reporting specific collections-related additions or deaccessions in the previous year.

Chart 8: Collection Activities (184 respondents)



More specifically, in the fiscal year ending in 2014 or early 2015:

- 53,841 objects were gifted or donated (to 147 museums reporting at least one donation, average of 366 per reporting museum)
- 113,540 objects were collected in fieldwork (by 11 museums reporting at least one object collected, average of 10,322 per reporting museum. Of the 113,540 objects collected, more than 112,000 were collected by two museums.)
- 1,996 objects were purchased (by 50 museums reporting at least one purchase, average of 345 per reporting museum)

Some of Ontario's museums also removed items from their collections in the previous fiscal year. Forty-six museums reported deaccessioning at least one item, with a total of 6,094 objects deaccessioned. However, it should be noted that one museum accounted for nearly 4,000 of the 6,094 deaccessioned objects. As part of moving its collection to new storage facilities, this museum found a large number of deteriorated objects or objects that did not meet its collections policy.

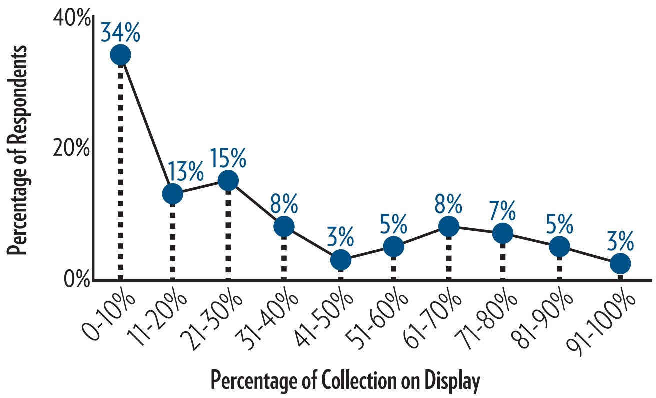
Among all respondents, museums representatives most commonly mentioned three reasons why they deaccessioned items from their collection: 1) Concordance with collections policy or organization mandate (22 mentions); 2) Poor or deteriorating condition of certain items (21 mentions); and 3) Duplicate items (18 mentions).

Only 26 museums reported the value of their collections. For these museums, the overall collection value is $125.7 million (average of $4.8 million per reporting museum). Another 23% of the museums with collections indicated that they did not wish to disclose the value of their collections, while 62% of the museums with collections did not know the value of their collections.

Collection display and storage

Typically, only a small proportion of museum collections are on public display during a given year. Chart 9 shows that, during the fiscal year covered by the OMA survey, almost one-half of museums displayed 20% of less of their collections.

Chart 9: Proportion of Collections on Display (173 respondents)



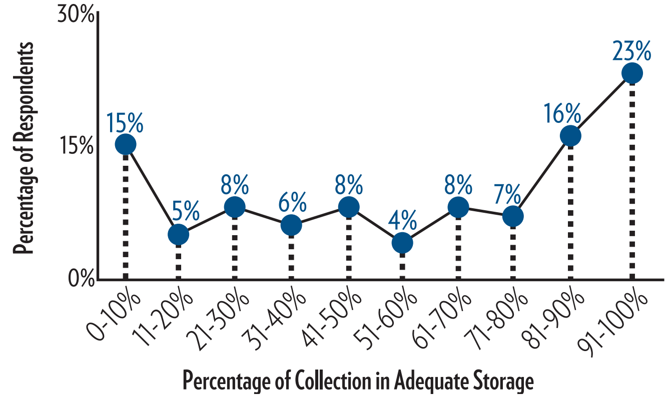
Collection items not on public display are stored by Ontario museums, either onsite or offsite: 94% of museums with collections have on-site storage; 35% have off-site storage.

For 27 museums reporting the cost of offsite storage of collections, this expense amounted to $3.4 million during the previous fiscal year (average of $125,400 per reporting museum).

For 37 museums reporting the dollar amount spent on onsite storage of collections, this cost totaled almost $350,000 during the previous fiscal year (average of $9,400 per reporting museum).

Responding museums indicated that, typically, about two-thirds of their collections are stored in areas that museum representatives "consider to be adequate (i.e. in secure premises with appropriate environmental conditions)," as shown in Chart 10.

Chart 10: Proportion of Collections in Adequate Storage (184 respondents)



OMA Note:

Collections define museums. The 2014 Profile suggests the significant monetary value of these collections held in public trust, but also the substantial investment needed for their ongoing care. The majority of these collections are in storage. Museums are working to explore creative ways to address important conservation and storage concerns (seen in the results of this report), but also to enhance public access to their collections. The OMA also recognizes that work is needed to ensure that these collections reflect the full depth and breadth of the lived experiences, creative aspirations and histories of all Ontarians.

To realize this opportunity, the OMA will work with Ontario's museums to develop a province-wide coordinated approach to collecting that:

- **Creates efficiencies and maximizes resources through new partnerships and collaborations.**
- **Recognizes the diversity of Ontario and reflects changing demographics.**
- **Maximizes impact through improved public access and use.**
- **Optimizes efforts through new technologies.**

We also seek to work with the Ministry of Tourism, Culture and Sport, as well as to align with its new Culture Strategy to achieve these goals.

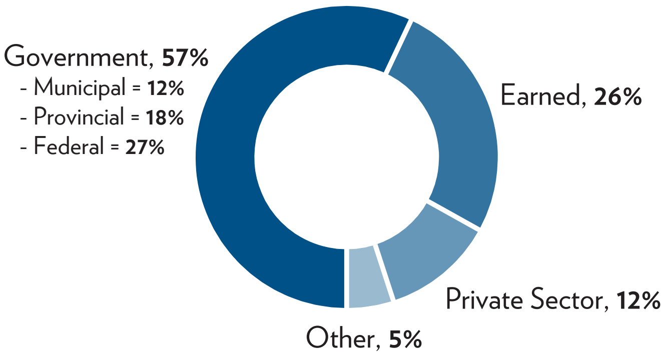
The 118 museums that provided details about their operating finances had total revenues of $291.9 million and total expenditures of $284.9 million, resulting in a collective surplus of $6.9 million (2.4% of total revenues). In general, the financial data relate to museums' fiscal years in calendar 2014 or ending in early 2015.

Chart 11 shows the breakdown of the $291.9 million in total revenues for all 118 museums reporting their finances:

- $167.5 million (57%) was received from government sources;
- $74.4 million (26%) was earned;
- $34.5 million (12%) was raised from private sector sources;
- $15.5 million (5%) was from other sources.

The 57% received from public sector sources includes funding from various levels of government: municipalities (12%, or $34.5 million), the province (18%, $53.2 million), and the federal government (27%, $79.8 million).

Chart 11: Operating Revenues (118 respondents)



Revenue sources excluding the largest museums

The above statistics are dominated by four very large provincial and national museums. In fact, these four museums account for 77% of the 118 museums' total revenues, 76% of government funding, 80% of earned revenue, and 72% of private sector fundraising.

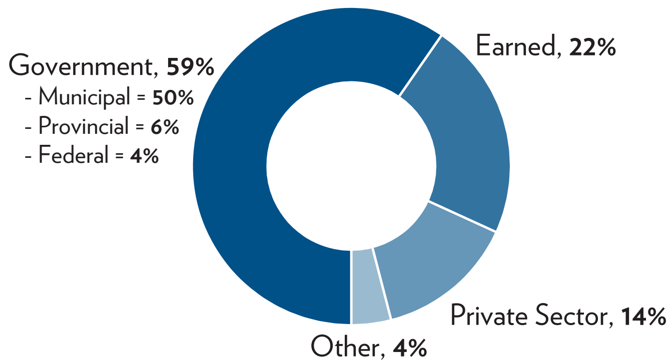
For the 114 museums that have operating revenues under $6 million, total revenues are $67.9 million, and total expenditures are $63.9 million. This results in a collective surplus of $4.0 million (6.0% of total revenues).

Chart 12 provides a breakdown of the $67.9 million in total revenues for these 114 museums:

- $40.4 million (59%) was received from government sources;
- $14.9 million (22%) was earned;
- $9.8 million (14%) was raised from private sector sources;
- $2.9 million (4%) was from other sources.

For these 114 museums, the 59% received from public sector sources includes funding from municipalities (50%, or $33.9 million), the province (6%, $4.1 million), and the federal government (4%, $2.4 million).

Chart 12: Operating Revenues, excluding four largest provincial and federal museums (114 respondents)



A further analysis of revenues by budget size and region of the province is provided on pages 31-36.

Provincial government funding programs

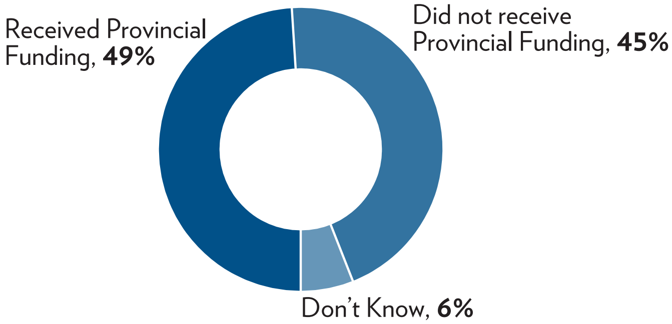
Ninety-one survey respondents received provincial government funding through the Community Museum Operating Grant program (CMOG) in 2014-15. This is almost one-half of the responding museums.

The 91 CMOG recipients were asked about desired changes to this funding program. More funding was the No.1 desired change (24 mentions). Fifteen museum representatives commented on the program's standards, with some indicating that they believe the standards are good. Others believe that the standards are too onerous and should be more flexible for different types of museums. Ten museums provided positive feedback about the importance of this funding program for them. The timing of the application process was noted as a challenge by nine respondents. Six requested simplification of the application and reporting process, and five noted issues with the online application form. Four respondents suggested sharing of the resulting museum data for benchmarking purposes.

A more detailed analysis of the funding of community museums is provided on page 27.

Chart 13 shows that about one-half of responding museums receive grant-based funding from another provincial program (i.e., other than CMOG). Survey respondents were asked which provincial programs provided them with grant-based funding. Most common is the Summer Experience program (21 museums), followed by the Ontario Trillium Foundation (14), the Museums and Technology Fund (14 respondents), the Heritage Organization Development Grant (13), and the Ontario Arts Council (12). The above programs are all within the responsibilities of the Ministry of Tourism, Culture and Sport. Other provincial ministries that support some museums include the Ministry of Training, Colleges and Universities (7 museums), the Ministry of Agriculture, Food and Rural Affairs (5), and the Ministry of Northern Development and Mines (3). Many of these other ministries provide a summer employment program that is accessed by some museums.

Chart 13: Provincial grant recipients (other than CMOG)
(184 respondents)



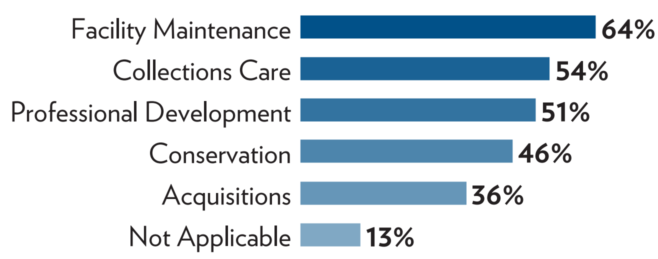
Staff costs account for one-half of museums' expenditures

Staff expenditures are by far the largest component of museums' expenditures, accounting for 49% of the expenditures of all 118 museums reporting their operating finances ($139.0 million out of $284.9 million).

Dedicated funds

Many of Ontario museums have dedicated funds for specific purposes. As shown in Chart 14, the most common funds are dedicated to facility maintenance (64% of 182 responding museums), collection care (54%), professional development (51%), conservation (46%), and acquisitions (36%).

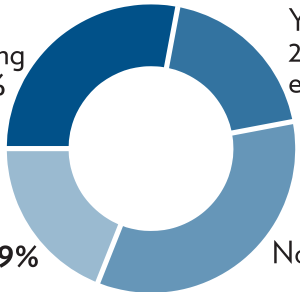
Chart 14: Dedicated Funds for Specific Purposes
(182 respondents)



Financial reserves

As shown in Chart 15, just less than one-half of responding museums (47%) have financial reserves, including 28% with reserves below one-quarter of their yearly operating expenses and 19% with reserves exceeding one-quarter of their operating expenses.

Chart 15: Financial Reserves (181 respondents)



OMA Note:

The 2014 Profile clearly demonstrates the differences in capacity and activity of Ontario's museums. The results also indicate substantive and defining commonalities, one of which is the funding challenge.

Through their collections and educational programming, museums provide an important public service. Public funds support this work and are critical to their operations.

For most responding museums, a substantial majority of this government support is municipal. Federal and provincial funding amounts account for a relatively small percentage of total revenues. However, the 2014 Profile also demonstrates the importance of provincial funding to increasing the capacity and impact of recipients, with respondents noting the value of the Province's support, namely through the CMOG program. These same respondents also noted the need for increased funding, and an improved and strengthened process and administration of the program.

Based on these results, the OMA and Ontario's museums seek to renew the current museum funding model to include:

- Adequate Ontario government investment, allowing museums to thrive, contributing to Ontario's communities and the economy.
- Responsiveness to the changing nature of Ontario and museum operations and capital needs.
- Transparency in decision-making around museum operating funding.
- Enhanced accountability in decision-making and reporting on the part of both government and museums.
- Stability and consistency in funding.
- Alignment with municipalities, and better leverage investments in education and tourism.

We seek to work with the Province of Ontario, and alignment with its new Culture Strategy, to achieve these goals.

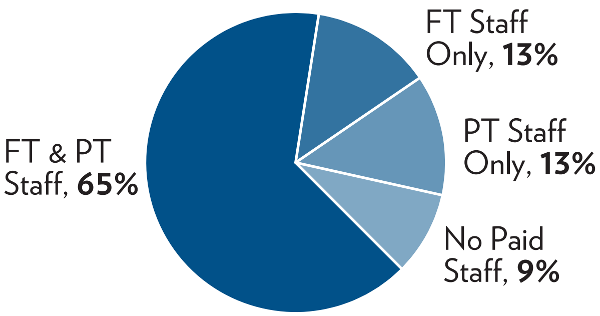
Of note, the OMA also recognizes the need for additional professional development and training around private sector engagement and fundraising, which could translate into new and more robust private sector support for the sector.

HUMAN RESOURCES

The survey results show that 78% of responding museums have at least one paid full-time staff member, and 78% have at least one paid part-time staff member. *Note: In the survey, full-time employees were defined as "employed persons who usually worked 30 hours or more per week." However, the survey did not instruct respondents regarding seasonal or full-year workers. As such, some museums included seasonal workers in their full-time or part-time numbers, while others did not.*

Chart 16 breaks down these numbers in slightly more detail, showing that 65% of responding museums have both full-time and part-time staff, 13% have full-time staff only, 13% have part-time staff only, and the remaining 9% have no paid staff at all.

Chart 16: Paid Full-Time (FT) & Part-Time (PT) Staffing (184 respondents)



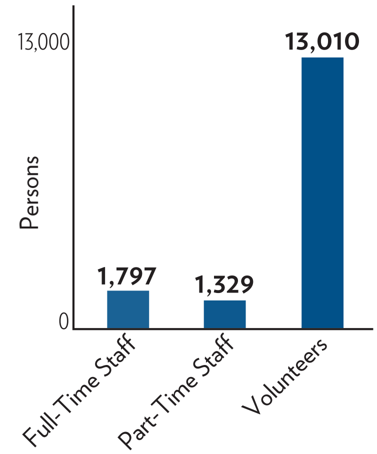
Number of staff and volunteers

Chart 17 shows that slightly more than 3,000 staff members work at responding museums, whether on a full-time (1,797) or part-time (1,329) basis.

More than 13,000 volunteers worked with Ontario museums during their last fiscal year. This number is more than four times the total staff level at Ontario museums.

Volunteers worked an estimated total of 777,300 hours (at 157 museums that reported their volunteer hours). This is the equivalent of 405 full-time, full-year jobs. Using the average hourly wage in Canadian arts, entertainment, and recreation industries in 2014 ($17.55), the 777,300 volunteer hours at these 157 museums can be valued at $13.6 million.

Chart 17: Number of Staff & Volunteers (184 respondents)



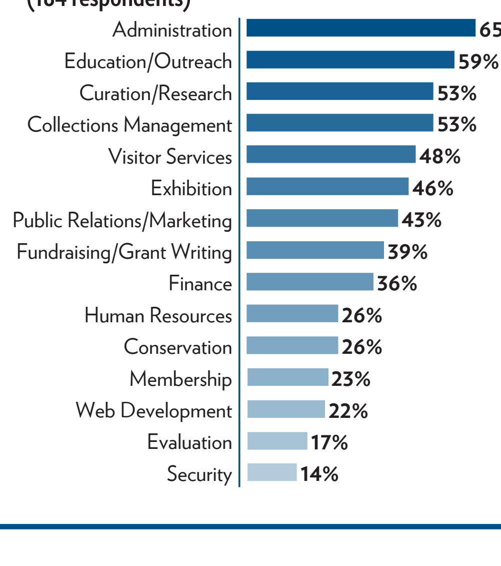
Staff turnover

There was a total of 569 departures from the 165 museums reporting staff turnover (average of 3.5 departures per reporting museum). This represents 18% of the total full-time and part-time staff members. *Note: This number may reflect the use of seasonal and summer student staff by many museums.*

Functions of paid staff

More than one-half of responding museums have a paid staff member devoting a majority of their time to administration (65%), education/outreach (59%), curation/research (43%), and collections management (53%). See Chart 18 for all such functions asked about in the OMA survey.

Chart 18: One Paid Staff Member Devoting Majority of Time (184 respondents)



Professional development

The vast majority of responding museums (90%) provide training and professional development opportunities for staff and volunteers. Most commonly, these opportunities include:

- Funding for professional development (seminars, courses, workshops, conferences): 71%
- Orientation program for volunteers: 65%
- Orientation program for paid staff: 65%
- In-house training program: 60%
- Volunteer engagement/retention/recognition program: 53%
- Collection of current reference material: 44%
- Orientation program for board/governing authority: 39%

In addition, 89% of museums indicated that all staff are "provided with information on health and safety hazards in the workplace and are trained in their management or mitigation". Similarly, 85% of museums reported that at least one staff member, whether paid or unpaid, has current First Aid training.

No-cost services

Some Ontario museums receive services that are provided at no cost by their municipality or parent organization. While 40% of the 184 museums indicated that they receive no such services, the most common services provided at no cost to museums are:

- IT: 30% of all 184 museums
- Facility Services (maintenance, janitorial, grounds-keeping): 29%
- Financial Management: 28%
- HR: 27%
- Communications/Marketing: 17%

Consultants hired

During the previous year, 41% of museums had hired an outside consultant. The most common reason for engaging a consultant was strategic and business planning (mentioned by 26 museums). Other common reasons for hiring a consultant included architectural services (nine respondents), exhibit design and development (eight respondents), and conservation work (seven respondents). Between four and six respondents mentioned a number of other consultant activities, including human resources, collections management, graphic design, governance, engineering work, and web design.

OMA Note:

The 2014 Profile indicates the important role and substantial contribution of volunteers. From other OMA work, we also know that the nature of volunteering is changing, with volunteers themselves aging. The 2014 Profile results indicate that these volunteers out-number staff by four to one. Ontario's museums must proactively plan and adjust to meet this challenge while continuing to maintain their collections and increase public engagement.

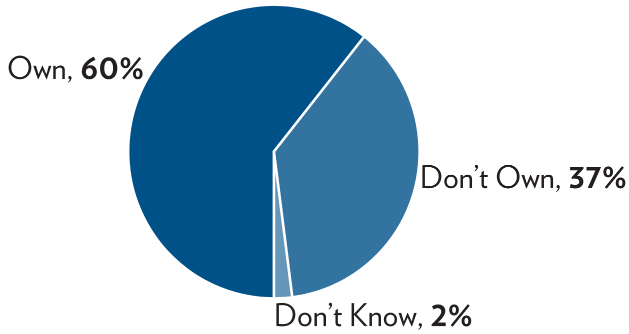
A new volunteer paradigm is needed, and new innovative approaches through shared service delivery can be explored, including shared curators or conservators. The OMA has an important contribution to make in developing and delivering the needed training and professional development. To successfully address future staffing needs, new investments should also be made in the career development of emerging museum professionals.

FACILITIES

A majority of responding museums own their own facility, as shown in Chart 19.

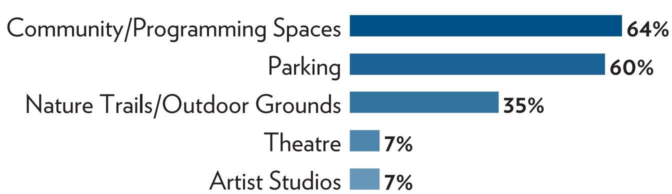
For many museums, their facilities are a source of revenue generation: 67% of museums that own their facilities also rent them out for non-mission-related purposes.

Chart 19: Facility Ownership (182 respondents)



As shown in Chart 20, a majority of museums have public use spaces such as community or programming spaces (64%) and parking (60%). About one-third (35%) have nature trails or outdoor grounds accessible to the public. Only a small number have theatres or artist studios.

Chart 20: Spaces for Public Use (182 respondents)



ArtsBuild Ontario's Bricks&Mortar survey results for museums

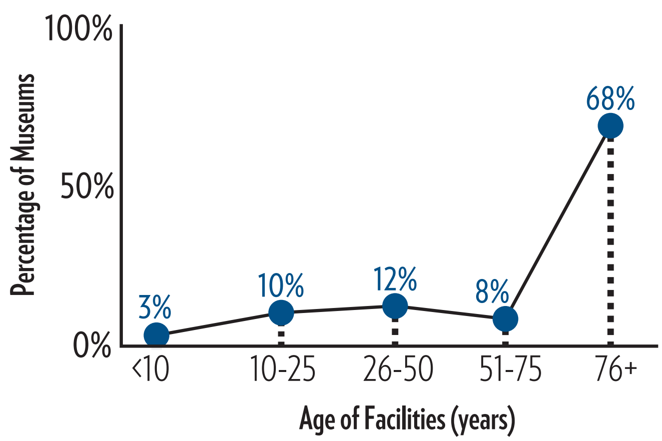
This section contains some highlights of museum-relevant data from ArtsBuild Ontario's Bricks&Mortar survey. That online survey aims to provide a facilities inventory, including "current information about the facilities used and needed by Ontario's arts organizations."[6]

Ninety-six museums provided information about 114 different facilities, 43% of which are municipally owned, 39% owned by the museum itself, and 18% leased.

A substantial minority of museum facilities are designated heritage facilities (43%) and/or on a heritage registry (42%).

Chart 21 shows that the museums' facilities tend to be very old: about two-thirds were built more than 75 years ago.

Chart 21: Age Range of Facilities (103 respondents)



The museum facilities are of a wide range of sizes:

- 0 - 1,000 square feet: 12%
- 1,000 - 2,500: 28%
- 2,500 - 5,000: 20%
- 5,000 - 10,000: 12%
- 10,000+: 28%

Fifty-eight museums reported their facilities expenditures, with average expenditures of $431,000 and median expenditures of $122,000.

Only 38% of museums reported having a capital reserve fund, with an average fund level of $179,000 and a median level of $75,000.

Respondents were asked about the adequacy of each of their facilities in meeting "all the needs of its users / your organization." Only 44% of museum respondents indicated that their facilities meet their needs.

[6] See http://www.artsbuildontario.ca/bricksandmortar/bricksmortar-faqs/

Inadequacies most commonly exist in spaces used for exhibition (30%), storage (29%), education (14%), and public presentation (10%). Reasons for insufficient access of facilities include:

- Size: 33%
- Cost: 22%
- Accessibility: 13%
- Technical Suitability: 12%
- Location: 9%
- Availability: 8%
- Other: 5%

Given the inadequacy of many facilities, it is not surprising that museums reported 91 plans for future facilities, including:

- Renovating an existing facility: 37% of the 91 future plans
- Building a new facility: 35%
- Building an addition: 11%
- Leasing a new facility or additional space: 10%
- Purchasing a new facility or additional space: 4%
- Purchasing land for the future: 2%

Most of these future capital plans are in the early stages: 42% of the plans were characterized by museums as "We Have a Dream - No Significant Planning Yet," and another 21% are in the early planning stages (with a "case developed and tested"). Other plans are somewhat more advanced, including 16% at the intermediate stage (with needs assessed), 14% with most or all of the feasibility studies complete, 3% that are "almost there – funding plan done," and 4% that are "ready to go."

OMA Note:

Along with collections, many museums also own facilities. These buildings are often important community landmarks and designated heritage sites that are maintained for public benefit and enjoyment. They are also iconic places, sources of community identity and pride. From other OMA work, we know many of these facilities are aging and have ongoing and increasing maintenance needs. The OMA believes this represents an opportunity — to use and care for museums' spaces through new approaches, including regional collections storage facilities and the community hub model. The OMA will explore these opportunities fully, engaging in collaborations and partnerships with museums, other cultural organizations, community groups, and public institutions.

WEBSITES AND SOCIAL MEDIA

Ninety-six percent of the museums reporting to the OMA have an active website. Eighty-three museums reported a total of 13.7 million visitors to their websites, with the average number of visitors per reporting museum at 165,030.

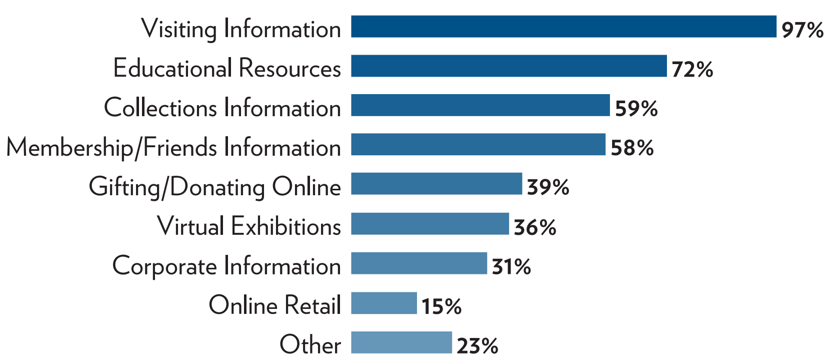
Museums were asked about the type of content that they make available on their websites. Among the museums with a website, almost all provide basic visiting information, and a majority also provide education resources, collections information, and membership or friends information (as shown in Chart 22).

Social media tools are important to the communications and marketing efforts of Ontario museums. Eighty-six percent of surveyed museums participate in at least one social media channel. Most common are Facebook (81% of museums) and Twitter (62%). Less than half of surveyed museums participate in the other social media channels in the survey: YouTube (35%), blogs (15%), Instagram (13%), and Flickr (7%).

Other social media channels mentioned by the museums include:

- Pinterest: 7 museums
- LinkedIn: 3 museums
- Tumblr: 2 museums
- Google +: 2 museums
- TripAdvisor: 2 museums
- Vimeo: 2 museums

Chart 22: Information on Websites (175 respondents)



OMA Note:

Like other public organizations, Ontario's museums want to maximize the benefits of new technologies and social media in delivering their work, especially to:

- Foster new relationships and networks;
- Create immersive and dynamic experiences for onsite and online visitors;
- Enable public access to collections, programs and resources, and staff.

The OMA will support this goal through the development of tools, best practices, and models, as well as through the provision of necessary training and skill development.

Responding museums were asked a series of questions about their operating practices, policies, and insurance coverage.

A majority of responding museums have an exhibition policy (75%), an interpretation and/or education policy (72%), and a community relations and/or engagement policy (54%). Only 20% of museums have none of these policies.

Museums were asked whether they have a number of other policies and plans:

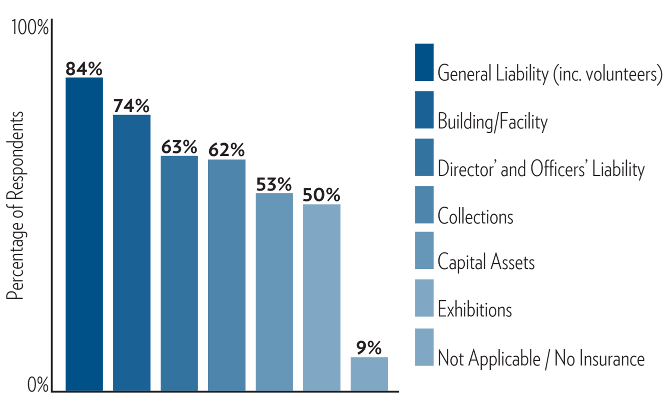
- 74% have a written emergency/disaster plan; 83% of these plans include the collection.
- 64% have a written maintenance manual, providing for regularly scheduled inspections, ongoing housekeeping and repairs, and capital upgrades.
- 26% have a written fundraising policy.

Most museums make public an annual financial report; 82% of responding museums do so, in the following ways:

- Digital copy posted on website and hard copy distributed to stakeholders: 20%
- Digital copy posted on website (only): 11%
- Hard copies distributed to stakeholders (only): 24%
- By request only: 21%

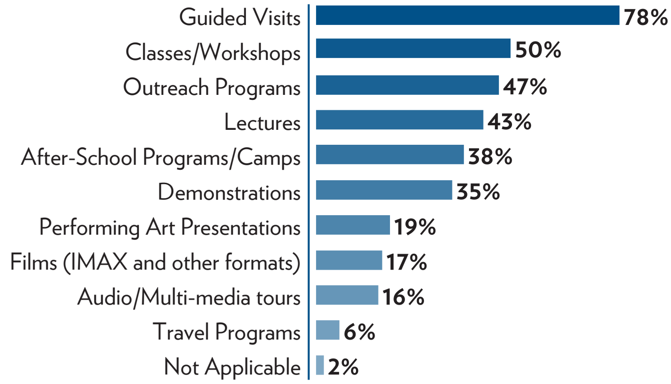
A majority of responding museums carry various types of insurance, as shown in Chart 23.

Chart 23: Insurance Coverage (182 respondents)



Programs and events

Chart 24: Programs for General Public (184 respondents)



The vast majority of Ontario museums deliver programs or events: 159 museums (86% of the 184 responding museums) reported a total of 5,500 programs or events that attracted more than 750,000 participants. The four largest museums responding to the survey, all provincial or national institutions, account for just 7% of the 5,500 programs or events but 45% of total program participants.

A number of museums' programs are specifically targeted to certain groups, including:

- Toddlers/pre-schoolers: 43,400 participants (average of 820 for the 53 museums reporting)
- Youth: 66,700 (average of 775 for the 86 museums reporting)
- Seniors: 43,900 (average of 720 for the 61 museums reporting)
- Aboriginal groups: 55 (average of 2 for the 28 museums reporting)
- Recent Immigrants/New Canadians: 124 (average of 4 for the 31 museums reporting)
- Ethnic/cultural groups: 221 (average of 11 for the 20 museums reporting)
- Socially and Economically Disadvantaged/ Vulnerable groups: 42,100 (average of 1,317 for the 32 museums reporting)
- Persons with Disabilities: 42,700 (average of 1,294 for the 33 museums reporting). *Note: The survey defined persons with disabilities to include challenges related to seeing, hearing, mobility, flexibility, dexterity, pain, learning, developmental, mental/psychological, and memory.*

In terms of programs offered to the general public, Chart 24 shows that guided visits, classes or workshops, outreach programs, and lectures are most common.

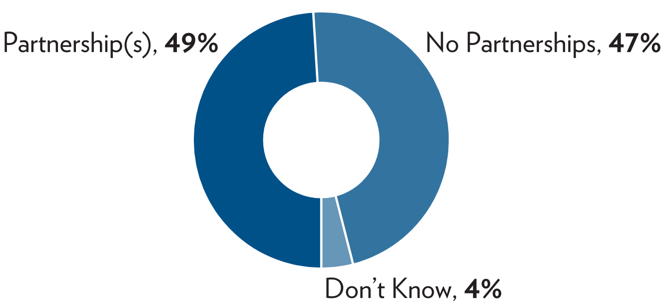
Temporary exhibits

The 162 museums reporting temporary exhibits indicated that they displayed a total of 850 temporary exhibits in the previous fiscal year, for an average of five exhibits per reporting museum. Seventeen percent of museums did not have temporary exhibits.

Partnerships

Chart 25 shows that responding museums are almost evenly split between those that have established formal partnerships (with signed agreements and shared resources with any other institutions) and those without such partnerships in the past fiscal year.

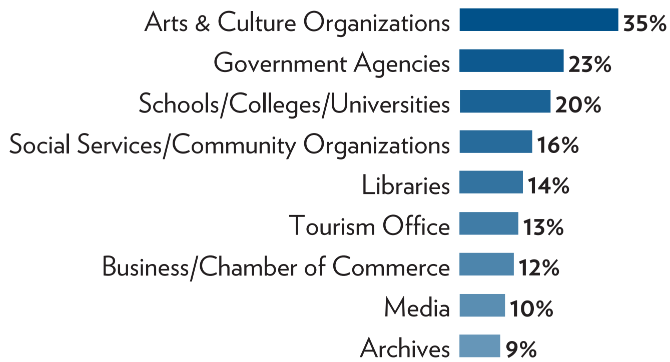
Chart 25: Museums With/Without Partnerships (184 respondents)



Museums participated in 736 partnerships, for an average of nearly nine partnerships for each of the 86 museums reporting their number of partnerships.

Not surprisingly, the most common partner organizations are other cultural organizations, followed by government agencies and schools. Many museums also partner with social service organizations, libraries, tourism offices, and businesses, as shown in Chart 26.

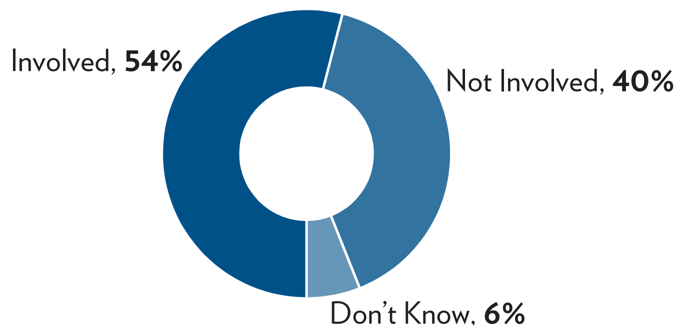
Chart 26: Partner Organizations (184 respondents)



Participation in local cultural planning

A majority of Ontario's museums are actively involved in local cultural planning. As shown in Chart 27, 54% of responding museums have been involved in these planning processes.

Chart 27: Involved in Local Cultural Planning (184 respondents)



OMA Note:

Ontario's museums deliver important public programs to their communities. The 2014 Profile indicates opportunities to engage with non-traditional museum goers, to become more diverse and accessible places in service of various groups of Ontarians. The results also indicate an important area of growth – specifically, more effective partnerships and collaborations with other organizations to deliver museum work and increase their community and collective impacts.

In 2014-15, 173 Ontario-based community museums received funding through the provincial Community Museum Operating Grant (CMOG) program. To be eligible for this funding, museums must:

- Have a collection of historical artifacts.
- Have a curator (who may also be the director or manager of the museum).
- Operate on a not-for-profit basis.
- Be open to the public for a minimum number of days and hours per year, with different standards for seasonal and year-round museums.

Overall CMOG funding

The 173 CMOG-funded museums received a total of $5 million in provincial funding in 2014-15. On a per capita basis, CMOG funding in 2014-15 represented $0.36 per resident of the province. In 2014-15, for 81 CMOG-funded museums reporting financial details to the OMA, CMOG funding represented 5.9% of total revenues.

No-cost services

Many of the 130 CMOG-eligible museums are part of a municipal structure. As such, a relatively high proportion (63%) receive some type of service provided at no cost by another section of the municipality. These services include:

- IT: 34% of CMOG-eligible museums
- HR: 32%
- Financial Management: 31%
- Facility Services (maintenance, janitorial, grounds-keeping): 30%
- Communications/Marketing: 21%

Comparison of CMOG recipients and non-recipients responding to the OMA survey

Ninety-one museums responding to the OMA survey are CMOG recipients. These 91 museums represent:

- 53% of all 173 CMOG recipients in 2014-15.
- 49% of all 184 OMA survey respondents.
- 70% of the 130 OMA survey respondents that are eligible for CMOG.

Based on the criteria noted above and responses to the OMA survey, 39 survey respondents were eligible for CMOG funding but did not receive a grant in their most recent fiscal year. There are an additional 14 museums that self-identified as a community museum in the OMA survey but are not eligible for CMOG funding.

The rest of this section identifies differences between the 91 CMOG recipients and the 39 museums that are eligible for CMOG but do not receive funding. These museums will be referred to as "CMOG recipients" and "non-recipients" respectively.

A much larger proportion of CMOG recipients (64%) than non-recipients (15%) are part of a municipal government structure. In contrast, fewer CMOG recipients (27%) than non-recipients (62%) are independent not-for-profit organizations. Three percent of CMOG recipients are part of a conservation authority, while no non-recipients have this structure. Five percent of CMOG recipients and 23% of non-recipients have another governing authority.

Almost all CMOG recipients are OMA members (98%, or 89 of 91), compared with 74% of non-recipients (29 of 39).

CMOG recipients tend to have higher revenues, larger collections, and more staff than non-recipients:

- Median revenues are $283,000 for CMOG recipients but only $159,000 for non-recipients. *Note: The financial differences are based on those museums reporting financial data in the OMA survey: 81 of the 91 CMOG recipients (89%), and 14 of the 39 CMOG-eligible museums (36%).*
- CMOG recipients are much more likely to have very large collections, with 67% of CMOG recipients having collections with more than 10,000 objects, compared with 29% of non-recipients.
- As shown in Chart 28, CMOG recipients are much more likely to have both full-time and part-time staff than non-recipients.
- For CMOG recipients, the average number of

full-time staff members is 5.2, compared with 1.7 for non-recipients. Similarly, the average number of part-time staff members is 7.4 for CMOG recipients, compared with 2.7 for non-recipients.

Chart 28: Full-Time (FT) & Part-Time (PT) Staffing at CMOG Funded Museums (130 respondents)

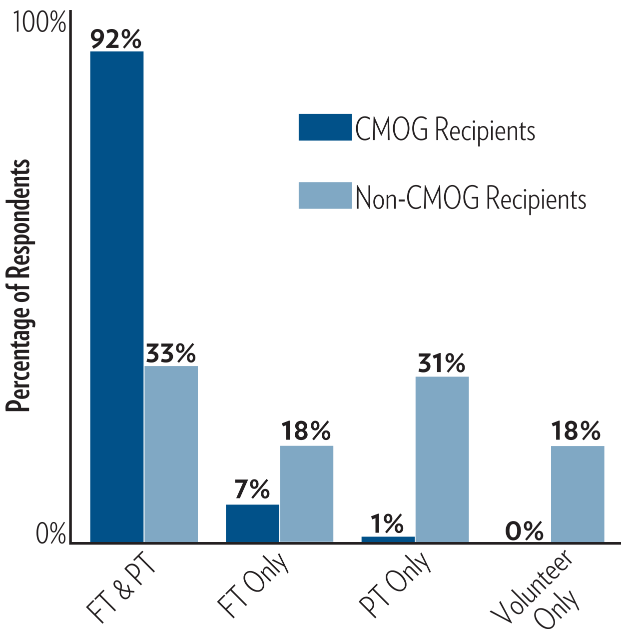
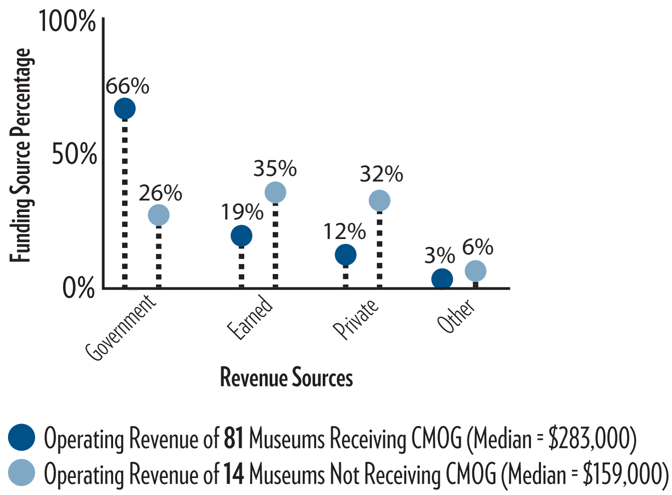


Chart 29 shows that CMOG recipients and non-recipients have very different sources of revenue. The main difference is that government revenues are much larger for CMOG recipients than non-recipients (66% and 26%, respectively). Because many CMOG-funded museums are part of a municipal government structure, they receive much higher municipal support (56% of total revenues) than non-recipients (15%).

On average, CMOG recipients obtain 7% of their revenues from provincial sources (overall, not just CMOG). Excluding one outlier with significant provincial project funding, the 13 other non-recipients receive, on average, 2% of their funding from provincial sources, much lower than the 7% for CMOG recipients. Seven of these 13 organizations receive no provincial funding at all.

In part due to their lower government funding, non-recipients have lower total revenues, generate a higher percentage of these revenues from earned sources, and a larger proportion of their revenues from the private sector.

Chart 29: Operating Revenues of CMOG Recipients and Non-Recipients (96 respondents)



CMOG recipients attract many more visitors than non-recipients. Median paid attendance at CMOG recipients is 3,900, compared with just 1,000 at non-recipients. Similarly, median unpaid attendance at CMOG recipients is 4,400, much higher than the median of 1,300 at non-recipient museums.

Forty-four CMOG recipients and 22 non-recipients provided an estimate of the locations of residence of their visitors. As shown in Table 1, visitors to CMOG recipient museums are predominantly local (56%), while another 24% come from other areas of Ontario. Nine percent of visitors to CMOG recipients are from other provinces or territories, and 11% come from other countries.

Table 1:
Location of Visitors to CMOG Recipient & Non-Recipient Sites

Residence of Visitors	CMOG Recipients (44)	Non-Recipients (22)
Local	56%	40%
Ontario	24%	39%
Canada	9%	13%
International	11%	9%

Visitors to non-recipient museums are evenly split between local residents (40%) and visitors from other areas of Ontario (39%). Thirteen percent of visitors to non-recipients are from other provinces or territories, and 9% come from other countries.

For the purposes of this analysis, the project researcher grouped Ontario's 15 tourism regions into five larger areas in order to compare CMOG recipients and non-recipients across broader geographic ranges. It should be noted that the five larger areas are not official Ontario geographic regions. The broader areas provide an indication of under or overrepresented geographic ranges among the 91 CMOG recipients and 39 non-recipients responding to the OMA survey.

Two geographic areas are underrepresented among CMOG recipients compared with non-recipients:

- Eastern Ontario (tourism regions 9-11) includes 14% of CMOG recipients responding to the OMA survey but 23% of non-recipients.
- Northern Ontario (regions 13a, 13b, and 13c) includes 14% of CMOG recipients but 21% of non-recipients.

The only area that is overrepresented among CMOG recipients is Southwestern Ontario (regions 1-4), which includes 41% of CMOG recipients but only 26% of non-recipients.

The two other geographic areas have similar numbers of CMOG recipients and non-recipients. The Greater Toronto Area (regions 5 and 6) includes 16% of CMOG recipients and 18% of non-recipients, and central / cottage country areas (regions 7, 8, and 12) include 14% of CMOG recipients and 13% of non-recipients.

Analysis of CMOG grants as a percentage of expenses

Eighty-one of the 91 CMOG grant recipients submitted financial information as part of the OMA survey. The analysis below compares the actual grant levels of these 81 CMOG recipients and an eligible funding level using a formula outlined in Ontario Regulation 877, which governs the CMOG program. The Regulation also provides for funding levels to be determined by multiplying the most recent grant received by "a factor determined by the Minister after considering the amount voted by the Legislature for grants under this Regulation."

In principle CMOG funding is based on a percentage of operating expenses; some expenditures are considered non-eligible. Because only total expenses were captured in the OMA survey (not CMOG-eligible expenses), the analysis below uses total expenses as a proxy for eligible expenses.

Note: In fact, the analysis was done three different ways, with very similar outcomes. The second version of the analysis used a 10% reduction in total expenses to estimate eligible expenses. The third version reduced total expenses by 10% for smaller museums and 5% for larger museums. Because all three versions of the analysis yielded very similar results, only the first version is reported here.

The 81 grant recipients received $2.4 million in CMOG funding, while their eligible grant amount was estimated at more than $5 million. The actual grant level of the 81 recipients was approximately 45% of their eligible funding level.

Based on their total expenses, the 81 recipients were divided into four groups of 20 or 21 recipients each. This analysis shows that actual CMOG funding, as a percentage of maximum funding, varies by size of museum. On average, the smallest and largest museums receive lower proportions of their maximum funding level than mid-sized museums:

- 21 CMOG recipients with the lowest total expenses: actual funding averages 38% of maximum funding
- Second group of 20 CMOG recipients: 63%
- Third group of 20 CMOG recipients: 61%
- 20 CMOG recipients with the largest expenses: 37%

OMA Note:

Ontario's museums hold the province's public collections in trust, an important principle that has guided the funding relationship between museums and the Ontario government.

One hundred and seventy three of Ontario's museums receive importantprovincial support for their operations through the CMOG program. For the past decade, Ontario has invested approximately $5 million annually in these museums, an amount that has remained unchanged.

Ontario Regulation 877 of the *Ontario Heritage Act* provides a desired ratio of public funding through the CMOG program. Recognizing the prerogative of the Minister to adjust the factors considered in the funding, it is clear that there is a growing gap between the operations and capacity of museums and the level of public funding made available.

The 2014 Profile indicates the gap between funding received and eligible funding, as identified in Regulation 877, is over 50% for 81 respondents. The 2014 Profile also shows a misalignment in funding percentages awarded to museums of different operating size.

That said, we know that the Province's long-standing investment in CMOG has strengthened the museums receiving this funding. Profile respondents that receive CMOG funding demonstrate greater capacity and impact in their communities, providing benefit to Ontarians.

To move forward and increase the impact of public museum funding, a better understanding and communication of the decision-making process and the determination of funding levels is needed.

Building on the findings of the 2014 Profile and the recommendations of *Ontario's Museums 2025*, we recommend a renewed funding model to be developed by the Province of Ontario in discussion with the OMA and Ontario's museums. This recommendation is consistent with Ontario's anticipated Culture Strategy.

The OMA recommends the following key principles for a renewed program:

- Outcome based, with decisions based on the public impact museums have with their audiences in their communities.
- More inclusive and responsive to the changing environment, based on criteria that are transparent to all museums in Ontario. The sector should work with government in the development of benchmarks and criteria that support this goal.
- More adequately funded, with the capacity to provide sufficient support that ensures Ontario government funding has an impact in the operations of museums.

For additional information, see OMA Note on page 19.

MUSEUM DIFFERENCE BY REVENUE SIZE

The project researcher divided museums into revenue groups based on significant gaps in the revenue data. It was clear that the four largest museums (all national or provincial institutions) should comprise their own group, and it was also evident that the five other museums with more than $2 million in total revenues should also form their own group. The researcher tried to keep a fairly similar number of museums in the other groups, while still looking for substantial gaps in the revenue data. Because of these gaps, the revenue maximum in each group is less than the revenue minimum in the subsequent group.

Revenues by budget size

Table 2, which provides a breakdown by budget size of the 118 museums reporting their operating revenues, shows that museums of different budget sizes have substantially different revenue components. As a percentage of total revenues:

- Earned revenues are highest for larger museums.
- Private sector revenues show no consistent pattern by size of museum.
- Government revenues are lowest for the second-largest group of museums (budgets between $2 million and $6 million): 40%. *Note: All other museum groups receive over one-half of their total revenues from government sources.*
- "Other" revenue sources are quite consistent among the six groups of museums.

Table 2: Revenue Sources by Budget Size

Revenue Groups	Museums	Earned	Private Sector	Government	Other
<140K	33	19%	16%	60%	5%
160K-320K	27	12%	14%	70%	4%
350K-650K	24	20%	13%	63%	4%
700K-1.9M	25	21%	8%	67%	5%
2M-6M	5	30%	26%	40%	4%
40M+	4	27%	11%	57%	6%
All Museums	**118**	**26%**	**12%**	**57%**	**5%**

Government revenues by budget size

Table 3, which provides a further breakdown of government revenues by size of museum, shows that there are significant differences in the sources of public sector funding by budget size.

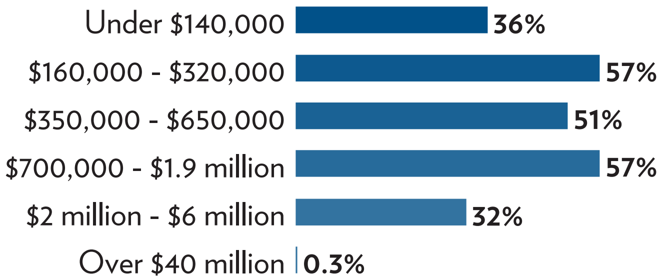
Municipalities are the main public sector funder for most groups of museums, with the exception of the largest museums. The four largest museums receive almost all of their government funding from provincial and federal sources. Provincial sources account for 22% of the revenues of these museums, and federal sources account for 35%. The four largest museums account for 92% of total provincial funding and 97% of federal funding for all 118 museums.

Table 3: Government Revenues by Size of Museum

Revenue Groups	Museums	Municipal	Provincial	Federal
<140K	33	36%	13%	11%
160K-320K	27	57%	9%	4%
350K-650K	24	51%	9%	4%
700K-1.9M	25	59%	5%	3%
2M-6M	5	32%	4%	4%
40M+	4	0.3%	22%	35%
All Museums	**118**	**12%**	**18%**	**27%**

Chart 30 focuses on municipal revenues by budget size. Municipal revenues represent over one-half of total revenues for the three groups of museums with revenues between $160,000 and $1.9 million. Municipal revenues represent about one-third of revenues of the smallest museums (budgets under $140,000) and those with budgets between $2 million and $6 million. The very large provincial and national museums receive almost no municipal funding.

Chart 30: Municipal Funding as Percentage of Total Revenue
(118 respondents)



Staff and volunteers by budget size

The four largest museums responding to the survey account for 66% of the full-time staff members and 42% of the part-time staff at all museums (as shown in Table 4). On the other hand, the four largest museums represent 17% of all volunteers and 44% of total reported volunteer hours.

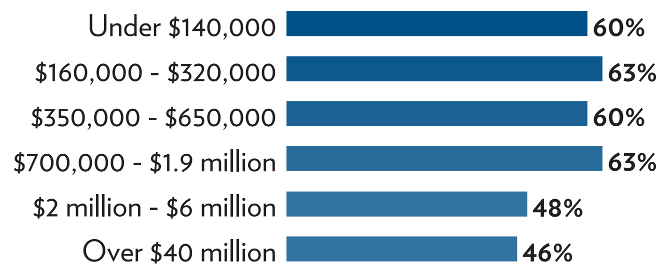
Table 4: Full-Time and Part-Time Staff by Revenue Size

Revenue Groups	Museums	Full-Time	Part-Time	Volunteers	Volunteer Hours
<140K	25	39	86	1,140	54,467
160K-320K	26	58	62	1,065	53,190
350K-650K	23	92	112	1,590	94,642
700K-1.9M	25	184	335	2,880	118,887
2M-6M	5	155	30	1,204	29,817
40M+	4	1,044	450	1,601	280,827
All Museums	**108**	**1,572**	**1,075**	**9,480**	**631,830**

Staff costs are particularly high in small museums

Staff costs are highest for smaller museums (as shown in Chart 31). For the four groups of museums under $2 million in revenue, staff costs represent 60% or more of total expenses. Staff costs account for just under one-half of the expenditures of larger museums.

Chart 31: Staff Cost as Percentage of Expenses
(118 respondents)



Attendance by budget size

Table 5 presents attendance statistics by size of museum, based on the 106 museums that reported both their attendance figures and their operating revenues.

Three of the very large provincial and national museums account for 58% of total attendance at the 118 museums and 75% of total paid attendance. (These percentages are actually low, because a fourth very large museum did not report its attendance.)

For 24 museums with budgets between $700,000 and $1.9 million, unpaid attendance is over 450,000, which is more than double their paid attendance (203,000). This is the highest such ratio among the different sizes of museums.

Table 5: Paid and Unpaid Attendance by Budget Size

Budget Size	Museums	Paid	% of Total	Unpaid	% of Total	Total Attendance	% of Total Attendance
Under $140,000	26	53,982	2%	63,102	5%	117,084	3%
$160,000 - $320,000	25	75,909	3%	126,360	10%	202,269	5%
$350,000 - $650,000	23	206,053	8%	138,184	11%	344,237	9%
$700,000 - $1.9 million	24	203,513	7%	450,101	37%	653,614	16%
$2 million - $6 million	5	150,814	5%	198,844	16%	349,658	9%
Over $40 million	3	2,054,245	75%	245,706	20%	2,299,951	58%
All Museums	**106**	**2,744,516**	**100%**	**1,222,297**	**100%**	**3,966,813**	**100%**

Admissions policies by budget size

A majority of responding museums in all budget ranges have paid admissions, as shown in Table 6. Admission by donation varies by size of museum, but not consistently. Free admission is provided by a segment of all museums under $2 million in revenues. Among museums with paid admissions, free times are provided by a vast majority in all revenue groups.

Table 6: Key Admission Policy Statistics by Size of Museum

Revenue Groups	Museums	Admission Policy			Museums with Paid Fee Providing Free Entry Times
		Paid	Donation	Free	
<140K	29	66%	24%	10%	89%
160K-320K	25	56%	20%	24%	86%
350K-650K	24	58%	25%	17%	64%
700K-1.9M	25	60%	12%	28%	87%
2M-6M	5	60%	40%	0%	67%
40M+	4	100%	0%	0%	100%
All Museums	**112**	**62%**	**21%**	**18%**	**83%**

The proportion of museums offering services in multiple languages increases by size of museum:

- Under $140,000: 23% offer services in at least one other language (in addition to English)
- $160,000 to $320,000: 19%
- $350,000 to $650,000: 63%
- $700,000 to $1.9 million: 52%
- $2 million to $6 million: 67%
- Over $40 million: 100%
- All museums reporting revenues: 40%

Education statistics vary by budget size

The vast majority of responding museums in all budget sizes provide educational programming tied to provincial curriculum requirements (see Table 7).

Both the number of school visits to museums and the number of students reached by school visits increase significantly by size of museum.

Table 7: Key Education Statistics by Size of Museum

Revenue Groups	Museums	Museums with Education Programs	School Visits	Students on School Visits
<140K	33	79%	342	9,521
160K-320K	27	89%	629	19,754
350K-650K	24	92%	807	42,175
700K-1.9M	25	88%	3,200	92,281
2M-6M	5	100%	609	51,762
40M+	4	100%	7,602	258,549
All Museums	**118**	**87%**	**13,189**	**474,042**

Facility ownership varies little by budget size

Facility ownership varies only slightly by size of museum, as shown in Table 8. Museums of all sizes are likely to provide spaces for public use, such as community/programming spaces. On the other hand, the likelihood that a facility rents out its spaces for non-mission-related purposes increases with budget size.

Table 8: Key Facility Statistics by Size of Museum

Revenue Groups	Museums	Own Facility	Community/ Programming Space	Rent out Facility
<140K	33	58%	70%	39%
160K-320K	27	63%	70%	33%
350K-650K	24	58%	71%	50%
700K-1.9M	25	63%	72%	54%
2M-6M	5	60%	100%	100%
40M+	4	75%	75%	75%
All Museums	**118**	**87%**	**13,189**	**474,042**

Note: The above statistics were also queried based on the full-time staff contingent at museums. However, there is a strong correlation between revenue size and staff contingent, and the statistics simply reiterate the key findings by revenue size.

MUSEUM DIFFERENCE BY REGION

The project researcher grouped Ontario's 15 tourism regions into five broad geographic areas in order to compare key statistics across geographic ranges with a larger number of survey respondents.

This section excludes the four provincial and national museums, as they would dominate the statistics for Eastern Ontario and the Greater Toronto Area. Readers should also keep in mind that, of the five museums with revenues between $2 million and $6 million, three are in the GTA and the other two are in Southwestern Ontario.

The five broad geographic areas are:

- Southwestern Ontario: tourism regions 1, 2, 3, and 4 (60 respondents, 33% of the 180 museums examined in this section)
- Greater Toronto Area (GTA): tourism regions 5 and 6 (33 respondents, 18%)
- Central/Cottage Country areas: regions 7, 8, and 12 (24 respondents, 13%)
- Eastern Ontario: tourism regions 9, 10, and 11 (37 respondents, 21%)
- Northern Ontario: tourism regions 13a, 13b, and 13c (26 respondents, 14%)

These broad areas, which are not official Ontario geographic regions, contain some anomalies. For example, the GTA grouping excludes the Halton Region (which is actually part of the GTA), because Halton is part of the southwestern Ontario tourism region #3 (including Hamilton). On the other hand, some parts of tourism region #6 (e.g., Hills of Headwaters) are not part of the GTA but are included here because most of this tourism region is within the GTA. Finally, Bruce County and Grey County, which are often included in Southwestern Ontario, are part of the Central/Cottage Country grouping (tourism region #12, including Barrie).

Revenues by region

Table 9, which provides a breakdown by region of 114 museums reporting their operating revenues, shows that museums in different regions have substantially different revenue components. As a percentage of total revenues:

- Earned revenues are highest for museums in the Greater Toronto Area.
- Private sector revenues are highest for museums in the Greater Toronto Area, Southwestern Ontario, and Northern Ontario.
- Government revenues are highest in Eastern Ontario and lowest in the Greater Toronto Area.

Table 9: Revenue Source by Region

Revenue Groups	Museums	Earned	Private	Government	Other
North	13	25%	13%	59%	5%
Eastern	19	6%	5%	87%	2%
Central	18	25%	9%	58%	8%
GTA	21	32%	24%	40%	4%
Southwestern	43	18%	13%	66%	4%
All Museums	**114**	**26%**	**12%**	**57%**	**5%**

Government revenues by region

Table 10, which provides a further breakdown of government revenues by region, shows that municipalities are the main public sector funder for museums in all regions of the province. That being said, there are substantial differences in the level of municipal support by region.

Table 10: Government Revenues as Percentage of Total Revenues

Region	Museums	Municipal	Provincial	Federal
Northern	13	46%	9%	4%
Eastern	19	81%	5%	1%
Central	18	46%	8%	4%
GTA	21	29%	6%	5%
Southwestern	43	58%	5%	3%
All Museums	**114**	**50%**	**6%**	**4%**

Staff costs represent the lowest percentage of expenses in Eastern Ontario and the Greater Toronto Area.

As shown in Chart 32, staff costs account for over one-half of the total expenses of museums in all regions of the province, with the highest proportion in Eastern Ontario (73%) and the lowest proportion in the Greater Toronto Area (52%).

Chart 32: Staff Cost as Percentage of Expenses
(118 respondents)

Attendance by region

Table 11 presents attendance statistics by region, based on 143 museums that reported their attendance figures (excluding four very large provincial and national museums).

Unpaid attendance is higher than paid attendance for museums in the Central and Southwestern Ontario regions. In particular, museums in the central/cottage country area have unpaid attendance that is more than double their paid attendance.

Admissions policies by region

A majority of responding museums in all regions except the Greater Toronto Area have paid admissions. In the GTA, 46% of museums have a paid admissions policy. Paid admissions are most common in Northern Ontario (60%) and Eastern Ontario (61%), as shown in Table 12. Admission by donation varies somewhat by region. Free admission is most common in Southwestern Ontario (26% of museums).

For museums with paid admissions, free times are provided by a large majority in all regions.

Table 12: Key Admission Policy Statistics by Region

Region	Museums	Admission Policy			Museums with Paid Fee Providing Free Entry Times
		Paid	Donation	Free	
Northern	25	60%	20%	20%	87%
Eastern	28	61%	18%	21%	82%
Central	24	58%	25%	17%	64%
GTA	28	46%	32%	21%	85%
Southwestern	58	52%	22%	26%	76%
All Museums	**163**	**55%**	**23%**	**22%**	**78%**

Table 11: Paid and Unpaid Attendance by Region

Budget Size	Museums	Paid	% of Total	Unpaid	% of Total	Total Attendance	% of Total Attendance
Northern	21	96,701	8%	47,119	4%	143,820	6%
Eastern	25	235,724	20%	125,696	10%	361,420	15%
Central	20	142,325	12%	291,706	23%	434,031	18%
Greater Toronto Area	23	234,375	20%	271,059	21%	505,434	21%
Southwestern	54	467,005	40%	536,151	42%	1,003,156	41%
All Museums	**143**	**1,176,130**	**100%**	**1,271,731**	**100%**	**2,447,861**	**100%**

About one-half of museums in Northern and Eastern Ontario offer services in more than one language. These are the highest such percentages among the five regions:

- Northern Ontario: 48% offer services in at least one other language (in addition to English)
- Eastern Ontario: 49%
- Central/Cottage Country areas: 35%
- Greater Toronto Area: 32%
- Southwestern Ontario: 31%
- All museums: 39%

Education statistics vary by region

A large majority of museums in all regions provide educational programming tied to provincial curriculum requirements (see Table 13).

Given its lower overall population, it is not surprising that both the number of school visits to museums and the number of students reached by school visits are lower in Northern Ontario than in other regions.

Table 13: Key Education Statistics by Size of Museum

Revenue Groups	Museums	Museums with Education Programs	School Visits	Students on School Visits
Northern	26	69%	314	8,743
Eastern	37	76%	706	23,004
Central	24	83%	941	35,259
GTA	33	67%	2,209	98,904
Southwestern	60	82%	3,541	148,305
All Museums	**180**	**76%**	**7,711**	**314,215**

Facility ownership varies somewhat by region

Facility ownership varies by region of the province, as shown in the Table 14. Museums in Northern Ontario are least likely to own their facility, followed by museums in the Greater Toronto Area.

Museums in all regions are likely to provide spaces for public use, such as community/programming spaces.

Museums in Central/Cottage Country areas are least likely to rent out their spaces for non-mission-related purposes.

Table 14: Key Facility Statistics by Size of Museum

Region	Museums	Own Facility	Community/ Programming Space	Rent out Facility
Northern	26	48%	54%	36%
Eastern	37	65%	68%	38%
Central	24	63%	71%	29%
GTA	33	55%	64%	42%
Southwestern	60	64%	60%	46%
All Museums	**180**	**60%**	**63%**	**40%**

OMA Note:

The 2014 Profile indicates some significant differences in museum work and funding based on the region in which the responding museums are located. Of note, municipal support is key to museum success, and yet inconsistent across regions. From other OMA work, we know this inconsistency is a concern in smaller communities facing an aging population, outmigration, and a decreasing tax base.

The OMA encourages provincial leadership to enable consistent and strong funding support, throughout all of Ontario's municipalities, to include the consideration of appropriate allocations from municipal programs, services, and investments.

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