

**the happy
museum**

Happy Museum thematic case study

Planning, developing and
measuring what matters

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This case study is relevant to:

- Senior management teams
- Learning and community engagement teams
- Curators
- Evaluators

This case study looks at how different museums and galleries have made use of Happy Museum tools and approaches to evaluation. With evaluation built in from the start, the organisations have a framework that leads them from a vision of the change they want to make, through to planning, developing, delivering and measuring what matters.

About our Story of Change

Since 2008, the Happy Museum project has been testing a set of working principles related to wellbeing through small commissioned projects. The funded projects used a 'Story of Change' tool to define their sustainable wellbeing vision for the project and to plan the route to achieve that vision. Story of Change is also known as Theory of Change; Logic Modelling is a similar approach. Using a story of change challenges 'business as usual' thinking by starting with the

'why?' – the overall purpose of a project – and working backwards. Moving to a focus on wellbeing and sustainability is not something that can be planned and executed in the way a construction project can be. Thinking about a convincing narrative that will take us in that direction and sharing it helps everyone to align around the new direction.

More about our Story of Change can be found on [page 16](#) and [online here](#)

Principles	How? The 'drivers' of success	What? The activity you deliver	Why? The difference we want to make
<ul style="list-style-type: none"> • Measure what matters • Be an active citizen • Pursue mutual relationships • Create the conditions for wellbeing • Learn for resilience • Value the environment and be a steward of the future as well as the past 	<p>How you go about setting up a Happy Museum approach: the drivers for change, commitments, set up and investments that underpin the approach.</p>	<p>The activity you deliver, working internally and/or externally, in partnership with staff, volunteers, participants and audience.</p>	<p>This is the reason we're here, the outcomes a Happy Museum can achieve. The difference we make to everyone, staff, volunteers, participants and audience.</p>

About this case study – and measuring what matters

Measuring matters. We pay attention to what we measure. The measurable outcomes defined for a project or an organisation inevitably shape their development. Counting admissions tells a museum or gallery nothing about the quality of visitors' experiences or the difference we make. Happy Museum thinking proposes using wellbeing and other 'alternative' measures for evaluation. With evaluation built into projects right from the start, organisations can plan, develop,

deliver and review their progress against the criteria established at the visioning stage.

Measuring things that really matter to the core values of an organisation can lead to a wide range of benefits. This case study looks at how different organisations have made use of – and benefitted from – Happy Museum tools and approaches to plan, develop and measure what matters.



1 How we plan for success: share a wellbeing vision, share a Story of Change

“We want to foster the idea that the Museum belongs to the community – local people, volunteers and staff.”

Jo Rooks, Museum of East Anglian Life

The Happy Museum principle of ‘measure what matters’ is not just about evaluation. We believe that evaluation should be built into projects right from the start – at the vision stage.

Some of the Happy Museums shared a wellbeing vision within the organisation and externally, many used a story of change to turn a vision into plans and to measure progress.

The Happy Museum Project grew out of the work of the **Museum of East Anglian Life**, which developed a set of wellbeing-focused principles to guide its work. In shortened form they are: **working together** with local communities; **courage** – bold thinking to enrich people’s lives; **belonging** – sharing knowledge of local heritage to inspire a greater sense of place; and **discovery**

– provoking thought through creating powerful experiences. “These four organisational pillars form our core identity and we use them as the basis for all our work – they inform everything we do, from new exhibitions to the kind of evaluations we use,” says Jo Rooks, Museum Learning Officer. “We want to foster the idea that the Museum belongs to the community – local people, volunteers and staff.” The museum’s vision led to it running a range of learning, training and skills development programmes to inspire and support young people and vulnerable groups. By 2015, the museum had helped over 70 young people find jobs since 2008, and provided accredited training for over 200 new learners. The museum works with local people and schools to co-create exhibitions linking the theme of wellbeing with local history.

[Read our case study on the Museum of East Anglian Life](#)



“Working on the Happy Museum project has made us think differently about what success looks like.”

Zoe Dunbar, Imperial War Museum North

“I now understand how the work that we do can benefit people’s health and wellbeing.”

Vicki Pipe, London Transport Museum

The **Imperial War Museum North** (IWM North) used the Happy Museum Story of Change tool to plan the museum’s overall vision. The tool was an integral part of a ‘Re-imagining IWM North’ development process the museum undertook. Using Happy Museum principles also helped them to focus on sustainability. “The museum’s leadership team used story of change to plan the future of IWM North and our core purpose and function,” says Head of Exhibitions Zoe Dunbar. The leadership team then used the tool to plan and chart progress. “Working on the Happy Museum project has made us think differently about what success looks like,” says Zoe Dunbar. “We have a stronger focus on the wellbeing agenda now rather than just marking success against visitor figures.” Charlotte Smith worked at IWM North during the Happy Museum project and has gone on to use the learning in her new job as Head of Discovery and Learning

at **Chester Zoo** where she can deepen her work on environmental sustainability. “I have used a version of story of change as one of the tools to develop and redefine new programmes and an overall strategy here at Chester Zoo. The focus on the difference an activity makes and measuring what matters is part of the way I think now.”

[Read our case study on IWM North](#)

London Transport Museum also used the story of change to kick off its Happy Museum funded project in 2012. During the Conversation Hub project, which was run in partnership with the homelessness charity St Mungo’s, the museum hosted a series of volunteering workshops for recently homeless people. Established volunteers mentored and worked with some of the new recruits. The story of change was used to define the project objectives and has since proved to be a useful tool for LTM’s Vicki Pipe. “Being involved in the Happy Museum has led to a lasting change in my practice and approach. I now understand how the work that we do can benefit people’s health and wellbeing. During the project we saw the volunteers make leaps and bounds in skills and confidence – the project showed how we can help and affect people’s lives for the better.” The team uses the approach for all their learning and participation service planning.





2 Thinking about the 'people who matter'

The Story of Change methodology asks organisations to identify the 'people who matter' in making the vision become reality (this approach borrows from the social accounting principle of 'materiality').



"The fact we do the count and write it down is a way of saying wellbeing matters in this organisation."

Kim Pickin, The Story Museum

The museum's staff, volunteers and other close stakeholders are inevitably key to identifying the people who matter – and beyond, sharing the vision with them. Happy Museum thinking advocates seeking to use everyone's potential, to share ownership, seek mutual benefits, and work across hierarchies. All this helps to motivate people and bring their skills to the fore.

For example, at **Manchester Museum**, the people who matter were the front of house staff who were trained in child-led play, and were asked to carry out the observational evaluation of play sessions and to lead on social media reporting of activities.

At the **Story Museum** in Oxford, one legacy of the Happy Museum project is that several years after the project ended, the museum still uses the 'happy tracker' in its weekly staff meetings. With this tool each person shares a score on a happiness and wellbeing scale from 0 to 10. The scores are noted down and tracked by individuals and by the team. Crucially, the scores are not commented on or discussed in the meeting. The happy count is treated as an order

of business at the start of the meeting. "We are used to doing it now," says Kim Pickin, co-director of The Story Museum. "The happy count has been a very good tool for us, says Kim. "Every six months, we review using it. When new people start we ask them if they find it a bit weird, but people say that it is a good thing. The fact we do the count and write it down is a way of saying wellbeing matters in this organisation." The Story Museum found that this tool didn't necessarily make people happier, but did build kindness, team spirit and resilience when times were hard.

[Read our case study on the Story Museum](#)

[Read about our happy tracker tool](#)

3 The delivery: following through on evaluation plans

Deciding what matters right from the start shapes the design of activities, informs plans for their delivery, and decides how and what you must measure to evaluate progress and impact.

“We also have anecdotal evidence that their wellbeing increased, through new friendships, and fun and being involved in a group activity.”

Brendan Carr, Reading Museum

Starting to re-think what matters made some museums use different tools for evaluation. **Reading Museum** developed a ‘time capsule’ tool to help it evaluate the impact of its Happy Museum funded project, a community history project focusing on three deprived parts of the town with a reputation for crime and anti-social behaviour. By exploring their hidden heritage, the aim of ‘Hidden Histories’ was to instil a more positive sense of place. During the project, 60 different participants worked with the local

neighbourhood action groups, museum staff, local historians and others to research past lives of the different areas. Temporary ‘pop up’ exhibitions were set up in the neighbourhoods and 15,000 colourful ‘pocket history’ pamphlets were created and distributed. The ‘time capsule’ evaluation was used to see if participants had changed their views of the areas they live in. Participants were asked at the start of the project to pick words they felt that described their area from a pack of word cards. Their selection was recorded and put away in the capsule, and the process was repeated at the end of the project. The selections were compared and analysed. “The data showed a slight increase in the number of positive words participants used to describe their neighbourhoods. We also have anecdotal evidence that their wellbeing increased, through new friendships, and fun and being involved in a group activity.”

[Read our case study on Reading Museum](#)

[Read about our time capsule tool](#)



“We have learnt many simple, but effective evaluation tools that can be easily integrated into projects.”

Alice Briggs, Ceredigion Museum



Manchester Museum used observational analysis as a new tool for measuring the quality of play in activities for children as part of a Happy Museum funded project on child-led play. The museum had worked hard on being a welcoming, informal and accessible place for visitors. Play spaces and activities for children are well established. To develop its offering for younger visitors further, the museum decided to focus its Happy Museum project on developing policy and practice on child-led play. The observational technique used involved front of house staff observing the children and adults during the activities and recording group sizes and composition, observed emotions and intensity, as well as notable anecdotes and quotes. The museum was able to analyse the difference having an adult in a group made to the kind of responses, the impact of group size and other factors. The museum went on to develop a 'Playful Rule Book' (a second Happy Museum project) as a resource for its own staff and for other museums and galleries.

[Read our case study on Manchester Museum here](#)

[Read about our observational analysis resource here](#)

[See the Rules for a Playful Museum here](#)

For some small museums, such as **Ceredigion Museum** in Aberystwyth, being able to use low-tech tools and retrospective analysis was helpful. “We had done lots of fantastic projects in past, but we didn’t know what their impact was,” says Alice Briggs, assistant curator. “The Happy Museum idea of measuring what matters has been really important for us. We have learnt many simple, but effective, evaluation tools that can be easily integrated into projects.” The museum used a focus on social impact assessment as part of its (successful) Heritage Lottery capital project funding bid. “We are working on how to set up integrated evaluation into the community engagement plan that forms a large part of the implementation of that project.” The museum has developed a narrative evaluation approach based on retrospective analysis of comments in the visitors’ book. (This was inspired by the work at the **Beaney House** in Canterbury that embedded narrative evaluation feedback into the fabric of its Happy Museum project).

[Read our case study on Cerdigion Museum](#)

[Read our case study on Beaney House](#)

[Read about our narrative evaluation](#)

4 The delivery: extending the role of the senses



Museums and galleries have found that they can engage audiences with a playful approach, through aesthetics or by appealing to the feelings and the senses – and that this way of working can extend to how they evaluate their responses. Museums are very good at focusing on the intellect, but this approach calls on emotional intelligence.

As well as the happy tracker for staff, the **Story Museum** also use a 'mood tree', on which visitors put a coloured leaf representing their mood on the tree when they arrive and another when they leave. This way, museum staff could get a visual snapshot of the difference that the museum experience had made to visitors. The Story Museum has also had success with an exit questionnaire linked to a small gift – tins of tea with Alice in Wonderland on them – with

some 90% of visitors agreeing to answer the questionnaire. Some Story Museum exhibits allow visitors to write their reactions and comments onto labels and tie them on or next to an exhibit. The museum's first exhibition – 'Other Worlds' – had a remarkable level of engagement, with 6,000 written contributions in 18 days.

Having evaluation embedded into the fabric of an exhibition, rather than tagged on as an afterthought, was also an approach used at the **Beany House** in Canterbury, where the 'cultural prescriptions' given out at the Paper Apothecary had a tear-off feedback section that asked visitors to record how the prescription worked for them. During its two-week run, the Paper Apothecary exhibit had around 300 forms returned.



[Read our case study on the Story Museum](#)

[Read our case study on Beany House](#)

[Read about our embedded evaluation](#)

“There are now more veterans in the galleries sharing their stories and object handling still forms a strong part of what we do.”

Zoe Dunbar, IMW North

At the **IMW North**, Happy Museum funding was used to test different approaches to object handling by visitors. The six approaches were: the handling of large objects; access to a play trolley; using veterans to support object handling in the IWM's TimeStacks; art sessions run by a mental health charity; and group sessions organised with Veterans North. The objects used ranged from a tank to a soldier's prayer beads or last letter home. "Using veterans to support object handling at our TimeStacks was the most successful approach we

tested," says Head of Exhibitions Zoe Dunbar. "This highlighted to us the importance of first-hand or eye-witness testimony to the experience on site and we have built upon this since the project completed. There are now more veterans in the galleries sharing their stories and object handling still forms a strong part of what we do."



5 Making an impact

Some museums and galleries have found innovative ways of measuring the impact of their work on audiences. Others have found that thinking again about what matters through the whole 'plan do review' cycle has the power to change their organisation.

"The qualitative evaluations we did showed that people felt their wellbeing improved as a result of being involved in making,"

Andrea Mercer, Derby Museums

At **Derby Museum's Silk Mill**, co-creating with audiences, local people and communities was at the heart of the project to refurbish the mothballed museum. Local people have been working with makers in residence to build the museum's tables, chairs and display pods. Improving wellbeing for participants had been an important driver for the project – and museum gathered convincing evidence that it had. "The qualitative evaluations we did showed that people felt their wellbeing improved as a result of being involved in making," says

Andrea Mercer, senior manager of audiences and communities at Derby Museums. To test this empirically, the museum teamed up with the University of Derby's Biology department to measure the impact of making. Researchers measured participants' blood pressure and heart rate over a period of three weeks. They also collected saliva samples to measure levels of the stress hormone cortisol. The research found a small but measurable lowering in cortisol levels.

[Read our case study on the Derby Silk Mill Museum](#)



In 2010, the **Museum of East Anglian Life** (MEAL) commissioned research using the Social Return on Investment model, which showed that for every £1 invested in its programmes, £4.10 of social value was created. The Museum's approach demonstrates that collaborative working with individuals over the long term has a positive impact on their wellbeing

[Read about the MEAL SROI report](#)

Starting to re-think what matters made **Godalming Museum** work in a different way and the impact on the trustees has meant the organisation has changed fundamentally. Godalming's Happy Museum project was to work with local people and community groups to create a new interactive exhibit linking local history and geography with the theme of environmental sustainability. A working group of local people and organisations developed the concept of a 'Living Landscape' gallery, which was then built with the help of local artists and craftspeople – strengthening the museum's links with local people

and forging new partnerships with a range of local organisations. The scale of the project grew from the initial idea of simply having an exhibit to the concept of a whole gallery. This change meant the museum's usual model – a new exhibition unveiled with a private view – gave way to a rolling, participative development. This neatly demonstrates the 'project management triangle' – the three constraints of cost, timescale and scope have to flex for a given quality of project. In this case with the scope growing and the budget limited, the timescale had to be allowed to grow. "Working on this project has made us realise that environmental sustainability is at the heart of the story the museum tells about development and change in the local community, and is important for its own sustainable long term operation," says Alison Pattison, Museum Director. The learning from this project is informing the museum refurbishment - the approach is now to spend money on skills rather than materials, with the aim of sending 'zero to landfill'.

[Read our case study on Godalming Museum](#)

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Alison Pattison, Godalming Museum



LIFE Survey – a tool for measuring impact

“The survey is now available free to use, and comes with some guidance on self-analysis.”

Happy Museum has spent the last few years developing a new ‘LIFE’ survey as a tool for measuring the impact that museums and galleries have on the wellbeing and happiness of their audiences. The survey is now available free to use, and comes with some guidance on self-analysis. If you send us your data, we may be able to use it as part of our sector-wide econometric analysis.

LIFE stands for Learning, Interaction, Feelings and Environmental care. Its key features are:

- it is ‘asset-based’ and considers aspects such as surroundings, which are such an important element of what museums offer; and
- it measures both aspects of wellbeing, feelings AND functioning, and it aligns with national datasets for easy comparison.

In developing the LIFE survey, seven museums took part in detailed research led by Daniel Fujiwara, an economist specialising in behavioural economics and econometrics. Daniel had previously carried out [secondary research](#) for Happy Museum, which found that the ‘value’ of museums in terms of their impact on happiness was the equivalent of some £3,000 per person per year.

The museums taking part were: Woodhorn, the Lightbox and Derby Museums (all were previously had Happy Museum projects); and the British Museum, National Maritime Museum, Glasgow Museums and North Lincolnshire Museums. National Museums Liverpool also piloted the survey independently. Limited resources meant some museums found it hard to complete the necessary control group research and large enough samples. However the tool was broadly valued: “The quality of



“The quality of thinking was superb, and unusual in my experience of the museums sector.”

thinking was superb, and unusual in my experience of the museums sector,” said a representative of one Commission.

All results showed some association between the museum experience and good outcomes, though the ‘causal relationship’ was less clear. The most significant results were from highly participatory projects in the smallest venue North Lincolnshire Museum (NML), where learning and engaging emotions were statistically associated with the experience. Derby Museum showed a link between its Re:Make project and life satisfaction and in the first analysis Woodhorn’s

comedian in residence project was associated with better outcomes in all the LIFE areas, but the more rigorous causal test narrowed this to feeling happy and worthwhile. In Glasgow, ‘Burrell for Blokes’ participatory projects in the highly disadvantaged area showed a relationship between happiness and the project. Surprisingly though, neither of the national museums showed an impact on outcomes, though we did uncover some useful data about particularly disadvantaged participants. NML, who did their own analysis, found a difference between the control and participating groups in all outcomes, but didn’t test for statistical significance. They have recommended its ongoing use.

Results from LIFE analysis in Derby and Glasgow hint at an effect on wellbeing by focusing on craft and making, especially when linked to objects, surroundings and the outdoors, one of the key strengths of Happy Museums explored in our other case studies.

[Find out more about the LIFE Survey](#)



6. More about the Happy Museum's 'Story of Change' tool

The projects funded by the Happy Museum project used a 'Story of Change' tool to define their vision for the project and to plan the route to achieve that vision.

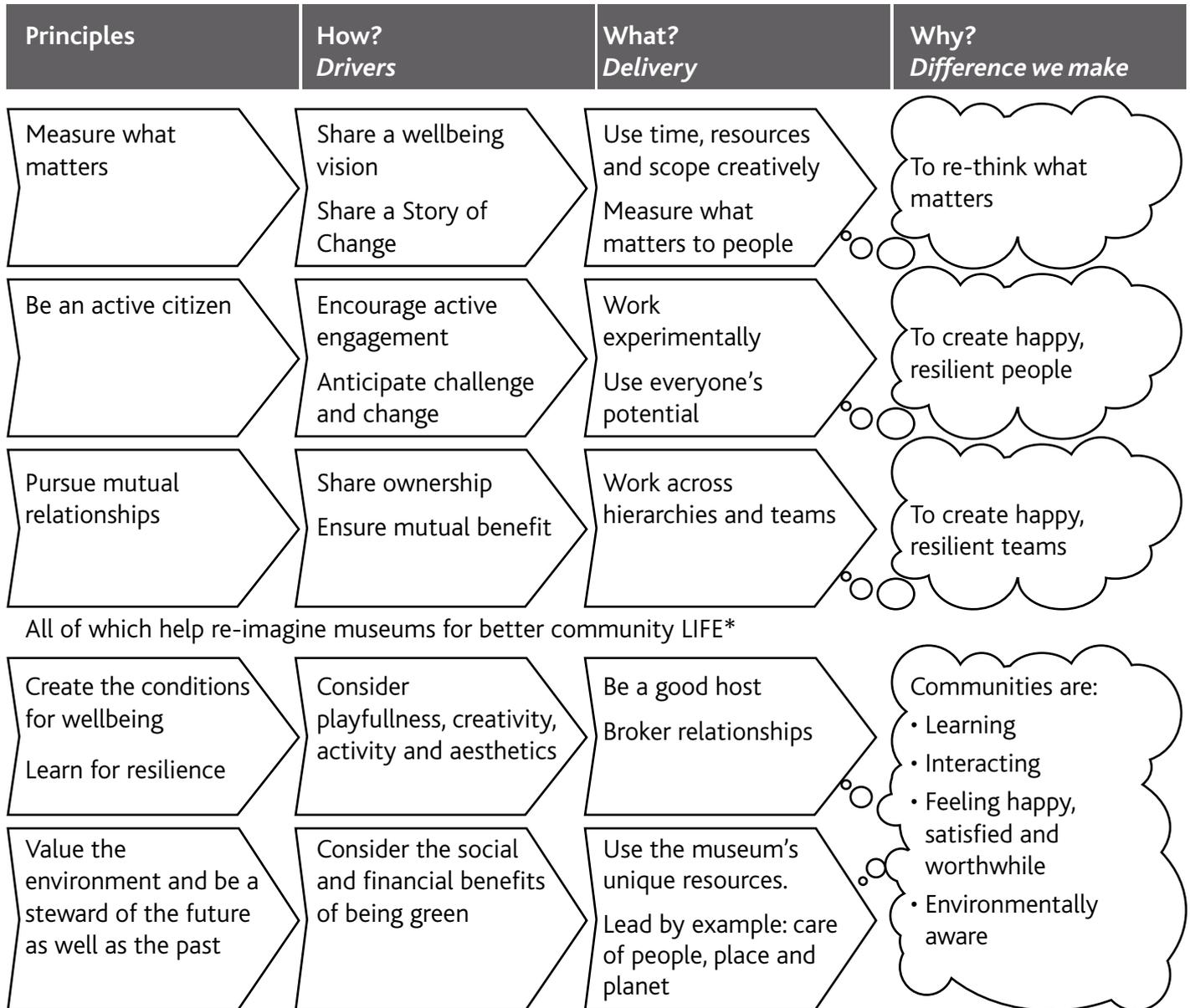
The purpose of this tool (which is similar to theory of change, or logic modelling) is to make sure we start by focusing on the difference we want to make rather than on the activities we may use to achieve those ends. Using a Story of Change challenges 'business as usual' thinking by starting with the overall purpose and working backwards. The process of

'measuring what matters' can then start at the planning stage – by defining the success factors for a project, a strategy or a change of direction. The tool is also valuable for helping to communicate a vision to staff, volunteers and all stakeholders, as well as the thinking that underpins it.

[Read more about the Story of Change tool](#)



See below for our own Story of Change which shows success factors for Happy Museums. An [online version](#) contains links to further case studies and resources.



* The Happy Museum Project is conducting a national LIFE survey, where LIFE = Learning, Interactions with others, Feelings and emotions, and Environmental awareness. More: www.happymuseumproject.org