SUMMIT COUNTY HISTORICAL SOCIETY:
A MEMBERSHIP PROGRAM CASE STUDY

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CHAPTER I

INTRODUCTION

A membership program is typically at the core of any museum's marketing strategy (Bhattacharya 31). In addition to providing a source of reliable revenue from the actual sale of the membership package, the museum's membership program provides a means by which to segment the museum's visitors, as well as a critical pathway toward developing the donor base (Bhattacharya 32).

Museum members represent loyal patrons who, through their memberships, are given a structure in which to make greater contributions to the museum, such as by volunteering or being regular monetary donors (Bhattacharya 32). A good membership program affords the members the feeling of being closely connected with the museum, and a sense that they belong there (Bhattacharya, Rao, and Glynn 47). The degree to which those members stay connected to and involved with the museum are absolutely critical factors in the museum's
day-to-day success and longitudinal potential (Bhattacharya, Rao, and Glynn 46).

Although there have been a number of peer-reviewed papers on the subject of museum membership published within the past fifteen years, the scope of this scholarship is narrow. The research primarily investigates membership at art museums in Western Europe and the United Kingdom. Additionally, these studies are almost always concerned with large museums with thousands, if not tens of thousands, of members. There has been scant research done on museum membership in the United States, and even less on membership to small museums, historical societies, and historic sites.

Most of the extant literature on museum membership also tends to examine the members themselves, rather than the actual membership programs to which they belong. Detailed case studies of museum membership programs are virtually nonexistent. Such case studies may be valuable to museum administrators looking to assess their own membership program, by giving them examples against which to measure.

One of the aims of this paper is to do just that, to add to the scholarship on the subject of museum membership by conducting a detailed case study of the membership program of a historical society in the United States that
operates a small museum and historic site. What is needed to conduct such a study is a tested rubric by which this membership program can be assessed.

The literature provides this. There is a method for assessing a museum membership program and classifying it according to a typology, described in a 2001 paper by Debi Hayes and Alix Slater for the International Journal of Nonprofit and Voluntary Sector Marketing. The study that bore the method and typology looked at large museums in London, UK. Hayes and Slater stated the possibility for their tools being used to study membership programs in other types of organizations (Hayes and Slater 75, Slater, “Revisiting” 255). However, I have found no paper that yet does so.

This paper has two objectives:

1. To provide a detailed, thoughtful review of the pertinent scholarly literature on the subject of museum membership from the past fifteen years;

2. To examine the membership program of the Summit County Historical Society in Akron, Ohio, assess and classify it according to the Hayes-Slater assessment framework and membership program typology, and compose a case study of the museum and its membership program.
Through this study, I seek to learn how the Summit County Historical Society views its own efforts at acquiring and retaining members in order to help me formulate recommendations for how these efforts might be improved. I also wish to contribute to the existing research by Debi Hayes and Alix Slater, to provide a stateside example of a membership program assessed and classified according to their rubric, thereby fulfilling the stated need for further research (Slater, “Revisiting” 255).

The value of this paper to the Summit County Historical Society will be in having a concise overview of what their membership program is and how the organization uses it, along with recommendations for how to improve membership in the near future. To the field of inquiry into museum membership, this paper’s value is in its focus on an historic house museum in the United States, a type of museum rarely studied.
CHAPTER II

A REVIEW OF RECENT SCHOLARSHIP

ON THE SUBJECT OF MUSEUM MEMBERSHIP

The purpose of this chapter is to provide a thorough review of important literature on museum membership. Initially, the review was intended to look only at papers published within the ten years leading up to the commencement of this present research, from 2004 until 2014. It was determined that this would exclude several key pieces of scholarship published in the early 2000s that directly influenced later work and are critical to understanding the development of theory on museum membership, including the first assessment and typology paper by Debi Hayes and Alix Slater. For that reason, this literature review has been expanded to include papers published from 2000-2015.

The review will focus on two groups of papers, the first being papers written in the past fifteen years that give insight to the structural and functional differences between museum membership programs, and the second group
being the two papers by Debi Hayes and Alix Slater (2001) and Alix Slater (2004) that outlined the assessment framework and typology that will be used to build the case study of the Summit County Historical Society.

The review will work through the other papers chronologically, and then will close with the two Typology papers to help the reader transition directly into the study.

Before the year 2000, actual research on museum membership was rare. The papers of C.B. Bhattacharya, Stuart Davies, and Burns Sadek Research Limited in the 1990s represented the first real stab at trying to understand why museum visitors become members and how membership might be used as a marketing tool for museums and galleries.

Over the past fifteen years, more scholarship on museum membership has appeared. However, it has so far been rather limited in scope, the purview of a few select researchers conducting surveys of large museums in Western Europe. By far the most prolific writer on the subject of museum membership has been Briton Alix Slater, formerly of the School of Business and Management at the University of Greenwich, and presently on the business faculty at Middlesex University, London. Of the thirteen papers
reviewed here, she either wrote or co-wrote seven, including the two papers upon which this study is based. Other papers of hers appear in the bibliography.

The recent museum membership literature primarily looks at why visitors to museums become members and how they use their memberships. With the exception of one that examines actual service quality to museum members, the papers reviewed here deal more or less with individual motivations for purchasing membership and/or involvement of members. Finally, there are the paper by Debi Hayes and Alix Slater and the paper by Alix Slater that outline the assessment framework and describe the membership program typology.

What are lacking in the recent literature are case studies of actual membership programs and analyses of how successful they are.

The first paper in this review is “An Audit of Friends’ programs at UK Heritage Sites” by Alix Slater (2003), published in the *International Journal of Heritage Studies*. This paper served to provide the first detailed study and audit of friends’ and membership programs in the United Kingdom (Slater, “Audit” 360). It also functioned as a bridge between the paper Slater wrote with Debi Hayes that described their membership program typology, and Slater's
lar paper that revised that typology. Many of Slater's findings in this paper were used to help her develop the 2004 version of the assessment framework, and led to the addition of subtypes to the typology.

The findings were based on responses from a mailed survey to members of the British Association of Friends of Museums (BAFM) (Slater, “Audit” 360). Eighty percent of respondents to the survey were what Slater and Hayes would later describe as either “Social Club” programs or “Public” programs, meaning they were either wholly independent from the heritage site that they served, or were only partially integrated into the organizational structure of their affiliated site (Slater, “Audit” 368). These programs had fundraising and social activities as their primary goals, and most had very little in the way of segmentation of membership categories. Finally, formal business planning and marketing was mostly ad hoc and not of a strategic nature (Slater, “Audit” 371).

The findings from this research directly influenced Slater's revision of her assessment framework and typology, due to her realization that a substantial number of the membership programs surveyed were of a type in-between two
of Hayes' and Slater's previously described types (Slater, “Audit” 370, Slater, “Revisiting 239).

In their 2004 paper “Non-Profit Organization and Membership Motivation: An Exploration in the Museum Industry,” published in the *Journal of Marketing Theory and Practice*, Audhesh K. Paswan and Lisa C. Troy, both of the University of North Texas, examined the link between member motivation and membership level (Paswan and Troy 1). Through a study of members of an art museum, Paswan and Troy attempted to prove that a) members motivated by philanthropy, preservation, and social recognition will purchase higher-level memberships, b) members motivated by children's benefits and other tangible benefits will purchase lower-level memberships, and c) that there will be no difference in hedonic (related to personal pleasure) motivations across membership levels (Paswan and Troy 3-4). What the authors found was that all except one of their hypotheses proved true (Paswan and Troy 8-9). Interestingly, they found that members at both higher and lower levels were equally motivated by preservation (Paswan and Troy 9).

The value of this research is that museum administrators can use it to make informed decisions about how to market different membership levels based on who will
likely be purchasing them. Most valuable is the revelation that the issue of preservation of artworks was a concern across membership levels, meaning members at both ends of the economic spectrum can be motivated to purchase a membership based on preservation.

The 2010 paper “Involvement, Tate, and Me” by Alix Slater and Kate Armstrong (London College of Communication), published in the *Journal of Marketing Management*, examined extant members of the Tate Museums in England and their reasons for being involved with the museum, in order to learn a) whether members of art museums are “involved” with the museum (meaning beyond occasional visitation, as volunteers or consumers of extra programming), b) if involvement can inform us of how members use their memberships, and c) if the characteristics of member involvement in art museums are unique to art museums (Slater and Armstrong, “Involvement” 733).

The Tate is collectively four art museums, including Tate Britain, Tate Modern, Tate Liverpool, and Tate St. Ives. For the purposes of their study, Slater and Armstrong focused on Tate Britain and Tate Modern, again restricting their research to the geographic area of London (Slater and Armstrong, “Involvement” 729).
Through qualitative, narrative surveys of a sampling of Tate members that comprised thirty-four females and twenty-five males of various ages and socioeconomic backgrounds, the authors identified six “involvement characteristics”, categories of reasons why members choose to be more involved with the museum:

1) **Centrality and Pleasure**: The museum holds a central position in the member's life, and/or visiting the museum gives him pleasure;

2) **Desire to Learn**: The member comes to the museum to be enriched intellectually, to learn about art and history;

3) **Escapism, Spirituality, and Creativity**: The member got involved in order to escape from regular life, to gain spiritual fulfillment, or to be inspired;

4) **Sense of Belonging and Prestige**: The member likes the “club” feel of being active in the museum. He comes to meet others and to socialize with others he perceives as being “like” him;

5) **Physical**: The member likes being inside the building, and derives pleasure from feeling as though the museum is his personal, private space;

6) **Drivers of Involvement**: The member is motivated to be involved by the intentional drivers devised by the museum.
administration, e.g. the cafe, the special programs, volunteer opportunities, the members' room, etc (Slater and Armstrong, “Involvement” 727).

This paper is valuable because Armstrong and Slater have outlined the specific reasons why members choose to go beyond their membership to be more involved with the museum. This gives museum administrators a clear guide of what works best to develop stronger relationships with members. The inclusion of actual interview responses in the findings gave much insight.

While these reasons for involvement are vague without context, the paper works due to the subjective, narrative interview responses that link tangible situations to esoteric concepts. Museum administrators will best be able to put the concepts to use by conducting interviews of their own, with their specific membership base.

The 2010 paper “Incentives, Organizational Identification, and Relationship Quality Among Members of Fine Arts Museums” by Carmen Camarero and Maria Jose Garrido (University of Valladolid, Spain), published in the Journal of Service Management, sought to find the link between the material and non-material benefits that museum members get out of their memberships and the degree to which they
identify with the museum. To investigate this, the authors collected survey data from 231 members of five fine arts museums in Spain (Camarero and Garrido 266).

Camarero and Garrido posit six hypotheses: That a) “a more intense use of the services offered by a museum is associated with a greater perception of material benefits,” b) “the material benefits received by members lead to satisfaction,” c) “the sense of organizational identity felt by members is enhanced by the material benefits they receive and the non-material benefits they receive,” d) “identifying with the organization has a positive impact on members' satisfaction, the trust they place in the museum, and their future commitment,” e) “satisfaction with the service provided by a museum has a positive influence on members' trust in the museum,” and f) “members' trust in a museum has a positive influence on their future commitment” (Camarero and Garrido 270-272).

The authors did indeed find correlations between the benefits that members are afforded by their memberships and the degree to which those members identify with the organization. However, they failed to confirm all six hypotheses. They wrote that they believed two to be confirmed, their first and third, above listed as “a” and
“b”. All others were either not conclusively confirmed or only partially confirmed (Camarero and Garrido 275-282).

Overall, this is a valuable paper for museum managers. It affirms two presumptions about membership benefits, that a more intense use of those benefits results from, and in, greater member satisfaction with those benefits, and that those benefits correspond to an enhanced identification with the museum. As the authors stated, the only real drawbacks to this research are the geographic limits of the sample, and the lack of a comparative analysis of members to glean their motivations for becoming members.

In 2011, Kate Armstrong and Alix Slater collaborated again to produce the paper “Understanding Motivational Constraints to Membership at the Southbank Centre”, published in the Journal of Customer Behavior. The authors examined the various barriers to visitors becoming members, through a study of patrons of the Southbank Center, a visual and performing arts center in London, England (Armstrong and Slater, “Understanding” 353).

Armstrong and Slater attempted to learn a) the typical non-member's perception of membership, b) his motivational constraints to joining, and c) whether these constraints
were fixed or changeable (Armstrong and Slater, “Understanding” 360).

Through qualitative, narrative surveys, the authors identified four common categories of motivational constraint:

1) **Structural**, meaning membership is perceived as being a poor value for the money, and that the benefits offered and/or the programming of the Southbank Center do not warrant the cost of the membership;

2) **Attitudinal**, meaning that non-members perceive membership as elitist and beyond their means;

3) **Lack of Awareness**, meaning non-members simply do not know that the Southbank Center offers membership;

4) **Emotional and Aesthetic**, meaning non-members feel a lack of a basic connection to the Southbank Center and its programming (Armstrong and Slater, “Understanding” 263).

This research is valuable because it helps to shed some light on the subject of motivation as it relates to museum visitors and members, a subject that the authors describe as enigmatic (Armstrong and Slater, “Understanding” 369).

The next paper in this review is another by Carmen Camarero Izquierdo and Maria Jose Garrido Samaniego, titled “Strengthening Members' Relationships Through Cultural
Activities in Museums” (Journal of Leisure Research, 2011). Here, the authors sought to learn whether the structural characteristics and service quality of “complementary cultural activities” offered to museum members such as lectures and workshops impacts the emotional response of participating members (Camarero Izquierdo and Garrido Samaniego, 563). For example, in a group activity, does the size of the participating group impact the emotional value that the participant absorbs from the activity?

To complete their research, the authors asked three main research questions: a) What features of cultural activities affect member emotions, b) do the structural characteristics and quality of service matter, and c) does positive emotional response have an impact on a member's desire to participate in future activities (Camarero Izquierdo and Garrido Samaniego, 563)?

The authors also posited a number of hypotheses that each directly related to a specific feature that the authors have identified as affecting member emotions. They then conducted a survey and analysis of variance to determine the percentage that each of their hypotheses proved true (Camarero Izquierdo and Garrido Samaniego, 566-572).
The authors stated that their intended value for this research was to add to the understanding of how a museum's service quality is related to visitor emotion and satisfaction (Camarero Izquierdo and Garrido Samaniego, 563). To this end, they learned that museums can in fact influence visitor pleasure through activity design, and that when the activities a museum offers make use of new technologies, the likelihood that museum visitors will be satisfied with their experience is increased (Camarero Izquierdo and Garrido Samaniego, 576-581). Both of these points are valuable for museum administrators to consider.

The 2011 paper “Benefits Visitors Derive From Sustained Engagement With a Single Museum”, published in Curator: The Museum Journal, by Michele C. Everett and Margaret S. Barrett (The University of Queensland, Australia) used interviews, observations, researcher reflection, and the narrative inquiry method to find out how individuals benefit from maintaining long-term relationships with museums (Everett and Barrett 432).

Everett and Barrett acknowledged that “sustained engagement” is not a concept that is well-defined in the museum literature, and that for the purposes of their paper, they defined it as a relationship that an individual
sustains with a single museum over multiple stages of their lifetime (Everett and Barrett 432). Their study focused on female respondents between the ages of 5 and 80 years of age who were visitors at the Tasmanian Museum and Art Gallery in Hobart, Australia (Everett and Barrett 433).

The personal narratives obtained through the study revealed that these visitors derived intrinsic, cognitive, social, and emotional benefits from their relationships with the museum (Everett and Barrett 440). Intrinsic benefits include feelings of enjoyment and a sense of fun. Cognitive benefits are the stimulation of new thinking, opportunities to learn, etc. Social benefits are related to how the visitor uses the museum with others, whether visiting with friends and family, or getting involved in activities hosted by the museum. The emotional benefits are feelings of connection to the “place” of the museum and the connection with objects in the collection (Everett and Barrett 440-442).

The authors defended their research by stating that few museums have made efforts to find out precisely what sorts of benefits visitors derive from sustained relationships (Everett and Barrett 443). That may be true, but the real value here are the narratives themselves, which create
lively portraits of the art museum as seen by real people in
the stages of childhood, adulthood, and old age.

“Patterns of Voluntary Participation in Membership
Associations: A Study of UK Heritage Supporter Groups”, a
2012 paper in the Nonprofit and Voluntary Sector Quarterly
by Kirsten Holmes (Curtin University, Australia) and Alix
Slater, explained findings from a mixed-methods study of
members of organizations in the UK “heritage sector” (Holmes
and Slater 850). Not confined to strictly art museums, as so
many membership studies have been, Holmes' and Slater's
research looked also at historic house museums, castles,
cathedrals and churches, archaeological sites, libraries,
and even parks (Holmes and Slater 852). This paper is thus
unique in that it is the only paper in this literature
review that deals with history museums and historic sites.

The authors' research aimed to examine patterns of
participation among these heritage sector members, to learn
why members participated and what barriers might exist to
member participation (Holmes and Slater 851). After an
eleven-month, three-phase study that included both
qualitative and quantitative methods, Holmes and Slater
identified four distinct categories of participating members
(Holmes and Slater 860).
Three of these, core volunteers, peripheral volunteers, and pay-and-players, were already identified in earlier literature. Holmes and Slater identified a fourth new category, substitutors. These are members who do not actually volunteer, due to constraints, but would if they could, and so use monetary gifts or other contributions as substitutes for physical participation (Holmes and Slater 860).

Holmes and Slater also identified four types of motivation among participating members, three of which, again, had already been identified in earlier studies (purposive/cause servers, solidary/socializers, and material/benefits seekers). The authors identified a fourth new type of motivation, hobbyists. These are members who join and get involved because they are interested in the subject matter, not necessarily because they wish to support a cause, meet new friends, or get free tickets (Holmes and Slater 862).

This is a valuable piece of research, primarily because it investigates membership at historic sites and history museums, as opposed to a fine art museum. Holmes and Slater acknowledge that response rates were low in the first two
phases of their study (22% and 37%, respectively) which perhaps limited the findings somewhat.

In their 2013 paper “An Exploratory Study of Stalled Relationships Among Art Museum Members” (International Journal of Nonprofit and Voluntary Sector Marketing), Brooke Reavey, Michael J. Howley, Jr., and Daniel Korschun (Drexel University, Philadelphia) examined how and why museum/member relationships stall out after an initial honeymoon phase. The authors focused their study on one-time members who chose not to renew their membership after their first year (Reavey, Howley, and Korschun 90-91).

Reavey, Howley, and Korschun identified four primary categories of reasons museum/member relationships stall:
1) Lost interest in membership, either because the member did not find the exhibits interesting, or because he simply forgot to renew;
2) No value seen in membership, which could mean either the member did not see the membership as being worth its monetary cost, or other responsibilities in life took precedence and left no time for museum attendance;
3) Membership was not a rewarding experience, due to either service failures on the part of the museum, or
because the member did not attend often enough to experience the full benefit of membership;

4)  *Self-blame*, meaning that the member blamed himself for the relationship stalling due to lifestyle changes, relocation, not having an easy means of transportation to the museum or the museum being too far away, or having a lack of interest in art (Reavey, Holwey, and Korschun 92-93).

The authors plotted these reasons in quadrants, labeling the X-axis “Managerial Control” and the Y-axis “Member Engagement.” Each reason for stalled relationships is classified as one of four types:

1)  *High Managerial Control – High Member Engagement*: Within the museum administration's power to change, and exists in spite of positive member feelings toward the museum. The member was hoping for something great from membership, but it just didn't pan out that way. These are the easiest relationships to revitalize;

2)  *High Managerial Control – Low Member Engagement*: Within the museum administration's power to change, but resultant of poor general attitude toward the museum by the member, possibly due to service failures. These members probably joined for cultural or social reasons, rather than to get
more involved with the museum. These relationships can be fixed, but it will require work;

3) Low Managerial Control – High Member Engagement: These are reasons such as major lifestyle changes or relocation. The members may have really enjoyed their membership and gotten a lot out of it, but they couldn't help but let the relationship stall. The museum, as well, has little power to fix the situation;

4) Low Managerial Control – Low Member Engagement: Again, this is the result of lifestyle changes, but tends to occur more in members who joined for flimsy reasons, either because they wanted a new entertainment outlet or they were lured by the perquisites. The museum has little power to draw such stalled members back, because they were never that committed to the relationship to begin with (Reavey, Holwey, and Korschun 96–98);

This research is valuable because it goes a long way toward debunking the misconception that stalled membership is related wholly to service failures. In fact, many stalled members actually view both the museum and their relationship with the museum in a positive light, even if they maintain no formal relationship in the form of a membership.
“Drivers and Motives for Membership at the Southbank Centre, a Mixed Arts Venue in London, UK” (International Journal of Nonprofit and Voluntary Sector Marketing, 2014) is the third paper by Alix Slater and Kate Armstrong included in this review. As in their 2011 paper, Slater and Armstrong investigated membership at the Southbank Centre, a mixed-arts venue in London. Where that earlier paper described the constraints that prevented visitors from purchasing a membership at the Centre, this paper described the factors that motivated visitors to actually purchase membership (Slater and Armstrong 4). The stated intent of the authors was to learn more about the drivers and motives for both purchasing and retaining a membership to a mixed-arts center such as the Southbank (Slater and Armstrong 7).

Once again, Slater and Armstrong employed the qualitative “narrative inquiry” method to gather personal data on why each member chose to invest in membership. The authors separated the interviewees into five groups, based on how they had patronized the Southbank Centre in the past. These groups were a) Contemporary Bookers, who had primarily purchased tickets to contemporary musical performances including rock, pop, and/or jazz, b) Visual Art Bookers, who had primarily patronized the Hayward Gallery, c) Classical
Bookers, who had primarily purchased tickets to performances by one of the Centre's four resident orchestras, d) Non-Bookers, who had not purchased any tickets in the past twelve months, and e) Across-Art-Form Bookers, who had purchased tickets to both contemporary and classical concerts, and/or had purchased tickets to concerts and had regularly patronized the Hayward Gallery (Slater and Armstrong 6).

Through the narrative responses from their interviewees, Slater and Armstrong identified four motivations for the purchase of membership:

1) To get advance access to information on programming;
2) To secure tickets to performances or exhibitions;
3) To get booking priority for popular events;
4) To have VIP access to the Hayward Gallery (Slater and Armstrong 10).

This research is valuable because it adds to the authors' prior research on membership at the Southbank Centre, creating a more vivid picture of why and how that venue attracts members. It would be beneficial if the authors were to continue examining membership at the Southbank, perhaps by conducting a study of how its members
use their memberships, similar to the study they did on members of the Tate museums in 2010.

The papers reviewed here offer excellent data on why museum members become members and how they use their memberships. The qualitative, interview-based data gathering and interpretation methods used in many of these papers is extremely helpful for understanding the nuanced reasons why people choose to join museum membership programs.

Unfortunately, the geographic and genre restrictions of the museums studied are quite severe, with the vast majority of the research looking into art museums in Western Europe. Only one paper takes into consideration membership at other types of museums, such as history museums and heritage sites. Not one of the papers reviewed specifically examines a science or natural history museum. The papers also tend not to focus on the membership programs themselves, but rather on the members.

Overall, the data contained in these papers should be valuable to any museum administrator looking for ways to improve their membership program. However, there is still a lack of both a case study of a membership program, and any research at all on a historic site in the United States.
The 2003 paper “From 'Social Club' to 'Integrated Membership program': Developing Membership Schemes Strategically” by Debi Hayes and Alix Slater described a new typology for classifying museum membership programs and established a framework by which museum administrators can assess their membership program and identify areas of need (Hayes and Slater 59).

Hayes and Slater developed their typology from findings of a study done of large museums in the city of London, in the United Kingdom (Hayes and Slater 60). To identify the three contrasting types of membership program, Hayes and Slater selected eight criteria with which membership programs would be analyzed:

1) Membership Profile: Who are the members, and what is their economic and geographic status?
2) Purpose/Mission: What is the stated mission of the membership program? Does it have its own mission, or does it follow the mission of the museum?
3) Benefits: What perquisites are offered members?
4) Recruitment Methods: How do the managers of the membership program grow their roster?
5) **Structure/Governance:** Is the membership program self-governed, or does it fall under the governance of the museum?

6) **Fundraising:** To what extent, and how, is the membership program a tool for fundraising?

7) **Promotional Methods:** How do membership managers promote membership?

8) **Evaluation Techniques:** Is any sort of evaluation done, and if so, how and when (Hayes and Slater 61)?

Based on their findings from their study, the three membership program types described by Hayes and Slater are as follows:

1) **The Social Club Group:** This is an independent organization, totally autonomous from the museum, comprised wholly of volunteers, which provides fundraising and other services to the museum. The membership base tends to be small, local, and affluent.

Organizations of this sort are prevalent in the UK, but plenty of examples can also be found in the United States. Here, these tend to be called “Friends” groups, and tend to be associated with government-operated historic sites, whereas in the UK “Friends” groups could include more integrated membership programs in larger museums.
A likely example of this type is the Friends of James A. Garfield National Historic Site, located in Mentor, Ohio. This group is an autonomous, incorporated nonprofit, completely independent from the National Park Service that operates the site, yet still closely associated with the site and heavily involved in fundraising and advocacy efforts. The Friends do not maintain offices on the grounds of the James A. Garfield site, but are very active as volunteers (The Friends of James A. Garfield National Historic Site, Website, 2016).

Further research beyond this present paper could include an assessment and classification of this membership program to see if it indeed fits the type of “Social Club Group”.

2) The Public Members Program: This is a semi-professional organization, typically at least partially integrated into the affiliated museum. If it still maintains autonomy, it will at least have a formal association with the museum, and also nonprofit status of its own. This type almost always has different levels of membership, at different price points, each offering a range of benefits.

This type of membership program seems rare, and in fact this reveals a weakness of Hayes' and Slater's research.
Since they do not include the names of the museums surveyed, and because their paper does not serve as an actual case study of the membership programs themselves, we cannot see for ourselves what a Public Members Program actually looks like. We in the United States, in particular, where this type of program is arguably uncommon, are left to speculate about how it might function.

Yet, the membership program of Historic Zoar Village might fit the type of “Public Members Program”. Historic Zoar Village is a collection of historic buildings and sites in Zoar, Ohio. Most are privately owned. However, the community as a whole functions as a sort of collective living history museum, which programming, interpretation, and preservation activities are managed by the Zoar Community Association, an incorporated 501(c)(3) (Zoar Community Association, Historic Zoar Village Website, 2016).

The Zoar Community Association offers multi-tiered membership to Historic Zoar Village, yet there is no true museum organization, as such. Instead, the museum is the village. The membership program is integral to the “conceptual” museum of Historic Zoar Village, but also necessarily independent from the “real-life” village that has an actual village government.
That this program fits a “Public Members Program” is speculation, however. The membership program offered by the Zoar Community Association to Historic Zoar Village seems to fit many of the criteria for this type, but again, further inquiry in the form of assessment and classification is necessary.

3) The Integrated Membership Program: This type is fully integrated into the museum organization and has its own dedicated staff, or at least a single manager. More common at larger institutions, this type represents the “mature” membership program, and typically factors into the museum's annual budget and strategic plan. Stratification of membership levels will be more sophisticated among this type, allowing for a wider range of possible members from a wider range of economic backgrounds (Hayes and Slater 61-65).

This is the most common type, certainly at larger museums in the United States that typically have the organizational complexity to have a dedicated membership program, but also at many smaller, independent museums. As stated earlier, truly autonomous “Friends” groups are typically seen, in the US, only at museums and sites operated by a government agency.
To create their Assessment Framework, Hayes and Slater selected eleven benchmarking criteria:

1) Stratification of membership categories to match segmentation of membership base;
2) Number and style of membership categories;
3) Channels of entry into membership;
4) Fundraising approaches;
5) Focus on longitudinal relationships;
6) Extent of professionalism;
7) The Museum's strategic dependence on membership;
8) Level of business planning underpinning membership;
9) Promotional Methods;
10) Application of audience research and evaluation;
11) Degree of autonomy (Hayes and Slater 66).

Each criterion was scored from 1 to 3. Hayes and Slater identified eleven benchmarking criteria, and so the lowest possible score was 11 and the highest was 33 (since all criteria receive a base score of 1). Membership programs with a score of 11-18 were classified as “Social Club Groups”. Programs with a score of 19-26 were classified as “Public Members' Programs”. Programs with a score of 27-33 were classified as “Integrated Membership program” (Hayes and Slater 66).
Debi Hayes' and Alix Slater's paper was the first to actually identify the distinct types of museum membership programs and provide a system for classifying them. Unfortunately, the three types described were too few to accurately represent the full spectrum of museum membership programs, and the two separate sets of criteria, one for placing a membership program within the typology and another for assessing its effectiveness, were redundant (Slater, “Revisiting” 241).

Alix Slater would, in her later paper, admit that the scoring of 1-3 was insufficient, as it granted points where points were perhaps undeserved, and so failed to account for membership programs that either totally lacked in any one criteria, or fulfilled none of the criteria whatsoever (Slater corrected this in her later paper, amending her scoring scale to 0-3) (Slater, “Revisiting” 241).

Furthermore, the study was limited to large-sized museums within a relatively small geographic region. Alix Slater refined the criteria and expanded the typology in the next paper we will look at, though the geographical limitation remained.

“Revisiting Membership Scheme Typologies in Museums and Galleries” (International Journal of Nonprofit and
Voluntary Sector Marketing, 2004) by Alix Slater expanded the typology developed in 2001 to include four subtypes for each main type, and refined the criteria to five principle categories, each with sub-categories (Slater, “Revisiting” 242-249).

Slater’s expanded typology accounted for four subtypes of each of the three main types:

1) “Aspirant” membership programs aspire to develop, but have not yet. For example, an Aspirant Public Members program is a program that seeks to grow out of its present status as a Social Club Group;

2) “Emerging” programs are in transition from a less-sophisticated main type to a more sophisticated main type. For example, an Emerging Integrated Membership program is no longer a Public Members program, but it is not yet a fully mature program;

3) “Established” programs are exactly what they sound like, membership programs firmly planted within a specific main type;

4) “Stagnant” membership programs are those that have failed to evolve, and have actually begun to decay due to waning participation and/or lack of funds (Slater, “Revisiting” 254-255).
Slater's refined set of criteria can be used both for classification and benchmarking, and includes five main categories and fifteen total sub-categories, as follows:

i. **Degree of Autonomy/Integration and Strategic Value of the Membership Program**

a) **Degree of Integration into the Organization**

- Basically, is the membership program an independent affiliated organization established to provide support to the museum, or is it partially or wholly departmentalized within the museum’s organization?

b) **Organization’s Strategic Dependence on the Membership Program**

- Does the museum take membership into account when budgeting, strategic planning? And to what extent?

c) **Relationship Between Membership and Organizational Objectives**

- Are the museum’s organizational objectives considered by the membership program’s leadership, or does the membership program operate without such consideration?

d) **Relationship Between Membership Activities and Organizational Objectives**

- Do the activities of the membership program relate
to and support the museum’s organizational objectives? Does the membership program follow a mission that is in line with the mission of the museum?

e) **Cooperation with the Organization**

- Do the membership program and the museum work in tandem to achieve their respective goals?

ii. **Number and Stratification of Membership Categories**

a) **Number of Membership Categories**

- How many levels of membership are offered? Are their corporate or group memberships?

b) **Focus on Longitudinal Relationship**

c) **Status of Membership Base**

- Who are the members? Are they primarily high-profile wealthy benefactors, or does the membership base cover the whole gamut of museum visitors, from college students, to families, to corporate sponsors?

iii. **Fundraising and Marketing Approaches**

a) **Channels of Entry to Membership**

- How do members become members? Are most members brought into the program through invitation by other members, or are broad marketing measures used to
attract new members?

b) Fundraising Approaches

• What does the membership program employ to raise funds for itself and for the museum?

c) Marketing Communications

• How is the membership program marketed? Is it responsible for its own marketing, or is marketing handled by the museum organization?

iv. Extent of Professionalism

a) Degree of Volunteerism, Honorary and Paid Posts

• Is the membership program operated solely by volunteers, or are there paid employees?

b) Level of Business Planning Underpinning Membership Organization

c) Charitable Status of the Organization

v. Application of Audience Research and Evaluation

a) Frequency of Evaluation

b) Extent of Evaluation

(Slater, “Revisiting” 243)

To account for membership programs that fail totally at any one benchmarking criterion, criteria were scored from 0-3 instead of 1-3. Slater revised the framework to include fourteen total criteria. Membership programs were now
classified based on scores of 0-14 (Social Club Group), 15-28 (Public Members' program), and 29-42 (Integrated Membership program) (Slater, “Revisiting” 244).

In undertaking this research, Alix Slater made more broadly applicable the typology that she and Debi Hayes devised in 2001. Overall, these two papers represented an important addition to the field of scholarship on museum membership by identifying distinct, contrasting types of membership programs and providing a means by which museum administrators can classify their own program and pinpoint areas where evolution is needed.

The only shortcoming to this more recent paper by Alix Slater is once again the restriction to museums in Britain. Slater acknowledged this and expressed an interest in others taking this typology and using it to classify membership programs in other regions of the world (Slater, “Revisiting” 255). Hence, this thesis.
CHAPTER III
A CASE STUDY OF THE MEMBERSHIP PROGRAM OF
THE SUMMIT COUNTY HISTORICAL SOCIETY

While the study of “local history” dates to the mid-17th century in England (Kammen, On Doing 11), historical societies as a type of organization date to the late 18th century. The earliest such formal historical society in the United States is understood to be the Massachusetts Historical Society, founded in 1791 by Rev. Jeremy Belknap. Belknap is also considered the father of the study of “local history” (Lord et al. 20).

From its inception until the early 20th century, local history was the purview of the amateur historian (Lord et al. 3-4, Kammen, On Doing 12-32). Many academic historians ignored the goings-on at the local level, favoring to study the major persons, international conflicts, and broad political and social shifts that affected global history (Lord et al. 4). This is perhaps unfortunate, for much of human history has likely been lost due to disinterest on the
part of the academic historians in the affairs of the village, town, and county. Yet, all history is “local history”, to some extent (Cavanaugh 11).

In the United States, at least, local history was the metier of the Local Historical Society, rather than the Academy, for much of the late 19th and early 20th century (Kammen, On Doing 12-32). These being largely voluntary organizations, this meant that research and scholarship was subject to trends among the population most likely to be involved. Local historical societies and an interest in local history have both swelled during times of patriotic upwelling, most notably in the years following the 1876 Centennial celebration and in the years following the 1976 Bicentennial (Lord et al. 3). To mark the Centennial, President Ulysses S. Grant implored the citizenry to begin researching and writing about the history of their communities, sparking not only a renewed interest in the subject of local history, but an entire industry of local-history-specific publishing houses (Kammen, On Doing 15).

If local history was reserved for the local historical society, the local historical society was quite often reserved for women. By the early 20th century, local history had undergone a transition from a male-dominated field to
one that was overwhelmingly female, and this continues to the present. New York State’s Department of Education keeps a registry of active local historians in the state, and 80% of those listed are female (Kammen, On Doing 27).

This shift toward women could be due to the fact that while local history was lacking in prestige as an academic pursuit, it was still considered very necessary by the public, and so became the specialty of patrician women, well-educated but otherwise unoccupied (Kammen, On Doing 26-27). The most famous case of historic preservation in US history is arguably the saving of George Washington’s home at Mount Vernon from demolition in the 1850s, an effort that was spearheaded by wealthy plantation heiress Ann Pamela Cunningham and her Mount Vernon Ladies Association (Johnson 90). Many local historical societies grew out of genealogy-focused, upper-class women’s clubs such as the Daughters of the American Revolution. The Association of Collegiate Alumnae even included “local history” as one of its suggested careers for women, alongside teaching (Kammen, On Doing 26).

The late 19th century was a verdant time for local historical societies to grow and flourish, and this continued into the 20th century with America’s continued
economic growth. More money meant more people had more time to devote to pastimes such as local history, and since these organizations were largely volunteer-driven, excess free time was a necessity (Lord et al. 3-4).

It was not until the advent of the academic discipline of “urban history” in the 1930s that “local” history began to get more attention from professional historians. Even so, for decades afterward, “local history” generally remained a thing that was often viewed as un-academic, often pedantic and overly concerned with “correctness” and a summarizing of the known facts. Local history remained obsessed with the what, where, and when rather than careful critical analysis of the how and why (Kammen, On Doing 33-35).

Things began to change in the 1940s with the organization of the American Association for State and Local History, which sought to professionalize the local historical society and bring academic criticism to the field of local history. By the 1970s, universities had begun offering majors in public history, coinciding with a resurgence of interest in local history that resulted from an upwelling of patriotism in anticipation of the Bicentennial of the United States (Kammen, On Doing xii, 36).
Universities began turning out professional historians whose specialization was the historic site and the house museum, long the realm of the local historical society. The more forward-thinking historical societies began sourcing new funding to pay the salaries of these professionals, and as a result, the breadth of these organizations’ scholarship increased (Kammen, *On Doing* xii).

The Local Historical Society as an institution has thus transitioned, in many places, from a social club for amateur historians who are concerned chiefly with assembling the errata of that particular place’s past, to a professional organization with paid staff that is concerned with academic inquiry into the social trends underpinning local history.

Yet, today, the vast majority of local historical societies are still volunteer-driven, with few, if any, paid staff. Even those with paid staff may only have one or two, and these may or may not be full-time positions. Some survey evidence suggests that around 40% of the more than ten-thousand local historical societies in the United States are either totally volunteer-driven, or have only one part-time paid position, and only 25% have two or more paid staff members (Doyle 1).
The Summit County Historical Society in Akron, Ohio, the subject of this paper, fits the profile of a local historical society that has transitioned, over nearly a century, from a strictly volunteer-driven, socially-motivated organization concerned with preserving the naked facts of the history of Summit County into a professional, education-motivated organization concerned with interpreting that history and placing it within the broader context of American and human history.

The Summit County Historical Society (SCHS) is a private, not-for-profit, 501(c)3 organization incorporated in Akron, Ohio. The mission of the SCHS is to preserve and interpret the history of Summit County and Akron, and to educate regional communities about the people and events that have shaped our rich history. (SCHS Archives)

The SCHS is governed by a Board of Directors that, as of this writing, is comprised of twenty directors. The board is very active and engaged, and directors have a broad range of experience in nonprofit fundraising, administration, historical preservation, law, finance, marketing, and
communications. Directors include lawyers, architects, educators, local government administrators, and business owners.

The SCHS has a staff comprised of a full-time President and Chief Executive Officer, a full-time Curator, a full-time Education Coordinator, a part-time Business Manager, a part-time Volunteer Coordinator, and a part-time Administrative Assistant.

The SCHS’s primary functions are the operation of two historic house museums, the 1837 Simon Perkins Stone Mansion and the 1830s John Brown House, and the maintenance of a large collection of historical artifacts. The SCHS also manages a small general history museum at a city-operated mixed-use entertainment complex located in downtown Akron, as well as several exhibit cases located in public office buildings and the Akron-Summit County Public Library's main branch. The SCHS owns the 1840 Old Stone School, which is operated by the Akron Public Schools.

In addition to its historical properties and exhibition facilities, the SCHS maintains a 3,000+ square foot off-site artifact storage facility that also serves as the office of the Curator. This space is leased by the SCHS from a local real estate developer at an annual rate of $1.00.
The SCHS’s primary programming consists of guided tours of its historic house museums. In addition, the SCHS loans out “Discovery Trunks” filled with touchable artifacts and hand-on activities, primarily to schools and scouting groups, and presents educational “Remember When” programs aimed at adults to churches, nursing homes, and senior clubs. The SCHS produces and/or has produced a variety of other types of programming, including themed tours, lectures, meals, and cocktail parties.

In the past, the SCHS published many books on local history, including Karl Grismer’s *Akron and Summit County* in 1952 and James and Margot Jackson’s *At Home on the Hill: The Perkins Family of Akron* in 1983. Publishing is no longer a facet of the SCHS's regular operation.

The SCHS was founded in 1924. Its initial membership was comprised of members of the Daughters of the American Revolution, a women’s organization that limits its membership based on descent. The SCHS itself was created in part to acknowledge the city of Akron’s centennial in 1925. The publishing of the book *A Centennial History of Akron, 1825-1925* was the first project undertaken by the fledgling organization, with considerable support from the city and county governments.
Following the book's publication, the SCHS looked toward the acquisition and conservation of historical properties in Akron and Summit County. The SCHS acquired the Old Stone School in 1929 through a donation by the City of Akron, and worked to restore it over the next thirty-eight years. In 1943, the John Brown House was bequeathed to the SCHS by Mrs. Charles E. Perkins, and two years later, the SCHS purchased the Simon Perkins Stone Mansion from George Perkins Raymond.

The SCHS has owned three other historical properties which it has since relinquished: the 1839 Bronson Church in Peninsula, Ohio, the 1830s Brown-Whipple House in Cuyahoga Falls, Ohio, and the 1935 Joe's Diner in Akron. After a period of sitting fallow, Joe's Diner was sold for $500 to a company of restaurateurs who were interested in reviving it as a viable commercial entity (SCHS Archives, 1993). Those plans never came to fruition, and the diner was again sold in 1994, this time to the Illinois Railway Museum, which continues to work toward its full restoration. The Bronson Church was turned over to the Peninsula Foundation in 2003, which continues to operate it (SCHS Archives, 2003). The Brown-Whipple House was sold to a private party in 1999, and
the proceeds placed into the endowment (SCHS Archives, 1999).

In 1983, the SCHS remodeled the interior of the wood shed on the Perkins Stone Mansion property into its administrative offices, which are still used today.

The SCHS offered memberships to the organization from the outset. As stated, the initial membership was comprised mostly of members of the local chapter of the Daughters of the American Revolution. Membership in the SCHS was thus fairly elite, made up of wealthy whites living in the upscale western neighborhoods of Akron.

To say that the SCHS's first twenty years were rather uneventful would be unfair, as there was certainly nothing particularly unique about the way the organization conducted its affairs, in relation to other historical societies of the period. With the acquisition of the John Brown and Simon Perkins properties in the 1940s, however, and with the appointment of Carl Pockrandt to the position of Board Chairman and SCHS President in 1939, the organization began to professionalize in a way that would put it ahead of its contemporaries.

The SCHS, under Pockrandt's direction, would also begin to think seriously about its membership and what it meant to
the long-range sustainability of the organization. The Membership Committee became one of the most active board committees, and considerable time was spent during each board meeting discussing and analyzing membership figures (SCHS Board Minutes, 1949-1959).

The membership of the SCHS went from less than 100 in the 1920s and 1930s to over 2,000 by 1952 (Old Portage Trail Review Vol. 33, No. 5, and Board Minutes, 1952, SCHS Archives). 1951 in particular was a tremendous year for the SCHS in terms of membership, with the organization's drive increasing the number of active members from 321 in January 1951 to 1,814 in November of that year. For the remainder of the 1950s, the membership of the SCHS fluctuated between 1,400 and 2,000, ending at 1,600 in 1959 (SCHS Board Minutes, 1959). That decade remains the high water mark of the membership numbers for the organization.

The membership program as developed by Pockrandt and his board consisted of eight levels: “Junior” at $0.50 per year, “Individual” at $2.00 per year, “Affiliated” at $2.00 per year, “Husband and Wife” at $3.00 per year, “Sustaining” at $10.00 per year, “Life” at $100.00 per year, “Memorial” at $100.00 per year, and “Special”, which cost nothing but also offered no benefits except addition to the mailing
list. The paying memberships all offered basically the same benefits, including free admission to the Perkins Mansion and John Brown House and a subscription to the organization's newsletter, the *Old Portage Trail Review*. The “Life” membership also included a copy of Karl Grismer’s *Akron and Summit County*, published the following year.

Pockrandt remained on the board into the mid-1960s, during which period membership drives were still undertaken on a fairly regular basis (SCHS Board Minutes, 1964). There are insufficient records to determine what the actual membership numbers were from year to year in the 1960s, but the number dropped to 1,102 by the end of that decade (SCHS Archives, 1969). No records are available for most of the 1970s, either, though it is known that membership was between 1,300 and 1,400 in 1980. This seems to indicate that there must have been some active recruitment during that decade.

Membership drives again became a standard component of strategic planning for the organization beginning in the 1980s under the direction of Jeffrey Smith. Here we will examine four of these membership drives to see what the goals of each were, and what strategies and tactics were
employed to reach those goals, and whether the drives were successful.

In October 1985, the SCHS began a “Membership Enhancement Project”. The stated goals of this project were

To increase annual membership income through encouraging current members to raise their giving levels and by attracting new members to the Society and

...enticing our General members ($15) to 'jump' to the Sustaining ($30) annual giving level.

(Funding solicitation letter to B.F. Goodrich Company, dated September 25, 1985)

The drive was structured in three phases. In Phase I, existing SCHS members were sent letters and response cards encouraging them to upgrade their memberships by paying the difference between the two, which gave them the better membership for a year. In Phase II, the membership rosters of other area organizations were solicited to join the SCHS. Phase III consisted of follow-up letters being sent to
members and potential members reminding them of the opportunity.

The strategies and tactics employed to further the goals of the Membership Enhancement Project included new recruitment materials such as dedicated response cards, a dedicated slogan for enticing new members (“More old stuff and local history”), offering a subscription to the Western Reserve magazine at the Sustaining level and above (SCHS could get the magazine at a large discount, in order to make adding it as a premium economical), “nomination mailings” as a way to entice current members to recruit new members on their own, and mailings to encourage existing members to pay their dues early in the year in advance of tax season.

Additionally, in order to entice more members to upgrade to the Century Club level, the SCHS began offering an annual event exclusive to Century Club members. Any member who did upgrade to that or any membership level was given a copy of Gold Rush: The Overland Diary of Samuel A. Lane, 1850.

The idea was floated to offer a joint membership with the SCHS and another organization in Akron, possibly Hower House, Stan Hywet, and the Akron Art Museum. It was also
suggested to try and partner with area businesses such as the West Point Market to offer discounts to SCHS members. Neither of these ideas was carried though, however. (Membership Benefits Package Revision Proposal, August 1st 1985, SCHS Archives).

The Membership Enhancement Project commenced with the Phase 1 mailing in early October, 1985. By December, 141 General members had upgraded to the Sustaining level, and 50 Sustaining members had upgraded to the Contributor level. This amounted to 26.8% of SCHS members upgrading their membership, based only on the letter asking them to do so.

The results of the Phase 2 solicitation of targeted membership rosters were 13 total new memberships, 2 at the General level, 4 at the Sustaining level, 2 at the Contributor level, and 5 at the Century Club level.

What is interesting is that there were no existing SCHS members who upgraded to the Century Club, but the Century Club level represented the largest growth in terms of new memberships from without the organization.

The 1988-1990 Membership drive commenced in November, 1988. The goals of this drive were to recruit 200 new members by the end of 1988, increase membership revenue by
$5,000 by the end of 1989 (broken down as 50 new members at the $100 level, 100 new members at the $50 level, 145 new members at the $35 level, and 250 new members at the $20 level), and to double the SCHS's membership of 950 members to 1,900 members by the end of 1990. This number was chosen, presumably, because it would surpass the previous high membership mark of 1,821 set in 1950.

The strategies and tactics employed to reach these goals included a new membership solicitation mailer, a team-based organizational structure comprised of captained teams, each with its own specific membership recruitment goals (each captain was responsible for recruiting five team members, each of whom was then responsible for recruitment of 10-15 preselected recruitment prospects), a drive kick-off party held in the Perkins Mansion for captains and their teams, a new computer database for keeping track of membership, the hiring of a new volunteer coordinator to organize volunteers to do the basic labor required of the drive (stuffing envelopes, etc.), and a telethon event.

Most importantly, a pre-drive questionnaire was submitted to the extant SCHS membership to gauge their feelings on the programming and publications offered by the
SCHS. As far as could be learned from examining the institutional archives, this was perhaps the first time in the history of the organization that this sort of membership-wide interest survey was conducted. The questionnaire included questions such as “What kinds of programs are you most/least likely to attend,” “What kinds of (historical) topics are most appealing to you,” and “Which audiences and constituencies should the Society work harder to reach?”

The results of the survey are revealing. On the subject of whether the SCHS should build a collection focused on Social History as opposed to a collection of fine art and antiques, 89% responded either with “Agree” or Strongly Agree. Since this survey was conducted, it is arguable that the SCHS has, indeed, endeavored to collect objects pertaining to Social History over objects of high value and rarity.

On the subject of the types of programs members attend, the respondents overwhelmingly favored tours, including tours of local sites of architectural interest, walking tours of neighborhoods, and bus tours. At present, the walking and bus tours offered by the SCHS represent its most
popular programming offerings, with the Architectural Heritage Awards bus tour being one of the best attended.

On the subject of what historical topics are most appealing to the SCHS membership base, 100% of the respondents selected “Architecture and Preservation” as one of their top choices, followed by 94% selecting “Lifestyles of Past Eras” and 71% choosing “Canal History”. It is arguable that these three topics comprise the bulk of the programming offered by the SCHS, however it is also arguable that tastes may have changed in the 27 years since this survey was conducted.

This rather ambitious drive, with its goal of doubling the SCHS's membership base within three years, was largely unsuccessful. However, the real value to the organization was undoubtedly the membership survey conducted before the membership drive even commenced. The results of that survey clearly informed the organization's programming direction over the next two decades, a direction that has proven successful.

On the heels of the overly ambitious and mostly unsuccessful (in terms of increasing numbers) membership drive of 1988-1990, the SCHS embarked on yet another drive
in 1992. The goals of this drive were to recruit 200 new members (broken down as 160 at the $35 level, 25 at the $50 level, 10 at the $100 level, and 5 at the $500 level), increase corporate support, develop the membership program to offer more desirable benefits and also maximize revenue for the organization, raise the profile of the SCHS in the community by diversifying the membership base, and create a larger audience for the SCHS's programming.

The strategies and tactics employed to achieve these goals include improving the benefits packages at all levels of membership, offering premiums for joining during the membership drive, creation of new membership recruitment materials, and the creation of honorary memberships that would be awarded to prominent citizens in the hopes that their involvement with the organization would boost the profile of the SCHS.

Much like the drive that preceded it, the 1992 membership drive was largely unsuccessful. Two things seem to be true about these drives that were not true for the 1985 drive (which was deemed a success). One, the goals were increasingly numerous and increasingly disparate. Whereas the 1985 drive was focused only on increasing membership
revenue by either recruiting new members or convincing existing members to increase their membership level, the 1988 and 1992 drives have specifically stated dollar amounts by which membership revenue must increase.

In addition, these later drives set quantified goals without any real logic behind them. Doubling the membership, as was the chief goal of the 1988 drive, may be a lovely idea, but there was nothing in the organization's history to suggest it was even remotely possible. In the case of the 1992 drive, seeking to raise the profile of the organization is a goal for a long-range strategic plan, not for a membership drive. The addition of this complex and arguably unrelated goal only served to confuse the real aims of the drive.

The membership drive of 1993 was novel in that it focused on increasing the roster of only one membership level, the $500 Benefactor level, which is generally offered as a form of corporate sponsorship. Perhaps as a response to the failure of the previous overly ambitious drives, this drive sought a manageable number of new Benefactors (20), to be recruited from a pool of 200 identified potential prospects, companies in Summit County that might be
interested in supporting the SCHS. The actual contacting and recruitment of these prospects was carried out by a small committee of board members who had close ties to the prospective new Benefactors.

Unfortunately, attempts to discover the actual results of this membership drive from the archives of the SCHS proved fruitless. Examination of financial records from Fall of 1993 through 1994 revealed no significant change in membership revenue, possibly indicating that this drive was unsuccessful, but not conclusively (SCHS Financial Records, 1993-1994).

Today, the membership of the SCHS holds steady at about 600 members. Demographically, the membership base is predominately white, upper-middle class, and over the age of 50. Looking at the membership of the SCHS today, it is clear that membership drives are not projects to be undertaken only once a decade, but rather probably fairly often. It has also been over two decades since there was a committee specifically dedicated to membership.

The current membership program of the SCHS varies little from the program offered in the 1950s during Carl Pockrandt's tenure. Today there are seven levels: "Young
Professional” at $20 per year, “Individual” at $40 per year, “Dual” at $50 per year, “Summit Sponsor” at $100 per year, “John Brown” at $250 per year, and “Simon Perkins” at $500 per year. All members still receive the benefits of free admission to the museums and a subscription to the newsletter, in addition to tickets for the holiday tours and discounts on special events and programming.
In order to score and classify the Summit County Historical Society's membership program according to the Hayes-Slater assessment framework and membership program typology, I took Alix Slater's revised benchmarking criteria from her 2004 paper as the foundation for constructing a questionnaire that could be given to the President and CEO of the SCHS.

I attempted to clarify the language of the questionnaire to fit the criteria within the context of American museums, wherein different nomenclature is used to describe museum membership than that used in the United Kingdom. For example, in the UK, and in Hayes' and Slater's papers, the term “membership scheme” is used as opposed to “membership program”. “Membership program” has thus replaced “membership scheme” in the benchmarking criteria. Also, in the UK and most of the rest of Europe, museum membership programs are typically referred to formally as “Friends
Groups”, regardless of their typological classification. This is in contrast to the United States, wherein “Friends group” typically refers very specifically to a membership program that would, according to Hayes and Slater, be classified as a “Social Club”.

The questionnaire completed by the President and CEO of the SCHS can be found as an appendix to this paper, with her responses highlighted in green. Based on her responses, the membership program of the SCHS received a score of 28.7.

According to the original scoring rubric in Debi Hayes' and Alix Slater's 2001 paper, the Summit County Historical Society's score of 28.7 puts it within the type of “Integrated Membership Program”. Using the revised scoring rubric from Alix Slater's 2004 paper, however, the SCHS sits just in-between the highest possible score for a “Public Members' Program” (a score of 28) and the lowest possible score for an “Integrated Membership Program” (a score of 29). This suggests that the SCHS' membership program is of the “Aspirant Integrated Membership Program” type described by Slater, a membership program that is primed for transition into a more evolved type but may not yet be in the actual transitional state.
Following is a look at some of the responses to the questionnaire and how they might be explained.

Question 1, “How integrated is the SCHS’s membership program into the organization?” was responded to with “the program is fully integrated into the organization, under development or marketing.” Membership is the responsibility of the paid Administrative Assistant at the SCHS.

The response to Question 2, “To what extent does the SCHS depend on membership for strategic planning?” was “membership has a recognizable strategic value but only partly harnessed by the organization.” It is certainly the case that the Summit County Historical Society depends on its membership program strategically. For example, the most recent strategic plan developed by the SCHS, in 2005, was divided into six “focus areas”, with “Development” being focus area one. The chief goal of Development was stated as “increase membership”. This was to be accomplished by developing and monitoring all extant membership relationships, improving annual membership solicitation, and expanding programs for member involvement (SCHS Strategic Plan, March 2005).

Additionally, revenue from the sale and renewal of memberships accounts for between 13% and 18% of total
budgeted operating revenue for the SCHS. The SCHS has an annual operating budget of around $300,000, so membership dues might account for around $45,000. According to a brief published by the US Department of State's Bureau of International Information Programs, earned income, such as from admissions, retail sales, rentals, and memberships should typically provide an average of 27.6% of a museum's operating revenue (Bell 3-4). 13%-18% of this expected 27.6% (which would be $82,800 in the case of the SCHS) coming from membership alone indicates that membership is indeed strategically important to the SCHS.

Question 7, “What sort of fundraising is conducted through the SCHS membership base?” was responded to with “limited fundraising, with occasional donations by members.” This is true. The SCHS relies somewhat on its membership to conduct fundraising, even employing certain member volunteers to serve on planning committees for smaller fundraising events. Still, high-level development responsibilities, such as building relationships with government and foundations and planning major fundraisers, are mostly reserved for the staff and the Board of Directors.
The SCHS also offers multiple categories of membership based on demographic data (Question 4), provides multiple entries into membership (Question 9) and has paid staff oversight of the membership program (Question 10). These are all necessary facets of an “Integrated Membership Program”.

Finally, Questions 13 and 14, which have to do with evaluation, both garnered higher-scoring responses. To Question 13, “How frequently is the membership program evaluated?” the President and CEO responded “Every 3-5 years.” To Question 14, “What is the extent of the evaluation process?” she responded “program is evaluated on number of members and their motivations for joining.”

Both of these responses seem accurate. In 2012, an intern for the SCHS conducted a “members’ satisfaction survey” similar to the one that was done during the 1988-1990 membership drive. The purpose was to divine new “marketing initiatives” by which membership might be increased. The intern came up with three: Revise membership categories, expand geographically through new alliances, and appeal to a younger demographic. This was the impetus for the creation of the “Young Professional” membership level, priced at an affordable $20 per year (SCHS Archives, 2012).
So the SCHS has a maturing, integrated membership program that figures into strategic planning and earns substantial revenue for the organization. It is evaluated at least every five years, and recent history shows that these evaluations can lead to real, positive action on the part of the administration to improve the membership program. But what does the SCHS actually gain from its members, aside from earned revenue?

Where the SCHS depends on its actual members most is in the area of volunteer staff. The SCHS began as an all-volunteer organization, and reliance on volunteers is still an integral component of the operational philosophy of the SCHS. Member volunteers work in almost every capacity at the SCHS, from cleaning and maintenance of the museum properties, to special event staffing, collections management, and community outreach. Member volunteers also work as presenters of the adult education “Remember When” programs, one of the most popular programs offered by the SCHS.

Most importantly, the primary means by which the museum properties, the Simon Perkins Stone Mansion and the John Brown House, are experienced by visitors is through guided tours. Leading these tours are volunteer interpreters, all
of whom are members of the SCHS who typically join at higher membership levels and make additional monetary gifts during the year. These are not only the core members of the SCHS, they are the organization’s most stalwart individual supporters, with significant contributions of both time and money. Some have even included SCHS in their estate planning.

The question then is “Should the SCHS adopt a more active position with regard to member recruitment?” With the bulk of its earned income coming from membership dues, and some of its more ardent members making additional gifts to the organization, the SCHS is certainly dependent on membership financially. The SCHS is also dependent on its members for time and labor. With only three full-time staff and four part-time staff, the many and diverse programs offered by the SCHS would be difficult to maintain without member volunteer staffing. Membership for the SCHS is necessary. But are more members needed?

The membership base has remained relatively stable over a period of five years which is positive because there has been no noticeable attrition. The negative side of this is that while the survey response from the President and CEO indicates that efforts are being made to acquire new
members, the fact that the membership numbers have remained constant seems to suggest that these efforts are not working.

Two lines of action must be pursued if the SCHS wishes to increase membership. One, the SCHS must make membership-wide satisfaction surveys a biannual undertaking in order to gauge how well the programming of the organization is working for its members, how involved the members feel, and whether the benefits offered by membership are adequate. Using the Armstrong-Slater paper “Understanding Motivational Constraints to Membership at the Southbank Centre” as inspiration, it might be useful to also survey members of other museums in the Akron area who are not members of the SCHS, to find out why they are not members of the SCHS and what it might take to entice them to join.

Second, the SCHS must make membership drives a regular part of its ongoing strategic planning. Conducting a drive annually might be unnecessary and annoying, but certainly a biannual membership drive would not be out of the question, provided it is done in a cost-effective way. Coupled with a biannual membership survey, a biannual drive would be valuable. The survey and the drive could be undertaken on
alternating years, so as to keep some form of positive membership initiative happening every year.

    The key to cost-effectiveness is twofold: One, employ a dedicated Membership Committee comprised of both staff and member volunteers, so that the labor is not shouldered solely by paid staff, and two, keep the goals of the membership drive attainable. Drives in the past met with varying degrees of success, largely because the goals were simply not reasonable. The 1988 drive failed in its goal of doubling the membership of the SCHS, and there was no reason to believe, given the history of the organization, that this was even possible. The 1992 drive failed, perhaps in part because of confounded tangential goals that robbed the entire effort of ideological cohesion.

    The SCHS has around 600 members. This number has been more-or-less constant for the past five years. A reasonable goal for a biannual membership drive, then, might be 60 new members. Increasing membership by 10% every two years would amount to a 5% increase to earned income, using our earlier $82,800 number, which is respectable even by for-profit sector standards. Most blue chip companies would enjoy seeing steady 5% growth over two years.
Further research could include, as stated earlier, case studies, including assessment and classification, of the membership programs of the Friends of James A. Garfield National Historic Site and the Zoar Community Association / Historic Zoar Village. Completing these studies, and comparing the results to those of this present study, would help to create a more well rounded picture of the different membership program types in historic sites in the United States.

There are also potentially new criteria that could be added to the Hayes-Slater typology, such as “How diverse is the range of offered benefits between membership levels?” In other words, does each successive level of membership offer greater perquisites than the last, or is there little distinction between the lowest and highest levels of membership? There is not much diversity among the membership levels offered by the SCHS. All levels feature essentially the same benefits.

This diversity of benefits is often a major distinction between a developed, integrated membership program and a less mature program. Even programs with many levels that are well integrated into the museum’s organization and strategy often offer little in the way of increased benefit from
level to level. So, it might be valuable to have “diversity of offered benefits” as a benchmarking criterion.


Bell, Ford W. “How are Museums Supported Financially in the U.S.?” United States Department of State, Bureau of International Information Programs (March 2012).


APPENDIX

QUESTIONNAIRE SUBMITTED TO THE
PRESIDENT AND CEO OF THE
SUMMIT COUNTY HISTORICAL SOCIETY

1) How integrated is the SCHS's membership program into the organization?
   (Circle one)
   a) the membership program is an autonomous, completely separate organization. (1)
   b) it is semi-autonomous, outside of the formal management of the SCHS but housed in SCHS offices and with representation on the board or on committees. (2)
   c) the program is fully integrated into the organization, under development or marketing. (3)

2) To what extent does the SCHS depend on membership for strategic planning? (Circle one)
   a) the SCHS does not take membership into account whatsoever for strategic planning. (0)
b) the SCHS may rely on its members for fundraising and as a source of volunteers, but membership is not recognized as having strategic value. (1)

c) membership has a recognizable strategic value but only partly harnessed by the organization. (2)

d) high level of dependence with explicit and quantifiable objectives and strategies. (3)

3) Relationship between Membership program and Organization (Take average of scores of sub-questions)

a) What is the relationship between the membership program and the organizational objectives of the SCHS?

- Membership operates as an independent entity with objectives that may or may not be different from the SCHS. (Circle one)
  - strongly agree (1)
  - agree (2)
  - strongly disagree (3)

b) What is the relationship between the activities of the membership program and the organizational objectives of the SCHS? (Circle one)
• Membership activities are fully integrated with organizational objectives.
  • strongly agree (3)
  • agree (2)
  • strongly disagree (1)

c) What is the level of cooperation between the membership program and the SCHS? (Circle one)
  • Membership cooperates with SCHS but has its own aims and objectives.
    • strongly agree (1)
    • agree (2)
    • strongly disagree (3)

4) How many membership categories? (Circle one)
   a) one generic category (1)
   b) multiple categories at different price points based on demographic criteria (2)
   c) flexible pick and mix approach to enable members to personalize behavior and giving (3)
5) What is the status of the SCHS's membership base?

(Circle one)

a) noticeably declined in the last 5 years (1)

b) stayed the same over the past 5 years (2)

c) noticeably increased over the past 5 years (3)

6) What is the focus on longitudinal relationships?

(Circle one)

a) membership is socially-driven, with members
joining because their friends are members, and not
because the SCHS is actively seeking them (1)

b) the SCHS focuses on acquisition of members with
occasional attempts to reactivate stagnated
relationships (2)

c) the SCHS is focused on member retention,
calculating total lifetime value and keeping historical
records of membership trends. A database is used to
inform strategies for maximizing a member's potential
(3)
7) What sort of fundraising is conducted through the SCHS membership base? (Circle one)
   a) limited fundraising, with occasional donations by members (1)
   b) ongoing approach to fundraising driven by flagship projects. Diverse methods selected on their fitness for purpose, such as fundraising specifically for acquisitions, education, and capital projects (2)
   c) strategic fundraising approach integral to achieving organizational objectives. Multiple tools employed and routes for developing members’ “giving habits”, such as legacy planning, monthly giving, high-level membership categories, etc. (3)

8) What marketing communications are employed to reach membership base? (Circle one)
   a) very limited marketing communication tools, mostly word of mouth (1)
   b) wide range of communication tools used, such as special events, website, printed materials (2)
   c) extensive range of integrated marketing communication tools such as member-get-member drives,
joint promotions with other organizations, mailing drives (3)

9) What are the channels of entry into membership? (Circle one)
   a) by invitation through social networks (1)
   b) open membership, multiple channels of entry promoted by SCHS (2)
   c) open membership, multiple channels including hosts, affiliates, and mass marketing drives (3)

10) What is the degree of volunteerism versus professionalism in the administration of the membership program? (Circle one)
   a) amateur, run by volunteers (1)
   b) increased formalization of structures, possibly a paid employee who administers the program (2)
   c) dedicated, paid membership staff with relevant expertise in marketing, relationship management, and/or fundraising (3)
11) What is the charitable status of the SCHS? (Circle one)
   a) some form of constitution (1)
   b) formal organization without charitable status (2)
   c) charitable status recognized by the government (3)

12) What is the level of business planning underpinning the membership program? (Circle one)
   a) limited business planning, perhaps a business or fundraising plan (1)
   b) tactical rather than strategic planning undertaken with short-to-medium-term emphasis in two or more areas (2)
   c) strategic planning, collaboration between departments and long-term emphasis across a number of areas such as fundraising, business, audience development, and marketing (3)

13) How frequently is the membership program evaluated?
   (Circle one)
   a) program is not evaluated (0)
   b) ad hoc evaluation (1)
   c) evaluated every 3-5 years (2)
d) systematic research and evaluation to inform strategic planning, either annually or biannually (3)

14) What is the extent of the evaluation process? (Circle one)

a) program is not evaluated (0)
b) program is evaluated solely on the number of members (1)
c) program is evaluated on number of members and their motivations for joining (2)
d) program is evaluated on numbers, motivations, behaviors, and more (3)