

The In-House Evaluator: Opportunities and Challenges

A Panel Discussion

**Panel Leader: Minda Borun
Franklin Institute Science Museum
Philadelphia, Pennsylvania**

**Panelist: Margaret Marino
Denver Museum of Natural History
Denver, Colorado**

**Panelist: Zahava Doering
Smithsonian Institution
Washington, DC.**

**Panelist: Patricia MacNamara
Adler Planetarium
Chicago, Illinois**

Minda Borun: This session is one in a series of VSA programs which explore issues of concern to visitor studies professionals. We will not be presenting formal papers, rather we'll be discussing aspects of the life of the "in-house evaluator." The in-house evaluator is a fairly new creature, and there have been very few people in the job until the last two to three years. Those of us who've been in or around the position for a number of years have been struggling with some of its inherent challenges. Being an evaluator on a museum staff offers special opportunities and problems which are not encountered by the outside consultant. The in-house evaluator must establish a set of relationships with exhibit, education, and administrative staff, and tread a thin line between exhibit development and assessment. Our three experienced in-house evaluators will discuss their personal solutions to the issues and contradictions raised by this unique position, in the hope of helping those of you who are new to the task.

Margie Marino is in charge of Exhibit Evaluation in the Exhibits Division of the Denver Museum of Natural History. Her current focus is the development of the Prehistoric Journey exhibit, a seventeen thousand square foot exhibition on life through time, which opens in the fall of 1995. **Patty MacNamara** is currently Manager of Evaluation and Project Development at the Adler Planetarium in Chicago. She's been there since

March, 1993, a recent transition, before which she served as staff evaluator at the Science Museum of Virginia for thirteen years, involved primarily with exhibit development and formative evaluation. Our third panelist, Zahava Doering, is a sociologist and research methodologist. Zahava is primarily an applied researcher rather than an evaluator; she is the founding director of the Institutional Studies Office at the Smithsonian, an office that serves all of the Smithsonian museums.

Each of our panelists has picked one issue about which she will speak for about five minutes. Next the other two panelists will have a chance to comment on the subject. Then we'll have about five minutes of general discussion and go on to the the next issue.

Margie: My issue is, "how do you gain the confidence of the staff? I think the first thing is defining your role, and we have a lot of disagreement on the panel concerning this. My personal feeling is that the role of the evaluator is *not* a management role. I do not think a person can do good evaluation work and handle the responsibilities and the pain of being a manager at the same time. My feeling is, "I do the evaluation, I throw it out there, it's up to management to decide whether they should use it." It's out of my hands; they ignore it at their own peril, not mine.

The second concern is communication with the staff. In my case, it is a huge staff with a tremendous variety of evaluation needs. Each person—curator, designer, interpreter, or educator should have a chance at getting some evaluation done if they feel it's needed. I want to make sure everyone on the staff knows I am there, and that I am available and can talk to them.

I want everyone to come to me and just propose a possible study. If I went to all the development meetings, there would be no way I could complete the evaluation process. I think management has final responsibility for seeing that evaluation is used, not the evaluator. It's just too much of a conflict, and it creates dissension in the ranks. Without the management role, members of the team see the value in the information on its own merits.

Patty: I find that it is important to work with staff and really be a resource for them. The most frustrating thing is when someone says, "I have to write objectives for you so tell me what they should be." They're not writing objectives for *me*; they're doing that for *themselves*. I really try to work with people in figuring out how to use evaluation in a way that's creative for them, and not just as a requirement or something that they are doing for me.

In terms of exhibit development, I do run the risk of being the "bitch" on the project, especially when I come running down to them and say, "Oh, guess what, nobody saw the button"—that's not what they really want to hear. I've found that I have to concentrate as much on what worked with an exhibit, as what doesn't work. My interest really is in what doesn't work,

but that's not what endears me to the exhibit builder and the designer. I have to look at things from their perspective.

The other thing that I do that helps is to bring them into the process. I bring them up to the floor with me, and we watch an exhibit together. By watching it together, I think they see that observing the interaction between a visitor and an exhibit can be a creative experience rather than just a judgment and a critique; it can help you see where to go next.

Zahava: When Margie initially raised her issue—"How do you gain the confidence of the staff?," I wrote three words: *quality, limitations and use*, and I'd like to comment on them. In my short six-year experience in the museum world, I have learned that it is the *quality* of the work that you do that determines whether you're listened to or are respected. One of the things, unfortunately, that is happening in this emerging area of the in-house evaluator is that some people are being thrust into the position, who do not have adequate training, and thereby are hurting not only themselves and their institutions, but the field. I think it is imperative that every one of you recognize your *technical limitations*—be willing to admit them, face up to them, and ask for help from others. You will gain more respect by saying, "I don't know how to do that," or "I don't understand that," or "I don't know why the results came out that way," than you will by giving people poorly done work and off-the-cuff theories.

Quality work and understanding your limitations are aspects of behaving as a professional. In the last six years, I've walked into every museum at the Smithsonian and said quite honestly to my colleagues, "I don't know about exhibition design, I am not a museologist. But there are some things I do know; I need you to help me, and perhaps I can help you."

Another aspect is being willing to work with your colleagues about how to make research useful to them. Both Margie and Patty alluded to that. It is the combination of these things that will get you attention and respect.

Minda: Comments or questions from the floor?

Randi Korn: I think that evaluation is far too important not be a management position, and integral to the development process. There are problems where evaluators don't have some management control over the process.

Margie: In my institution, I feel confident that they will look at the evaluation findings and make a judgment based on evaluation results, as well as a number of factors that I may not be aware of. I do trust them. Certainly they're not evaluators, but they are supportive of the process, and they're supportive of my work. Staff frequently suggest during development meetings that people talk to me before they go on when a situation arises that they think should be tested.

Zahava: One of the things that Margie mentioned is that the in-house evaluator has the responsibility for communicating effectively, so that people they work with know how to interpret the evaluation results given to

them. It can be very high quality work, but unless your colleagues understand exactly what the limitations of a specific method are, you may be putting something out there which can be misused.

Margie: I maintain final interpretation of any results, and I agree there is a risk that others will reinterpret the results. There are people who have a particular agenda, who will use my findings for their own ends. I'm always cautioning them to make sure that what they are saying is what the research really shows. It is a very serious problem. However, you can't always be there to make sure that results are reported, or suggestions are followed to the letter. A certain amount of trust is involved.

Minda: Further comment?

Zahava: I want to raise for discussion the organizational placement of the in-house evaluator. I raise it in part because of watching the rise and fall of careers at the Smithsonian and other institutions in the United States. In the ideal case, the in-house evaluator should work for a very neutral party within the organization. I would argue that this person should report directly to a director, or a deputy director, or an associate director, or certainly somebody like that. It is through the neutrality of the boss, and the lack of vested interest on the part of the people around him or her, that an in-house evaluator can learn the most about the institution, and, in fact, make the greatest contribution.

Organizational placement, to a very large extent, defines your job. It is extremely difficult to take very negative results to the person who is going to write your performance evaluation, rate you, and evaluate you. One of the wonderful things about my job is that there is a distinction between the people within the Smithsonian who are my clients, and the individual who appraises and assesses me and worries about my career, my pay raises and the like.

A neutral position also allows you to assist in public relations, marketing, and other things that are outside the exhibition process. After all, if you don't worry about getting people to come to the museum to begin with, the best of exhibitions will remain unattended.

Margie: I was recently in the position of completing a summative evaluation of an exhibition where the head interpreter is my supervisor, and, of course, does my performance appraisal. I think she took it very well. I was critical of certain aspects of the interpretation, but I made an effort to meet with her several times before I gave the reported information to the division. I think she understood that the criticisms I had weren't directed at her, but at the process.

I do think of exhibit evaluation as what I do. Exhibits are products, and the evaluator has to be close to the product in order to have an awareness of all the different problems and issues involved. That is why I currently advocate that evaluations be placed in the exhibits division.

Patty: At the Science Museum of Virginia, I was in the position of being pretty much an independent department. I reported initially to the

Director, and then, as our bureaucracy increased, to a Deputy Director who managed all the exhibit and program aspects of our operation. I was never in the position of having to report any evaluation findings or anything that was at all critical to my supervisor, because she wasn't responsible for any of the exhibits or programs that I was working with. I think there are lots of problems when you're either in "exhibits" or in "education," in terms of what you can do for the institution as a whole.

Minda: Questions or experiences that people have had along these lines, that they'd like to share?

Doug Hoy: As an outsider, I have noticed that it is as Zahava says—it is difficult to break bad news, and it's also difficult to go to the director, and it's difficult to go to the trustees, too. So I think that being located as high as you can is good. I think you can use a more centralized approach if you look at evaluation as planning and budgeting—a way of working. The institution has to come to understand your reports.

Zahava: I'd like to hear from people in the room about where in their organization they are placed, and what they see as the pros and cons. Are you in exhibits, are you in education, or is your organization small enough that these are not issues?

[Person in Audience]: Well, I work in the Visitor Services Department because it is the quality of the visitor experience that's my concern. I don't get too close to the creative process of the designers and the writers; I focus my attention on visitor reaction. We've been doing a lot of remedial and formative research. The disadvantage is that designers and other people tend to say, "You don't know what you're doing, how can you tell us that your mock-up works better than my beautiful silk screened graphic?" It's very difficult to convince them that I'm not dictating design, and I'm only advocating what the visitor has said. It's their job to make effective things. You've got to go into battle a lot.

Patty: When I said that I reported to the Director, I don't mean that I reported *findings* to the Director. I worked with all the staff. By being independent, I wasn't "ghettoized" in either education or exhibits. I was a resource for everybody, but it was the Director or Deputy Director who did my performance evaluations and worked with me on what I was going to do during the year. My performance wasn't defined by the evaluation work itself, but by how useful the information was, and what kinds of decisions we were able to make as an institution based on the information we were getting from visitors.

Zahava: I want to clarify one thing in response to what was just said. *Where* you are in the organization is somewhat separate from how work on specific projects is organized. You can be an effective member of an exhibition team if you maintain some distance.

[Audience]: Are you saying that a person can't evaluate what they do themselves?

Zahava: Well, yes and no. I find myself encouraging people in programs, exhibitions, and the like, to do some evaluating themselves. If I can teach them a bag of informal tricks about how to understand their work better, by all means they should go ahead and use them. At the same time, they need to recognize that they don't have complete objectivity. The most impressive case I ever saw is someone who did an evaluation of her own program, and then went to her boss and said, "We need to phase this program out, because it's a lousy program." There aren't many of us who would do that. By raising this issue, I'm trying to say that *who* you work for, and how your job is defined, and how the work is organized, has a lot to do with both the quality of the work and to what extent it will be listened to.

[Audience]: I find myself in a very unusual situation, in that 50 percent of my job involves evaluation, and the other 50 percent involves staff development training. Both of the issues that we're talking about really hit home. In staff development training, I have an opportunity to develop confidence and rapport with people. Often, what I'm evaluating is our guide performance and visitor services, and I incorporate the lessons learned into my training. But it is very difficult when you have to tell people that they need to make changes.

Minda: Another comment?

[Audience]: Recently, I was asked to do an in-house evaluation for a project whose principal investigator was my boss, and the issue of conflict of interest arose. We found an external person to do the study, because I thought it was better for the institution, for me, and for the quality of the work.

Zahava: This issue of conflict of interest is one reason why a fair number of organizations go to consultants. Somehow they feel that an outside consultant can be more neutral and more objective. I *strongly* disagree with this idea. My salary is going to be paid, irrespective of what I find. There is a certain amount of "product concern" on the part of someone who's an independent consultant trying to make a living. Especially in the case where long-term relationships with an organization are developed, the consultant may be *less* objective than someone in-house. There are consultants in this business who are extraordinarily competent and professional. But we are going to see larger numbers of people from commercial firms coming into this business. Those of us on the inside are going to have to be *very* vigilant where issues of conflict of interest, and neutrality and objectivity arise.

[Audience]: You *can* be objective if you are involved. There are standard procedures that steer you away from bad practice—loaded questions, misinterpreting averages, not using the same criteria when evaluating performance.

Minda: That's a very helpful comment. Now we'll go on to Patty and the last issue.

Patty: As I said before, I was in a position to participate pretty effectively in decision-making. But as you've heard, I worked at the Science Museum of VA for fifteen years and I found that as the organization grew and changed, there were more people working on project teams, and the dynamics of the decision-making really changed. As more people were involved, tasks became more compartmentalized. I would be very involved during the development phase of an exhibit. As we were using formative evaluation to develop all the components, I was really part of that decision making process, and I could operate very effectively. We developed prototypes that really worked.

I find formative evaluation to be a kind of negotiation between the visitors, the designer, the builder, the educators; we're all trying to work out something that meets our various needs. I was the person who brought visitor information to the process. But as exhibit projects proceeded, I would participate less and less, because I didn't have any budget control; I wasn't supervising the fabricators or the designer, or any of the people who were building the final product. I found this to be a very discouraging experience. Even though I had worked really hard on a project, and we had gotten good information on what was going on, decisions were made very late in the process that, from my perspective, completely negated most of the work we had done. Often, these were very trivial decisions from the point of view of the designer or the exhibit builders who understood only vaguely what the whole point of the exhibit was. I want to tell you a story to illustrate the situation.

I worked on an exhibit fairly recently in which most of the activities were designed to be used by visitors who were seated. This worked out very well. It was easy to put activities on a table top and provide stools for people. Little kids could get on the stools, adults could sit down, and people in wheelchairs could get to the tables. Later in the process, when the permanent components were built, however, a budget shortfall eliminated the stools. Visitors had to drape themselves over the exhibits to use them. That experience galvanized my thinking. I realized that I needed to function at a higher management level. What I enjoy about my work is making good exhibits and working with visitors, but I realized that it wasn't going to be satisfying for me if I didn't have more decision making power in the institution, I've recently had the opportunity to move into a more senior position at a different institution, working for someone who recognizes the value of evaluation in the decision making process. Now I'm managing an exhibit project; I'm manager and evaluator; I have a chance to see if we can carry the vision through the process. In the end, if I feel that we've failed, I have only myself to blame. I think this is something that more people who've been doing evaluation and visitor studies need to consider. We need a career path. I think more of us need to think about moving into management level positions, so that we can use the evaluation process more effectively in museums.

Margie: There is a group within our organization called Audience Research and Evaluation. It includes someone from Marketing, someone from Visitor Services, someone from Education, and someone from exhibits, as well. We formed this group recently because we realized we were all doing research, but weren't talking to one another about it. Also, there existed a potential for over-soliciting the visitor. We shouldn't do that. These people are not our subjects, they are our visitors. I also put together a newsletter to deal with evaluation topics. I bring outside research into it, but it's primarily about my current project, *Prehistoric Journey*. It's distributed to all members of the team, but also to management, etc. There are ways that this information can go out in writing, when it's easy to read. Once it's out there, it's less likely to be ignored. People can look at it and read about it, and if they have any questions, they know to whom to go.

Zahava: Part of the problem arises from getting too close to the process. Patty's example of the stools is a case of being too close. I don't want that kind of control of decision making. The *best* I think we can do is to get a fair hearing, and I think a fair hearing comes out of, again, doing high quality work. I was clapping when Doug was talking about abiding by professional standards and gaining the respect of your colleagues. But it begs the issue that Patty raised—one that is sensitive to a lot of people in the room about the career path of people who do this kind of work on a full-time basis. Where do you go after several years? At what point do you get stale in doing these things over and over again, and where do you move? I don't think that's very clear. I don't want to see that after you've worked for an institution and developed a great deal of expertise, you have to become a private consultant. Some people have done that. There are some risks for people, and some losses for institutions. What do you do with this kind of training? I'd like to hear Doug actually respond to the question of possible career paths.

Doug Hoy: I would probably think about "going outside."

Minda: You said "going outside?" Becoming a consultant?

Doug: Yes. It's a personal choice I would make. Every project I do raises more questions.

Judy White: There are two different kinds of evaluators. The ones who are integral to the development of the exhibit and do their own evaluations—a lot of this is very informal, but it's really important. The other role is the neutral role that Zahava has been describing. I think the two roles need to be recognized as different. At the Smithsonian, there have been several people in various museums who have been in the informal evaluator role, which nevertheless has been very important to developing exhibits. But Zahava has been the kind of person you can go to when you need a little bit of outside objectivity.

Minda: I think that's an excellent point. We ought to bear it in mind and come up with names for the two different kinds of roles, because they are very distinct.

Zahava: There is a valid role for informal assessment that is part of the work that you do. That category of work is terribly important throughout these institutions. Exhibition teams, the education departments, marketing and development offices need informal assessment to provide a look at themselves. At the same time, there is other work which is more removed, objective, generalizable, scientific, and rigorous, that has implications for your own organization, and from which others can learn. I'll give you an example. Yesterday morning, Alan Friedman gave four examples of situations in which he felt evaluation would help. Alan admitted that the telescope example was the only study that followed accepted social science standards for sampling, for statistical integrity, etc. For the AIDS example, he referred me to John Falk. The other two cases Alan was very sure were not conducted according to social science standards. Now, what's important is that in the case of the telescope, the evaluation informed that project, and was also done in such a way that all of us can learn something from it. In the case of the roulette wheel and the children's electricity exhibit, because the results were so overwhelming, they were informative to that particular exhibition. But we can't apply those results to other situations.

Minda: I think Zahava's just given us a distinction between evaluation and research. Evaluation seeks to illuminate the development of a particular project, in a particular place, at a particular time. Research, on the other hand, seeks generalizable findings by using standard scientific practices, sampling techniques, valid and reliable measuring techniques in order to shed light on a more general range of projects.

Zahava: I *totally agree* with the distinction that Minda has made. I totally disagree with the *words*. I spent ten years of my career doing "evaluation" using *scientific standards*. Evaluation, by definition, is not "not scientific." There are textbooks and courses out there on how to do evaluations so that they lead to generalizable results. I don't know how we unscramble the language.

Minda: What we are talking about is a continuum. At the far end, you've got formative evaluation, which is part of an exhibit development process. If you interview five people and they don't get it, then the exhibit is obviously not working. You don't need a large random sample to make a change. You make a change, and then you're not studying the same thing anymore. It's altered. So it's a *systematic procedure*, but you're not looking for scientifically replicable results because the thing you study doesn't exist ten minutes later. At the opposite end of the continuum, you have a full-blown research project where the goal is to contribute to the literature. In between, you have evaluation studies that are valid and reliable, and can illuminate the exhibit communication process beyond a particular exhibit. Furthermore, you have systematic research based on a number of case studies, and intended to contribute to the literature, as well as to the development of individual projects. We're a new field, we have

some disagreements about language, they'll probably get sorted out. That's all part of the endeavor.

[Audience]: Is there a difference to the user whether it's called evaluation, research, or informal assessment?

Patty: One issue is the type of decision you're trying to make. If it's an exhibit that you're talking about, and things need to proceed, you're not going to be collecting the kind of data that would be called a study. You really are collecting the data and using it pretty quickly. But in terms of how someone might function in a museum, or as an evaluator, there are other decisions that you might want to make in the institution that would call for more systematic data gathering. The results may or may not be publishable outside the institution, but would yield research reports that could indicate whether or not you should expand a program, drop a program, or address the needs of the audience differently.

Zahava: The way I want to answer it, for those of you in the room who have had some statistics, is, "How much are you willing to pay for a reduction in the standard error?" For those of you who don't, I'd like to put it in terms of, "What are the implications of the decision if the results are wrong?" Many decisions that you are dealing with within an exhibition may not require rigor. However, if you're in the position of making critical decisions, you should consider implications. For example, if you were making recommendations to Congress about the possible location of a new museum with millions of dollars, and jobs, and transportation systems involved, then you want to come as close as possible to a precise, correct, justifiable answer. Part of the advantage of having a well-trained, across the board in-house person is that they can help assess how much a decision is worth in terms of effort, and recommend the kind of study you want to undertake. I reject about 80 percent of the work that comes into my office because the decision isn't worth the resources."

Minda: We're going to have to wrap up now. I want to thank you for coming to this session, and also to tell you that I think there is a community of interest and concern among in-house evaluators, and this is the start of an on-going conversation. The AAM Committee on Audience Research and Evaluation (C.A.R.E.) has just started a newsletter, *The Gauge*. We're planning to have a regular column devoted to the concerns of in-house evaluators. If any of you would like to express your thoughts on some of the issues raised here, or others that you've been pondering, I'd like to suggest that you write them up and send your discussions to Randi Korn.

Randi is the editor of *The Gauge*, which will be our first forum for continuing this discussion, and then we'll look for other vehicles—supportive ones, as we try to find our way through the maze of what is essentially a new career, and I welcome you all to it. I'm happy to see our numbers growing, happy to see you joining up. We'll be working together.