

Chapter 2

EVALUATION IN MUSEUMS: JUMPING THE HURDLES

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In Molly Hood's pre-conference workshop, a fellow participant asked an excellent question: "How do you get the director to support evaluation in your museum?" In answer to that question, let me tell you a fairy story.

"Once upon a time in the not-too-distant past, there was a quiet town called Memphis on the banks of the mighty Mississippi River. In this town, there was a neighborhood in which there lived a variety of law-abiding, God-fearing people of all ages, inclinations, and occupations. There was a teacher, a doctor, a photographer, and, as it happens, an evaluator.

One day a new family moved into this neighborhood—there was a Mommy, a Daddy, and a little girl. The Daddy, it was rumored in the neighborhood and elsewhere, was a museologist and had come to town to assume the directorship of the Memphis Museum System.

Not long after the new family arrived in the neighborhood, as chance would have it, the museologist and the evaluator met. And what do you think happened then?

That's right! The new museum director exclaimed with glee, 'Oh boy, I've been looking for an evaluator; am I glad to meet you! Evaluation is exactly what the Memphis Museum System needs. Please come at once and help us maximize our resources, improve our exhibits, programs, and facilities, and document our value to the community!'

The evaluator, of course, jumped for joy, clapped her hands, and graciously offered to begin at once on a pro bono basis—'I'd love to,' she exclaimed—and off they walked—the museum director and the evaluator—arm in arm, gaily discussing their very first project!"

I believe I did mention that this was a fairy tale! Doug Noble, who really is the director of the Memphis Museum System, (that part was true) and I, who really am an evaluator, (that part is also true) are going to tell you what really happened and how you might use our experience to help you convince your director to support evaluation in your museum.

Our presentation focuses on three major issues which we feel are common to all museums. The first issue concerns the lack of understanding about evaluation and its uses in museum settings. For example, in my first "formal" discussion about evaluation with the director and the staff, I asked how the museum system knew when an exhibit or program "worked." The answer to that question was swift and pointed—"By how many people come to it" was the response. Although that is one way to judge an exhibit, it is not the best one in terms of determining whether or not an exhibit has served its intended purpose, for example, to teach or inspire or intrigue a visitor.

In addition to a discussion of the issues which we feel are important in introducing and implementing evaluation in a museum setting, the problems or results caused by each issue will also be presented followed by the manner in which the issue was handled at the Memphis Museum System (MMS). Finally, suggestions for a generic solution for each issue, which can be used by others, will also be presented.

All of the issues seem to fall under one of three major headings: (1) lack of understanding of the role of evaluation, (2) tight budgets, and (3) staff concerns. The first group of eleven issues to be discussed falls under the major heading of lack of understanding of the role of evaluation.

Lack of Understanding of the Role of Evaluation

Issue 1. *Belief of director and/or staff that the number of people who come to the museum is the best measure of "effectiveness."* "Good" programs or exhibits are equated with those which are well-attended; i.e., the old "vote with the feet" ruse. Attendance is, of course, important because you must get folks to the museum before you can teach, expand, entertain, etc.; however, good attendance is clearly not the only criterion by which exhibit effectiveness should be judged.

Problem or Result. It confuses effectiveness of reaching goals with popularity. If the number of visitors is the primary criterion of success, museums will have a difficult time competing with movies, theme parks, and other leisure time activities which may be more popular.

MMS Solution. Education of museum director and staff regarding use of evaluation via one-on-one meetings, sharing articles, etc. This takes a lot of time. In MMS' case, the evaluator met with every curator in his or her setting at least once and with the Director of Development and PR staff and business manager frequently.

Generic Solution. Evaluators should use their expertise to select articles to share with staff, ask the right questions and persist in encouraging a mutually beneficial collaboration. They should also use their interpersonal skills to help the staff understand that there are other effectiveness criteria which must be considered in addition to popularity.

Issue 2. Intermittent evaluation.

Problem or Result. Director or staff belief that a survey administered once or, at best, intermittently is an adequate "evaluation". For example, the results of a single survey which was used for one purpose at one time are used to evaluate the entire museum's programming, exhibitions, or events for an inappropriately long period of time; e.g., five years. This misses trends in visitor needs and behaviors and ignores the fact that visitor needs change, political climates change, technology changes, etc. To be useful, evaluation must be ongoing.

MMS Solution. The evaluator reviewed the mission statement, departmental goals and all data collection activities across all museum components to determine their current usefulness. Recommendations for more useful data collection procedures and reporting formats which could be used on a continuing basis were then made. We are now establishing ongoing administration and analysis procedures for a visitor study at all components. Further, a systematic review of all planned surveys, etc., is now conducted to maximize the usefulness of all information collection plans and procedures.

Generic Solution. Museum staff should periodically review past surveys, the museum mission statement, current goals and existing data collection procedures and make recommendations to delete those which are no longer useful and to refine those which are, to encourage their use on an ongoing basis.

Issue 3. Evaluation is seldom included in planning.

Problem or Result. Avoidable mistakes and/or misunderstandings which compromise maximum effectiveness are made in the program, exhibit, facility or event design or implementation.

MMS Solution. The Director requested that the evaluator become involved in the planning of a major museum renovation as a member of the design team. Further, the director and evaluator continue to explore ways in which visitor studies, exhibit program evaluation and evaluation can be used in planning stages.

Generic Solution. Evaluators must educate museum directors about the role evaluation should play in planning. Directors must make monies available for evaluation, as well as other types of expertise, during planning.

Issue 4. Naive and inappropriate use of evaluation instruments.

Problem or Result. A single questionnaire, usually borrowed from another museum, is "boilerplated" for a use other than the one for which it was designed. This is an ubiquitous problem and is found across many industries. It often results in collecting the wrong information.

MMS Solution. As a part of the initial evaluation project, data collection instruments were collected, reviewed and modified or deleted as needed with staff input.

Generic Solution. Three recommendations are made: (a) have questionnaires professionally developed where possible; (b) ensure ongoing staff review of all instruments—i.e., periodic (at least annual) review of all data collection instruments in use—and ensure thoughtful development of new ones; (c) all instruments developed should be field tested to ensure that their administration, reporting formats, and analysis will yield useful information.

Issue 5. Misconception of museum staff that questionnaire and/or survey development is simple.

Problem or Result. Instruments that are not properly designed or field tested and, therefore, yield inaccurate or trivial results for decision-making. For example, one questionnaire reviewed at MMS early on contained at least four categories for terminal degrees; e.g., M.D., Ph.D., Ed.D., D.D.S., etc. There was no need for this fine delineation of educational background.

MMS Solution. The evaluator reviewed all instruments being developed; e.g., a questionnaire being developed to obtain information about the effectiveness of Museum Scope, a member newsletter, and helped staff delete trivial or useless questions and design useful ones.

Issue 6. Evaluation is often confused with research. While it should be noted that research is critical for its intended purposes and should be used in some situations (i.e., hypothesis testing), it is important to be able to identify those situations in which evaluation is more appropriate.

Problem or Result. Because research is not typically intended for practical use in real-life situations or by management for decision-making, it is often prohibitively expensive, time-consuming, and impractical for use by decision-makers. For example, many research designs call for use of a control group which does not receive the treatment against which to compare those groups which do receive the treatment. In a museum setting, this might mean that one group of children participate in a program and another group, matched for age, sex, race, etc. does not. Not only is this impractical, it is ethically inappropriate to withhold a program from some children. Further, no "bottom line" or value statement is made in research studies and, therefore, results may not be readily available in a useful and timely format for decision-making.

MMS Solution. The evaluator discussed previous research projects with the staff and identified those situations for which it was appropriate and those for which it was not.

Generic Solution. Evaluators should help museum directors and staff discriminate between those situations in which research is warranted and those situations which require evaluation.

Issue 7. Evaluation is often confused with market research.

Problem or Result. Market research typically entails determining how the effectiveness of a product can be maximized to meet consumer needs. However, information needed to market products is clearly different from some museum information needs; e.g., determining multiple audience needs; improving program, exhibit or event effectiveness; or making the museum accountable to the community. Further, market researchers appear to use only one or two methods; i.e., survey or focus group. Observation, which is an extremely useful technique in museum settings, and other useful information collection techniques are seldom used in market research.

MMS Solution. The evaluator works closely with the Public Relations (PR) Staff to suggest appropriate uses of evaluation and market research. Further, where possible, information which can be used to help the PR staff increase membership is included in visitor studies; e.g., the evaluator shares with the PR staff a list of folks who indicate on the visitor survey form that they want complimentary copies of museum literature. We are tracking the number of those who requested museum literature to determine how many eventually join the museum system.

Generic Solution. Evaluators should help museum directors and staff determine those situations in which market research is valuable and those which require evaluation.

Issue 8. Staff perception that the director is using evaluation as a "threat" to control staff.

Problem or Result. Staff is threatened by an "outside" evaluator who appears to be allied with the director.

MMS Solution. Key staff (i.e., all curators) are involved in all evaluation activities and questions of importance to them are included on surveys and questionnaires where possible. Further, the evaluator conducts one-on-one meetings, weekly updates by phone, and has ongoing chats with administrative staff.

Generic Solution. The evaluator should: (a) involve staff in evaluation design, implementation, and analysis; (b) demonstrate appropriate use of information for improvement, e.g., ensure that questions which are important to the staff are included and that results are shared with key staff (for example, people who want complimentary information, especially nice comments, etc.); (c) establish visible

feedback loops to demonstrate to staff that their involvement makes a difference. In the case of MMS, plans have been made to post visitor study findings in the lobby, the director writes about various evaluation activities, etc.

Issue 9. *Presumption of museum staff that they know or can divine what the public ought to know.*

Problem or Result. Each staff member has a specific, sophisticated body of knowledge which he or she believes is as interesting, exciting, and understandable by museum visitors as it is by staff members.

MMS Solution. This has not yet been directly confronted by MMS although education may present one aspect of this problem (i.e., educators often "know what we're doing is good"). However, the collaborative presentation of an Exhibit Evaluation Workshop led by Dr. Chandler Screven helped to desensitize staff regarding the fallibility of their "assumptions" since they were able to observe the usefulness of the kinds of exhibit changes which were made as a result of exhibit evaluation without direct involvement. In addition, the director held an internal evaluation workshop for his staff following conclusion of the formal workshop.

Generic Solution. Involve the staff in an initial visitor study in which audience understanding of a particular, preferably simple, concept is actually determined and not "divined".

Issue 10. *Each museum expert believes his or her particular knowledge is the most important and should be emphasized.*

Problem or Result. Each museum expert attempts to have his or her expertise become a focal point of the exhibit. Blinded by these personal concerns, the visitor is routinely ignored during exhibit development.

MMS Solution. Not encountered yet; however, evaluator skills at developing and articulating goals and in establishing group consensus during planning should be helpful in mitigating against this problem. The director has also suggested a "pre-exhibition area" idea in which exhibits could be mounted on a trial basis, labeled as such, tested, and improved before they are permanently installed.

Generic Solution. Use evaluation as a method to determine and reach consensus among staff about intended outcomes for planned exhibits, programs, and events.

Issue 11. *Evaluation is a waste of time or "If it ain't broke, don't fix it."*

Problem or Result. This attitude prevents forward movement by the museum. Needs, wants, and desires of future audiences are not considered and the museum's ongoing viability is threatened. It also places the museum in a noncompetitive stance for leisure time.

MMS Solution. The director's understanding of the museum's role in the future and belief that museums are for visitors as well as collections has resulted in his active support for visitor studies and evaluation in planning stages. Examples of this belief include sponsorship of the Exhibit Evaluation Workshop and the director's participation in the present conference.

Tight Budgets

Issue 1. Resource allocation is not maximized.

Problem or Result. Ineffective programs or exhibits are perpetuated or expanded.

MMS Solution. This problem has not yet been addressed but we have plans to begin program evaluation to maximize available education funds. Examples of intended evaluation projects designed to maximize resource allocation include the director's pre-exhibit area, the inclusion of an evaluator on the planning team for reopening the Pink Palace, planned evaluation of the *Jason* project and ongoing visitor studies.

Generic Solution. Evaluators must demonstrate the usefulness of evaluation to improve inefficient resource allocation by making specific recommendations about more effective allocations.

Issue 2. Management by assumption; "Guessing at what works."

MMS Solution. Evaluator/Director collaboration to present Exhibit Evaluation Workshop in which several MMS exhibits were evaluated. The workshop familiarized the staff with evaluation procedures and demonstrated that some things could be inexpensively modified/improved.

Generic Solution. The director and/or staff must actually see for themselves that evaluation results in improved exhibits, programs, and events.

Issue 3. Lack of a single direction for all museum specialists at the design and/or implementation phases results in wasted time for all involved.

Problem or Result. Exhibits, programs, or events must be modified to better meet audience needs after they are installed.

MMS Solution. This issue has not yet been addressed; however, the director and evaluator have discussed an option to pretest exhibits and still allow them to open in their finished form. Further, the evaluator is now included as a team member for planning.

Generic Solution. Evaluators must demonstrate the power of evaluation to focus everyone's expected outcomes. They must also encourage use of visitor data in mounting effective exhibits and programs.

Issue 4. *Relegating evaluation to "after the fact"; i.e., when budget allows.*

Problem or Result. Evaluation conducted in this way often becomes "Frill" evaluation; i.e., it has little use in decision-making. Little or no accountability can be established via such "after the fact" evaluation.

MMS Solution. Director has earmarked funds for ongoing evaluation and is committed to its use at MMS; e.g., the director's participation in this workshop and his dedication to the ongoing collection of information needed to demonstrate the Museum System's impact on the community are indicative of his commitment to evaluation.

Generic Solution. (1) When costs are factored in for all types of experts during planning, evaluation expertise should also be included. (2) Evaluation results must actually be used for better planning, accountability for public funds, and/or as necessary for collecting and maintaining grant development information.

Staff Issues

Issue 1. *Staff members are already overburdened with other responsibilities.*

Problem or Result. The attitude of some staff members that "It's not my job"; i.e., they are already too rushed "doing" so there's no time to assess the effectiveness of their efforts.

MMS Solution. Outside evaluation expertise was hired to develop, introduce, and oversee initial evaluation processes.

Generic Solution. (a) Hire outside evaluation expertise. Museum directors should check the prospective evaluation consultant's track record specifically in evaluation design. Contact the American Evaluation Association (AEA) or International Laboratory for Visitor Studies (ILVS) for lists of possible consultants. (b) Assign one (interested) staff person to attend evaluation workshops, review literature, etc. and make time available for him or her to do so. (c) Put evaluation function under marketing or PR in order to establish a rapid and visible turn around on use of information. (d) Use trained volunteers to actually implement evaluation.

Issue 2. *Each staff member has a particular "turf" to protect and does not want to expose him or herself to criticism.*

Problem or Result. No one is willing to "be evaluated" and, in order to prevent it, agrees with other staff members that no evaluation should be conducted.

MMS Solution. This issue has not been addressed yet but we believe that the Exhibit Evaluation Workshop helped desensitize staff regarding turf protection.

Generic Solution. Demonstrate the usefulness of evaluation in exhibit or program improvement via a small project in an area in which evaluation is perceived as least threatening to any particular person; e.g., museum orientation.

Issue 3. Staff has little evaluation expertise.

Problem or Result. Survey and/or other instruments are poorly designed, implemented, and/or analyzed yielding invalid or incomplete results. Studies are of uneven value and decisions may be based on incorrect information.

MMS Solution. The evaluator reviewed all data collection instruments, identified each study or instrument developer, and held individual meetings with these staff people to discuss the intended use of the study/survey. Modifications were made in concert with the original developer and suggestions made for future studies/instruments.

Generic Solution. Evaluators must serve as on-site educators for museum staff. For example, one-on-one meetings with staff and sharing relevant evaluation materials with staff members can help acquaint them with evaluation concepts and uses.

Conclusion

Perhaps the best analogy for evaluation in museums is not the fairy tale with its simple story line and happy ending but rather the old Saturday movie matinee serial. Just when our hero unravels another mystery, he becomes trapped in a hopeless situation and we are asked to return next week to see if he can defy death and bring the villain to justice. And sure enough, in the next episode, he escapes death only to find himself facing yet another hurdle by the end of episode 26!

Like the matinee serial, the implementation of evaluation in a museum setting is fraught with pitfalls. Clearly, success rests with the ability of the evaluator to gain approval and commitment from the museum's key leadership. Good evaluation needs to become institutionalized.

Staff involvement is also crucial to good evaluation practice. Although it is entirely appropriate to use an evaluation consultant for evaluation design, input and commitment from staff is critical in integrating valid evaluation into museum settings. Staff can also be trained to implement evaluation procedures with continued help from a qualified consultant. In fact, as evaluation becomes part and parcel of daily museum operations and the museum staff's evaluation skills improve over time, dependence on the evaluator-consultant should diminish as staff assume more responsibility for evaluation activities.

In the final analysis it will be people skills, staff education, moral commitment and allocation of financial resources that make evaluation

work. Time, patience, tenacity, and the belief that evaluation leads to good decision making are needed by evaluation consultants, museum directors and staff members alike. It also seems evident that those museums with a strong focus on the "public dimension" will be most supportive of evaluation as a means to encourage visitor input.

Like the serial, there are still hurdles which must be cleared to ensure the long-term commitment and success of evaluation activities at the Memphis Museum System. However, reasonable expectations for the administrative effort needed to implement decisions based on evaluation findings coupled with an understanding of the time needed to garner internal support for on-going evaluation are beginning to pay off in better program planning, staffing decisions and other improved "visitor friendly" services. And actually seeing these payoffs makes it a great deal easier to jump the hurdles!