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Acceptance or Excuses?: The Institutionalization of Evaluation

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The title of this special issue, "Institutional Acceptance of Visitor Evaluation," presumes that museums *should* want to institutionalize evaluation and that doing so is a good thing. I agree with this premise and I was trying to come up with a succinct, convincing rationale as to why one should institutionalize evaluation. I was reminded of a conversation with a friend when I was learning to SCUBA dive. I had said to him that I found the classroom work and the laws of physics pretty dull stuff and had trouble motivating myself to study. He was quick to point out an excellent motivator: if you don't do it right, you die. I have to admit that the consequences of not conducting evaluation on exhibits are far less dramatic, but important nonetheless. Exhibits that don't work are a waste of money, a waste of time and a waste of a good opportunity.

We have a responsibility to the people who come to our museums: museums in the United States recorded more than one-half billion visits per year and museum attendance is increasing. In spite of our general consensus that evaluation is worthwhile and *should* be part of our standard operating procedures, it appears that only nine museums out of more than 8,200 have a full-time evaluator on staff. These same 8,200 museums spend more than \$4 billion per year in operating expenses. How much of this goes toward ensuring that our visitors have the best possible experience, that our exhibits and programs reach their intended goals? I hope that my comments will spark some ideas and provide some motivation.

I'd like to offer an example of what happens when you don't conduct any evaluation. At the Philadelphia Zoo we installed an exhibit on naked mole rats, with label copy that *staff* agreed was the most interesting and important concept—the mole rats' social structure. The exhibit has been up for about four years, and last year, as part of another project, we discovered that the questions visitors ask most often (are they blind? are they babies?) were *not answered* by any of the graphics/text panels.

While we really goofed with the mole rats, I would like to share four examples of different types of evaluation we have done and how they have resulted in change. Then, I'll try to offer some suggestions based on our work and conversations with others.

In a 1995 evaluation of audio boxes, called Talking Storybooks, we used a combination of short interview and

observation. This study revealed that 68% of respondents were able to recall at least one bit of information from the device, and that 94% reported that the boxes enhanced their visit. Zoo staff had been considering using celebrity talent to record new scripts, but the evaluation results reported that only 32% of respondents thought that having a celebrity voice would add to the appeal of the device.

In another study, we asked focus group participants to look over a brochure and respond to it. Although all had seen the piece before, recognition was low, and participants seemed confused by what the piece was all about. We had tried to combine two distinct messages into one brochure. In the next printing, we created two brochures and highlighted the information the focus group participants had responded to most enthusiastically.

In a very simple "seat of the pants, nose-prints on the glass" evaluation of short theatrical shows in the Zoo in 1994, we noted that visitors didn't stay for the entire show. They looked for a shady place to sit down, and at one site, they were extremely disappointed because they expected something different from what we presented. Future shows will take place in the shade, be shorter, and we'll pay more attention to visitor expectations.

Sometimes evaluating label copy can be as simple as talking to visitors. We tested what we thought might be controversial label copy at the elephant exhibit. The sign said "How Can I Help?...Elephants in both Africa and Asia are threatened by loss of habitat to an evergrowing human population. You can help save space for elephants and other wildlife by supporting family planning programs worldwide." We asked visitors to read the text for us and tell us what points they thought we were trying to communicate. People understood the message and did not find our approach preachy or offensive.

With these examples in mind, I'd like to offer a 12-step approach to institutionalizing evaluation.

Step One. Learn what evaluation is, what it can do for you and what it can't. Learn everything you can about the field.

Mary Ellen Munley, in her 1986 article in *Museum News*, "Asking the Right Questions: Evaluation and Museum Mission," identified five reasons for undertaking an audience study:

- 1) *justification* of the institution and/or specific programs;
- 2) information gathering to aid in *long term planning* for the museum or for one of its divisions;
- 3) assistance in the *formulation* of new programs;
- 4) *assessment* of the effectiveness of existing programs;
- 5) increased general understanding of how people use museums through the process of *research and theory construction*.

She notes that these purposes require marketing studies, evaluation, and research. She goes on to say that evaluation, if properly understood, can become a way of life for a

museum. One way to learn more about evaluation is to take a workshop like the ones often offered in conjunction with conferences such as the annual Visitor Studies Conference. These programs usually include not only instruction, but real-life practice sessions with surprising benefits. I just learned that temporary graphics installed as part of an evaluation workshop in Philadelphia on March 18 are still in place in one gallery because they work so well.

Step Two. Identify impediments

Some impediments you might encounter: (1) lack of knowledge of the field; (2) scarce financial resources; (3) lack of credibility of personnel or practices; (4) unwillingness to acknowledge the results and make changes; (5) general skepticism, impatience and desire for a "quick fix" solution; (6) a shortage of champions for your cause.

Several years ago, staff at the Brooklyn Children's Museum wanted to incorporate evaluation into their exhibit development process. They encountered impediments in the form of limited resources and a general skepticism about the benefits of evaluation. They were convinced that this was the right thing to do, and developed a special project called "Doing It Right: Planning for Communication" that provided training in evaluation techniques for staff and some implementation, funded by outside sources.

Randi Korn (1993) urges evaluators and exhibit planners to work together and challenge the political forces of their institutions. She notes that evaluation may be driven by a museum's need to demonstrate that their work is worth funding, and so museums are driven to primarily quantitative measures to illustrate cognitive gains-measurement that is easily understood and perceived to be "hard" data. I believe that it is possible to turn these political forces into positive energy for change, but it takes time and perseverance. Save some of your exhibit creativity for figuring out how to institutionalize evaluation.

Step Three. Create discontent; provide dissatisfaction; rouse curiosity

My example of the Brooklyn Children's Museum illustrates the dissatisfaction with the status quo. If everyone is satisfied with the status quo, if no one seeks improvement, or if no one dreams, you're in trouble. Create a problem to solve. Pose questions about placement of labels or objects. Quote interesting data from other museums. Write a grant proposal that demands evaluation.

Step Four. Identify the value of evaluation and research

A number of professional organizations have begun to request or mandate evaluation. Point this out in your mission to institutionalize evaluation. The American Association of Museums publication *Excellence and Equity* includes the following observations on the need for evaluation: "Museum professionals also need to study and test the implications of communications technologies, ideas from the field of educa-

tional psychology, and the latest exhibit design principles. Ongoing assessment of the effectiveness of exhibits and programs is critical, because the assessment process stimulates the capacity for change." AAM urges museums to: "Assess the effectiveness of exhibitions and programs in an ongoing evaluation process that encourages revision and experimentation to improve the visitor's experience of learning from objects and exhibits."

The Education Standards of the American Zoo and Aquarium Association also mandate program evaluation: "Education programs should be evaluated on a regular basis for effectiveness and content and current scientific information included."

Other professional standards, those of the Alliance of Marine Mammal Parks and Aquariums, urge evaluation: "Education programs about marine mammals must include a written education plan consisting of a mission statement, goals, and an evaluation strategy."

Make evaluation pay. In a recent summative evaluation of audio boxes in our zoo, we included a question "Who sponsored the Talking Storybooks?" We are using the data (more than 40% of those interviewed correctly recalled the sponsor's name) to help gain additional sponsorships for programs and exhibits. We included the cost of the evaluation in the initial sponsorship.

Evaluation can also help use scarce human resources more cost-effectively. The modest in-house evaluation of theatrical performances in the Zoo to which I referred earlier led us to reformulate shows that use our scarce human resources elsewhere.

Step Five. Build a network of advocates

Show others how evaluation can help them succeed. Get buy-in from colleagues. Remind colleagues that evaluation is not testing them or their work, but rather how their proposed effort is perceived by the intended user. Evaluation needs acceptance and participation or it will fail. Discuss objectives and protocols for a proposed study with all stakeholders and acknowledge their feedback. Then, try it out and review it with stakeholders again. Share the results first with key stakeholders before they are more widely disseminated, and give stakeholders the chance to comment on the report.

Step Six. Just Do It

Whether you contract with a consultant, recruit someone else in your museum, or attempt evaluation yourself, just do it. Here are just a few evaluation techniques to help you get started: observation; interview; "nose-prints on the glass"/trash-picking; ethnographic; survey; anecdotal; telephone interview; tracking; focus group; drawing, sorting, interactive assessments; games with pre-literate children.

Step Seven. Use your results

You have decided to conduct evaluation to determine the effectiveness of an exhibit component, sign, program, or

service, so don't be tempted to put your data on the shelf if you experience unwanted results or if the necessary changes seem like too much trouble. Remember, you asked for it and you'll have to live with the results if you don't make the changes.

Step Eight. Spread the word. Disseminate your results

How else can you build support if you don't tell others what you're learning and how the process is improving the visitor's experience?

Step Nine. Find sources of funding

Many if not most foundations require evaluation as part of a project and will provide the funding to implement it. Build evaluation into all grant projects or design it into corporate sponsorships. Add consultant fees or a staffing allowance to your operating budget.

Step Ten. Make evaluation someone's job; make it everyone's need

Who should conduct evaluation and what do they need to know? Bitgood & Carnes (1987) surveyed museum or zoo directors and subscribers to *Visitor Behavior* to determine their knowledge and attitudes toward exhibit evaluation. All respondents agreed that evaluation was important, but they differed on their expectations of evaluators. Most non-directors (76%) felt that evaluators must have sufficient knowledge, while many directors (54%) did not agree with this statement, displaying an "anybody can do it" type of attitude.

In a recent article Borun and Korn (1995) note that evaluators need objectivity. In placing evaluators on an organizational chart, they should answer to a high-level, neutral staff member not aligned with a specific department. The evaluator should not have a stake in the product being evaluated, and under no circumstances should the person responsible for the product being evaluated be in charge of doing the evaluator's performance review.

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The Institutionalization of Evaluation

by D. Perry, K. Ronning, J. Siska, & S. Weaver
From the 1994 Visitor Studies Conference
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Summarized by Erica Reed

This paper offers a simple view of the institutionalization process and describes case studies of three institutions (High Desert Museum, Chicago Academy of Sciences, and Chicago Children's Museum).

Institutionalization of evaluation was portrayed as a three-stage process – *casual dating* (characterized by the use of evaluation without any long-term commitment to it); *going steady* ("implies that the institution or some part of it, has committed to integrate evaluation into the fabric of the institution, at least as far as the specific project goes"); and *getting married* (becoming so committed "that no matter what, it will continue to do evaluation").

Each of the three museums participating in this session was said to be *going steady* and seriously considering *getting married*. The Chicago Academy of Sciences used staff development (visitor evaluation workshops) and team building to strengthen the institutionalization of evaluation. During the *casual dating* stage, the Academy used exhibit development projects to increase staff responsibilities gradually and decrease the reliance on outside consultants. During the *going steady* stage, the management team led a series of projects. The major problem during this stage was overcoming staff fears of talking to visitors and putting unfinished prototypes out on the floors. The Academy is moving toward *getting married* where they need to improve their basic team, exhibit, and program development skills.

At the Chicago Children's Museum institutionalization began with a series of staff development and evaluation activities including a variety of workshops and other related functions for the staff. *Going steady* was characterized by a ten-phase plan for developing new exhibits at the remodeled facility. The process began with a concept paper and ended with "Fabrication, installation, testing... and ongoing evaluation and remediation." *Getting married* will require remaining invested in maintaining evaluation, and evaluating and revising the ten-phase process as necessary.

The *casual dating* stage at the High Desert Museum occurred over several years in which numerous evaluation projects of limited duration were implemented. During the *going steady* stage, Education Department staff received training from an outside consultant, and the museum's long-range Comprehensive Plan was implemented. Until the Comprehensive Plan is fully implemented, movement to the *marriage* stage will not be official. For this to happen all top administrative positions need to be filled, and the vast majority of the museum staff needs to have an understanding of evaluation.