

Evaluation for an Historic House Museum: The Moody Mansion As A Case Study

Patrick H. Butler III
Moody Mansion and Museum
Galveston, Texas

Ross J. Loomis
Colorado State University
Fort Collins, Colorado

Introduction

Long ago, Coleman (1933) noted that historic house museums needed help in attracting the public. These museums are often located in out-of-the-way places and lack the visibility of larger institutions. Audience research can help staff in these institutions monitor the quality of their offerings and attract visitors. This presentation will review how one historic house, the Moody Mansion and Museum, undertook some evaluation work. Perspectives will be shared from the Director and an Evaluator who worked with the Director and staff.

The Director's Perspective

Galveston's Moody Mansion, which opened to the public in April of 1991, is a case study suggesting the value of evaluation efforts in the effective management of a museum. Without the evaluation activities we have been engaged in since prior to the opening, decisions regarding docent training, grant applications, budget allocations, food service, and all aspects of our operation, including maintenance, would have been more difficult and, I think, less effective.

Early in the Moody Mansion's development program, the leadership recognized the value of evaluation in assessing the programs of the museum-to-be. We initiated conversations with Dr. Ross Loomis in 1989 and, as the opening approached, arranged for evaluation activities. Because many of the techniques we planned to use are unique to the Mansion, we had little opportunity to test their effectiveness until the opening. We would have benefited from his insight, but circumstances prevented bringing him in until the end of the development process. Much earlier in the process, as

a part of the discussion, concepts or goals, and systems for the interpretive program were defined. The goals were: (1) to present the Moody family to the public as exemplars of the American tradition of individual entrepreneurial capitalism; (2) to interpret the Moodys as a representative, very real family whose experience reflects the lifestyle and values of turn of the century America; (3) to present Willis-Moody Mansion as a statement of the aesthetics popular in the era, with respect to architecture, historic interiors and furnishings; (4) to exhibit material culture of and in the Willis-Moody Mansion as a representative statement of the cultural values giving expression to the traditions of individual entrepreneurial capitalism in the Nineteenth and Twentieth Centuries.

These goals moved us to the following four specific strategies: (1) To consider the mansion as a stage and, by combining a variety of effects which are controlled by the individual docent, to bring the house to life through a program of sound and light shows narrated and given structure by the docent. We believe that the most effective strategy for interpreting the historic house is to treat it as theater. Too often, we all forget the dictum of the historian Samuel Eliot Morison, that "History is a Literary Art." To paraphrase this, historical museums are a performance art.

(2) To focus on a day in the life of the family which could be documented, and through that day, to discuss the values of the era. We selected the day in 1911 of Mary Moody's debut, and were able to set the stage for the house. (3) To include special effect audios, to incorporate dramatic readings of documents, including personal letters, diaries and newspaper articles which highlight business, political, social, and family values in the period. Docents use about seven of the twelve available audios on any given tour. (4) In the future, on a four year cycle, to revise the interpretive program and modify the interiors to change the house to a different date. Over the next fifteen years, we expect to move through the 1920s, 30s, 40s and perhaps into the 50s before considering starting over.

Because of our institutional history as the project of a private foundation, we did not have a volunteer organization associated with the museum during development. Now that we are open, this is changing. A group of individuals have been the nascent volunteer organization this past year, organizing our first fund raising event. Even with substantial resources, we have learned that no museum has enough money to do all that it could. Yet, even in a community with a substantial number of existing cultural organizations (three other house museums, two art institutions, three gallery type institutions, and two theaters), there is a place for us. We have had 63,000 visitors in the first fourteen months of operations and, in fact, recover between 35% and 40% of our operating budget from visitor services.

Evaluation plays an important part in this success. When we opened, we instituted daily report forms by the docents to pick up unanticipated

problems. We had the formal visitor survey forms which were presented to the visitors. In the fall, we went through a period of evaluation for the docents. In the case of unsatisfactory performance, docents were required to review and improve in the areas that were of concern. In several instances, the docents left because they could not accept our requirements.

Among the modifications that were made because of the evaluation activities—both docent reports and visitor survey data—we modified physical elements in the operation. Among the changes were: (1) the addition of carpeting on the rear stairs to improve comfort and safety; (2) a change of food service from a strictly pre-booked catering operation to one which included the availability of tea, lemonade and cookies on weekends; (3) the improvement of lighting in the orientation area; (4) improvement of signage both on the grounds and in areas of the interior; (5) addition of a third security position; (6) better instruction for the docents in the use of the audio and lighting systems; and (7) improvement of maintenance services.

Evaluation appears to confirm the validity of the approach we have taken. There have been favorable professional reviews through an unannounced site visit. William T. Alderson observed that we “set a new standard for historic house interpretation.” The reactions in the press and from visitors on an anecdotal basis are strongly positive. The evidence in the evaluations confirms this and yet it also shows that docents are central to the experience. If one wishes to use a high tech approach, one must remember that museum visits are people experiences and there must be a good, well-trained docent who puts the program together.

Evaluation activities have been central to creation of our program. My concerns are both pragmatic, since numbers help keep the doors open, and intellectual. Some parts of the organization emphasize the former while others are more interested in the latter. The importance of the evaluation activities for both elements is that they give us insight into our success and help us to plan for the future. As we move to expand the range of our evaluation activities, particularly as a part of the planning for the 1920s exhibit, we will come to know even more about the value of this approach to historic house museums. In a sense, we have found a way to combine entertainment with education and good history that is not a detriment to either.

The Evaluator's Perspective

It was an exciting challenge to work with Patrick Butler and his staff to set up an evaluation program. The hope was to develop an evaluation plan that would serve the Moody Mansion well, but also be useful to other historic house museums. Cost of evaluation would have to be kept modest, since most museums of this type have very limited budgets and small numbers of personnel. The Moody, with its greater resource base, could

afford to be a leader in developing evaluation. Also, much of the evaluation effort would be directed at very practical matters rather than theory. In time, it could be possible to do more theoretical work assessing the experience of visiting historic properties.

I entered into the plans of the restoration of the Moody Mansion too late to develop front-end or formative evaluation. Most of the work I will describe is summative or remedial in nature (Screven, 1990). It was necessary to discover right from the opening any problems that required correction. Also very important was setting up ongoing or running records to provide information for reports and funding applications. In addition, historic houses are apt to be less known than other visitor attractions and drawing a consistent audience is a major challenge. In the case of the Moody Mansion and Museum there are many competing attractions in the Galveston area thereby making it important to understand the marketing environment. It was also critical to assess docent performance to develop and maintain a high quality experience. Finally, summative evaluation of visitor experience with the setting, and the tours in particular, would help point to modifications that could be made when the change-out to the next time era took place. General goals for the evaluation then were to: (1) gain insights as quickly as possible for changes that should be made; (2) document public use of the facility; (3) promote quality control by completing timely evaluations; and (4) document the kind and quality of visitor experience to develop future programs for the Mansion.

As already mentioned by Patrick Butler, several methods were developed to accomplish the evaluation goals just mentioned. Not all of the methods have been applied at the time this paper was prepared. What follows are summaries and comments about each method used.

Running Records

One immediate need was to record attendance and other indications of visit use. The method used was to incorporate attendance data into the accounting reports that were required each month. Doing this ensured that counts would be taken and recorded. As much as possible, attendance data were instrumented on cash register systems to facilitate recording and maximize accuracy. An important feature was to record the type and number admissions, such as general (adult), senior citizens, and group. Included also was noting special promotion ticket sales, which permitted staff to track responses to promotional efforts. Data from the daily reports were summarized by the month and could be entered on a standard spreadsheet program such as Lotus 123. Figure 1 displays attendance, broken down by type of admission, for the first eleven months following the opening. The graph in Figure 1 is a modern adaptation of an analysis done by Powell (1939) many years ago. Note that by graphing the attendance by month the patterns for the different types of admissions become apparent. Child and

youth attendance were also recorded and Figure 2 shows a composite attendance summary, by percentages, for the time period reported. The composite summary is also helpful in understanding trends. These kinds of attendance data become even more useful when available over a period of years (see Loomis, 1987, Chapter 2).

Docent Daily Reports

Early in the operation of the tours, all docents were asked to file a report for each tour indicating visitor reactions and any problems. The report form, shown in Figure 3, asked docents to estimate group interest and report problems with the group, physical problems with the building and equipment and complaints or other significant comments made by visitors.

This report system became tedious after the first month of operation and was replaced with a much simpler "yellow pad" procedure where docents recorded only important events or questions for the curators. The daily reports did their job, however, thanks to the cooperation of docents. In the early start up phase of tours and other operations, the reports provided a close level of monitoring and identified needs like having more security personnel present and physical changes such as additional carpeting to increase safety. Docent comments also provided the first indicators of overall visitor reactions to the Mansion and the interpretation program.

Visitor Survey

Docent reports indicated that visitors were very positive in their informal feedback about the Mansion, tours and experience in general. This apparent positive reaction needed to be documented in a more objective manner. In addition, a visitor survey was required to learn more about who visitors were and how they came to be at the Moody Mansion and Museum. I was able to expand on survey work already undertaken by staff and design a simple, but effective, sampling plan. The plan required front desk personnel to administer a few self-report surveys each morning and afternoon. The number of surveys administered was varied to match anticipated attendance.

In-house visitor surveys are a demanding evaluation method if done correctly and properly utilized. My expectations as an evaluator exceeded resources available. Front desk personnel found it difficult to administer the surveys during busy times. Coding the surveys proved an even bigger problem. One way to help with the demands of an in-house survey is to use a reduced-size questionnaire. Figure 4 displays some of the most basic questions required by staff. Keep in mind that additional information, such as group versus individual admissions, was collected at the front desk. Modern cash registers can also be programmed to record information such as home zip code. The questions shown in Figure 4 reflect the needs of the staff person doing marketing. For example, some of the questions help position the Moody Mansion and Museum in a very competitive Galveston

visitor market. Knowing what kind of trip the visitor is on and what other attractions are part of the trip helps marketing planning. For example, one promotional package that was developed, and reflected in the attendance data of Figure 1, was a combined historic house ticket package worked out with other historic mansions in Galveston.

Docent Evaluation

Essential to quality control in an historic house is evaluation of docent performance and tours. Whether paid, as in the case of the Moody Mansion and Museum, or volunteer, the docent is the primary source of interpretation and thereby influences the quality of visitor experience. An evaluation program was developed that called for both docent self-evaluation and a review by a full-time professional staff member. The latter was done on a one-to-one basis. An important role I played as the external evaluator was to meet independently with full time staff and the docent group. Those meetings lead to the recommendation for more organization team building to be done before implementing the evaluation. Docents were also asked to provide input into the evaluation process. In addition, a docent council was established to facilitate closer communication with the professional staff.

Summative Evaluation

A summative evaluation of tours and visitor experiences was being planned at the time this paper was being written. Timing this evaluation is important to provide feedback for the planned interpretive change-over to the decade of the 1920s. Both staff and an external evaluator will be involved in the summative work. An Importance-Performance analysis is planned for the evaluation, using both group interviews and individual questionnaires. Wagner (1989) presents a good example of this kind of analysis applied to a visitor setting. The analysis provides information on what features of a visit are judged important, and how well each feature is performing. Plans for the evaluation include seeking funding support and use of a student intern from a museum studies program such as the one at Baylor University.

Overall, the Moody Mansion and Museum is to be commended for undertaking evaluation in the operation of a newly restored facility. I felt that some of the evaluation tools described above could be developed for many small museums and historic houses. Organizing running records of attendance, setting up a docent reporting system and developing a docent evaluation program are basic evaluation tools within the reach of staff. Some consultant help could facilitate getting these tools operational. Maintaining an in-house survey effort is more problematic. Completing a valid sample collection, analyzing and then interpreting survey results must be done with professional level standards. While help is available in the literature (see for example, Hood, 1986; Korn & Sowd, 1990; and Loomis, 19897, Chapters 3 & 4), it is often best for institutions to procure

contracted surveys. Local marketing and/or survey contractors can provide this service. Small museums can network with each other or other cultural institutions to help contain costs. If an in-house, continuous sample survey is planned, it is very important to commit staff time and plan for volunteer, or temporary paid help, well in advance to starting the survey.

Summative evaluation also needs some outside help to be credible. While all of the evaluation could be done by an external contractor, it is also possible to work with a professional evaluator on a shared effort project. As mentioned by Patrick Butler, an unplanned critical appraisal evaluation took place by a site visit team. Feedback from the site visitors helped validate survey and docent report reactions. Critical appraisal done by prearranged groups can be planned for and is another workable evaluation tool for small museums (see Loomis, 1987, Chapter 4).

Conclusion

Visitor studies and evaluation can help small museums. While resources to support evaluation efforts are limited, a number of tools are available that can be used. As with other professional tasks such as exhibit design and collection conservation, staff members and volunteers at small museums and historic houses are showing that they can do high quality work. The Moody Mansion and Museum case study provides one example of how evaluation work might be done.

References

- Coleman, L. V. (1933). *Historic house museums*. Washington, D.C.: American Association of Museums.
- Hood, M. (1986). Getting started in audience research. *Museum News*, 64(3), 24-31.
- Korn, R. & Sowd, L. (1990). *Visitor surveys: A user's manual*. A Technical Information Resource Report. Washington, D.C.: American Association of Museums.
- Loomis, R. J. (1987). *Museum visitor evaluation: New tool for management*. Nashville, TN: American Association for State and Local History.
- Powell, L. H. (1939). A study of seasonal attendance at a mid-western museum of science. *Museum News*, 16(3), 7-8.
- Screven, C. G. (1990). Uses of evaluation before, during, and after exhibit design. *ILVS Review: A Journal of Visitor Behavior*, 1(2), 33-66.
- Wagner, K. F. (1989). Maintaining a high quality visitor experience. In S. Bitgood, A. Benefield, & D. Patterson (Eds.), *Visitor studies: Theory, research, and practice, Volume 3* (pp. 192-202). Jacksonville, AL: Center for Social Design.

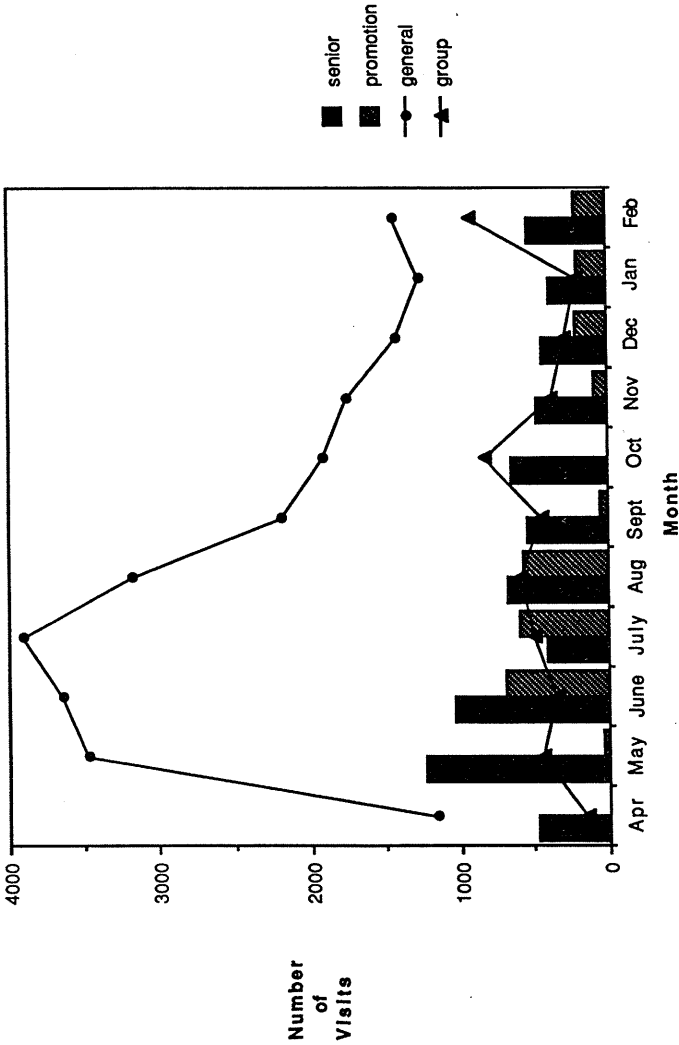


Figure 1
Attendance Breakdown 1991-92
Moody Mansion and Museum

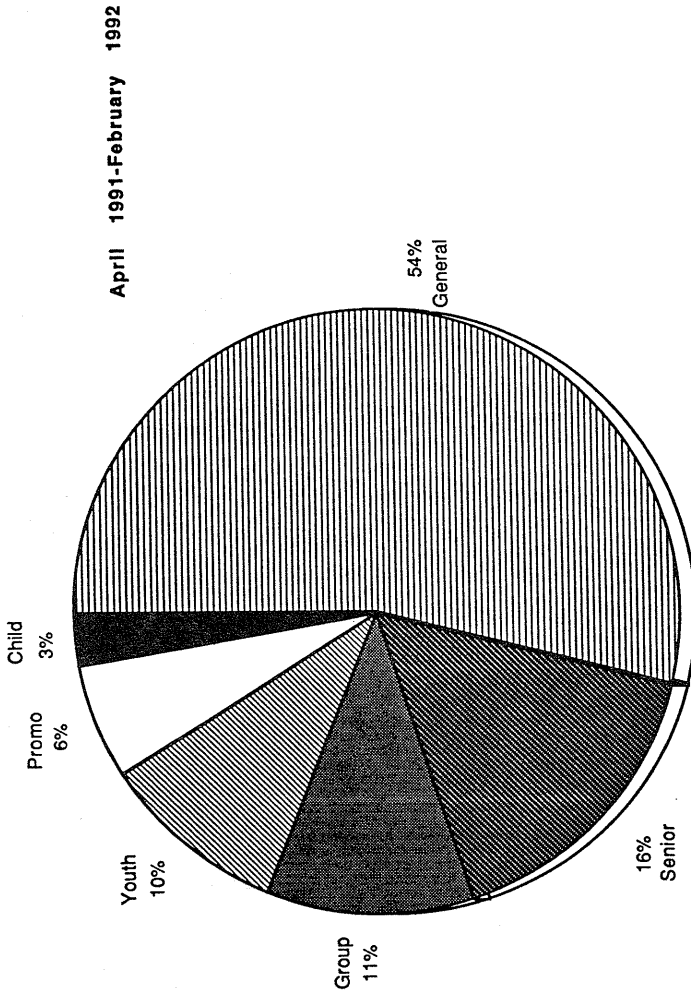


Figure 2
Attendance Category Breakout
Moody Mansion and Museum

Figure 3
Docent Report Form

Moody Mansion and Museum
Docent Report Form

Docent Name: _____

Time: _____

Weather: _____

Group ID Number
<u>Day/Mo/Group No./Year</u>

Was group part of a larger tour? If yes, name of tour:

1. Interest level of group: LOW MED HIGH
2. Significant questions asked:

3. Any problems with group (i.e., illness, accident)?
[If yes, specify actions taken]

4. Any physical problems with Mansion, including equipment?
[If yes, specify area of Mansion]

5. Complaints, suggestions or other significant comments made by group?

Figure 4 Important Questions for a Short Visitor Survey

1. Is this your first visit to the Moody Mansion & Museum?
 _____ If no, how many times have you visited _____.
2. How did you hear about the Moody Mansion? (Check as many as apply)
 _____ Friends told me about it
 _____ I read about it in a magazine or newspaper
 _____ I saw a billboard
 _____ I read the Museum's brochure
 _____ I visited another attraction on the island and people there told me about it
3. Do you live in Houston? _____ If yes, what area of town? _____
 If no, where do you live? _____
4. Is your visit today part of ... (check one)
 _____ a break from work on a business trip?
 _____ part of a vacation trip of at least four days?
 _____ part of an overnight trip to Galveston?
 _____ part of a day-trip to Galveston?
5. What other places in Galveston have you visited or plan to visit? (check as many as apply)

_____ Ashton Villa	_____ The Flight Museum
_____ Bishop's Palace	_____ The Railroad Museum
_____ The Historic Strand Area	_____ The Williams Home
_____ Outdoor Musicals	_____ The Colonel
_____ the beach	_____ Texas Seaport Museum
_____ Moody Gardens	_____ Rosenberg Library
6. My tour of the Moody Mansion & Museum was: (check one)
 _____ less than I expected
 _____ more than I expected
 _____ about what I expected
7. My tour guide was: (check one)
 _____ very well prepared
 _____ adequate
 _____ poorly prepared
8. The attendants at the front desk were: (check one)
 _____ friendly & courteous
 _____ okay
 _____ unpleasant
9. The special lighting, audio dramas and music during the tour: (check one)
 _____ made little difference to my tour
 _____ distracted from my tour
 _____ added to my tour
10. Answer each of the following by rating the feature with P=Poor, A=Average, G=Good and E=Excellent
 _____ Making arrangements for my tour, including buying an admission
 _____ Courtesy of front desk personnel
 _____ Courtesy of my tour guide
 _____ Appearance of the grounds and service areas of The Mansion
 _____ The gift shop: _____ Inventory, _____ Prices, _____ Displays
 _____ Parking
 _____ The tour itself
11. Comments _____