

Chapter 3

THE USE, MISUSE AND ABUSE OF CONSULTANTS, I: THE VIEW OF AN AUDIENCE RESEARCHER

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Museums employ consultants to benefit from their expert advice and their ability to supervise projects when the requirements of the project exceed the staff's knowledge and skills. At least, that is the supposition under which professional consultants approach a museum's invitation to intervene.

But there are often differing expectations about what a project will involve and produce, staff apprehension about what the consultant might suggest or do, and misunderstandings about who has the responsibility to make critical decisions.

The focus of this paper is not to excoriate but to offer precautions, to identify potential trouble spots, to help a consultant and staff work together effectively in a partnership, and to illustrate what not to do.

As an audience research and audience development consultant who has worked with many kinds of institutions—art, history, science, children's and university museums; historical sites, nature preserves, botanical gardens, arboretums, zoos; arts organizations and churches—I have experienced a variety of relationships with these entities and their staffs and trustees. Some have been gloriously harmonious, mutually enriching, and extremely productive; others have been disappointing, puzzling, and nearly a tug of war. All have taught me lessons I can pass on to museum staff considering the employment of a consultant.

Sessions at other museum meetings and articles in museum publications have stressed the role of the consultant from the museum's point of view (see Munley, "Advice with Consent: Using Consultants," Museum News, May/June, 1980). Harris Shettel and I felt it was time to present the consultant's perspective—Harris on the role of the evaluation professional and I on the viewpoint of the research expert.

General Problems that Apply to Consultants

Eight topics are common to both our fields and about ten others are found more often in one or the other area. The following eight are the bases for most difficulties arising in the relationship between consultant and museum staff and/or trustees:

1. *Definition of the problem by the staff is not well thought through, not comprehensive, not clearly expressed.* If the terms of reference are not inclusive and explicit, the consultant will not be able to respond satisfactorily, nor the parties be able to agree on what is expected, or is reasonable to expect. For a complex, extensive project, it may be necessary for the museum to get outside assistance at the outset to help define the problem before asking a consultant to respond to a request for proposal. Does everyone on staff agree on what is wanted, and are their expectations reasonable for the time frame, support systems, funds? Sometimes the request for a proposal is deliberately vague because staff members cannot agree among themselves on what they want or they don't realize what is possible/impossible and they want the consultant to define the problem as the first step of his/her work.

Recently I received a request for assistance in finding out why people do and do not patronize a community arts and recreation center. When I phoned for further information, I learned that they wanted: a survey of residents' demographics and leisure participation patterns, a psychographic study of residents to probe their motivations for participation or non-participation at the center, focus groups with current users and non-users, and a cultural economics study to ascertain willingness to support a major fund-raising drive to build a new community center and to identify the level of prices acceptable to users of specific recreation facilities and services. All this was to be accomplished within two months at a cost of \$5000! The center director was obviously sincere in her insatiable desire for information for major decision making, but completely unaware of the magnitude of the project she was proposing. Just as obviously, I declined the invitation to submit a proposal. I did take time to write her a two-page letter outlining what she had to analyze and prepare before she ever got to a proposal stage. Need I add, she did not bother to thank me for the advice.

In other instances, massive projects have been outlined in voluminous booklets, with pages of lists of what the consultant is to accomplish—often minute descriptions of specific aims—yet the overall concept has been mushy and the aggregate of individual goals did not add up to an integrated project. Because staffs are so close to their problems, they often delineate only the minutiae and either ignore or are oblivious of the broader concept that must drive the project. A consultant cannot

effectively respond to your needs when the staff—or staffs of several cooperating organizations—are not clear about the overall intent. You must first answer: Why are you doing this project? Who will benefit from it? How? What difference will the outcome make in the way you do business—designing exhibits, producing publications, introducing programs, building audiences, raising funds, enhancing your building or the amenities you offer? How will you use the information gained from the study for your decision making and long range planning? If you cannot answer these basic questions for yourselves and explain them adequately to a consultant or other outsider, you are not ready to write a request for a proposal.

2. *This vagueness in defining the problem is often due to the fact that the project is being undertaken for the wrong reasons, such as:*

- justifying a decision already made, an exhibit already in place, a program already underway, especially if it has been criticized;
- clobbering someone who doesn't agree with the proponent of the project;
- getting on the audience evaluation/research bandwagon because, as one staff member winsomely put it, "It would be nice to do because everyone is doing it";
- confirming what you already know (also known as "reinventing the wheel");
- mollifying critics, all the while intending to ignore the findings you won't like;
- accommodating a board member or benefactor who offers his research funds or marketing department services, whether or not you need a survey;
- allowing a few persons to foist the results onto other staff members for implementation;
- acquiring a weapon to attack the way things are going.

The purpose of evaluation and research is to find out something new and to incorporate those findings into improving the system. If you fear learning what needs improvement, cancellation, or expansion, don't hire a consultant because any consultant worth hiring will not just tell you whatever you want to hear.

3. *Another reason that the problem may not be well defined—even cannot be defined—is because of internal turf friction.* One department avidly wants the project and another vehemently opposes it. One thinks it's essential for progress and the other sees it as threatening or unnecessary.

In one case, when a concerned longtime department head asked me for guidance on conducting a visitor survey, her new, very confident director hurriedly informed me that the requestor was unsure of herself,

unknowledgeable about her responsibilities, and uncertain about her authority. He firmly stated that he would direct her and that they needed no outside guidance, thank you. Having observed this director in various circumstances as a determined young man on the fast track, it was obvious to me that he perceived any legitimate questioning of the status quo as a personal threat.

In another situation, the public relations personnel of a large metropolitan museum sought my advice because they recognized that their clientele was almost entirely upper middle class suburban and they wanted to broaden their audience. After spending a stimulating half-day discussion with them, and being assured I would immediately receive an invitation to do an audience study, I learned that the education department director had killed the project because his classes, lectures, and workshops were oversubscribed. He bragged that it was sheer folly to try to interest more people because the museum was already monumentally successful, albeit with a very limited constituency. Fortunately, I found about this internecine warfare before I got caught in the middle of it.

4. *There is staff apprehension about an outsider "dictating" to museum staff members, even though the outside professional is an acknowledged expert in an area unfamiliar to staff.* Though I always endeavor to work in a collaborative manner with clients, there have been times when I have had to say, "We have to do it like this because this is the correct way"; or "We cannot take shortcuts that will undermine the project." I have been asked if I were going to "force" the staff to include certain essential survey questions they didn't view as important and I have had to insist they drop trivial queries that would not produce the information they sought.

Sure, consultants invade museum turf and shake things up; that's what we're supposed to do. We are there to point you in new directions, broaden your thinking, introduce you to new techniques and skills. You should not be doing business as usual after a consultant leaves. If that is your intention, save your money and her time.

5. *There's also consultant apprehension about losing control of a project.* The research professional must have the final word on conducting research. Museum staff must not change any step in a project, with or without notifying the research director. Modifications may need to be made enroute, but only in consort and with full understanding by both sides. Potential disagreement over who is in charge of any step in the process or decision can be avoided if the original terms of reference are comprehensive and explicit. Even though museums supposedly hire consultants because they lack the necessary expertise in-house, some want to second-guess the expert and ignore the advice. I know what I'm doing and am not about to lead anyone astray. My professional reputation

depends on the high quality of every project I design and supervise, and on the recommendations of satisfied clients.

6. *In a collaborative process, the person on staff who acts as the in-house project director or liaison doesn't have the clout to get the job done.* This individual must be able to order other people to do things, on time. In one study, a competent secretary was assigned this task. Though she performed beyond the call of duty, she had no authority to order another secretary of equal status, much less a department head, to meet deadlines or provide support. The project was not accomplished with the quality it should have had because neither she nor I could enforce deadlines or other requirements.

7. *In the kind of consulting that Harris and I undertake, we are the visitors' advocate, which is sometimes forgotten by museum staffs.* We bring the visitors' perspectives, shedding light on why people don't respond in the way museums expect them to, and showing museums how they unintentionally impede visitors' learning, enjoyment, and satisfaction—thereby defeating the museum's expressed aims. We are hired to confront problems you have identified, not to hold your hand. We may need to be blunt, to attack sacred cows and cherished myths. We may have to tell you what you don't want to hear, on behalf of your audiences.

8. *Sometimes, if more than one museum staffer is in charge of parts of a project, not everyone is equally familiar with the terms of reference or the proposal and things fall through the cracks, such as meeting deadlines, completing sections of the project satisfactorily, and paying the consultant on time.* For instance, the project director is often not the individual who authorizes payment or sends the check to the consultant. It has taken several letters and phone reminders over a period of two months to some museums to extract the payment due me. Such treatment is not only discourteous, it is bad business. If I have fulfilled my part of the contract, the museum is responsible for fulfilling its obligation.

Problems Specific to Audience Research

In addition to the eight basic areas described above where potentials for misunderstanding and abuse arise, the audience researcher may experience additional difficulties peculiar to her field. For instance:

1. *The client sabotages the contract and project because he doesn't understand the process, deliberately omits procedures he is responsible for, or changes the process without the knowledge or approval of the consultant.* In one case, a client who thought he knew everything about

the research process but actually knew very little, informed me halfway through the project that we were going to omit some essential steps that he didn't think important. Though I warned him that he was undermining his own project and diminishing the value of the results, he was intransigent. In the final report I had to qualify the results and explain that the process had not been carried out as designed. The fact that the client did not get what was promised in the contract was not my fault. I am still mystified by why he would impair his own project and compromise the results.

2. Museums ignore or disown advice or project results when they find out what they don't want to know. When expectations for positive results are high, such as when the project is being done for the wrong reasons (see no. 2 in the earlier list), the museum may be so outraged by lack of confirmation of what it wants to believe that it not only denounces the truthful report as "rubbish," but it bad-mouths the consultant for being the bearer of the unwanted message. In one case, an extremely high quality, lengthy study was so roundly condemned by sponsoring museum officials that the consultant's reputation as an audience researcher was ruined. Several reports emanating from the study verify that the work was correctly done according to quality survey research criteria, but the results did not compliment the museum; its decision was to "kill the messenger." How can a consultant protect herself and her reputation from such abuse when the project was conducted properly and the results were valid?

3. Museums make desperation calls for help, but don't follow up. When they call on Thursday, they often want the consultant to drop everything and speed to the site by the next Tuesday. However, after the phone or on-site initial consultation, the museum frequently drops all interest in pursuing the study, but never informs the consultant. The audience researcher may have spent hours, even days, preparing for the proposed project—sending a mini-proposal, publications, background material—and never receive a response. When the consultant tries to follow up by phone or letter, she is denied access to the appropriate staff person, or is told he changed his mind, or he has been told to drop it, or he failed to convince the trustees or staff to pursue the project. However, no one had the courtesy to inform the consultant, who had been asked to reserve time in the next weeks or months for the project.

Sometimes the museum finds out enough from the knowledgeable consultant on the first contact that it can write a description of what it needs, and then proceeds to hire a local person with minimal knowledge about museums or nonprofit organizations to do a sketchy job. When this explanation is offered to the consultant, it is presented with great satisfaction for having resolved the issue locally, and with no thanks to

the consultant for having told the museum what was important for them to consider in designing a project or hiring a researcher.

4. *Museums set totally unrealistic deadlines, especially on proposal responses.* The staff may have been mulling for a year over the contents of a request for proposal on a monumental project. Then they require the consultant to respond within two weeks. A thoughtful, comprehensive response is not possible, especially if the proposal preparation involves research, travel, or lengthy phone investigation. Illogical deadlines impose such constraints on thorough development of a response that the museum cannot receive the best proposal the consultant could produce. This results in inadequate evaluation of the situation and in standard, cookbook responses, instead of innovative, groundbreaking approaches—even though the museum contends it wants innovative solutions to its audience development problems. It is puzzling to see museums continually shooting themselves in the foot on this time issue.

5. *Museums look upon consultants as repositories of free information and advice, much like the public library or cooperative extension service.* Usually these inquiries begin, "I know you have the answer to my question, and I know you can help me." Sometimes their questions require the consultant to call back, write letters, or send publications. When I remind them that I am giving them an hour's free consultation, they get huffy and protest that they're paying for the phone call. Only one client has ever offered upfront to pay for the phone consultation, acknowledging that time is money.

Since American Association of Museums consultants receive token compensation because they also have paid jobs, museums expect outside consultants to give away their services. Because I work only part-time on consulting and because I consider it my professional responsibility to enlighten museum staffs and trustees (I call it my "missionary work"), I require very low fees. So, it is startling to have a museum expect me to pay my expenses out of the modest fee I receive even though the expenses may be more than the fee for a seminar! Museum people generally are unsophisticated about the costs of professional travel, especially if they attend meetings on museum funds, and they are usually unknowledgeable about the costs of collecting and processing data.

6. *Museums expect consultants to make presentations for the "exposure" the museum feels the appearance will offer the consultant—that is, "We can't pay your fee or expenses, but this opportunity will offer you wonderful exposure!"* This statement is based on the expectation that when a consultant speaks to a group of museum people, she will inspire one, or some, of them to want her services on a paying basis. That sometimes happens, but the usual fallout from "exposure" is two-fold—the

phone calls asking me to solve problems free because "I know you have the answer," and a flood of letters requesting copies of my publications, with no check enclosed for copying or postage. Since the journals I publish in do not furnish reprints, I do not have free copies to distribute. The cost to me to have an article copied, packaged, and mailed, including mileage and travel time, is at least \$5 per article. If you expect a researcher to provide a copy of an article, be sure to enclose at least \$5 to cover expenses.

7. *Museums continually badger researchers to conduct more research and to publish frequently, so "we can learn what you found out."* When I tell them I can and will do more research as museums come forward to sponsor projects, they are taken aback. "Oh," they say, "I thought you would do the research on your own without needing a museum to sponsor it!" If I were a private foundation, I could and I would. When I suggest that their museum sponsor a study, to add to the knowledge base they want to tap into, they demur with, "Oh, we have no money. We just want you to continue so we can read what you found out elsewhere."

8. *Hospitality for the consultant varies greatly, from near neglect to pampering.* The consultant who is on site for several days, even weeks, may be left to shift for herself from the moment she arrives at the airport, or she may experience nearly smothering attention throughout her stay to the point she hardly has a moment alone. Museum people who are assigned to be the liaison person may perceive the consultant to be an impediment to their work, and will constantly remind her they don't have time to spend on her project. Others may welcome the consultant's presence because they want to learn throughout the research process; they offer efficient, cooperative, almost nurturing support. In one instance, I was put up at a guest house with no radio, TV, or even a newspaper or suitable reading light. When I returned from going out to dinner by myself, there was absolutely nothing to do for the rest of the evening except to go to bed at 7 p.m. In contrast, in another city, the sponsor would not allow me to take a taxi to the airport, following a Saturday seminar, because he said I would be too tired to bother with the hassle. Instead, a new silver stretch Cadillac limousine with uniformed driver was sent to pick me up. I must confess it did revive my spirits as well as amuse me.

9. *And then there's the matter of sex discrimination.* I doubt that Harris has been criticized or complimented on his clothing, haircut, or mustache, or asked if his wife minds that he travels on business. Museum staffs, however, have not hesitated to tell me whether they thought my apparel, hairstyle, and makeup were appropriate, and nearly everywhere I've been, they have solicitously inquired how my husband could get along without

me. Criticism of or compliments on professional services are welcome, but let's treat all consultants, regardless of sex, with respect.

So, there you have a few of the concerns that add zest to the field of museum consulting. They are offered in the hope that museum staffs and trustees will become more aware of potential pitfalls and will be able to prevent disasters waiting to happen.