

# New Directions in Evaluation

**Randi Korn**

Randi Korn & Associates, Inc.

**E**valuation is a way of thinking as much as a tool for determining a program's successes and shortcomings. Ideally, assessment can be integrated into organizational behavior to help museums make decisions, learn, and change. This chapter discusses how museum evaluation has changed over the last several decades and identifies the forces responsible for its rise in stature within the museum community. It also explains how evaluation can help an organization build its institutional capacity to become a learning organization.

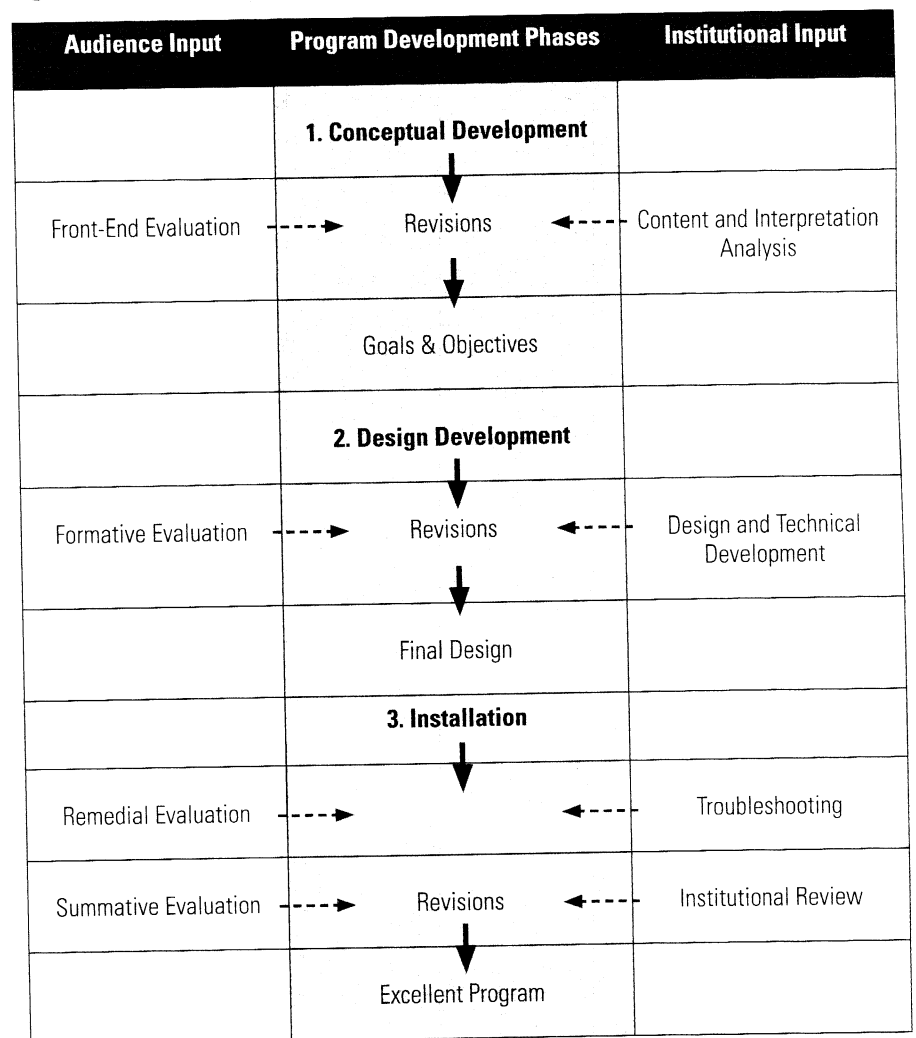
## The Changing Meaning of Evaluation

At one time, if a museum conducted an evaluation, it meant that the museum had used a reliable system for tracking attendance figures because high visitation was and still is considered a criterion for success (Cameron, 1970). Today, however, evaluation is about documenting and studying visitors' experiences during their museum visit. Once viewed as a luxury or add-on that usually occurred at the end

of a project, evaluation now has four distinct phases that occur throughout program design and implementation (see Figure 1). The first phase, front-end evaluation, tells program planners how visitors think about and understand the concept of a new program or exhibition. This information can help planners determine how best

to communicate their concept and fulfill their most important responsibility: creating exhibitions and programs that demonstrate the value of the museum's greatest assets—its collection, knowledgeable staff, and viewers—and pique the interest of others (Korn, 1998, 2003).

Figure 1. Program Development and Evaluation.



Phase two, formative evaluation, takes place farther along in the development process and is likened to piloting a program or testing prototype exhibit components. Formative evaluation is used to identify problems before finalizing a program or exhibition component. For an exhibition, formative evaluation can focus on pragmatic issues such as communication, intellectual and physical accessibility, legibility, and usability (Taylor, 1991). For a program, formative evaluation can examine organizational issues such as program management, in addition to program attendees' experiences. Some institutions also conduct a remedial evaluation after an exhibition is installed to address problems not identified during the formative evaluation (Bitgood & Shettel, 1994). In formative testing, components are isolated from the context of the full exhibition environment. But in remedial evaluation, all components vie for visitors' attention, causing different problems to surface. Before conducting the summative evaluation, evaluators expect staff to change aspects of the exhibition based on findings from the remedial evaluation. Summative evaluation, the fourth evaluation phase and the one that institutions are most familiar with, is conducted after opening an exhibition or presenting a public program to determine whether the visitor experience is similar to or different from program planners' intentions.

As shown in Figure 1, the museum (far right column) and audience (far left column) collaborate, in a sense, to develop programs (middle column), with each contributing

equally. Note, however, that the public is not consulted *before* developing a concept, but rather *after* the idea is identified. In both front-end and formative evaluation, infusing the public into the process helps practitioners clarify their thinking, improve their product, and learn how they can best communicate their ideas. Evaluation is a tool that fine-tunes exhibitions and programs, indicates whether an exhibition or program is achieving its intended effect, and assists in decision-making.

### The Larger World of Visitor Studies

Evaluation has not only grown to embrace the planning process, but it is also now one of three distinct areas of study in the field of museum visitor studies, along with scholarly research and market research (see Figure 2). While the three focus areas require thoughtful analysis and use similar data collection strategies, and,

in some ways, study similar ideas, they differ in how practitioners use the information they collect. Researchers test hypotheses and generate theories, and the information they collect is generalizable and may create new knowledge (Patton, 1986). The Museum Learning Collaborative (2005), funded by the National Science Foundation (NSF), the Institute of Museum and Library Services (IMLS), the National Endowment for the Arts (NEA), and the National Endowment for the Humanities (NEH), was an example of a museum research project. This 5-year endeavor, which ended in 2003, produced an annotated bibliography,<sup>1</sup> numerous research papers,<sup>2</sup> and several edited volumes. The project was established for academic and museum researchers to collaborate so they could proceed with a

Figure 2. Museum Visitor Studies.

Basic Researchers	Evaluators	Market Researchers
<p><b>Study</b></p> <p>↓</p> <ul style="list-style-type: none"> <li>Learning styles</li> <li>Social interactions</li> <li>Gender differences</li> <li>Effect on community</li> <li>Cultural differences</li> <li>Emotive responses</li> <li>Learning</li> </ul>	<p><b>Study</b></p> <p>↓</p> <ul style="list-style-type: none"> <li>Visitor experiences</li> <li>Visitor understanding of content</li> <li>Visitor learning</li> <li>Visitor pathways</li> <li>Experience with interpretive methods</li> <li>Design of components</li> <li>Effect on community</li> </ul>	<p><b>Study</b></p> <p>↓</p> <ul style="list-style-type: none"> <li>Demographics</li> <li>Psychographics</li> <li>Target audience</li> <li>Community perceptions</li> <li>Visitor satisfaction</li> <li>Nonvisitor perceptions</li> </ul>
<p><b>Result</b></p> <p>↓</p> <ul style="list-style-type: none"> <li>Test hypotheses and generate theories</li> </ul>	<p><b>Result</b></p> <p>↓</p> <ul style="list-style-type: none"> <li>Determine a program's successes and shortcomings</li> </ul>	<p><b>Result</b></p> <p>↓</p> <ul style="list-style-type: none"> <li>Identify market segments</li> </ul>

common research focus that built from two substantial bodies of knowledge—on learning and on museums—to clarify how learning occurs in museums.

Evaluation, on the other hand, generates systematically collected information about the characteristics, activities, and outcomes of a program that are examined against stated goals and objectives to determine how the program has succeeded and how it has failed (Weiss, 1972). An individual program evaluation, while highly valuable to the museum that designed the program and the funder, is less valuable to people outside those spheres. Although there is a distinct difference between how one uses research findings and how one uses evaluation findings, an evaluator can also conduct research. For example, Serrell (1998) conducts what she calls descriptive research. Her questions are: How do visitors behave in exhibitions? What are the parameters of visitor behavior? What is normal “use” of an exhibition? Do visitors behave differently in different types of museum exhibitions? People conducting descriptive research look for baselines and patterns within existing situations without asking theoretical or experimental research questions about cause and effect or influences of particular variables. Whereas a timing and tracking study is one component of an exhibition evaluation, more than 100 timing and tracking studies are included in Serrell’s descriptive research study. Other evaluators use her analysis to gauge success in exhibitions because she reports the average time that visitors spend in exhibitions by museum type and the average percentage of use

of exhibit components. Thus, her accumulated tracking and timing studies are serving a larger purpose than one tracking and timing study would in one evaluation.

Market researchers seek to understand how museums can reach different audiences and how they can best “sell” their museums to the public (Kotler & Armstrong, 2001). Because evaluation is centered on visitors’ experiences and historically has been associated with attendance, museum staff often confuse marketing and evaluation. Market research is conducted to understand how and to whom to sell the museum and its programs, and evaluation is undertaken to examine the visitor experience and determine the success of the museum and its programs against stated goals and objectives. Certainly a program evaluation can include questions to accommodate the marketing department, but typically the questions an evaluator asks are different from the questions a marketing specialist asks.

Sometimes research, evaluation, and marketing are so intertwined that it is difficult to label a study as marketing, evaluation, or research. For example, a visitor survey has always been conceived as an initial step in getting to know a museum’s visitors, but visitor surveys have evolved from asking a few demographic questions (for marketing purposes) to asking several pages of thoughtful, probing questions that try to discover visitors’ personality characteristics, their attitudes toward art and museums, their

emotional response to art, the appeal of various interpretive media, the depth and quality of experiences with art in the museum, and their preferences for viewing and experiencing art, to name a few (for evaluation and research purposes). The reasons an institution chooses to conduct a visitor survey and how staff intend to use the information it generates should determine how the visitor survey is characterized.

While it is an asset for an institution to know its visitors, it is also valuable for an institution to know its organizational self (e.g., what kind of institution it is, what its educational philosophy is, what its management philosophy is), whom it wants to serve, and how it wants to serve its public. Institutions should resolve internal struggles before attempting to understand their audiences (Korn, 2004). A visitor survey will be most useful to an institution if it is conducted for the right reasons at the right time and within a context that will help staff understand their visitors from an institutional vantage point. For example, if an institution has a core idea or philosophy it would like to put into practice, a study could explore visitors’ attitudes from that context and provide the museum with concrete information about executing its ideas. Similarly, an institution’s staff should not conduct a visitor study as a panacea for the institution’s problems. Staff—not visitors—solve institutional problems.

## The Evolution of Evaluation

During the last five decades, the visitor studies field has matured and is now a valued endeavor in museums. Its rise in stature is tied to several factors operating simultaneously but independently. The most critical factor is a museum's funding source. Outside funders control the flow of money to many museums; if those funders value evaluation and require it of their grantees, evaluation will rise in popularity (Sheppard, 2000). The competitive marketplace also has played a significant role in the growth of visitor studies in the marketing realm, but perhaps more important is the museum field's recognition that the communities surrounding museums are valuable assets and that museums should respond to the diverse constituents (visitors and potential visitors) in their communities (Holman & Roosa, 2003). Finally, visitor studies literature has flourished, providing ideas and information. Museums' desires to embrace their communities' and funders' emphasis on accountability have fueled the need for museums to determine how they affect visitors inside the museum and how they could improve their image in their community. Evaluation has become the tool for understanding the visitor experience, measuring program effectiveness, and determining the impact of a museum on its community.

Evaluation's rise in stature correlates with the establishment of several federal agencies that fund museums. The NSF was established in 1950, and the NEH and NEA were established in 1965. In 1996, IMLS was established from two

## Ann Rowson Love

Department of Art Education,  
Florida State University

As Korn discusses, many of us think of evaluation as coming at the end of a grant-funded project to be used as a reporting measure, or we think of evaluation as a major, multiyear, endeavor, often expensive, involving organizational overhaul. Yet, even those of us who practice in small to mid-sized museums can use assessment and program evaluation strategies on a daily basis.

I think of assessment and program evaluation as being similar to the process of curriculum development. First, develop objectives related to what the museum team wishes to accomplish for a program or project. Before developing a product or sequence of instruction ask, "What does it look like when visitors or participants achieve the objectives?" Here's a brief example:

*Objective:* Object labels will include questions to stimulate reading, looking, and dialogue in the exhibition.

*Outcome:* Visitors will read the labels, as evidenced by their spending more time reading and looking at artwork.

*Objective:* Visitors will use social interaction to further their understandings.

*Outcome:* Visitors in groups will engage in discussion with other members of their party.

With objectives and outcomes as a tentative starting point (they may change during the process), coming up with a sequential method for obtaining the outcomes is like developing lesson plans and creating resources. I find it helpful to include community members with specific knowledge as active team members. This will ensure community involvement in making decisions about content and format throughout the development process. Building on the example here, a possible sequence might include team members doing the following:

1. Select works of art in the exhibition.
2. Research the artist(s) and artworks to generate label content and questions.
3. Write and format label copy using an agreed-upon structure.
4. Ask for feedback from colleagues, family, friends, and gallery visitors to start the editing process.
5. Complete the editing process with more feedback as needed.
6. Install new label copy.
7. Select different times and days for gallery observations. Observe or ask visitors what they think about the new labels.
8. Make changes as needed.

The process inherently embeds evaluation strategies—front-end, formative, and summative. By including community members from the starting point, we are addressing audience needs, which, in turn, establish ownership of the project and the museum itself.

separate government departments, one for museums and one for libraries. While these government funding agencies *support* evaluation by questioning prospective grantees about their processes for evaluating their programs, NSF and IMLS go a step further to *require* evaluation. IMLS adopted outcome-based evaluation (OBE), which tremendously affected the museum community because the Institute was extraordinarily successful in communicating the value of OBE and evaluation in general. Private foundations also started to require their recipients to evaluate their programs to prove they were using the foundation's funds as they had purported—thereby allowing foundations to improve what they do (York, 2005a). In so many endeavors, evaluation is tied to money. If government agencies and private foundations—those holding a museum's purse strings—require evaluation, evaluation will happen. As the last several decades have demonstrated, museum staff are learning that evaluation can satisfy funders *and* help them understand the visitor experience and know which aspects of a program are successful. Institutions ready to integrate visitor studies information into how they think about their public selves are realizing that evaluation can be a powerful planning and decision-making tool.

While funding agencies advocated evaluation, the number of publications about visitors' experiences quickly grew. This body of literature supported evaluation and introduced the museum visitor experience to a novice audience. In *The Museum Experience*, Falk and Dierking (1992) introduced the contextual model of learning. This model proposed that three contexts—the personal context, the sociocultural context, and the physical context—overlap and influence visitors' interactions and museum experiences. Falk and Dierking championed evaluators' and researchers' work, which became part of museum practitioners' conversations. Emerging from the museum field at large was the notion that museums should be more visitor-centered, and evaluation was and continues to be a process that is strongly associated with museums' desires to be visitor-centered.

Weil (2002) wrote eloquently about the shifting focus of museums in his book *Making Museums Matter*. He argued that museums must shift from being *about* something to being *for* somebody. If a museum does not have the ultimate goal of “improving the quality of people's lives,” he asks, “On what other basis might we possibly ask for public support?” (p. 39). As early as 1920, John Cotton Dana expressed a similar idea (Peniston, 1999), but Weil's writings came at the right time—as museums pondered their value to society *and* when IMLS declared their grantees would need to plan their programs following OBE's logic model. Weil became the scholar spokesperson for IMLS.

## The Next Step

Evaluation can serve a broader function in museums beyond programs and their audiences. As audiences are studied and programs are evaluated, the information can be used to provide feedback about organizational functioning and effectiveness. Sanders (1993) wrote:

*Evaluation gives direction to everything that we do in an organization. It is the process used to identify needs. It is the process used to set priorities among needs and translate needs into program objectives or modifications of existing objectives. It is the process used to identify and select among organizational strategies, staff assignments, materials and equipment, schedules, facilities and other alternatives faced by staff of any organization. It is the process used to monitor and adjust programs as they are implemented. It is the process used to determine and document program results and why they are as they are. It is the process used by outsiders to determine whether an organization should be supported. (p. 13-14)*

Traditionally, strategic planning includes asking important institutional questions about mission and core philosophies regarding audiences, learning, interpretation, and visitor experiences, and developing a plan to realize the mission through programs. However, few museum leaders can state, in concrete terms, what they hope or expect their institution to accomplish (Weil 2002). Museum leaders could and should consider the following questions when developing a strategic plan: What purpose does the museum serve? How does it expect to affect its community?

How *does* it affect its community? How does it define “community”? What kinds of visitor experiences does the museum value? How will the museum create a platform so visitors can have those kinds of experiences? What is the museum’s educational philosophy? How does the museum plan to actualize that philosophy? What are the anticipated outcomes? What evidence does the museum need to know it has achieved its objectives?

Precise thinking is an important component of strategic planning. To think precisely, museum leaders should answer these questions: Who are the target populations? How will the museum accommodate each one? Which audiences are best served through which programs? How does the museum define museum learning in exhibitions? How does the museum define museum learning in school programs? What mechanisms will the museum employ to achieve the ideals implicit in staff members’ responses to the above questions? As a museum begins to answer these questions, visitor studies can assist in two distinct ways. First, staff discussions about the above issues can be exploratory, and results from carefully crafted visitor studies can clarify staff members’ thinking by providing insight and information about visitors in different contexts. Feedback helps planners realize what constitutes realistic goals for a museum program and often helps them identify effective strategies for achieving those goals. With feedback, staff from all museum departments will be able to make informed decisions about programs, based on real

information about visitors and their experiences. Second, precise thinking leads to identifying outcomes (e.g., What does success look like?) and describing how one will achieve them (e.g., What is the plan of action for achieving success?). Visitor experience outcomes can be studied—not to accommodate a funder, but to inform the museum of its progress in facilitating the kind of visitor experience it envisions.

Findings from timely and periodic evaluation studies—or visitor surveys that delve into the quality of the visitor experience—can also identify gaps between outcomes and organizational capacity. For example, careful analysis of data from an evaluation conducted as part of organizational planning can ascertain the strength of the relationship between the education department and visitor experience outcomes. The museum can learn which parts of the education department need attention and resources and which parts are functioning optimally (The Conservation Company, 2002).

When relevant information is infused into the planning process, an organization can confidently plan for its future because it has knowledge about its inner workings and its constituents. Combining planning and evaluation provides balance because evaluation reflects the visitor experience and tempers the institutional vision with reality. An organization that combines evaluation with planning is a true learning organization (Senge, 1990) because it is constantly exploring and learning about its institutional self (i.e., how staff in the museum view themselves) and its public self (i.e., how the public views the museum).

Most museums place education and learning at the center of what they do, and staff say they wish to provide learning opportunities for visitors. But staff can be learners, too, and there is great value for them to become learners in the context of the organization in which they work. In an interview, Michael Quinn Patton, a prolific writer and evaluator, promoted evaluative thinking as a “willingness to do reality testing, to ask the question: How do we know what we *think* we know?” (Waldick, 2002, ¶10). Evaluative thinking is thinking analytically about your organization, ideas, programs, and actions. Evaluative thinking includes taking action—conducting a study to answer planning questions or to determine whether a program is achieving its objectives so staff can decide whether to continue it. Patton (2005) said that evaluative thinking connects action and reflection. To reflect on action, he noted, one must know how to integrate and use feedback, weigh evidence, consider inconsistencies, articulate values, interpret findings, and examine assumptions. Evaluative thinking and conducting evaluations can facilitate ongoing institutional learning if they are infused into organizational planning and program execution and if staff members see themselves as stakeholders in the process. Learning from evaluative thinking and evaluation data and applying that knowledge to one’s day-to-day work activities is the highest level of organizational learning that one can achieve (York, 2005b). It is apt for staff members to strive to become life-long learners in the context of their museum. Evaluation is an inquiry strategy that can infuse new information into an organization while allowing staff to continually learn about themselves and their visitors along the way.

## REFERENCES

---

- Bitgood, S., & Shettel, H. (1994). The classification of exhibit evaluation: A rationale for remedial evaluation. *Visitor Behavior*, 9(1), 4-8.
- Cameron, D. (1970). The numbers game. *The Gazette*, 4(1), 11-15.
- Falk, J., & Dierking, L. (1992). *The museum experience*. Washington, DC: Whalesback Books.
- Holman, K., & Roosa, A. M. (2003). Cultivating community connections. *Museum News*, 82(3), 40-47.
- Korn, R. (1998). Making sure the time is right for front-end evaluation. *Visitor Studies Today*, 1(1), 12-13.
- Korn, R. (2003). Making the most of front-end evaluation. *Visitor Studies Today*, VI(III), 1, 22-24.
- Korn, R. (2004). Self portrait: First know thyself, then serve your public. *Museum News*, 83(1), 32-35, 50-52.
- Kotler, P., & Armstrong, G. (2001). *Principles of marketing*. NJ: Prentice Hall.
- Museum Learning Collaborative. (2005). Retrieved September 21, 2005, from <http://museumlearning.com/default.html>
- Patton, M. (1986). *Utilization-focused evaluation*. Beverly Hills, CA: Sage.
- Patton, M. (2005). *The challenges of making evaluation useful*. Retrieved October 6, 2005, from [http://www.scielo.br/scielo.php?script=sci\\_arttext&pid=S010440362005000100005&lng=en&nrm=iso&lng=en](http://www.scielo.br/scielo.php?script=sci_arttext&pid=S010440362005000100005&lng=en&nrm=iso&lng=en)
- Peniston, W. (1999). *The new museum: Selected writings by John Cotton Dana*. New Jersey and Washington, DC: The Newark Museum and American Association of Museums.
- Sanders, J. R. (1993). Uses of evaluation as a means toward organizational effectiveness. In S. T. Gray (Ed.), *A vision of evaluation: A report of learning from independent sector's work on evaluation* (pp. 13-18). Washington, DC: Independent Sector.
- Senge, P. (1990). *The fifth discipline: the art and practice of the learning organization* (1st ed.). New York: Doubleday.
- Serrell, B. (1998). *Paying attention: Visitors and museum exhibitions*. Washington, DC: American Association of Museums.
- Sheppard, B. (2000). *Perspectives on outcome-based evaluation for libraries and museums*. Washington, DC: Institute of Museum and Library Services.
- Taylor, S. (1991). *Try it! Improving exhibits through formative evaluation*. Washington, DC: Association of Science-Technology Centers.
- The Conservation Company. (2002, Fall). *Perspectives: A newsletter for the clients and friends of the conservation company*.
- Waldick, L. (2002). In *conversation: Michael Quinn Patton*. Retrieved September 20, 2005, from [http://www.idrc.ca/en/ev-30442-201-1-DO\\_TOPIC.html](http://www.idrc.ca/en/ev-30442-201-1-DO_TOPIC.html)
- Weil, S. E. (2002). *Making museums matter*. Washington DC: Smithsonian.
- Weiss, C. (1972). *Evaluation research: Methods for assessing program effectiveness*. New Jersey: Prentice-Hall.
- York, P. (2005a). *A funder's guide to evaluation*. St. Paul, MN: Fieldstone Alliance.
- York, P. (2005b). *Learning As We Go: Making Evaluation Work for Everyone*. Retrieved September 21, 2005, from [http://www.tccgrp.com/pdfs/per\\_brief\\_lawg.pdf](http://www.tccgrp.com/pdfs/per_brief_lawg.pdf)

## FOOTNOTES

---

<sup>1</sup> See <http://informalscience.org>, retrieved on September 21, 2005.

<sup>2</sup> See <http://museumlearning.com/paperresearch.html>, retrieved on September 21, 2005.