MUSEUM NOTE: PROGRAM PLANNING AND EVALUATION

This Museum Note will help community museums to comply with the Ontario government's **Exhibition Standard** *and* **the Interpretation and Education Standard** outlined in the *Standards for Community Museums in Ontario.*

Standards enable community museums to:

- provide the appropriate care and management of collections
- meet visitors' expectations
- be accountable and transparent to the community, funders and donors

EXHIBITION STANDARD
As a community museum, your exhibits provide an important link between your community and its heritage.

In the planning and presentation of exhibitions, you must strive for accuracy of information, relevance to the community, effective communication, opportunities for learning and engagement, and the safe display of artifacts.

Program planning and evaluation – exhibits, public programs and events

Your museum's exhibits are an important source of information about your community's heritage.

When planning and presenting your exhibits, museum staff should:

- provide accurate information
- ensure exhibits are relevant to your community
- effectively communicate with your audience
- provide opportunities for learning and engagement
- safely display your artifacts

INTERPRETATION AND EDUCATION STANDARD:
As a community museum, your interpretation and education programs allow the community to interact more closely with your collections and information and reach audiences of all ages, interests and abilities.

As a community museum, your interpretation and education programs should:

- allow your community to interact with your collections
- connect with audiences of all ages, interests and abilities
- serve as a resource for your community
- complement other sources of learning in your community

Public programs: making museums matter

Your public programs – including exhibits – should serve the evolving needs, interests and priorities of your community.

Public programming can provide:

- more ways to interpret the museum's collections
- learning opportunities designed to meet the needs of targeted audiences
- more chances for visitors to engage with the collections, exhibits and other audience members
- a forum for community input to help create meaningful exhibits, events, and activities

Public programs: staff responsibilities

The staff member responsible for creating programs at your museum must create a plan that responds to the needs of your visitors.

This requires an understanding of your audience, backed by research.

Your program planner should be familiar with:

- target audience
  - current community or societal interests, needs and issues
  - learning preferences
- age-specific abilities of your audience
- learning objectives of specific school curriculums, badges and other programs

TIP: Audience learning styles

To help plan your museum program or exhibit, it is helpful to see it from at least four types of perspectives – or learning styles – as identified by 4MAT.[1]

Ask yourself how people with different learning styles would view your exhibit, and plan for them.

1. **Why**
   Imaginative people spend time reflecting, seeking personal meaning and involvement. They are focused on personal values and making connections**.**

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[1] McCarthy, Bernice. 4MAT Learning Styles.

2. What
Analytical people are interested in information, facts and ideas. They like to know what the experts think.

3. How
Practical people like thinking and doing. They are happiest experimenting, building and creating usable ideas and items.

4. What if
Dynamic people like doing and feeling. They are constantly seeking hidden possibilities and exploring ideas to create original adaptations, they learn by trial and error and self-discovery.

You can also identify individuals from your community to participate on a planning committee. The committee would contribute their ideas and perspectives to a topic or theme you're considering.

Planning checklist

There are a number of factors to consider when planning an exhibit or program.

They include:

- goals and objectives
- program concept
- target audience
- budget
- roles and responsibilities
- research
- logistics
- marketing
- program integration

Goals and objectives

When developing a new program, it's helpful to first list your goals and objectives. These should support your museum's mission and strategic plan.

Goals should:

- be limited (between 3-5 goals) and specific
- identify your specific target audience – consider demographics (e.g. age, gender, ethnicity, education, geography), interests and availability; resist the urge to denote the 'general public'
- describe the intended visitor experience
- outline the themes or collections that your program will explore

Objectives should be SMART:

- **S**pecific
- **M**easureable
- **A**ttainable
- **R**elevant
- **T**ime-bound

Types of program objectives include:

- **Internal or operational.** These are usually quantitative.

  Examples:

  - increase attendance by a certain percentage
  - appeal to a specific age group
  - a fundraising target at an annual fundraising event

- **External or visitor experience.** These are usually qualitative (words, descriptions and/or emotions).

  Examples:

  - visitors to the exhibit will learn about 1815-2015 household and industrial waste disposal practices; the social changes that influenced them; and suggest ways to reduce waste
  - grade 3 students will compare pioneer tasks, tools and how they were powered, with comparable modern tools we use today
  - participants in the bread-making workshop will use 19th century process, ingredients and tools, including a brick oven, to bake three kinds of Pennsylvania-German breads

Program concept

- **Generate an idea**

  A theme(s) for public programs can come from an existing exhibit, collections or from your visitors or partners. Classroom teachers or group leaders may have suggestions that connect their needs to your museum collections and approaches.

- **Determine the format**

  Program learning experiences can be:

  o structured
    – delivered in a scripted way by a guide or in an exhibit
    – has a clear path or storyline

  o unstructured
    – delivered in an inquiry-based or conversational style
    – using labels designed to engage the reader with the objects or ideas presented

- **Program delivery**

  Your program can be delivered by staff, self-guided by your visitors, or both.

  o staff-driven efforts include guided tours, demonstrations, performances, lectures and workshops

  o visitor-driven efforts include the use of audio guides, gallery information, activity sheets and computer terminals with suggested links.

  You can also provide more interactive options such as discovery boxes, a hands-on table and places to ask questions or share thoughts online.

- **Duration**

  You will need to determine if your program or exhibit will be:
  - short-term:
  - designed to complement
      o a community or historic event
      o a seasonal celebration or theme
      o a temporary or travelling exhibit

  - long-term:
      o to further develop a theme in a "permanent" exhibit or historic site
      o to support a curriculum
      o to support an ongoing community need or interest

- **Location**

  Where will your program/exhibit take place?

  Potential locations include:

- o your museum
- o a venue in your community, as part of a community event
- o online e.g. virtual exhibit, social media conversation, YouTube demonstration, heritage video, performance or lecture
- o at a pop-up event or exhibit
- o as a travelling exhibit
- o as part of an outreach kit or program

Target audience

To help connect with your target audience, consider:

- audience knowledge

  - o what does the audience know about the topic/theme?
  - o what will they want to know?
  - o what issues are of concern to your community?

- group size

  - o will the target audience visit/participate in groups e.g. classes, bus groups, seniors' centres, as families or as individuals or couples?

- values and interests

  - o what are the values or interests of this audience (in general)?
  - o will the program be designed to reinforce existing values or to change an attitude?
  - o what do you want them to think about/talk about after they have participated?

- physical abilities

  - o what are the physical abilities of your target audience?
  - o what are their conceptual abilities e.g. for different ages of children?
  - o what are their communication abilities, e.g. is English their first language?
  - o are they hearing impaired, do they suffer from memory loss or have attention-deficit disorder?

- geographical area of origin
  - o will this be a program for a local audience or of specific interest to tourists?
  - o will they plan to stay for a long time, repeat visits or just a quick drop-in?

You may also want to consider including members of your target audience in your planning process, as individuals or representatives from community/cultural groups.

Budget

Is revenue generation one of your organizational objectives?

Expenses
Determine:

- Will staff, volunteers need training or research time to develop and deliver the exhibit and related programs?
- What will it cost to bring in training or can this be provided by another municipal department or community partner?
- What are the costs for research, development, and implementation of the program, e.g. facilities, materials and programming supplies, technology, equipment, human resources, marketing?
- Are there transportation costs for presenters or if the program is held off-site?

Revenue
Determine:

- What is the cost for participation (estimate number of participants), project grant or foundation support, partner or sponsor support?
- Will there be sale of refreshments, publications or other program-related revenue?

Note: don't forget to include costs for these as expenses.

Roles and responsibilities
Determine:

Who will be responsible for what, by when? Don't forget to include time and responsibility for:
  - volunteer recruitment
  - confirmation of outside participants
  - staff training
  - preparation of program materials such as hand-outs, pre-threading needles or other workshop/class activities
  - finding suppliers and ordering supplies for hands-on activities
  - pilot testing particularly for ongoing programs such as curriculum-based programs, marketing/communication
- What needs to be done first; next?
- When to schedule meetings for all involved
- Who will be responsible for project coordination or management

Communication is key.

Research

Objects

Determine:

- what objects in the collection, and the information collected about these objects, will contribute to the concepts of the program and appeal to the target audience
- what objects can be touched
- what artifacts might be reproduced to allow use such as trying on, performing an activity or playing a game

Stories

Glimpses of the individuals behind the history or concept engage the audience and may lead to programming opportunities such as re-enactment of a local historic event, a dramatic reading, play or puppet show, or visitor engagement opportunity to share their stories in response.

Determine:

- what personal or local stories, anecdotes, biographies or folklore can bring the program or exhibit to life

Audience

This is key to the success of your program. For school programs see tip below. Your plan is to identify what you need to know about your target audience and how to find out.

Images

People are drawn to images of people. Images can include photos, maps, graphics, moving images, political posters or cartoons.

Determine:

- if there is a compelling image that will communicate the theme
- if there is an idea that can be reproduced for marketing purposes and/or enlarged as the focal point of the exhibit, performance or programming space
- If images be reproduced to illustrate a lecture, introduce a tour, include in an activity guide or takeaway information booklet

Sound

Songs or speaking voices can be particularly evocative of an era or theme.

Determine:

- o the popular music of an era, of a war or issue e.g. temperance, protest movement, civil rights
- o a recorded voice that is symbolic of a time or idea
- o songs that might be reproduced in a songbook for a sing-along or to accompany a performance

Logistics

It's all in the details. This part of the planning ensures that the **visitor experience** will be a positive one, from first contact with the organization until after they leave.

Think about how to make each contact pleasant and welcoming, including:

- registration process
- signage/directions
- parking
- washrooms, are they clean/are there enough?
- accessibility
- food
- seating
- licenses
- permissions or notifications required (if any)
- weather contingencies (*aka Plan B*) e.g. if your expectation was for most visitors to be visiting outside, welcome them to come inside to look at exhibits instead

Be sure that programs start and end at the scheduled time and that an event and all its participants are ready to go at the time advertised and continue until closing time.

Marketing

The more you know about your audience, the easier it will be to market your program.

- Find out where your target audience looks for information about leisure activities. This could be:
  - o in the newspaper – what publication?
  - o on the radio – what station?)
  - o online – which website?
  - o posters at their religious institution, community centre or library

- o direct contact from the museum, by e-mail or invitation

- Use key words or phrases that will accurately describe what kind of experience your program will provide.
- The language you use should reflect the experience your audience is looking for, for example:

  - o intellectual stimulation
  - o hands-on activities
  - o "fun for the whole family"
  - o a unique experience they can talk about with their friends later
  - o an opportunity to meet new people
  - o a way to earn a new badge or meet curriculum outcomes that can't be achieved as well in school or at a meeting
  - o learn more about their community or celebrate the achievements of an individual or group. Participate or sit back and take it all in?

Program integration

Consider how the exhibit will be connected to other aspects of the museum operation.

For example:

- Can it be used as part of school programming, special events, etc?
- Have you thought about online content and social media?
- How will this new exhibit assist or interfere with capital work, maintenance?
- Have you left enough time for the collections and conservation work?

Measuring success

Success is achieved when you meet the objectives you've set down for your museum and audience. Specific quantifiable objectives are much easier to evaluate than qualitative objectives.

Qualitative objectives can include:

- % increase or decrease in revenue or attendance
- sold-out limited capacity events such as workshops, lectures, day camps
- # of mentions in the media or social media
- new partnerships or sponsorships established
- outside funding support, such as a grant or foundation secured
- number of memberships sold at a *friendraising* event
- number of new local visitors

An institutional objective might also identify what paid and/or volunteer staff will do for the benefit of the institution, its brand and its reputation (see *Logistics* above*).* This type of self-evaluation can be done with a questionnaire for staff and volunteers, after the event. You can find examples of staff self-evaluation questions in the AMA *Standard Practices Handbook* and in *Creating Great Visitor Experiences.*

Measuring your objectives

Measure your objectives against your results to determine what worked well and what needs improvement.

Be careful that you are not measuring just to measure something. Your evaluation must tie directly to your objectives and SMART goals. This may mean that your objectives will be harder to determine and your evaluation harder to design, but it will more accurately measure your success.

Tips: measuring audience success

Objectives for your audience can also be evaluated qualitatively. This can be challenging when reporting back to stakeholders and funders – particularly government bodies – who look for quantitative results that can be interpreted as 'impact'.

When applying for financial support, look at their grant objectives to determine what you will need to measure e.g. number of tourists reached; number of communities a travelling exhibit reached; amount of clicks on a virtual exhibit.

DOs

- develop an audience survey that includes questions directly linked to your objectives.
- build an engaging question into an exhibit or program
- ask a provocative question on a chalkboard, whiteboard or bulletin board placed at the end of an exhibit and encourage visitors to respond using post-it notes, chalk, markers, paper and coloured pencils
- sample questions:
    - Who is your community hero? Why?
    - What will you do to help the environment?
- use an exhibit or event takeaway to determine whether the participant was engaged in the topic or theme
- how many people asked at the front desk for game instructions?
- how many "Want to Know More?" sheets were picked up from activity stations, in an exhibit, from the presenter or workshop instructor?
- ask your front desk or interpretive staff/volunteers about audience feedback. They are the ones who answer the questions and engage visitors in conversation

DON'Ts

- don't rely on visitor comment books as evaluation tools.

- don't ask personal questions drawn from surveys used by marketers (age, education, salary)

Tips: success with schools

- **Review the school's curriculum.** Curriculum documents provide information about content and audience which is useful in program planning and evaluation. Teachers and principals will want to see how your museum's program or exhibit is relevant to what students are learning at school.

- **Provide a summary or description of the program outcomes** that the students will be demonstrating, doing and thinking. Standing at the back of the class and observing students is a rare and valuable opportunity for the teacher so in helping the teacher measure success, you are also measuring the success of your program*.

- **Identify two or three definite outcomes** for students that rather than several you can't verify.

Note: Recently, all Ontario elementary and secondary curricula have undergone major reviews and modifications. Increasingly, the curricula are placing greater emphasis on critical thinking, inquiry models and discipline-specific skills. These documents should be studied thoroughly. Consultation with teachers is a must.

Tips: evaluating success

To help determine the success of your school, education-focussed or badge-related program:

- ask participants about what they already know during the "warm up" or introduction of your program; then ask them to share with each other what they did and learned during the during the "cool down" or summary

- provide the teacher/leader with an evaluation form at the end of the program that asks them to assess whether or not their students were provided with the opportunity to accomplish the promised outcomes, whether they were satisfied with the program and if they can recommend improvements

And finally, it is not enough to conduct program evaluation. Your organization must learn from it. To this end, consider:

- writing and circulating a report on what worked for a particular exhibit and/or during the year, what did not and what should be done differently next time. What modifications might be made to an exhibit to help it meet the intended outcomes?

- meeting with all participants to capture their feedback and suggestions for improvement.

Celebrate the successes and, even more importantly, learn from the less-than-successes and plan for success next time.

Recommended Resources

Alberta Museums Association. Standard Practices Handbook for Museums, 3rd edition. 2014. Information on audience-focused planning, production and evaluation of museum exhibits, education programs, public events and activities. Program planning and evaluation p.p. 265-298 and exhibits 336-374.

Anderson, Gail, ed. Reinventing the Museum, Historical and Contemporary Perspectives on the Paradigm Shift. Lanham, MD: AltaMira Press, 2012.

A number of articles useful to this topic organized under headings such as: The Role of the Museum: The Challenge to Remain Relevant; The Role of the Public: The Need to Understand the Visitor's Perspective; The Role of Public Service: The Evolution of Exhibits and Programs.

Canadian Museums Association, Ethics Guidelines
(2006) http://www.museums.ca/uploaded/web/docs/ethicsguidelines.pdf

Center for the Future of Museums:
The Center for the Future of Museums (CFM) helps museums shape a better tomorrow by exploring cultural, political and economic challenges.
monitors cultural, technological, political and economic trends of importance to museums
equips museums to help their communities address the challenges of coming decades
builds connections between museums and other sectors
http://www.aam-us.org/resources/center-for-the-future-of-museums

CMOG Standards Resources:

Education

Castle, M. Christine. What Difference Did It Make? Using Outcome-Based Planning & Evaluation
http://www.museumsontario.com/vm/newvisual/attachments/891/Media/OMAOutcomesWorkbook2013Web.pdf
http://newsarticle.museumsontario.com/members/Resources/OMAOutcomesWorkbook2013_FR.pdf

Exhibitions

Castle, M. Christine. What Difference Did It Make? Using Outcome-Based Planning & Evaluation in Exhibits. Archived webinar, notes and workbook. July 16, 2013.
http://www.museumsontario.com/en/35/597/148

Moore Museum. Moore Museum Accessibility Plan.

http://www.museumsontario.com/en/35/597/148

Pankowski, Kathryn. Evaluation Techniques for Museums with Few Staff and No Money.
http://www.museumsontario.com/en/35/597/148

Freeman, Ruth and Paul Martinovich. The Evolution of an Exhibit Community Museums
Travel Exhibits. Ontario Museum Association, 2001.
http://www.museumsontario.com/en/35/597/148

McCarthy, Bernice. 4MAT Learning Styles.
Using just four learning styles makes this an easy to apply approach for planning a
museum exhibit.
http://www.4mat.eu/method-learning-styles.aspx

McLean, Kathleen. Planning for People in Museum Exhibitions. Washington, D.C.
Association for Science and Technology Centres Inc., 1993.
Can be purchased at www.astc.org.

McLean, Kathleen and Wendy Pollack, eds. Visitor Voices in Museum Exhibitions.
Washington, D.C. Association for Science and Technology Centres Inc., 2007.
Includes case studies, some from Ontario, and information about how to begin and benefit
from visitor contributions and dialogue and concluding with "What Visitor Voices Can Teach
Us". Can be purchased at www.astc.org

Museums Association. Museums Change Lives. July 2013.
Examples of audience-focused objectives and linked evaluation from a variety of UK
museums. http://www.museumsassociation.org/museums-change-lives/web-resource

National Association for Museum Exhibition (NAME). The Exhibitionist. Spring 2005.
For exhibits in small museums.
http://name-aam.org/uploads/downloadables/14978_NAME_spg05_lores.pdf

Serrell, Beverly. Framework Assessing Excellence in Exhibitions from a Visitor-experience
Perspective. Left Coast Press, Inc. 2005.
An easy to use tool for a regional museum network to learn how to plan an exhibit from the
point of view of the visitor's experience: comfortable, engaging, reinforcing and meaningful.
http://www.exhibitfiles.org/dfile2/ReviewWalkthrough/481/original/Framework1.pdf

Simon, Nina. Museum 2.0
A blog that explores the ways that the philosophies of Web 2.0 can be applied in museums
to make them more engaging, community-based, vital elements of society.

The Public Medievalist. Why you hate that museum and how to fix it.
A short, informative blog post about why your exhibit might not be "successful" from a
visitor's perspective.
http://www.publicmedievalist.com/hate-museum/

U.S.S. Constitution Museum. Family Learning Forum. Evaluation.
This section has articles on The Power of Evaluation, Types of Evaluation and Evaluating Prototypes. Additional sections on Family Learning and Programming are worth exploring too. See Resources section for presentations, reading lists and sample forms.
http://www.familylearningforum.org/evaluation/index.htm

Weaver, Stephanie. Creating Great Visitor Experiences A Guide for Museums, Parks, Gardens, and Libraries. Walnut Creek, California, Left Coast Press, Inc. 2007.