



Resource List

Audience Research and Evaluation in History Museums and Related Institutions

To encourage more audience research and evaluation in history museums and related institutions, [Visitors' Voices](#), an affinity group of the [American Association for State and Local History](#) (www.aaslh.org), compiled an annotated list of print and electronic resource materials. [Note: unfortunately the Visitors Voices' group is no longer active]

Getting Started with Evaluation

Diamond, Judy, Michael Horn, David H. Uttal. 2016. *Practical Evaluation Guide: Tools for Museums and Other Settings, Third Edition*. Lanham, MD: Rowman & Littlefield Publishers. An all-in-one resource to guide professionals working in museums and other informal educational institutions. This new edition includes updates throughout and a new chapter on evaluating digital interactive exhibits. The section on observational tools includes a new section on using video recordings and the section on interviews includes recent studies from countries outside the U.S.

Dierking, Lynn D. and Pollock, Wendy. 1998. *Questioning Assumptions: An Introduction to Front-End Studies in Museums*. Washington, DC: Association of Science-Technology Centers. Dierking and Pollock offer an in-depth look at the purpose, planning, methods, interpretation, and application of front-end evaluation studies in informal settings. In addition, they offer practical tips on how to utilize front-end studies to involve staff and create a "learning organization," and provide dozens of examples of actual front-end studies, their goals, methods, and findings.

Hood, Marilyn G. 1986. "Getting Started in Audience Research." *Museum News*, 64(3), 25-31. A concise guide for practitioners just beginning to conduct audience research, this article outlines the basic questions to consider, how to develop a plan, and how to select appropriate methods (questionnaires, interviews, observations, and other techniques). Hood also offers four examples and further reading on audience research.

Korn, Randi. 1994. "Studying your visitors: Where to Begin." *History News* 49(2). A useful overview of key evaluation terms and definitions. In addition to explaining the general background and purpose for evaluation in museums, Korn provides information on the range of potential types of evaluations a museum can use.

Lewis, Andrea. 2007. "Surveying Visitors, Plain and Simple." *History News*, 62(2), 17-19. Lewis explains to readers how to focus on small, in-house, DIY high-impact evaluations that provide efficient and applicable results.

Shettel, Harris. 2010. "No Visitor Left Behind." *Curator* 51(4), 367-375. Shettel makes the case for using evaluation as part of exhibit development and audience engagement. This thoughtful essay presents common arguments about conducting evaluation and how museums can overcome barriers and move toward implementation.

Stein, Jill, Adams, Marianna and Luke, Jessica. 2007. "Thinking Evaluatively: A Practical Guide to Integrating the Visitor Voice." *Technical Leaflet #238*. Nashville: American Association for State and Local History. The technical leaflet may be downloaded and purchased online by visiting the AASLH website.

Wilkening, Susie. *Understanding Audiences and Visitors*. AASLH StEPs Curriculum Packet. Nashville: American Association for State and Local History. Curriculum materials for a workshop that helps participants understand how to collect visitor information, locate demographic research and overall trends, and explore using that information to make their organization more relevant to their visitors and audiences. The package includes an instructor's guide, PowerPoint slides, and handouts. The materials may be downloaded free of charge by visiting the AASLH website.

Tools and Techniques

Bradburn, N. M., Sudman, S. & Wansink, B. (2004). *Asking Questions: The Definitive Guide to Questionnaire Design*. San Francisco: Jossey-Bass. This is a classic guide for developing effective questions and surveys focused on attitudes and behaviors. Includes information on conducting surveys in a variety of strategies and includes examples of actual survey questions.

Fischer, Daryl K. 1997. "Visitor Panels: In House Evaluation of Exhibit Interpretation." In *Visitor Studies: Theory, Research and Practice*, Vol. 9. This article describes the concept of visitor panels, small focus groups that serve as representatives of the audience and serve as "experts" on the visitor experience. It includes details on creating visitor panels including recruitment, role of the moderator, and experiences from staff.

Korn, Randi and Sowd, Laurie. 1990. *Visitor Surveys: A User's Guide*. Washington, DC: American Alliance of Museums. An easy-to-understand guide to designing and conducting your own visitor survey from start to finish. With a computer, commitment to the project, and this manual, your staff can accurately measure your museum's performance in any area of operation. Two experienced evaluators outline a step-by-step format for assessing your programs in the public dimension and guide you around potential pitfalls in data collection and analysis.

Using Evaluation Results

Bubp, Ken and Allison, Dave. 2007. "Opening Doors to Great Guest Experiences." *History News*, 62(2), 20-23. An example of the decisions and process that led to a major visitor research effort at Conner Prairie, an outdoor immersion history museum, beginning in 2000 and changes in interpretation programming developed as a result (Opening Doors).

Graft, Conny. 2007. "Listen, Evaluate, Respond! The Colonial Williamsburg Visitor Research Story." *History News*, 62(2), 12-16. An example of the decisions and process that led to a major visitor research effort at Colonial Williamsburg in 2004 and the educational programming developed as a result (The Revolutionary City).

Lewis, Andrea. 2007. "Surveying Visitors, Plain and Simple." *History News*, 62(2), 17-19. Lewis explains to readers how to focus on small, in-house, DIY high-impact evaluations that provide efficient and applicable results.

Tools and Techniques: On-line Resources

American Association for State and Local History. <https://learn.aaslh.org/products/jump-right-in-and-get-your-feet-wet-with-a-special-event-survey> *Webinar: Jump Right In and Get Your Feet Wet with a Special Event Survey*. 2013. Have you thought about doing a survey or gathering visitor information, but were overwhelmed by the prospect? Are you looking for a place to start? In this free, on-demand webinar, learn about a special event survey you can adapt in five minutes or less for your site. Hear from real people who have used this template to evaluate their special events. This link includes a webinar, a template for a Special Event Survey and several other handouts.

Indiana University and Institute for Museum and Library Services. 2010. *Shaping Outcomes*. <http://shapingoutcomes.org/> Free, online tutorial and materials for developing logic models and outcome-based evaluation projects specifically targeted for museums and libraries. Developed in cooperation with the Institute for Museum and Library Services. Includes case studies, resources, and worksheets. Course also available for iPhone. \

Museums, Libraries, and Archives Council. 2008. *Inspiring Learning for All: An Improvement Framework for Museums, Libraries and Archives*. <http://www.inspiringlearningforall.gov.uk/> Comprehensive website that provides tools and resources for planning and evaluation. Of particular interest are the "generic learning outcomes" and "generic social outcomes" to provide a quick start for defining visitor experiences across a range of settings. Includes downloadable templates, case studies and checklists for planning.

University of Wisconsin-Extension. Program Development and Evaluation Publications. <http://www.uwex.edu/ces/pdande/evaluation/evaldocs.html> Comprehensive website that includes information on evaluation, program development and logic models. Includes several worksheets and tips on planning evaluations, designing questionnaires, analyzing qualitative and quantitative data, and using excel for analysis of surveys.

W.K. Kellogg Foundation. (2004, January). *Logic model development guide*. <http://www.wkkf.org/~media/36693510092544928c454b5778180d75/logicmodel.pdf> A comprehensive guide to developing a logic model for your program or exhibition, and includes a useful chapter on how to apply a logic model to plan for evaluation. The chapter offers exercises, activities, and templates that will help you pose appropriate evaluation questions and establish indicators of success.

Evaluation Case Studies, Reports and Planning Resources

Australian Museum Audience Research Unit Centre. <http://www.australianmuseum.net.au/Audience-Research/> Shares resources, short papers defining visitor research, and evaluation reports.

Family Learning Forum <http://www.familylearningforum.org> Website developed out of the IMLS-funded family learning project at the USS Constitution Museum. Offers a wealth of information and resources including short articles, examples of exhibit and interactive activities that promote family learning, evaluation, sample forms and videos from leaders in the field.

Informal Science_ <http://informalscience.org> While focused on informal science learning, the website has resources and examples of evaluation plans, logic models, evaluation studies and tips for working with outside evaluators that is useful for all kinds of informal learning and museum settings.

Museum Learning Collaborative <http://www.museumlearning.org/> A comprehensive database of publications related to museum studies, education, evaluation, and research. The database contains more than 2,300 citations (500 annotated and reviewed), which can be searched by type of museum, topic, author, and title. The collaborative project, funded by IMLS, NEA, NEH, and NSF, officially ended in 2003, but the website still serves as an invaluable resource for identifying key publications in the museum learning field. (Citations from 2003 and beyond can be found at www.informalscience.org)

Opening Doors to Great Guest Experiences

A DVD and CD-ROM training package includes video and other resources to support visitor-centered experiences through live interpretation programs. The set includes tips and techniques for engaging audiences, more than 30 interpretive communication exercises, discussion questions and introduction to conducting guest research all based on Conner Prairie's award-winning "Opening Doors" approach to experience development. Available through the Conner Prairie, Noblesville, Indiana.

Planning for Visitor Experiences

McLean, Kathleen. 1996. *Planning for People in Museum Exhibitions*, 2nd edition. Washington, DC: Association of Science-Technology Centers. An engaging, practical guide to incorporating visitor perspectives when planning for museum exhibitions. In a very user-friendly format, this book addresses the essential issues and questions to consider when planning, developing, evaluating, and implementing exhibitions—focusing on specific aspects such as creating participatory, interactive exhibits; writing effective labels; and reinforcing exhibition themes through physical design.

McRaine, D. Lynn and Russick, John. 2010. *Connecting Kids to History with Museum Exhibits*. Walnut Creek, CA: LeftCoast Press. Edited volume with chapters from history museum professionals that present research and practice that integrates children into museum experiences. The work includes information and tools for audience research and evaluation for this particular audience.

Serrell, Beverly. 1998. *Paying Attention: Visitors and Museum Exhibitions*. Washington, DC: American Alliance of Museums. Looking across more than 100 evaluation studies, Serrell provides a meta-analysis of museum exhibitions that contributes several important pieces: (1) it establishes measures and methods for assessing the effectiveness of exhibitions defined by "thoroughness of use" (based on time spent and stops made); (2) it offers significant insights into visitor behavior in exhibitions based on a broad range of studies

and learning contexts; and (3) it proposes a model for interpreting data and establishing parameters of relative success of exhibitions. While the book is clear and easy to follow, it is most relevant for practitioners with some evaluation background.

Taylor, Sam, editor. 1992. *Try It! Improving Exhibits Through Formative Evaluation*. Washington, DC: Association of Science-Technology Centers. Demystifies the formative evaluation process by outlining step-by-step procedures along with case studies from around the United States. Includes contributions from some of the eminent leaders in the informal evaluation field including Minda Borun, Alan Friedman, and Beverly Serrell.

Weaver, Stephanie. 2007. *Creating Great Visitor Experiences: A Guide for Museums, Parks, Zoos, Gardens, and Libraries*. Walnut Creek, CA: Left Coast Press. Cultural institutions today face the daunting task of attracting visitors who have almost limitless choices for education and entertainment. What gets them through your front door and coming back again and again? In the commercial world, some businesses stand apart from their competition and profit by providing sophisticated, meaningful, and memorable customer experiences. In this practical, user-friendly guide, Weaver translates these methods to nonprofit organizations. She introduces the latest thinking and research on consumer behavior, branding, leisure studies, and staff training. She offers an eight-step process to evaluate how visitors view you, from before they arrive until after they leave.

Ideas behind Evaluation Practices

American Alliance of Museums. 2002. *Mastering Civic Engagement: A Challenge to Museums*. Washington, DC: American Alliance of Museums. This call to action from AAM's Museums & Community Initiative challenges museums to pursue their potential as active, visible players in community life. An opening essay urges museums to reinvigorate their civic role and purposes and offers guideposts for inquiry and transformation. Other essays and reflections -from museum professionals and community practitioners - offer food for thought on the complex process of changing the terms of engagement between communities and museums.

American Alliance of Museums. 2002. *A Museums and Community Toolkit*. Washington, DC: American Alliance of Museums. This toolkit is designed to help museums plan successful museum-community dialogues. It includes helpful hints, logistical tips, and sample documents for organizing a structured and creative conversation among people involved in the day-to-day business of building community. A companion to *Mastering Civic Engagement: A Challenge to Museums*.

Falk, J.H. and Dierking, L.D. 2013. *The Museum Experience, Revisited*. In this new revision to their landmark work, Falk and Dierking explore why people go to museums, how and what they learn, and what roles museums can serve in facilitating more effective learning experiences and foster communities of learners. The authors discuss the "contextual model of learning," which includes the personal, sociocultural, and physical contexts of a museum experience.

Hein, George E. and Mary Alexander. 1990. *Museums: Places of Learning*. Washington, DC: American Alliance of Museums. The authors explore all aspects of educational theory, museum education practice, and visitor studies in a straightforward, concise, and readable manner. Useful in relating the educational contributions of museums to

the wider educational issues of society and to public service.

Sheppard, Beverly. 2007. "The Need to Know." *History News*, 62(2), 7-11. An introduction to the importance of evaluation in history museums with an emphasis on evaluation as a resource for R&D, accountability, sound business practice, and as institutional learning tools.

Weil, Stephen E. 2003. "Beyond Big & Awesome: Outcome-Based Evaluation." *Museum News* Nov-Dec. A discussion on outcome-based evaluation and a rationale for measuring learning in museums. Includes examples of museum use of outcome-based evaluation practices in developing successful visitor experiences.

Visitor Services

Adams, Roxanna. 2001. *Museum Visitor Services Manual*. Washington, DC: American Alliance of Museums. Are you concerned about providing visitors with the best overall experience possible? This manual can help museum staff make a case for visitor services, understand and meet the needs of visitors, plan and staff visitor services, train staff, and evaluate services. More than 25 museum leaders contributed their knowledge and experience to make this manual the most complete resource for museum visitor services today. Includes professional standards, a sample staff handbook, and position descriptions.

Runyard, Sue and Yiva French. 1999. *Marketing and Public Relations Handbook for Museums, Galleries and Heritage Attractions*. Lanham, MD: AltaMira Press. Marketing and public relations have become central to the success of a museum. Without effective use of both, museums of all kinds will fail to maximize their potential and fulfill their financial and cultural missions. This definitive guide describes the role of marketing and effective marketing and public relations techniques any museum or heritage site can utilize.

Where can I find more help?

American Evaluation Association (AEA)

<http://www.eval.org>

The premier organization for evaluators, the AEA website provides a wide range of resources, information, and publications related to evaluation in both formal and informal settings. It includes a comprehensive bibliography of printed publications, collection of links to evaluation-related websites professional groups, training opportunities, and listservs. Also includes a directory to find an evaluator in your area.

Committee on Audience Research and Evaluation (CARE), American Alliance of Museums Open to members of the American Alliance of Museums. CARE offers webinars, skills labs and other professional development opportunities throughout the year and annually at the AAM annual meeting.

Visitor Studies Association (VSA)

<http://www.visitorstudies.org>

The VSA website offers resources related to visitor learning in informal contexts, including a list of VSA publications, recommended reading, and other related websites. The VSA also publishes a quarterly, peer-reviewed journal titled *Visitor Studies Today*. Includes a visitor studies professional evaluator database.