

SUMMARY OF SMALL ORGANIZATION VISITOR RESEARCH PROJECTS (AS OF FEBRUARY 4, 2009)

Background: As part of preparation for a workshop on visitor research, Stacy Klingler, Assistant Director of the Indiana Historical Society's Local History Services department and Chair of the AASLH Small Museum Committee, collected information from a variety of small history organizations about projects they had recently undertaken. Below are summaries of those projects. For further information, contact Stacy at 317.233.3110 or sklingler@indianahistory.org

Follett House Museum (1 full time staff, 3 part time seasonal)

Maggie Marconi, Museum Curator
Sandusky, OH
Entrance Survey

Goal: Who is coming and why? (Pared down from larger ideas)

Method: Self-administered survey, as visitor enters museum

Training: one-on-one consultation – 4 hours

- 1st session (2 hours): theory, question-writing, examples;
- Homework: write questions for ten question survey
- 2nd session (2 hours): picked questions, fine tune wording; excel spreadsheet set up

Cost: \$23 for clipboards, pencils, copies

Time:

- Staff - Training, design, data entry (most of time) and summarizing survey - 40 hours
- Volunteer - greeted, asked to sign guestbook, and told them about the survey, that it will take about 3 minutes to complete, and asked if they would be willing to fill out; chairs available; administered survey – 196 survey x 5 minutes = 16 hours

Results:

- Typical visitor was a white woman, over 60, who came for the first time, with friends, learned of the museum by word of mouth, and came to learn something new.
- Word of Mouth – know that they have a good reputation but are considering how else they might publicize, such as outdoor signage and brochures at visitor centers

Biggest Challenge:

Avoiding leading questions

Comments:

“It was a lot easier than I thought it would be.”

Belfast Historical Society (*All volunteer, 2 seasonal interns, budget less than \$30,000*)

George Squibb, Archivist

Belfast, Maine

Focus Groups (also visitor questionnaires and interviews)

Self-evaluation Plan/Process Policy Draft

Goal: How might we serve our local community better and raise our profile?
(Particularly local audience; most of current audience are tourists.)

Previous Research: Guest register asks “where are you from?” then tallied monthly by student interns in handwritten format. They discovered that they weren’t reaching local audiences. Board members identified relationship with in-town audience as top priority. Additionally, improving their relationship with schools was also a priority.

Cost: Less than \$500 (postage, printing, refreshments, training)

Time: 200 hours

50 hours - preparation and recording of focus group

60 hours - 2 hours per person for focus group participants

30 hours – training (5 people)

Training:

- One day, 3-hour training session; 5 people trained – 2 interns, archivist, president, and board member. (\$60 per hour) Covered many techniques. Located through New England Museum Association.
- Purchased book on institutional assessment: *Practical Evaluation Guide* by Judy Diamond. Read completely by 2 team members.
- “I wouldn’t have thought it necessary, but it proved to be.”

Methods: Wanted broad (valid) results so used multiple methods.

- Written Questionnaires –100 filled out over 3-4 month period
 - Special event visitors (monthly lecture series) – local people
 - Visitors to the museum – short, closed-ended questions, very willing to participate (generally tourist)
 - Discovered what visitors liked about museum, audience demographics, what they knew about the museum, and why they came
- Interviews of Museum Attendees – 12 completed – not as systematic and least helpful
 - Student interns interviewed with interested visitors (not a random sample)
 - Scripted – open-ended
 - In-depth – audience interest, how serving audience
 - Discovered people with museum backgrounds part of their audience (helpful with later research)
- Focus Groups - 3 groups – most helpful
 - *Carefully* chosen participants and facilitators

- All groups spend one hour visiting museum and taking notes (including behind-the-scenes for all groups, and examining exterior and signage for adult groups). After a short break for refreshments, a round table discussion was led by an outside facilitator. The Society recording secretary took notes and summarized the sessions. All participants received a copy of the summaries, a hand written thank you note, and other follow-up about the results of the research. All board members received notes and summaries of research.
- Local students (high school, 5; middle school, 4) – Students were nominated by teachers. Sent letters to parents, asked for permission, spoke with parents on the phone. Students eager. Clear expectations.
 - Facilitator – museum professional who trained Society
 - Results: didn't know as much local history as hoped; interested in clothing collection, notable Belfast women, Belfast education; not civil war or ship models; *students suggested direct contact with teachers to get schools more involved*
 - Note: cream of the crop students, so somewhat biased
- Belfast community leaders - 8 participants – city council, state legislator
 - Facilitator – museum professional from larger museum – who learned and decided to do focus groups at his institution
 - Results – importance of exterior of building and entry area, insufficient signage, entry area needed to be more welcoming, some aesthetic improvements
 - Note: inviting prominent community members was also a means of donor cultivation
- Non-visitor – 8 participants, long-time residents
 - Facilitator – professor from local college with some experience
 - Of particular interest were perceptions of the Society before and after the visit
 - Results - Pleased with efforts of group (after visit); interested in economic history (chicken processing), more recent history (parents or grandparents)
 - Note: also a means of artifact donation cultivation

Results: Set priorities for change

- Improve the signage and make exterior and interior entry more welcoming
- Raise profile of museum - more advertising in town, possibly in shop windows
- Address exhibit labeling (too cluttered and too much to read)
- Added high school history teacher to board (to strengthen connections, e.g. doing research at the museum.)
- Institutional change: created written policy and plan for ongoing institutional evaluation and an evaluation manual (including letters, questionnaires, etc.)

Biggest Challenge/Lessons Learned:

“Be well prepared! Know exactly what you want to get out of it.”

“Make it easy for them [visitors to provide information].”

General Lew Wallace Study & Museum (2 full time staff, 2 part time seasonal)

Amanda Wesselman, Associate Director

Crawfordsville, IN

School Tour Written Evaluations

Goal: To improve current program and directions for the future; raising awareness/subliminal message – how to include in the classroom.

Method: Survey – printed, self-addressed, stamped envelope and Data Shell

Training: On-the-job, required by grant. Based on book: *Program Evaluation: Alternative Approaches and Practical Guidelines* by Jody Fitzpatrick, James Sanders, and Blaine Worthen.

Cost: \$25

Time:

3-5 hours to create survey

10 hours per year to maintain and report

Results: Able to report to grants about teachers' evaluations. Shapes new programs and changes.

Biggest Challenge: Stamp makes a huge difference in return rate (tripled response rate).

Comments:

If you know what you want people to get out of the program, the evaluation is relatively easy to write.

Include both open-ended and closed-ended to get the best of both worlds in one page. Open-ended – what is foremost in their minds. Closed-ended most important for reporting and intent of the program and easier to analyze.

General Lew Wallace Study & Museum (2 full time staff, 2 part time seasonal)

Amanda Wesselman, Associate Director

Crawfordsville, IN

Outcomes-based Youth Program Evaluation

Goal: To demonstrate learning (but not necessarily retention) for special summer program

Method:

Pre- and post-test for each half-day program (4-5 questions); compare difference for individual students and then average.

Training:

Based on book: *Program Evaluation: Alternative Approaches and Practical Guidelines* by Jody Fitzpatrick, James Sanders, and Blaine Worthen and ILMS resources.

Cost: \$0

Time: For five day program, 2-3 hours prep time; 7-8 hours of scoring and data entry

Results: Direct quantifiable measure of the educational impact of the program. E.g., “Students learned 56% more about this subject in this workshop.”

Biggest Challenge: Time constraint; takes too much time for school tours

Putnam County Museum (1 full time staff, 1 part time)

Stacy Klingler, Museum Director
Greencastle, IN
Visitor Register

Goal: Who is coming, how did they find out about us, when are they coming (day of the week, month) and how do exhibits affect attendance?

Method: Visitor Register

Training: Previous background in Excel. Observed what is collected at other institutions.

Cost: Minimal - copies

Time:

- Data Summary – spreadsheet set up and form creation – 4 hours; maintenance, once per month – 30 minutes
- Data Entry – 1-2 hours, once per month
- Volunteer - greeted, asked to sign guestbook – 1 minute per visitor

Results:

- New exhibits and organized special tours increase attendance
- Thursday & Saturday schedule not adequate – demand on other days of the week
- 14% of visitors from out of the county (so our tourism numbers were not strong)
- New location & visibility increased visitation (but was it exhibits, programs, meeting space?)

Biggest Challenge:

- Using register for events when several people show up at the same time
- Realizing that counts don't always answer the question of why people are coming – demonstrates need for another kind of evaluation

Comments:

- Taking the time to set up the process is the hardest part. Maintaining it isn't bad, and we were please to have the numbers at our finger tips for grant and annual reports.

Sacred Heart Historical Society (all volunteer)

Sonja Thune, Properties Director (board position) and Curator (nonboard position)

Sacred Heart, MN

Tally Sheets & Visitor Register

Goals:

To evaluate programs; to take the first step toward connecting with schools and other groups in town by understand who the current audience is; to have statistics for grants

Past Research: Visitor register, including name, membership status and time in and out

Methods:

Visitor register – added age and reason for visit (photocopy use, facility, research, museum); volunteer staff fills in information after the fact each day (if known)

Tally Sheets – created for the different types of contact that they were interested in learning about

- Daily Visitation – date, name, address, membership status, reason for visit, time in and out, total time
- Special Events (quarterly programs, summerfest, group tours) – name, address, age, member, (tour guide)
- School Tours – date, teacher, student name, member status
- Outreach (e.g., presentation at schools) – date, project, project leader, total count, adult, child, member

Organized in a binder for each type of contact and then a “master” binder that includes summaries (by month) and master forms. All information is tracked on paper.

Training:

Minnesota Historical Society workshop introduced concept; invited Field Services representative (David Grabitske of the MHS and a colleague) to give a workshop at the museum for most board members covering tracking visitor information is important and what will be involved. Also, several staff members have background in developing paperwork tracking systems.

Cost: \$200 for copies and organizational materials

Time:

- Daily – few minutes
- Monthly – two people, one to two hours to tabulate information from all forms

Results:

- Share program attendance in quarterly newsletter
- Share comments from visitor register in newsletter
- Will use to evaluate programs (Summer 2009)
- Were able to justify purchase of color printer/copier based on usage

Biggest Challenge:

- Visitor Register – but don't find that people are willing to check off
- Getting the full cooperation of the board and staff (7 board members, and 12 volunteer staff – available once per week) – to make this a priority
- Don't see necessity of paperwork – for planning and grants

Comments:

- We had thought about the impact of programs, but this was the first time we had the figures right in front of us
- Will be helpful with grants
- Helpful with determining success of programs – it is important to ask “why are we offering this?”

Monroe County History Center (4 full time staff, 2 part time)

Lisa Simmons, Education/Membership/Volunteer Coordinator
Bloomington, IN
Attendance Tally

Goal: To more specifically track the types of people (especially children vs. adults) who come and the reasons they come (especially drop-in vs. scheduled) to assist with serving youth audience better and to seek funding.

Past Research: Started with just a visitor count; later broken down into categories (e.g. days of the week, reason for coming, and visitor type). This is an evolution from a visitor register.

Method: Weekly Tally

Volunteers and staff monitor front door and greet visitor, and ask:

- Why are you visiting today?
- Admission cost based on age group, so this information also recorded

Staff records tours, programs, or rentals during the week

Each week's recording entered in an Excel spreadsheet for summarizing

Training: Previous Excel experience; reading grant requirements to determine what information to collect; regional and national conference presentations. Occasionally we

have consultations with local market research and marketing company with connections to local university.

Cost: Minimal for copies

Time:

- Summarizing – weekly maintenance – 10 minutes; monthly for the board (includes other programming info) – 30 minutes
- Collecting – 30 minutes a week

Results:

- Most of under 18 contact is through out-of-house programs or a tour.
- Most of adult contact is through in-house programs (lecture) vs. tours or self-guided museum visit.

Biggest Challenge:

- Tracking volunteer and intern hours
- Would like to collect where people come from; however we've currently decided that this information won't influence our marketing, so we don't need it now
- What to collect next that will be most helpful

Comments:

We have worked with university students to do some small visitor research projects, but staff sometimes have a hard time hearing the results.

MEDIUM-SIZED VISITOR RESEARCH PROJECTS

Connecticut Historical Society (42 staff, summer 2008)

Anne Guernsey, Exhibit Developer

Hartford, CT

Tally Sheet and Exit Survey

Goal: General audience evaluation of satisfaction of visitors to the gallery or research center – not special program visitors.

Previous Evaluation Experience: Counted number of visitors through the doors. Programs completed their own evaluations.

Methods:

- Exit Survey – satisfaction and demographics
 - Self-administered survey; staff requests visitors to fill out as leaving the gallery or research center
- Tally Sheet – when visitors approached the front desk, staff...
 - Noted number in an age group (adult, senior, age 6-17, under 6) based on admission charge

- Asked for zip code, member number, purpose (gallery, program, research), if a first time visitor, and how they heard about CHS
- Observed and noted gender, racial/ethnic background, age and any other notes based on conversation

Training: No previous experience. Currently spending 7-10 hours a month training with evaluator (cost covered by foundation) for 2 years.

Cost: Minimal - copies of surveys and tally sheets

Time:

- Primary Evaluator – 2 hours per week maintenance; 5-10 hours checking and reporting (twice per year for attendance, four times per year for survey)
- Data Entry – 2 hours a week for survey
- Front Desk – 5 minute per group for the tally sheet

Results: (one year)

- Demographic information interesting
- Audience equally male and female
- Better handle for who is visiting, particularly for grant reporting
- Unexpected: A lot of people coming from out-of-state and out of New England

Biggest Challenges:

- Front desk staff are reluctant to ask information
- Low response rate for the survey; evaluator is considering shortening the survey

Comments:

- Evaluation is an ongoing process. We will always make changes
- Good to have a support network in place – staff, powers that be, professional evaluator, Visitor Voices