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Bundle 25

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TL232 – Strike Up the Brand: Creating or Enhancing Your Museum’s Brand Identity
TL 237 – Membership Matters: Establishing a Vital Membership Program
TL238 – Thinking Evaluatively: A Practical Guide to Integrating the Visitor Voice
TL242 – DIY Strategic Planning for Small Museums
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TECHNICAL LEAFLET #232
A PUBLICATION OF THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

# Strike up the Brand: Creating or Enhancing Your Museum's Brand Identity

By Diane L. Viera

As history museums strive to make themselves relevant in the twenty-first century, the challenge of growing (and for some just maintaining) audience can be daunting. Competition for public attention continues to increase while people's leisure time continues to shrink.

A strong brand will set your museum apart from the myriad competing messages that bombard your audience every day. Branding—a concept once reserved for consumer product companies—has become a hot topic as museums seek new ways to increase visibility and expand their outreach.

Traditional museums, especially smaller ones with limited resources, may think they can't afford or won't benefit from branding. Not true. Every museum has a brand identity, or multiple brand identities, whether planned or not. The goal is to manage effectively your brand identity.

Institutions of all sizes and budgets can achieve a clear, simple, and compelling brand identity that will help to grow audience and refresh and strengthen the institution's image while staying true to its mission. The following guidelines for developing, launching, and maintaining a brand that differentiates and reinvigorates your museum are presented through a case study on the branding of Historic New England.

Historic New England is the public identity of the Society for the Preservation of New England Antiquities (SPNEA). The Historic New England name was launched in June 2004. Although SPNEA introduced a new name as a component of its branding strategy, the branding process outlined in this technical leaflet will be effective for your organization whether or not you are considering a new public identity.

# Who is Historic New England?

Historic New England is the oldest, largest, and most comprehensive regional preservation organization in the country.

That seems like a pretty clear and concise description of the organization, doesn't it? You might be surprised to learn that this simple answer to, "Who is this organization?" didn't exist until June 2004. Prior to that, when we asked twenty of the organization's key stakeholders this question, we received twenty different answers. It's nearly impossible to communicate successfully about an organization when those closest to it don't even agree on how to describe it.

To understand why the organization's identity was so muddy, it's important to understand its history. One of the country's first professional preservationists, William Sumner Appleton, founded the Society for the Preservation of New England Antiquities (SPNEA) in 1910. Over the years, the organization continued to expand its collection of historic properties, collections, and archival materials. As it moved into the twenty-first century, SPNEA operated a headquarters in Boston and thirty-five historic house museums spread across Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island. The organization's collection had grown to more than one hundred thousand objects and one million archival documents.

SPNEA was highly regarded by those who knew it. The problem? Not enough people knew about SPNEA, and many who did had limited knowledge of what the organization could offer. Its world-class resources were underappreciated and underutilized. Membership was much too small and not growing. The organization's image was not clearly defined, and traditional historic house museum tours were losing popularity across the country. At the same time, an economic downturn translated to more competition for funding, and funders were becoming more aggressive about asking nonprofits how they planned to expand outreach and grow audience.

Current marketing and public relations efforts clearly weren't enough. SPNEA needed to take an impartial and honest look at how it was presenting itself to the public, and what message the public was receiving. It was time to develop a brand strategy.

**De-Mystifying The Meaning of Brand**

**What is a brand?**
It is *not* simply our logo, tagline, or printed pieces. They support the brand. The brand is the image we portray. It's the clear, crisp, consistent message that defines us.

**What is marketing?**
Marketing is how we build, communicate, and maintain our brand.

**Your brand will answer:**
"Why should I visit, join, partner with, work for, volunteer for, or make a donation to [put your museum's name here]?"

## The Discovery Phase: So, How Do They *Really* Feel?

One of the most important rules of getting started with your branding initiative (and a good rule to continue following) is: Don't assume you know what people think (even the people closest to you).

You may believe you know how people feel about your museum and, in some cases, you could be right. But, if you haven't been consistently gathering feedback, it's more likely you have an inaccurate or incomplete understanding of your public image. A strong branding initiative starts with the discovery phase, when you develop a solid understanding of how your museum currently is perceived. During 2003, SPNEA's new president conducted individual listening meetings with more than two hundred stakeholders. This motivated the organization to investigate more fully its brand identity.

The first formal step of SPNEA's discovery phase was completion of in-depth interviews with twenty key stakeholders. The group included staff members, trustees, general members, donors, and council members (an advisory group). Participants were carefully chosen to represent different areas of interest as well as varying levels of involvement and years of association with the organization. Interviews were conducted either in person or by telephone and lasted about one hour each.

SPNEA contracted with independent branding consultant Michele Levy to conduct these interviews. If you choose not to use a consultant, seek an interviewer who can remain objective while conducting the interviews and afterwards when reporting results. This can be challenging if a staff member conducts the interviews. Also, it may seem more efficient to conduct this type of research using a written survey, but that is not recommended. Valuable, thoughtful

## BRAND STRATEGY DISCUSSION GUIDE

### Goals and Strategies
**(for internal audience interviews)**

- What are the organization's overall goals for this year (fundraising, attendance, membership, exhibitions, etc.)? Have goals been established for the upcoming year?
- What strategies has the leadership agreed to pursue in order to achieve these goals?
- What are your more specific brand and communication goals?
- Do you know what strategies you will pursue to achieve these goals?
- What challenges have you identified that may make it difficult for you to achieve your organizational and/or brand and communication goals?
- How will you measure success?

### Involvement with SPNEA
**(for external audience)**

- How long have you been involved with SPNEA?
- How did you get involved?
- Why do you stay involved?

### Current Brand Strategy
**(internal and external)**

- How do you describe SPNEA to people you meet (the elevator speech)?
- What do you consider the single most important message to send constituents?
- What makes SPNEA unique?
- What does the organization do well? What could it do better?
- What is the personality of the organization (i.e., if it were a person, what type of person would it be…serious, scholarly, professional, fun, etc.)

### Desired Brand Strategy
**(internal and external)**

- What do you think are the strengths of the current brand (or image)? What is sacrosanct?
- Where would you like to see changes/improvements made? Why?
- Where would you take the organization if you were in charge?

### Competitive Landscape
**(internal and external)**

*Although "competition" is sometimes an awkward concept for nonprofits, the reality is that you are competing for funding, volunteer resources, and awareness with consumers.*

- Who or what do you consider the most challenging competitors in each of these areas?
- Are there other areas we should consider?
- What do you consider to be competitive models we can learn from?
- How do you see the competitive landscape shifting over the next eighteen to twenty four months?

### Target Market
**(internal and external)**

- Describe the various target audience segments the organization serves. What do you think each of these values about SPNEA? What need do you fill for them?
- How would the various target audience segments describe SPNEA?
- Do you see your target market evolving over the next eighteen to twenty four months?
- Are you attempting to attract new audiences? Describe them and what you are doing from a products and services point of view to capture their attention.

### Challenges and Opportunities
**(internal and external)**

- What do you consider to be your most significant business and marketing challenges? Why?
- What do you see as the major opportunities over the next eighteen to twenty four months?
- What are the key trends in the marketplace? Are there trends that you think represent an opportunity or challenge for SPNEA?

### Marketing Tactics
**(internal and external)**

- What tactics/programs have you found to be particularly effective in meeting your goals? Do you know why?
- What has not worked that well? Again, do you know why?
- What tactics have you seen your competitors use successfully?
- How do you keep the brand alive within the organization and across your wide variety of sites, programs, services, etc.?

### The Name (optional)

- What is your point of view on the SPNEA name? Would you change it? Why or why not?

information is shared during discussion that won't reveal itself in written responses.

You can refer to the discussion guide on the previous page that was used by Historic New England's consultant. This is only a guide. While the interviewer's goal was to cover all of the topics listed, participants sometimes had more to say in certain areas and were less engaged by others.

Feedback in the areas listed in the chart on page three will prove invaluable as you move forward with defining your museum's brand. You'll gather many opinions during this exercise. The first two steps in turning this feedback into usable information are:

*1. Synthesize the results.* Read through the transcribed interview notes and look for trends, common thoughts, ideas, and opinions. Don't pass judgment on the opinions that were expressed! Impartiality is critical.

*2. Make lists.* We found it useful to create two bulleted lists of "What we learned." One list included positive items that enhanced our image/brand; the other list included items that created branding challenges.

## What We Learned: There's Good News and Bad News

Museums are great places with a lot to offer; mine is and yours is too. So there will be some good news resulting from your discovery phase. But you'll probably be disappointed with some of the feedback as well. Following is a selection of what we learned from our stakeholder interviews. Creating lists like these will lead to the next step in the branding process: creating a brand personality.

*We Learned That…*

- People really appreciate our high standards, quality, and authenticity.
- The breadth and depth of our offerings set us apart—we have geographic diversity, a range of time periods and architectural styles, and we are seen as leaders in preservation, collections, historic houses, and education.
- People love the chance we provide to experience New England heritage "however you want to." We offer very personalized experiences.

*But…*

- People can't clearly explain what SPNEA does. No one describes us in the same way.
- The general perception is of an old New England institution that is elitist and a bit stuffy.
- We are too "low key," "modest," "unassuming," "conservative," "restrained," "insular."

## Creating Your Brand Personality: Highlight Your Strengths

SPNEA built its reputation on quality, authenticity, and scholarship. These key aspects of the organization's work did not and will not change.

People who are uncomfortable with the concept of branding in the museum world will sometimes accuse the branding process of "dumbing-down" the institution. That's just not the case. Your museum's mission and your brand go hand-in-hand. Does that mean that things will continue to be done the way they have always been done? Not necessarily. Identifying and testing more creative, maybe even friendlier, ways to achieve your mission and engage new audiences are key to your museum's future success.

*Your brand identity will reflect the desired personality of your organization.*

As your museum's brand champion, one of the most important messages about branding that you must continuously deliver throughout the organization is that your new or enhanced brand identity is *not* changing the mission or strengths of your organization. A strong brand identity enhances those strengths and makes more people aware of the good work that you are doing.

Your brand identity will reflect the desired personality of your organization. Taking the feedback you have received into account, and balancing it with your museum's vision, determine your desired brand personality. This is the time when you consider what aspects of your current image you want to keep and what impressions are not accurate and need to be changed. Following is Historic New England's desired brand personality.

*We Want People to Know We Are:*

- Open and accessible;
- High quality, authentic;
- Strong communicators;
- Dynamic;
- Flexible;
- Thoughtful, intellectual, knowledgeable;
- Interesting and entertaining.

Anyone who has any impact on the products and services you provide to the public—which is likely just about your entire staff—should know your list of personality traits. As you watch a staff member interact with visitors, proofread a new brochure, or draft your next membership renewal letter, ask yourself, "Is what I'm seeing or reading reflecting our brand personality?" If not, you're not integrating your brand effectively. But the desired brand personality is only one tool for effective brand communication. The next tool you need to develop is your brand platform.

## WHAT ABOUT THE NAME?

This may be the point at which to explain SPNEA's decision to change its public identity to Historic New England. I have intentionally excluded most information about the name change thus far because the branding process discussed can and has been effectively used by organizations without changing their public name.

In SPNEA's case, however, an early finding of the branding research process was that we would be open to gathering opinions on the name as well as on the organization's image and branding needs. This resulted from feedback the organization had been receiving for years on the challenges of its name.

During the stakeholder interview sessions, our consultant asked each participant his or her opinion on the SPNEA name. Here's what we learned:

- There was universal agreement that the Society for the Preservation of New England Antiquities is cumbersome.
- SPNEA (or "Spinea" as it is often pronounced), while shorter, is not much easier to say, nor to understand.
- However, stakeholders were somewhat divided on the resolution.
- A few with long-term affiliation were more likely to support keeping the name; the newer stakeholders were less tied to the name.
- SPNEA has some strengths: it provides some insight into what we do, and has some equity with key stakeholders.
- SPNEA also has weaknesses: it's too long, and the language (especially "antiquities") reinforces the old perceptions of a stuffy, elitist organization.

Gathering this feedback was important and reinforced for us the need to investigate further. As a result, we contracted with Massachusetts-based Cambridge Brand Analytics to survey one hundred people to evaluate four names and three tagline options for their ability to evoke our mission and brand promise. One of the four names tested was the Society for the Preservation of New England Antiquities.

The target audience comprised seventy non-members who were screened for their interest in the heritage and stories of New England, and thirty current SPNEA members. The surveying was done by telephone, each interview lasting no more than ten minutes. This proved to be the most cost effective and efficient method for gathering data. The results were very conclusive. The name and tagline that resonated most with the test group were:

HISTORIC
NEW ENGLAND
*Defining the past. Shaping the future.*

The Historic New England name tested very well. People found it short, consistent with our goals, descriptive, memorable, inclusive, and welcoming. As one respondent said, "I think it says it all. There is no guessing about what the organization does."

Changing the public identity of an organization, especially one with a long history, is a big decision. When such a change occurs, it may seem to have happened overnight. That's likely not the case. For an organization to consider this type of change, it has probably been struggling with the challenges and limitations of its current name for a long time.

At Historic New England, we recognized that transitioning to a new public name would take time. Although there was a launch date (June 1, 2004), a transition period of eighteen months was built into the communication plan. During this time both names were used for clarity. Depending on the context, wording such as "formerly known as SPNEA" was used.

Although the name Historic New England may have been new to some people, those closer to the organization recognized it immediately. In 1996, when SPNEA rejuvenated its licensing and merchandising program, the Historic New England line of reproductions was born. Likewise, when SPNEA introduced its new, four-color membership publication in 2000, it was named *Historic New England* magazine.

One final note on the name—the organization's legal name has not changed. It is still the Society for the Preservation of New England Antiquities. Historic New England is the public identity. On select printed pieces, such as at the bottom of letterhead, we include "Historic New England is presented by the Society for the Preservation of New England Antiquities."

This naming arrangement is a very common business practice. SPNEA is dba (or doing business as) Historic New England.

## Developing the Brand Platform: Keep it Clear, Crisp, and Consistent

Let's recap. So far:

• We have gathered feedback from stakeholders;
• We've synthesized the feedback and summarized what we've learned, both good and bad;
• We've recognized the strengths of our organization and our mission;
• We identified our desired brand personality.

This work lays the foundation for crafting the clear, crisp messages that will be consistently delivered to the public to support our brand identity. It's time to develop your brand platform, which is the document that serves as your guide to defining and communicating your museum's brand identity.

### Components of a Brand Platform

**Brand Platform**
The roadmap for defining and communicating your museum's brand identity. The elements of a brand platform may vary slightly, but most include the brand name, tagline, organizational mission, and/or vision statement, description, position statement, and brand promise. This document pulls it all together.

**Mission and Vision**
If your organization's mission and vision are not clear, it's premature to be creating your brand platform. Branding will enhance your mission and vision, but cannot and should not replace them.

**Description**
The brief statement that clearly describes the organization and is used consistently in communications. Think of it as the "elevator speech"—if caught on an elevator with someone for just one floor, what's the brief but effective description you would use to make them understand your organization.

**Position Statement**
What will people discover at your museum? Make this statement compelling and highlight what you have to offer.

**Brand Promise**
Answer this question for your audience: "What's in it for me?" Tell them what you're promising to deliver to them. This statement is all about the audience and what you do for them.

Following is Historic New England's brand platform as an example.

### Historic New England Umbrella Brand Platform

**Brand Name and Tagline**
Historic New England.
Defining the past. Shaping the future.

**Mission**
We serve the public by preserving and presenting New England heritage.

**Vision**
Historic New England will be a more public institution.

**Description**
Historic New England is the oldest, largest, and most comprehensive regional preservation organization in the country. It offers a unique opportunity to experience the lives and stories of New Englanders through their homes and possessions.

**Position Statement**
Historic New England offers a wide variety of ways to experience the lives and stories of New England with rich, personal experiences.
• 35 properties across a range of time periods, architectural styles, and geographic locations.
• Traveling exhibitions of New England treasures.
• Comprehensive archives.
• Exceptional educational programs and events.
• A tradition of stewardship and partnership with owners of historic properties.

**Brand Promise**
For a wide variety of audiences, from scholars and collectors to homeowners and families, Historic New England brings to life the heritage and stories of the region through the homes and possessions of those who lived here.

A document such as this will guide all of your marketing, public relations, advertising, and overall communication efforts to ensure a strong and effective brand identity. It will only be effective, however, if it is shared and embraced internally and used consistently throughout your organization.

If your museum is like most, you have several program areas providing different products and services. As a result, you may want to create an overall umbrella platform (above) for the entire organization and a program brand platform for your key individual program areas. Historic New England has a program brand platform that covers the organization's five dis-

tinct yet interrelated program areas:
• Historic Properties;
• Collections;
• Archives and Publications;
• Educational Programs;
• Preservation Services.

Here is just one section of Historic New England's five-part program brand platform as an example.

| Brand Platform: Educational Programs |
| --- |
| **Description**<br>A series of nationally recognized school and youth programs that use historic resources to reinforce and enrich student learning. |
| **Supporting Products and Services**<br>• Museum field trips.<br>• Programs to Go!<br>• Out-of-school time programs.<br>• Educators' resources.<br>• Membership. |
| **Position Statement**<br>Programs that are fun, multi-disciplinary, and suited to a variety of learning styles. They allow young people to learn through a range of approaches and include hands-on activities, role-playing, and cooperative learning. |
| **Brand Promise**<br>Discover the entertaining side of history—the stories and people who have made your community what it is today. Learn how, by understanding our shared past, we build a better future. |

You'll notice that the program brand platform includes an additional category: supporting products and services. Adding this category for all five program areas has proven useful in identifying how the public offerings Historic New England delivers fit into our five key program areas. The brand platform model provided above is a general guideline; you should make the brand platform your own and include information that will be most valuable to ensuring strong and effective branding of your museum.

## The Communication Plan: Rolling it Out and Keeping it Moving

With your desired brand personality and brand platform agreed upon, it's time for a communication audit. Simply stated, you should take a good, hard look at how your museum is currently portrayed. Be sure to look at the design as well as the content. What's the message that is presented to the public? Is there a consistent look that represents the entire organization?

To begin your communication audit, gather a range of materials about your museum—brochures, newsletters, signs, membership materials, annual fund mailings, Web pages (your own and others that feature your museum), press releases, newspaper and magazine articles, and the like. With a critical eye, compare what you see to your desired brand personality and platform. Look at design as well as content. Do the materials have a look and feel that matches your brand identity? Does the message support your brand platform? The results of this exercise can be eye opening.

For most museums, the results of a communication audit will tell you that you need to make many changes. This may seem overwhelming, but is quite manageable if you take time at the outset to develop a communication plan and schedule. Your communication plan should include:
• Communication goals;
• Target audiences, both internal and external;
• Brand personality and platform;
• Task lists, with target audience and due date for each task;
• Measurement.

Historic New England phased in its new brand identity over an eighteen-month transition period by making improvements to marketing and communication tasks that the organization already conducted on an annual basis (such as advertising, publications, brochures, membership materials, media relations, etc.) rather than developing a separate campaign to launch the new brand. The transition period had a June 1 public start, but the communication plan included tasks that began even earlier.

Tasks in the Historic New England plan were divided into three phases:

### *Phase I: Progress Reports and Brand Identity Rollout to Internal/Stakeholder Audience*

Do not ignore this phase. It's important to keep your internal audiences informed of what you are doing and to establish buy-in prior to the public rollout of your brand identity. Tasks in this phase included regular update presentations and/or written communication to staff, trustees, and other key stakeholder groups, as well as Q&A and tip sheets for staff on how to support the brand. This may include information on answering the telephone, e-mail communication, etc. These tasks were completed in the three-month period prior to rollout.

### *Phase II: Brand Identity Rollout to External Audiences*

Covering the first full month of the new brand identity, tasks in this phase included initial press releases, new signs, updated rack cards, new stationery and business cards, new staff nametags, updated Web site, redesigned membership materials, etc.

### *Phase III: Continuing Brand Awareness and Maintenance*

Covering the remainder of the first year, tasks in this category (some of which began in phase II) included longer-term communication tasks such as revising all print and broadcast advertising, direct mail materials, monthly newsletters, *Historic New England* magazine, monthly member e-bulletins, and annual fund appeals to support the new image and brand consistency.

## Brand Maintenance: It's Never Over

Your annual communication plan covers only twelve months of activity, but your branding efforts go on. Branding is not a project with an end date, it is a strategy that needs to be integrated into all of your outreach efforts to ensure that the public can answer the question posed at the beginning of this leaflet—"Why should I visit, join, partner with, work for, volunteer for, or make a donation to [put your museum's name here]?"

How do you know if your brand strategy is working? As with all efforts, it's important to measure results. Build measurement tasks into your annual communication plan. Measurements can include (but are not limited to):

- A follow-up communication audit. Are your updated materials more effectively communicating your brand personality and platform? Are there other materials that need updating?
- A membership survey. This can be cost-effectively done as a component of another mailing such as your regular newsletter or e-bulletin. Include some of the same questions asked in the discovery phase. Compare results. Have you made progress?
- Membership growth. Is your brand strategy attracting more members?
- Audience growth. Is your brand strategy drawing more people to your sites and programs?
- Donations. Has your brand strategy strengthened your ability to position yourself with funders?

The results of these measurements will guide you in developing your next annual communication plan and continually strengthening your brand identity.

## What Branding Won't Do for You

Every museum should develop a strong brand strategy to build its audience and expand outreach, but not every museum is ready to. Your museum's brand is a promise—it's the promise that you make to the public. If your organization lacks a well-defined vision and commitment to fulfilling this promise, your brand strategy will fail. The entire organization needs to believe in and be able to deliver on your brand promise.

A new or enhanced brand identity won't make your museum more focused on the public. That focus comes from the top and is achieved by staff throughout the organization. However, if the focus is in place, your work as brand champion can ensure that more people than ever will discover and engage with your organization.

## Bibliography

A tremendous amount has been written about branding for both for-profit and nonprofit organizations. A search for "museum brands" on www.Google.com will result in a wealth of online information. Following are just three sources that I found to be useful and well targeted to museum branding.

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Twitchell, James B. *Branded Nation: The Marketing of Megachurch*, *College Inc.*, and *Museumworld.* New York: Simon & Schuster, 2004.

www.museumbranding.com offers *TouchPoints*, a free e-newsletter with tips and ideas about museum branding.

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**Ms. Viera gratefully acknowledges the work of brand strategy consultant Michele Levy in the rebranding of Historic New England. Ms. Levy can be reached at 617-645-6672 or mlevy@brand-strat.com.**

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# Membership Matters: Establishing a Vital Membership Program in Your Museum

By Marianne Bez and Amy Cunningham

The purpose of a membership program in community-based organizations is to make a direct connection between your audience and the programs and services you offer. Members can be the biggest supporters, the biggest contributors—in both time and money—and the best ambassadors for museums. Yet at the same time, membership programs can also be time-consuming, costly, and challenging to maintain.

A growing, enthusiastic membership is a sign of a healthy nonprofit organization. But why is membership important for nonprofit organizations? It is important for five reasons:

1. Members provide a primary audience.
2. Contented members create community goodwill.
3. Members become volunteers, board members, and donors.
4. Members are initial prospects to look to for additional giving.
5. Members are an important source of additional earned income through gift shop sales, site rentals, and the purchase of other goods and services.

It is important for staff and board members to understand that although membership is the foundation of the development pyramid, there are significant differences between membership and fundraising. The granting of specific benefits and privileges distinguishes membership from all other forms of philanthropic support. **Membership** is a relationship between an organization and an individual or business, in which **tangible benefits are provided in exchange for annual dues. Fundraising**, or philanthropy, involves making a **contribution in return for gratitude** and other intangible benefits. The relationship between an organization and its members varies greatly from that of an organization and its donors and, therefore, the expectations of a member are different from those of a donor. The motivations for individuals to become members are seldom the same as those who contribute. It is possible to be a member and not a donor and vice versa, but it is desirable that most of your members will also be donors.

## *Museum Membership Challenges Today*

Membership is crucial to countless nonprofit organizations and it touches many aspects of work within these institutions. But few employees recognize their role in a successful membership program, and trustees seldom take note of the membership department until there's a problem. These tendencies are especially true for museums, whose staffs face so many other challenges, ranging from deteriorating collections, escalating costs, declining public funding, and meeting the needs of new audiences. It is not surprising that membership can be a low priority for museum administrators today.

The world is changing for museum membership programs. Some historical organizations are experiencing declining enrollments as a result of aging audiences retiring, moving away, or dying. Many museums face the challenge of large numbers of newcomers who are less likely to form allegiances to community institutions or have diverse interests and different needs from those audiences previously served. Museums are further challenged by changes in communications, and many in the field are still trying to maximize the use of new technology to advance their programs and improve communications with members. All of these challenges reinforce the importance of membership. In today's world, membership will succeed only with a systematic approach that has the full commitment and involvement of the board and staff.


National Baseball Hall of Fame and Museum

**The National Baseball Hall of Fame and Museum in Cooperstown, NY, provides visitors with many opportunities to purchase memberships while at the museum. Multiple points of purchase and easy processing have resulted in significant success rates, helping the museum to grow its membership to more than 22,000 in just a few years. Presently onsite sales account for almost forty percent of new memberships.**

## *Why Do People Join Organizations?*

There are many reasons why someone joins a museum or historical society, including financial (free admission), intellectual, and altruistic. Membership programs offer tangible benefits for joining, and the goods and services provided by museums in exchange for membership dues vary widely. The most common are free or discounted admission, publications, members-only events, lectures, parties, museum store discounts, and premiums (such as t-shirts or tote bags). Less frequently cited benefits include travel opportunities, reciprocal agreements with other organizations, free parking, and special volunteer opportunities. More recently, institutions have begun providing screensavers, online audio features, and members-only sections to their websites. Members who join specifically for these benefits are known as "value members." In the larger development picture, authors Patricia Rich and Dana Hines note that that tangible benefits serve as a "helpful nudge" to introduce these members to what the organization is doing, with the goal that they get involved on a more substantial level.[1]

In addition to value members, people join museums for personal reasons—a sense of belonging; a way to stave off loneliness; the desire to be around similar people, prestige or status; solving a particular problem; or addressing a specific personal interest. Others enroll for civic reasons—giving back, pride in the community, and the desire to make a difference.[2]

Understanding why people have joined your organization and an examination of your potential audience and their needs will help you to craft a more effective membership program. Rich and Hines cite Maslow's "Hierarchy of Needs," a framework that notes five areas of need fulfilled in hierarchical order. The first two levels are basic—food, water, safety, and shelter. The next is the sense of belonging, to which Maslow includes the need for acceptance and relationships, and being part of a group. The higher orders of need deal with esteem and realizing one's full potential (self-actualization). Hines and Rich argue that membership organizations offer ways for individuals to meet these higher order needs (although they may not fully understand or articulate this need).[3]

## *Planning Your Membership Package*

As with all programs and initiatives, an institution must first clearly define and carefully consider the membership program's objectives with respect to the mission of the organization and define the membership package accordingly (benefits, categories, and pricing structure). Whether starting a new program or revising a longstanding one, two rules apply to this important structure on which your membership program rests. First, membership must be cost-effective; the price of each membership category must exceed the cost of the benefits promised. Second, basic level dues should be about double the cost-per-member. As categories increase in value, so should membership income. It is useful to conduct periodic benchmarking to compare the categories, benefits, and prices you offer to those of other cultural organizations that share your audience or your target audience. Be sure to create a price structure that is competitive as well as cost-effective.[4]

**To create an enticing membership package, remember the following:**

- ✓ Keep categories as simple as possible. Clarity of choices and fewer options help streamline the program management.
- ✓ Offer benefits that fit your audience's desires and your organization's culture.
- ✓ Conduct comparative assessments of your membership benefits, categories, and pricing on a periodic basis.
- ✓ Calculate the costs of your benefits annually.

Benefits that induce your members to come to the museum, participate in programs and events, or shop and dine help foster a greater connection between the member and the organization. Generally there are two types of benefits, free or discounted merchandise or programs and access to places, people, or information. These range from the basic—admission, program and merchandise discounts, advance ticketing, and publications—to more upscale offerings such as members-only events, special customer services (parking, coat check), professional services (assistance with genealogical research), travel opportunities, and discounts on reproductions of historic photographs or artwork from collections. Many museums also reflect their own personality and mission through creative benefits. The Black River Academy Museum and Historical Society in Ludlow, Vermont, for example, offered coupons for free ice cream cones redeemable at their annual ice cream social. The same society also provides one free entry into their annual quilt raffle.

## *Membership Levels and Categories*

A successful membership structure will have well-defined levels with tangible benefit increases at each step. Tiered levels of benefits enable you to employ a "benefits-oriented" sales pitch in membership campaigns and provide incentives for existing members to consider increasing to higher levels. Museums should offer information-based benefits at all levels. Newsletters, calendars, invitations, or journals serve as avenues of communication to your membership and help them to perform an important role as ambassadors to your organization. Articles on local history also fulfill the educational component of a museum's mission. Institutional support is crucial, as one major challenge of a membership program is the reality that staff in other areas of the museum provide many of the promised services. Therefore, make certain to incorporate staff input into the design of the membership benefits.

The most common membership categories are the basic individual (benefits and privileges exclusive to one person) and the family (includes two adults and a certain number of children). According to results reported in the *NEMA News* in 2004, fifty percent of respondents also offer an additional membership category for sub-groups such as senior citizens, students, residents, and educators, among others. In addition, ninety percent of the museums surveyed also offered at least one category above the family level, and many offered several.

When calculating costs, many institutions fail to recognize how member benefits delivered though the work of another work unit impact the overall budget. These connections are particularly critical during periods of membership growth. To ensure that benefits are delivered as promised and remain institutionally feasible, changes in membership, either declining or increasing numbers or adjustments in benefits, must be shared widely throughout the institution. And finally, there is one absolute rule about making changes in benefits, fee structure, or categories. You must tell your members about any changes repeatedly and well in advance of implementation. You may also want to test these ideas on select members before finalizing new benefits. This communication is critical to the ongoing success of the program.

## *Developing a Membership Profile*

Another ingredient of successful membership recruiting and retention is the ability to profile the people who join your museum and who make up your organization's audience. This will aid in finding new members and engaging present ones. The best way to learn about members is to conduct surveys, focus groups, and even informal interviews. Some information also may be gleaned from analysis of your present membership records. Review the zip code distribution among existing members to determine which areas have the largest concentration of members. Review sign-up or termination dates to help determine if there is a seasonal pattern to your membership. Explore how these patterns relate to events at your museum.

Information about your museum visitors is also helpful. If your museum has a seasonal visitation pattern, remember that summer visitors may represent different demographics than those touring the museum at other times of the year. Do your visitors return randomly or at more frequent intervals? Ask what draws them to the museum initially and what would inspire them to return. Find out if they'd recommend the museum to others.

Before you undertake any research on your own, determine if other organizations in your community have already gathered research that would be helpful to you. Also consider the possibility of using the talents and skills of a nearby college marketing department, or interns from a museum studies graduate program. Armed with greater understanding of your existing members, their motivations and interests in your organization, and the sources that influence their behaviors, you can create an acquisition plan that identifies prospects for membership and formulates a message that will motivate newcomers to join.

**What other information is useful to develop member profiles?**

- ✓ Keep categories as simple as possible. Clarity of choices and fewer options help streamline the program management.
- ✓ Geographic breakdown
- ✓ Education level
- ✓ Income level
- ✓ Fields of interest/ occupation
- ✓ Gender of the membership decision-maker
- ✓ Age range
- ✓ Marital status

## *Attracting New Members*

Acquiring new enrollees is vital to sustaining a membership program and essential for growth. The key to selling memberships is asking. People rarely join without being prompted. Most acquisition campaigns are not immediately profitable and it is fairly common not to make a profit in the early stages. But the long-term benefits are substantial if new members become renewing members for years. Slow, steady growth is more manageable for smaller organizations; rapid membership increases for all sized institutions can make the delivery of benefits difficult, lower renewal rates in subsequent years, and jeopardize goodwill or support if you fail to meet expectations. It is much easier to recruit new members when staff, volunteers, and board members recognize and endorse the goal. To ensure that the membership program is an integral part of the museum financially and programmatically, provide progress reports to staff and board members.

A cornerstone to any acquisition effort is the identification of good prospect lists. Begin with prospects you know and exhaust in-house sources of contacts first. Solicit past board members, volunteers, staff members, and friends and associates of each, as well as researchers, collections donors, visitors, and vendors. At special events and staff presentations, identify potential new members. Be compulsive about collecting contact information of individuals and businesses who are interested in your museum. Use registration lists and guest books to collect names and contact information, including phone numbers and email addresses.

**Tips in finding new members determine:**

- ✓ What other organizations interest your members?
- ✓ What benefits are valued most?
- ✓ What motivates them to be members?
- ✓ What magazines and publications do your members read?
- ✓ What TV or radio stations do they tune to?
- ✓ What types of information do they search for on the Internet?
- ✓ Do they prefer to receive communications from your museum via mail, email, or phone?

Acquisition is the most costly and time-consuming component of a membership program and it is essential to have realistic goals and a well-conceived plan. The most common recruitment techniques employed by museums and historical societies include personal solicitations at the admissions desk and during special events, telemarketing, enrollment via the museum's website, membership drives, advertising, gift membership promotions, and direct mail. For the latter, direct mail specialists recommend testing various elements of a mailing package, such as the language of the cover letter, a special offer, or the use of an incentive, before undertaking a large-scale mailing.

## *Soliciting Visitors*

Museum visitors are an excellent source of new memberships. A New England Museum Association survey reported that over fifty percent of membership sales were made onsite. Invite every attendee at the museum, research library, programs, and special events to join. Incorporate a membership invitation into newsletters, promotional literature, and other mailings. Feature membership opportunities prominently on your website, and be sure to include the website address in all promotional literature and all advertising. Following a special event, send a direct mail letter appeal or e-solicitation to participants who are not members. Cull your lists so that only one appeal goes to each household. Be absolutely certain that you do not mail acquisition letters to existing members. Code your mailings so that when an enrollment comes in, you will know where it originated. Track results from every effort and repeat the methods that work best.

## *Direct Mail Campaigns*

After onsite sales, direct mail is the most common acquisition method. These efforts can be conducted by your staff or with the assistance of a professional mail house. The mail house can handle all aspects or assist with any portion of your direct mail campaign, ranging from preparation of your prospect list, design and production of the direct mail package, and mailing. But before outsourcing, first consider the volume of the mailing, your staffing levels and their abilities, and cost. You may find that it is financially viable to manage all of the work in-house. If you choose to use an outside firm, which can greatly advance your membership promotion, you should closely monitor their work. Regardless of the size of the mailing, carefully proof all of the literature to ensure its accuracy, and purge the mailing list to omit existing members and other VIPs.


**The membership message is front and center at the Peabody Essex Museum in Salem, MA. A membership sales desk is prominent in the main entrance before the admissions counter. While waiting to purchase tickets, visitors face rack cards promoting free admission with the purchase of a membership, cleverly placed in holders mounted on stanchions. Even the cover of the museum's map has a simple but direct message about membership.**

The direct mail package should contain a letter inviting an individual to join, along with the membership literature listing categories and benefits, a response form, and a return envelope. In an increasingly competitive market, it is imperative that your membership appeal stands out among other pieces of mail. Professional design services can also make your appeal attractive enough to lure individuals to open the package and read your message.

In mounting a direct mail campaign, identify other prospects beyond your immediate audience. Reference your membership profile and look for others who fit it. This list might include former members, long-time community residents, owners of historic homes, newcomers, regional businesses, people with connections to board members, seasonal residents involved in the community, and descendents of prominent local families. It is also possible to purchase lists inexpensively, using tax or voter registration rolls. More expensive and refined lists are available commercially, but if you consider outside lists, be analytical about which to use. Ultimately, select lists with valid mailing addresses who closely match the demographic profile you are seeking.[5]

The brochure is a crucial aspect of any direct mail campaign. Your brochure should emphasize membership benefits, especially those identified as the ones most valued by current members, and its graphics must reflect the quality of your museum. It is also useful to collect and study membership brochures of other museums and cultural organizations. Remember, this piece may make the museum's initial impression on a potential member. Draft your letter of invitation in an upbeat tone, written as if it's being sent to that specific individual. Focus the letter on what you've learned through your membership research about what entices your current members or visitors (i.e., an exciting new exhibition or special event).

Small museums should not be daunted by the idea of direct mail. With today's micro-processing capabilities, it is manageable to produce direct mail in-house, mailing a limited number of appeals each week or month, thus making incremental progress. By working continually on acquisition, a museum with fewer staff can experience new membership growth throughout the budget year. Response rates vary at certain times of the year. Be mindful of outside influences that may compete with your membership mailings, such as tax deadlines, major holidays, or other prominent donor campaigns in your community. Study your results and repeat what works.

In addition to direct mail, many organizations have used incentives, trial memberships, and discounted memberships to attract new members. Other methods include selling memberships on your website or recruitment events designed for the sole purpose of promoting membership. Some historical associations conduct membership drives using volunteers, an effort that requires coordination and training so that the "sales team" imparts the correct message and the knows the correct way to solicit new members. Gift membership promotions can be especially successful in the final quarter of the year. Packaging, which could include a sample publication, an inexpensive item from the museum gift shop, and wrapping with a bow, can make gift membership an attractive purchase. Before you consider these options, research the success rates of others with experience. Whatever lure you use, it must fit your organization's style and budget and evoke a response in potential members.

## *How Do You Keep Members Interested in Your Museum?*

After you've been inundated by responses to your membership acquisition campaign the work just begins. Start by acknowledging new members *promptly* with a welcome letter that includes an introductory message, an invitation to visit the museum, and a membership card. Find ways to honor members, not just with the traditional membership receptions or exhibition previews, but consider how to show appreciation for members every time they cross your museum's threshold. At major events, provide a membership entrance so members do not wait on admission lines. Offer members advance ticketing for popular exhibitions and programs.

**Whatever methods you use in selling memberships, it is vital to keep track of the following:**

- ✓ Total number of appeals or contacts made in each sales campaign
- ✓ When the prospects were contacted
- ✓ Length of time after solicitation until response was received
- ✓ Number of members and levels of membership joined
- ✓ Source of prospect name
- ✓ Rate of response

Deliver membership benefits on time and with pleasure. This step often requires the cooperation of coworkers in other areas of the museum. Educate your peers as to the importance of membership and be sure to acknowledge their role in its success.

New technologies such as websites, e-vites for special events and receptions, voice-mail, Internet-based surveying, and bar-coded identification cards are being incorporated into membership programs. Many museums offer e-newsletters rather than or in addition to printed versions. The Brookfield Zoo in Chicago provides an e-newsletter every other week as well as a choice of three self-selected thematic versions of their electronic newsletter, Behind the Scenes, Conservation, or Family. Communicating regularly through event publicity, letters, e-communications, publication, and other means will keep members interested and involved. They will feel invested in your organization and be more likely to renew. Building a relationship with your members will result in a program driven by loyalty and affiliation rather than merely benefits. Tapping into passion and core beliefs enables an institution eventually to convert members into reliable long-term devotees.


Phoenix Zoo

**Membership sales via direct mail campaigns require careful planning and creative design. Eye-catching samples designed by DateProse Direct for the Phoenix Zoo impel recipients to open rather than discard it.**

## *How Do You Succeed in Retaining Members?*

The renewal process helps to ensure that existing members retain their dues-paying relationship with your organization. Neil and Phil Kotler suggest, "Renewal rates are an annual market test in which members 'vote' on whether the product is worth the cost or involvement." When calculating renewal rates, separate first-year renewals and expect these rates to be lower than those of longer-term members. Awareness of these rates will be helpful in budgeting renewal income and knowledge of what sources yield the most long-term members will help you allocate staff time and membership acquisition resources. A total renewal rate of seventy to seventy-five percent is good, as is a first-year renewal rate of sixty-five percent.[6]

To encourage members to renew before their expiration date, renewal notification should be sent early. Multiple renewal notifications will increase your response. Careful tracking will enable you to calculate how many notices are cost-effective or necessary to maintain target renewal rates. Most museums send at least three renewal notices for each expiring membership, ranging from sixty days before to thirty days after the expiration date. The standard renewal mailing includes a cover letter, a pre-printed remittance envelope, and a response form. The essence of your membership message should be repeated along with payment options, categories of membership, and associated benefits. Some museums are experimenting with e-reminders and even telephone voice messaging to urge members to renew online, eliminating paperwork and postage.

Renewal time also presents an opportunity to upgrade members to higher categories. Use the renewal message to invite members to increase to the next level of membership. In your phrasing, convey a sense of urgency and be encouraging—"If you renew today, your benefits will continue uninterrupted." Mention an upcoming event or a new exhibition. Alter the message in each succeeding reminder to reflect greater urgency as the expiration date approaches. As

## Tips for Membership Success

Everyone's plan for membership is different according to the institution's specific needs, but the following tips apply to most museum membership programs:

1. **ASK, ASK, ASK —** People are not likely to become members unless they are asked. Mention membership at all events, exhibits, lectures, in your newsletter, and on your website. Most museums have circles of friends and volunteers who would gladly join if it were brought to their attention.
2. **Collect addresses whenever you can —** People who have been "consumers" at your institution, whether touring exhibits or attending a lecture, are the best bet for becoming members. Prominently display a guestbook and ask visitors to sign. If you have a display at a convention or event, have them sign up to get a chance to win something, such as a book published by your institution or a tee shirt with your logo.
3. **Send regular renewals —** Whether on a quarterly or monthly basis, send prompt and multiple renewals. Each member should get at least three renewal notices before being dropped from the membership rolls. Remember that lapsed members should be asked to join again.
4. **Eliminate life memberships —** Anyone who is so engaged and invested in your organization that they want become a member for LIFE is engaged and invested enough to pay dues every year.
5. **Communicate changes in advance —** If you decide to make changes to your membership fees or benefits, let your members know about these changes often and well in advance. You might use it as an opportunity for a membership drive or early renewal—"renew or join before June and save $10."
6. **Figure out what your membership program actually costs your institution.** Consider staff costs and postage. Do your dues reflect that?
7. **You must constantly find new members —** Even with a great annual retention rate of eighty percent, you must recruit twenty percent each year to keep your membership numbers steady.
8. **Keep 'em happy —** It is more costly to recruit new members than it is to keep current members. Make them feel like an important part of your organization by:
   - Welcoming new members, through an event or with a small token
   - Communicating through a newsletter or mailing at least quarterly
   - Delivering the benefits you promise
   - Recognizing members at events

with acquisition, it is equally important to keep track of the response rate for each mailing or renewal technique. Renewal tracking will help you establish an understanding of the patterns that emerge in the process. Multiple factors influence membership renewal, including benefits offered, frequency of benefits, visits to the museum, treatment of members, quality and regularity of communications with the organization, personal finances, and change of interest, health, age, or relocation.

It is important to analyze renewals and use this information to inform succeeding renewal efforts. Those members who do not renew after the final notice are commonly known as lapsed members. The records of lapsed members should be coded as inactive and their benefits ceased. If significant numbers of members (especially from higher categories) are not renewing, it may be time for research to determine how your museum is not meeting expectations. Surveys, focus group discussions, or other interviews with lapsed members can provide helpful feedback. Also, most membership-based institutions find it cost-effective to conduct at least one campaign annually targeted to soliciting lapse members to rejoin. Sample forms for tracking campaign progress and gathering production costs can be found in the *Nonprofit Membership Toolkit* listed among the references.

### *Making Membership Part of the Overall Institutional Thinking*

It might seem easy to let your membership program just glide along. In reality, however, membership needs constant care and attention. Maintaining and increasing your membership requires planning and resources. Ongoing program assessments, benchmarking other programs, and consistently tracking results are necessary to stay current and sound.

Membership touches all aspects of museum work and can succeed only with support across your organization, especially at the top. Constant consideration of the institutional mission and its tie to your membership will keep your program on course.

A strong membership program can strengthen your museum on many levels including financially, programmatically, and in audience development. A robust membership translates to audiences for programs and exhibitions, volunteers and collections donors, goodwill, and a foundation for successful fundraising. A growing and enthusiastic membership is a tangible sign of a healthy nonprofit organization and well worth the investment of time and resources.

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[3] Rich and Hines, *Membership Development*, 16.

[4] To learn more about benchmarking see Barbara Windle Moe, *Technical Leaflet #221: Process Benchmarking for Museums*, American Association for State and Local History, 2003.

[5] Questions to consider include: Where did the list originate?; How recently names have been added and what is the frequency of their updates?; What are the list's demographic characteristics? Also ascertain if you are purchasing a one-time use or if you can mail to these prospects more than once.

[6] Neil Kotler and Philip Kotler, *Museum Strategy and Marketing* (San Francisco: Jossey-Bass Publishers, 1998), 292.

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# Thinking Evaluatively: A Practical Guide to Integrating the Visitor Voice

By Jill Stein, Marianna Adams, and Jessica Luke

The history museum field is facing critical concerns: declining attendance, financial difficulties, and general uncertainty about sustainability. Yet this is also a time of tremendous opportunity, with increasing use of digital communication, expanding interest in free-choice learning, and people's trust in history museums as sources of information about the past. One proven strategy that can both maximize these opportunities and address critical concerns is better understanding visitors needs, expectations, and motivations. Integrating the visitor perspective into all stages of planning, development, and implementation is what we call "thinking evaluatively," and it is more important now than ever.

Thinking evaluatively means walking a mile in the shoes of our visitors in order to understand and respond to their needs, perceptions, and experiences. The visitor experience is not simply an outcome to be considered only at the completion of an exhibition or program; it should be a guiding thread interwoven through all stages of development. Although evaluation has played an increasingly significant role in museums over the past decade, much work still needs to be done to integrate evaluative thinking into organizational culture and practice.

What follows is a guide to the basic principles and practices of evaluation, along with a set of useful strategies for involving your institution in thinking evaluatively.

## What is Evaluation?

The basic process of evaluating is a natural human endeavor. We observe, reflect, note what is not working, and adjust our actions accordingly. These natural, adaptive human activities are not the same as evaluation but do form a basis for it. When the reflective process is expanded and made systematic, it then moves into the realm of evaluation.

Author Michael Quinn Patton notes that evaluation in its most basic sense is "any effort to…enhance human effectiveness through systematic data-based inquiry." While many people still believe that the goal of evaluation is to determine the quality of your work—whether good or bad (see "Five Common Misconceptions about Evaluation")—evaluation is as much a way of thinking as it is a product or finding.[1]

Evaluation is also much more effective when thought of as a collaborative process. It is not something to be done *to* people or programs, but rather a process that enables museum staff to be more aware and effective in their work. Evaluation can then be highly satisfying for all involved, helping us clarify goals, be more focused in our work, and accomplish our objectives.

## Why Do Evaluation?

Many museum professionals agree that evaluating exhibitions and programs is a good idea. It is intuitive that getting feedback from visitors and other stakeholders will contribute to the success of a particular project. However, these reasons are not often clearly articulated or the purpose of evaluation is viewed too narrowly, such as simply to rate a program as "successful" or not. In fact, there are many benefits to conducting evaluation that are not often emphasized or well understood. Becoming aware of these benefits can encourage more involvement and buy-in from staff and board members, supporting evaluative thinking throughout your institution.

### *Evaluation helps you define goals.*

Before beginning any evaluation effort, it is essential to define goals and outcomes. Only then do you have something to measure. Too many museum exhibitions and programs fail to identify their outcomes and measures of success. For example, goals and objectives are often simply intuitive rather than articulated; defined and written down without seeking consensus; or too broad, unrealistic, and/or not measurable. Consequently, staff often tries to implement the project without a clear sense of focus, which naturally poses challenges in conveying specific messages or creating appropriate experiences for visitors. Evaluation supports museum staff in collectively thinking about and articulating what would constitute the success of a project. They tend to become more focused, move beyond personal agendas, and concentrate on the quality of the visitor experience. As a result, the project has a much greater chance of being more effective.

An evaluation conducted at the Maryland Historical Society on their *History Explorers* Program, for example, revealed a discrepancy between how project team members perceived the goals of the program and how they articulated those goals in the initial grant, as the project had changed over time. In order to get a more realistic and shared view of current goals, researchers conducted focus groups with staff and participating teachers. The organization was then better able to agree upon and articulate the key elements of the program, and evaluators could clearly focus on what to measure.[2]

### *Evaluation can save time and money.*

Many institutions avoid evaluation because they feel it requires too much time and/or money. This is often a result of thinking short rather than long-term. For example, detecting problems early in the planning allows changes to occur before an exhibition is fabricated, copies of a curriculum are printed, or a new docent training model is implemented. There are also multiple ways of conducting small, low-budget evaluative projects in-house (see "Do It Yourself: Six Simple, Inexpensive Evaluation Activities" page 5).

A few years ago, the San Diego Natural History Museum was planning to add computer terminals throughout an exhibition, assuming that computer interactives were most desirable for many visitors, especially children and teens. However, after conducting dozens of focus groups with a variety of audiences (including children), researchers discovered this was not true. Audiences actually preferred other ways of getting information, such as live interpretation, videos, manipulatives, objects, and immersive experiences—all much less expensive to implement.[3]

### *Evaluation can help leverage funding and support for projects.*

Many funders now require evaluation as part of the granting process, and many more are moving in that direction. Boards want to know what the institution is really accomplishing, and funders want to know what impact their money is having. They increasingly want clear and systematic documentation that the institution's programming efforts are positively impacting visitors. Institutions are increasingly tasked with presenting convincing evidence that their efforts are effective. All sizes of institutions need to know the basics of evaluation to compete for funds in this era of accountability.

### *Evaluation can enhance staff communication and curiosity.*

Staff involvement in an evaluation project is an excellent professional development strategy. When staff

## FIVE COMMON MISCONCEPTIONS ABOUT EVALUATION

In order to better understand what evaluation is, it is equally important to clarify what it is ***not.*** Following are five of the most common misconceptions about evaluation:

1. **Evaluation is something you do at the end of a project.** Evaluation is most useful when it is incorporated into all stages of a project—allowing useful changes at any point in project development. Seeing it as the final grade of a project limits the true value of evaluation.

2. **Evaluation is a written survey.** A written survey is only one technique for gathering information. Other tools include interviews, discussions, focus groups, observations, and timed tracking of visitor behavior.

3. **Evaluation is about finding fault with something or someone.** Evaluation can be as much about finding out what works as what does not work as well. Evaluation does not lay blame, but rather helps project teams define their goals and objectives, create effective implementation, and shift directions based on visitor feedback.

4. **Evaluation won't tell me anything I don't already know.** While staff may have hunches about what s working and what s not, evaluation offers valid evidence and insights. When staff relies solely on assumptions, they may be puzzled and disappointed by visitors reactions.

5. **To be valuable, evaluation projects need to be BIG (and expensive).** Large, complex evaluation projects are not necessarily better than smaller, focused projects. When implementing evaluative thinking, start small. Once evaluation becomes a habit, it can expand according to need.

is asked to think carefully about the desired outcomes of a project, they must come to consensus about those goals. The very act of working through the issues involved in designing and conducting an evaluation establishes an intellectually-stimulating environment whereby staff can view their work and the visitors from a variety of perspectives.

### *Evaluation can increase the institution's responsiveness to the community.*

Implementing a process of evaluative thinking requires staff to step back from their work and begin to see the museum experience from the visitor's viewpoint. This may mean that a strongly-held belief about visitors or long-running programs will have to shift when the program no longer meets visitor needs. Museum staff does not have to sacrifice responsibility for selecting and interpreting content, or upholding quality, but they will have to think more deeply about how visitors approach and understand that content. In sum, evaluation can empower staff to design the richest and most accessible experiences for their visitors.

### *Evaluation can be a stimulus for change and growth.*

Evaluation is a political process that can affect change and enhance institutional growth. If an institutional environment consistently supports evaluative thinking, then projects will begin to align themselves more closely to the institutional mission. Any disconnect between mission and action will be more glaring in light of focused, systematic evaluation. It can help an institution push the edge of their thinking and move out of repetitive, sometimes defeating, practices.

One example from the living history field is the *Opening Doors Visitor Engagement* initiative implemented at Connor Prairie. Based on extensive visitor research that used audio and video recordings of visitor experiences with interpreters, staff discovered that visitors were not absorbing educational messages and were not having the quality experience essential to the museum's mission. This research launched a major overhaul of institutional culture, practices, and interpreter strategies, including developing conversations based on visitor interests rather than following a standard script or monologue.[4]

## When Should You Do Evaluation?

For many years, museums conducted evaluation only upon completion of an exhibition or program (if at all), and generally focused on the question, "Did we do a good job?" Recently it has become more common practice to incorporate evaluation throughout all stages of a project, asking multiple types of questions along the way—What do visitors already know about this topic? What will motivate them to attend the exhibition or program? What are their expectations for the experience? and What types of personal and social learning may occur?

To answer your most important questions, think strategically about the most useful stages in which to conduct evaluation and what you need to know at each juncture. Evaluation is generally divided into three main stages: 1) ***Front-End*** **–** The planning and conceptual design phase; 2) ***Formative*** **–** When the program or exhibition is up and running; and 3) ***Summative*** **–** Near the end or after the program or exhibition is over.

### *Front-End Evaluation*

Studies that begin in the earliest stages of developing an exhibition or program are often called front-end evaluation. This stage can be thought of as the start of a continuing conversation among museum staff, designers/advisors, visitors, and the subject matter itself. Evaluation at this point occurs after the broad concepts and goals of a project are established but before much time or money has been invested in expanding the concepts into an actual program or exhibition. These studies are exploratory in nature and typically seek information about visitors' interests, expectations, and understanding of proposed topics.

### *Formative Evaluation*

The purpose of formative evaluation is to assess ongoing project activities at several points in time to provide feedback for program improvement. Formative evaluation takes place while an exhibition or program is still being planned or during the early stages of implementation. The results of such studies are intended to offer direct, concrete, and practical ways to improve a project. Staff can make informed decisions about project development in order to better meet the needs of visitors and achieve the goals of the project and/or institution. During formative evaluation, researchers are often focused on how visitors are using a program or exhibition, how they behave (e.g., social interaction, time spent, quality of engagement), what visitors respond best to and what they struggle with, as well as the extent to which their learning outcomes compare to intended outcomes.

Formative evaluation means that you must be open to making changes midstream based on something that does not seem to be working. For example, the exhibition team at the USS *Constitution* Museum was developing a family gallery and tested one of the entry activities designed to have visitors role-play the recruitment process for sailors. They discovered that the activity was not intuitive to family visitors, who did not know what to do and quickly became frustrated. Team members talked to families to identify possible changes, implemented their suggestions, and re-tested mock-ups with another group of families. They continued the process over two weeks and finally created an activity that families now see as self-explanatory and fun.[5]

### *Summative Evaluation*

The purpose of summative evaluation is to assess whether or not a project achieved its goals and objectives. Did the program do what it was intended to do? What specific aspects or components of the exhibition or program led to these outcomes? This type of study is conducted at or near the end of an exhibition or program. In some cases such studies provide staff members information they can use to further modify the exhibition or program. For example, if staff covered the story on an exhibition that will remain open for some time, then findings from the evaluation could be used to make small changes, such as placement or content of labels. When modifications are not possible because of such limitations, summative evaluation results are still valuable as lessons learned for future projects.

A summative evaluation conducted for the American Philosophical Society suggested that while visitors preferred authentic objects to reproductions, they also saw the importance of using reproductions as an educational tool—as long as it was made clear that the objects were reproductions. While these findings were useful for the specific exhibition being assessed, they also informed the institution's future practices.[6]

## Who Should Do Evaluation?

Many museums want to do evaluation on their programs and exhibitions but are not sure how to proceed. Sometimes the first question is, "Should I hire an outside evaluator or try to do it myself?" There is no simple answer to that question. An outside evaluator usually brings a greater degree of objectivity to a project, and their wide range of experience provides a broader perspective. Professional evaluators also will have greater experience and skills in designing studies, framing questions, selecting methods, and collecting and analyzing data. On the other hand, the process of doing evaluation as a museum practitioner provides excellent professional development opportunities for the staff. There may also be times when familiarity with an institution and its programs is especially desirable.

### *Doing it Yourself*

Whether you are a large institution or a small historic house, conducting evaluation internally can be beneficial. While smaller, in-house evaluation studies do not necessarily replace conducting comprehensive evaluation studies with an outside evaluator, there are numerous low-cost ways to keep your finger on the pulse of the visitor experience and involve staff in more deeply connecting to and valuing the visitor experience (See "Do it Yourself: Six Simple, Low-Cost Evaluation Activities" page 6).

In-house evaluation can also be a nice opportunity to involve program participants. The Chicago Historical Society utilized members of their Teen Council to gather front-end data for a new exhibition and program called *Teen Chicago.* The benefits were three-fold: 1) using volunteer teens saved the institution money; 2) the teen data collectors gained valuable interviewing experience; and 3) teens who were interviewed for the study likely felt more comfortable sharing their thoughts with a peer than an adult.[7]

What follows are some helpful tips for conducting in-house visitor studies:

***1. Make sure your goals are clearly defined and agreed upon.*** The most essential first step in conducting evaluation, whether on your own or with an outside evaluator, is to have a clear understanding of the project goals, and to develop consensus among key stakeholders. All should agree on the desired outcomes of the exhibition or program to be evaluated, as well as the questions you would like to have answered by the evaluation.

*2. Place reasonable expectations on yourself.* It will take time for you to develop evaluation skills. Do not expect it to come all at once. Look at this process as a long-term learning experience, keeping in mind that you are not a professional evaluator, and you are not expected to become one. There are many benefits to doing evaluation on your own. One of them is to use evaluation as a process through which you gain greater understanding of your professional practice and to grow in your skills and knowledge.

*3. Be realistic about the scope of your project.* It is common for museum practitioners, excited about doing evaluation, to take on evaluation projects beyond their ability, time, and resources. Avoid getting overwhelmed. Select a small, focused question rather than a broad one. Start with a small group of visitors (twenty to thirty) to identify key trends and issues without using a lot of time and resources. Keep the number of questions to a minimum, and focus them specifically on what you want to find out. Last, evaluate only issues that you have the ability to change.

*4. Seek the support of other staff in the museum.* Do whatever you need to do to gain internal recognition for your evaluation project. Start small and use other staff members' questions/issues to form the basis of your initial evaluation. Have an initial group meeting in which staff can discuss what and how to evaluate from the very beginning. Evaluation is often seen as a negative process, one that will reveal what people have done wrong. Do not be disheartened at initial resistance or disinterest; it is common. You will need to educate others on the benefits of evaluation.

*5. Embrace the process more than the product.* Evaluation is not so much about a final finding as it is about informing the process of design and implementation. It reveals lessons we need to learn, and requires that we revisit our objectives and keep matching our actions to them. Remain open to learning about your practice. Use evaluation as an opportunity to capitalize on individual and institutional strengths, and to help increase buy-in and ownership among staff at all levels.

*6. Be creative about the methods you use to collect data.* Evaluation is as much an art as a science. Be open to experimenting and combining methods that are specific and well-tailored to your evaluation question. Think about using existing situations as opportunities to collect data. For example, if you are having a preview of an exhibition for teachers, how can discussions during this largely social event help you better define teacher needs? How can staff document these discussions to detect possible patterns and trends?

7. *Analysis and interpretation of data is the most difficult, yet most satisfying, step.* When you first look over the data you have collected, you will probably think that you have nothing more than a lot of interesting pieces of information but no larger meaning. Look again and again. Good information is almost always there and it gets easier to find as you gain experience. A few important points to remember:

- It takes time to reflect—don't rush the process.
- Always make analysis a team effort.
- Beware of jumping to conclusions or using one or two anecdotes to signify a trend—wait until all the data has been examined before deciding what it means.

## DO-IT-YOURSELF: SIX SIMPLE, INEXPENSIVE EVALUATION ACTIVITIES

Try these simple, low-cost activities to keep your finger on your audience's pulse. Use multiple methods: observing what people do, listening to what they say, or analyzing what they leave behind (such as comment cards).

1 **Spend time On the Floor.** Spending time observing visitors—provides valuable insight into how visitors use the space, engage with exhibits, read labels, and have conversations. Draft a checklist of behaviors you are interested in, or simply write down what you see and hear.

2 **Distribute simple survey cards.** Use simple survey cards to gather basic information about your visitors, such as age, gender, race/ethnicity, education, prior visitation, and residence. Design a half-page, attractive survey card to hand out to visitors or use as a tool for a quick interview.

3 **Create multiple opportunities for visitors to leave comments.** Many museums have comment books available, but they are often easy to miss. Be creative with the media you use—such as cards in a variety of shapes and colors, or anything visually compelling. To avoid assembling random information, consider using prompts for specific feedback.

4 **Talk to your visitors.** If you have a question about visitors, ask them directly. Talking with visitors does not necessarily require a detailed protocol, a long interview, or a large sample. Talking with visitors can range from a quick, ninety-second interview that is extremely simple and focused (e.g. did they notice a particular sign or interactive that you suspect is not well-placed?), to the "four-minute interview" [See Lewis, "Surveying Visitors"].

5 **The "piggy back" focus group.** Think about opportunities when visitors, teachers, and/or students are at the museum for another event—a professional development workshop or family event, for example. Spend ten to fifteen minutes getting feedback on a particular program, exhibition, or concern. This saves the time and effort of gathering people together and can make for a nice break in the regular agenda.

6 **Create advisory groups.** Think about developing a variety of advisory groups, such as ones for families with young children, youth and teens, special needs, or specific cultural communities. Whenever you need some quick feedback from a particular audience, you ll have a list of contacts that can help represent that audience s perspective or help organize a focus group.

- Be open to seeing what you were not looking for. Don't be disappointed if you do not get the expected results. Use them as a starting point for asking new questions.

Even if you always intend to work with outside evaluators, it is still important for you to be well-informed about evaluation, both what it is, and why you are doing it.

## Working with Outside Evaluators

If you have decided to hire an outside evaluator, there are a few points you will want to keep in mind before and during the process.

***1. An Educated Consumer is the Best Customer.*** Even if you plan to work exclusively with an outside evaluator, your work will be far more effective it you are well informed about the nature and rationale for integrated evaluation studies.

***2. Know Your Issues.*** Spend time working with museum staff to outline the broad goals and specific outcomes of the project to be evaluated. Any good evaluator will ask you questions about these issues during your first conversation, so you will save time and get more satisfaction from if you have done your homework (see the "Evaluation Action Plan Worksheet" page 7). Work on these questions as a team, so that staff writes down and agrees upon the desired outcomes before designing a project. While you will likely have many outcome goals, it is more effective to choose one or two to focus on for the evaluation. The next step is to form the broad evaluative question appropriate to what you want to measure. This is not an easy process, but it is essential. An outside evaluator will help you with this step, but your thinking will guide his or her work. Finally, be clear about why you want to answer that particular evaluation question. What do you intend to do with the information? Who will be the audience for the results?

Based on Evaluation Training materials developed by the Institute for Learning Innovation and the National Museum of African Art.

***3. Know Your Audience.*** When you contact an evaluator, you will need to bring something to the table about your audience. Avoid paying an outside evaluator to tell you what you could have learned if you spent a little time observing and talking to visitors. Review existing audience information available to you, such as previously-completed surveys or studies done by other organizations in your community on demographic trends.

***4. Good Contracts Make for Good Services.*** A responsible evaluator will require that the two of you develop a written contract and a work plan/timeline for the evaluation. Either party may initiate the contract, but be sure to define expectations, as well as a means to address the unexpected. Time spent clarifying outcome goals and evaluation questions is the best safeguard for staying on track.

***5. Establish a Realistic Working Relationship.*** Ongoing communication is the key to a successful working relationship. The contact person and the evaluator will need to establish the details of when and how you will communicate. A staff representative is essential to keeping the institutional perspective in place and making critical decisions. The success of the evaluation will depend in large part on the clarity of communication and the responsiveness of the museum.

***6. Make an outside evaluator more affordable by collaborating with other organizations.*** Small museums and historic sites may find it more affordable to engage an outside evaluator by creating a coalition of other organizations in their area that are seeking similar visitor information. Pooling funds might help all partners.

## Thinking Evaluatively: Engaging your whole staff

One of the greatest challenges of developing an institution that thinks evaluatively is embedding this mindset among all staff—from the front desk to curators, administrators, and educators—and incorporating it as a regular part of institutional practice and culture. Institutional change takes a long time, and there are many small steps along the way. Further, developing a visitor-centered organization cannot happen through the work of one or two individuals. Following are some strategies and examples that can help get all staff on board.

***1. Have staff from all levels and departments observe visitors on the floor.*** Thinking from the visitor perspective requires spending time with them. Doing observations is a relatively quick, simple, and non-threatening way for staff and volunteers to get a better sense of how visitors use exhibits or programming. Suggest that staff members take thirty minutes to walk around the museum and take notes on what visitors are doing and talking about. Ask them to observe what works well and potential problems or issues they notice. Encourage staff to write down whatever comes to mind, including thoughts, feelings, and impressions. At a follow-up meeting, have them share what they noticed, what trends they found, what was surprising, or what met their expectations. Specifically ask what they learned from this activity and what more they want to learn.

***2. Engage staff in a visitor role-play exercise.*** The key to thinking evaluatively is being able to walk in the visitor's shoes. As this can be a difficult task, role-playing activities can help staff shift their thinking in a fun, engaging way. For example, Institute researchers conducted a workshop with staff from the Art Gallery of Ontario focused on evaluative thinking. They broke staff into groups and assigned each team a visitor type (such as an older Asian couple interested in architecture; or a family with children aged two, six, and thirteen). Each team was then asked to think about the ideal experience for this visitor group and describe it in an imaginary letter/email. This activity allowed staff to clarify what they truly wanted visitors to experience. Surprisingly, many staff found that they did not focus as much on learning content, but on having the visitors feel excited, curious, comfortable, and welcome.

***3. Encourage staff to bring family and friends to the museum and visit with them.*** While many staff bring friends and family to the museum, they usually take on an educator or tour guide role. Instead, have them practice coming to the museum or site as a *true visitor* and try to experience it as a visitor rather than a staff member.

***4. Involve staff in developing evaluation questions.*** Involving staff from all different levels and departments in evaluation offers two key benefits. First, staff bring a variety of perspectives and visitor experiences to share. Second, they are more likely to gain a sense of ownership and appreciation for what evaluation can offer. Facilitate a brainstorming session with staff. Ask them what questions they have about visitors or what they have always wanted to know about visitors but were never able to ask. What do they think are some of the biggest issues visitors face or areas that the institution needs to improve upon in terms of the visitor experience? Next, encourage them to articulate which questions would need to be asked of visitors in order to understand the issue better. This activity can serve as a foundation for understanding what needs the institution has in terms of visitor research, while helping staff find value in visitor research.

***5. Involve staff in analyzing visitor feedback.*** Another good way to engage staff in thinking evaluatively is to involve them in part of the analysis process. For example, set up a system in which different staff members are responsible each week (or each month) for reading visitor comment cards and summarizing notable trends for other staff. You can also have staff sort the cards into categories, look for patterns, and discuss what they learned and what that might mean for the institution. Often staff is surprised to find that their own perspective is not necessarily the same as that of many visitors.

***6. Have staff make predictions about the outcomes of a study.*** If you are planning a simple evaluation study—such as what concepts visitors prefer or what exhibit/interactive is used the most—have staff make predictions about the results and support their assertions. Then have them help collect and analyze the data, followed by a discussion of the results and to what extent their predictions were correct. This exercise can help build enthusiasm and interest in the visitor experience, challenge people's assumptions, and simply make evaluation fun!

While history museums face multiple challenges in attendance, resources, and sustainability, the field is also currently poised for exciting changes and growth. Whether you are conducting evaluation yourself, with an outside evaluator, or in combination, integrating evaluative thinking into planning and implementation can create incredible opportunities to connect with your visitors in more effective ways, build stronger relationships with the community, and generally keep your fingers on the pulse of a rapidly changing public.

Not only can evaluative thinking result in more effective programming and exhibitions, it can also energize staff, increase buy-in, and help them appreciate the impact of their work in new ways. In short, thinking evaluatively provides a crucial opportunity to drive change in the history museum field. It can help refine institutional and field-wide goals and outcomes, align programming with mission, and offer engaging, valuable and relevant experiences for diverse audiences.

## EVALUATION ACTION PLAN WORKSHEET

Whether you decide to utilize an outside evaluator or conduct the evaluation in-house, the following questions will help focus your goals and define the nature and scope of the project.

1. What are your ”big  evaluation questions? What is it you want to know?
2. Why are you interested in investigating these questions? What will you do with the information?
3. What evidence would convince you that the evaluation questions had been answered?
4. How will you gather this evidence? What methods will you use and why?
5. From whom will you collect data—families, children, adults, members?
6. When will you collect the data“  weekdays, weekends, a combination?
7. How much data will you collect—what is the desired sample size?
8. How much time will it take to collect the data?
9. Where will you collect the data?
10. What resources will you need for data collection (e.g., tables, clipboards, pencils, thank-you gifts)?
11. Who will be involved in the analysis and interpretation of the data?
12. How much time will be needed to interpret the data?
13. How will you disseminate and communicate your findings?

*Based on evaluation training materials developed by the Institute for Learning Innovation and the National Museum of African Art.*

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# DIY Strategic Planning for Small Museums

by Cinnamon Catlin-Legutko

In the spirit of "do-it-yourself" television shows, this technical leaflet offers a do it yourself (DIY) approach to strategic planning. Developed in 2003 at the General Lew Wallace Study & Museum, a small museum and historic site, in Crawfordsville, Indiana, this approach is especially appealing to small museums as it costs little to no money to implement and it can be completed in-house. This approach is also a good match for small museums as it accommodates "nuts and bolts" goals and projects.

For the purposes of this article, a small museum will be defined as having an annual budget of less than $250,000, operated with a small staff with multiple responsibilities, and employing volunteers to perform key staff functions. Other characteristics such as the physical size of the museum, collections size and scope, etc. may further classify a museum as small.

Many small museums operate with volunteer and non-professional staff. Some small museums are in caretaker mode—operating to keep the roof on and the doors open. They may not have had the opportunity to look to the future and make the best decisions for the organization in the long term. DIY strategic planning is an excellent way to start thinking about the future and improve the present.

At its core, this template is rooted in basic project management where it is important to determine tasks, resources, and deadlines ahead of a project's start date to lower the risk of failure. With a vision for your organization, an allocation of time for planning, public speaking ability, and a modicum of computer literacy, you can easily create a strategic plan embraced internally by staff and externally by donors, grantmakers, civic leaders, visitors, educators, and other interested parties.

## Why Are Strategic Plans Needed?

A strategic plan is a map or chart that an organization agrees to follow for three or five years in order to reach their goals. Institutions need strategic plans to help direct efforts and resources in an efficient and strategic manner. Responding to community and audience needs requires a strategic plan.

The planning process is strategic because you are establishing the goals that make the organization dynamic in its community and allow it to keep in step with community needs. It is systematic because it is focused and evaluative in choosing priorities. Institutions make decisions about short- and long-term goals and secure consensus. And most importantly, strategic planning is about building commitment and engaging stakeholders. Once the plan is in place and you have met with all the stakeholders you can, you now have the authority to complete the work and a course of direction to take.

Strategic plans are different from long-range or operational plans. Plans are strategic when the goals are responding to the museum's environment, seeking a competitive edge, and looking for the keys to long-term sustainability. Long range or operational plans do not redefine the organization and position it in the community. These plans are more concerned with laying out immediate and future goals and are less concerned with organizational change. At the end of a five-year strategic plan, you will want to take the time to evaluate the success of the plan and consider next steps. If it was a complete success, changing course may not be necessary and you simply need to plan the next five years along the same course. This would warrant a long-range or operational plan.

Through strategic planning, pen is put to paper and major goals are defined. These goals may spur a sea change or a small shift in operations. It is important to realize at the beginning that the strategic plan is the means to an end. It is a living document and as such, opportunities that are good for the organization should be considered with the plan in mind, but not completely disregarded because "it's not in the plan." The *means* are flexible, while the *end* is not. ***The Strategic Plan is the means (flexible) to an end (not flexible). It is a LIVING DOCUMENT.***

## Is Your Museum Ready for Strategic Planning?

Conditions must be right for strategic planning to begin. None of us has the time to waste on planning if the board does not support it or if the goals are unachievable. In these circumstances, staff and board will ignore any attempt at a plan. The proper strategic planning conditions depend on the organization, but the primary indicators for readiness include board and staff commitment and a vision for the future. There are two parts to guaranteeing the success of a strategic plan:

1. Creating a realistic strategy that matches current and anticipated resources.
2. Ensuring board and staff embrace the plan and agree on the articulated goals.

Before you get started, the director should evaluate organizational readiness. If the organization has serious issues—such as board in-fighting, major budgetary shortfalls, or cynicism regarding planning—take steps to resolve them before the process begins. The following table provides several statements to help you consider organizational readiness. Consider the statements provided in the left column of the table and check whether your museum is ready or not. When selecting a "No" response, make a note about whom to consult with to consider resolution (the board president, executive committee, etc.) If you realize you are not ready based on two or more negative responses, use the considerations in the far right column to determine how to get ready and when you might be able to begin strategic planning.

If you have any checks in the "No" column, consider addressing those questions before beginning strategic planning and determining when to start. If you cannot easily remedy these considerations, create an action plan based on responses. Work with key individuals to execute that plan and set a schedule for getting back to strategic planning.

If you are ready, consider if you have lingering comments or concerns to capture and share with the appropriate committee or person before you proceed. It's essential to address these concerns up front.

## The Key Players

There are several individuals who should participate in the strategic planning process, but the actual number of participants and their function in the organization will vary from museum to museum. The goal should be to have all board members participate in the process, and depending on staff size, all or most of the staff should participate. It is also important to look beyond the internal players and think externally. The museum exists to serve the public, so what does the public want from your institution?

Depending on your museum's size, you could have the board, staff, and community leaders all sitting at

| Readiness Issues | YES | NO | Considerations if not ready | Start strategic planning |
|---|---|---|---|---|
| The museum has enough money to pay bills over the next six months. | | | How can your museum get enough money? By when? | |
| The museum has a history of being able to plan and implement its plans. | | | What can be done to address this issue? Leadership development? Other ideas? | |
| Board members work well together. Staff members get along. | | | Problem in board? Problem with staff? What can be done? | |
| Board members are willing to be involved in top-level planning. | | | What can be done? | |
| Board members and staff will find the time to do the planning. | | | What can be done to free up more time? | |
| No major changes are expected in the next 1-2 months. | | | What changes? What can be done to get ready for strategic planning? By when? | |
| There is extensive support for planning in your museum (internally and externally). | | | What can you do to address any cynicism? | |
| Strategic planning efforts are underway because the museum is ready for change and not just because a grantmaker or funder is asking for it. | | | What should you do about this? | |

**Adapted from *Field Guide to Nonprofit Strategic Planning and Fundraising* published by Authenticity Consulting, LLC.**

the same table during the strategic planning process. But realistically, splitting these groups up might be better. You could hold a joint board and staff session and a separate public focus group or you could hold three separate sessions. It depends on what the facilitator and/or the museum director find to be the best scenario for the organization.

## Creating the Plan

The following is a step-by-step outline for Do-It-Yourself Strategic Planning developed at the General Lew Wallace Study & Museum. This approach has been successfully implemented in other small organizations and produced the same results. While it was a complete success for us, you may want to adapt some steps to match your organizational behavior. For example, at my museum, board members involved in the plan were unable to meet for a long period of time. For this reason, we compromised and shortened the first session to three hours (instead of the six we really needed). By the next strategic planning cycle, the board will be more accustomed to strategic thinking and implementing plans and we anticipate that we will spend more time around the table developing the next plan.

## DIY Strategic Planning has three key processes:

*I. Preparation*
*II. Facilitation*
*III. Formatting*

### *I. Preparation*

**1. Gain board support for strategic planning.** One of the key functions of the board is to set the strategic direction of the museum and ensure that the resources are in place to realize the goals. During the course of a regular board meeting, the president should lead a discussion about strategic planning, the methods you plan to use, board member expectations, and how much time the process will take. Once the groundwork is in place, the president should call for a motion to proceed with strategic planning. During that meeting, set the date for the first session.

**2. Select project leader/facilitator.** The museum director serves as the project leader/facilitator in the absence of funding for a consultant. While it is better to have an independent party facilitate brainstorming activities and guide the overall process (this allows the director to participate more fully and prevents the director from being "heavy-handed"), this is often not feasible in a small museum. To make sure the director has input in the process, he or she may meet with board members before the meeting, share ideas, and encourage them to spur these ideas during later brainstorming opportunities.

**3. Determine length of plan.** Decide along with the board whether this will be a three- or five-year plan. There is no magic formula for deciding the length of the plan. In the case of our institution, we chose five years because the board and director knew that resources would support a five-year plan and we knew that the amount of change needed to improve operations would be better affected by a five-year plan. However, we left the fifth year open and assigned no formal tasks, specifically for the purpose of leaving room for scope and timeline changes. During the strategic planning process, the staff consisted of only two part-time seasonal employees, the director included. As the implementation of the plan gained momentum, the board and staff worked together to negotiate deadlines and adjust the scope to fit resources. By year three of the plan, the fifth year was full of tasks.

If you are an all-volunteer organization, a three-year plan might be more suitable. Volunteer energy needs to be replenished more frequently and the planning process can be a tool for reenergizing and refocusing. An organization that has board members not completely convinced with strategic planning may choose three years to demonstrate organizational potential. Experts do not recommend plans shorter than three years because it takes at least three years for many changes to take root and for resources to align with strategic areas.

**4. Identify five organizational categories.** Identifying categories from the outset will help frame the overall planning process and the later brainstorming activity. You will need to distill museum functions and projects into five categories at most. (Education, Administration, Collections, etc.) These categories can be broad umbrella terms or they can be issues pertinent to your organization such as interpretation, a community initiative, or a major event (e.g., a centennial commemoration). To guarantee the development of a feasible plan, limit it to five categories and use them as guideposts during the planning process and as the backbone of the final plan.

At General Lew Wallace Study & Museum, we used the categories of Administration, Education, Collections Management, Building/Grounds Preservation, and Development. For our purposes, exhibits, educational programming, and guided tours fell under the Education umbrella because their ultimate intent is to educate the public. Development included fundraising, public relations, marketing, and staff training because these efforts develop the overall sustainability and visibility of the site. For us, these categories were most relevant in 2003, but in 2008, when we develop the next plan, they may not be.

**5. Distribute a "warm-up" activity.** Before the first scheduled strategic planning session, distribute a worksheet to participants to spur thinking about the future of the organization and prepare them for the brainstorming session. Email or mail the worksheet and instruct them to complete it and bring it to the first session.

### WARM-UP WORKSHEET

Develop a worksheet that asks these questions:

1. What is your vision for the museum?
2. List five things you would like to see happen at the museum that will help make this vision a reality.
3. Where do you see yourself in this vision?
4. Where do you see the museum in five years?

## *II. Facilitation*

**1. Convene a brainstorming session.** Ideally, the first gathering should be a five-hour session with a clear agenda provided ahead of time. During this first gathering, the lion's share of board work is completed. Board members will be sharing ideas, thinking of new ones, and begin placing them into concise statements.

For this first session, you will need two flip charts (preferably the kind with adhesive) and several colors of markers. Do not use a chalkboard or dry erase board. You need to keep the notes throughout the entire planning process—you will refer to them during the second strategic planning session and you will need them as you draft the plan. Plus, it is always a good idea to keep the evidence.

**2. Begin with an icebreaker exercise.** Although it may sound and feel corny, an icebreaker exercise is a good way to make everyone comfortable and ready to begin. If you choose the right icebreaker, you can learn something about the participants. Go around the room and ask what was the last museum they visited (it cannot be yours) and why. You'll learn something about what drives them to go to a museum, what kinds of museums they like, or how far they will travel to visit a museum. Or, you'll find out that some of them have no relationship to museums other than the one they serve. Both types of responses can be very enlightening.

**3. Present ground rules.** Adults need ground rules as much as children do. To keep the group charged with positive energy and encouragement, cover the ground rules and post them on a wall in the meeting room. Refer to the rules throughout the process to help control behavior issues. At no point do you want anyone to feel alienated, threatened, or discouraged. The brainstorming process works best when everyone is firing off ideas and working in a respectful manner.

**4. Work in pairs.** Before you start the open brainstorming segment, divide the group into pairs. Be sure to select pairs of people who may not know each other very well or individuals who rarely have the opportunity to work together. Send them to various locations (outside, down the hall, in the corner) with the "Before the Storm Worksheet." This worksheet is designed to build confidence among participants,

### SAMPLE GROUND RULES

1. There are NO bad ideas!
2. One person speaks at a time.
3. Listen when another participant speaks. Allow him or her the floor.
4. Think about small, medium, and large ideas. No idea is too small.
5. Allow yourself to be inspired by another participant's idea.
6. When thinking of ideas, visualize yourself as a board member, a staff member, a volunteer, a museum visitor, and a donor.

## SAMPLE BEFORE THE STORM WORKSHEET

For the purposes of this strategic plan, we are using five pre-determined categories of museum management and operation: Administration, Collections Management, Education, Building/ Grounds Preservation, and Development.

1. Working with a partner, consider these categories and create a vision for the museum. What kind of museum will it be in 5, 10, 15 years? When the vision is realized, what will the museum be like for the visitor? This should be one sentence that imagines "a day in the life of the visitor" and makes a promise.
2. Use the vision and quickly brainstorm ideas that can make the vision a reality. These will be your notes for the group brainstorming session, which will ultimately reveal the main components of the strategic plan.
3. Finally, turn the sheet over and drill your brainstorm ideas down into five main strategic goals. You can come up with more if necessary.

***You will have thirty minutes to complete this activity.***

drill down the ideas, and begin the visioning process. At the end of the exercise, the pair will condense their ideas into five strategic goals.

**5. Brainstorm as a group.** The purpose of the group brainstorm is to gather as many ideas as possible, capture them on paper, and keep everyone engaged and excited about the ideas. Very simply, facilitation is about helping a group of people reach their goals. During the course of the brainstorming session, the facilitator will:

- Control the meeting
- Set rules and enforce them
- Ensure participation
- Allow for flow of thought
- Keep the ball rolling
- Keep the meeting on topic
- Act generally as a non-participant
- Be a subject matter expert
- Accurately sum up discussion
- Smile as much as humanly possible

Brainstorming sessions are fast, exciting, and creative. To warm up the group to the challenge, you may start the session with a mock brainstorm. Ask them to share ideas about what are the great moments in American history or what are the best movies of all time. Not only will newcomers to the process get the opportunity to see how it works (and you will get a chance to practice), you will see who the talkers and who the wallflowers are. This also helps you keep the conversation balanced and watch for domineering personality types.

Once the ball is rolling, these steps will take you through the process and help you gather the most salient points:

- The facilitator will jot ideas onto flip charts while keeping ideas flowing.
- Once momentum has slowed, review ideas for clarity and ask for a show of hands of how many people identified these ideas on worksheets ahead of time (mark the number of hands next to each one to show consensus—items with the most hash marks should receive highest priority in the plan). This quick break will likely inspire more brainstorming. Keep it going while ideas are hot!
- During a food break, categorize the brainstorm list onto separate flip chart sheets. Before getting started, write each operational category on a separate flip chart sheet (e.g., Collection Management). As an alternative, you can run through the lists and code the idea into a category, i.e., D for Development, E for Education, etc.
- Once everyone has eaten and had a break, reconvene the group to consider the categories and how you assigned them. Look for gaps. Did they have a million programming ideas but never mentioned collections care? You can take time at this point to restart the brainstorm if there are some obvious holes.

**6. Initial visioning session.** Once the brainstorm period has slowed down, it is time to start developing a vision statement. A vision statement is focused on the future and considers what the museum will look like down the road (What will the visitor experience be like? How will the museum function?) The vision statement incorporates the needs and desires of the board and staff and crystallizes them into a picture of the future. For some, it is the simple question, "What do you want to be when you grow up?" This first visioning session will start with a conversation resulting in a first draft of a vision statement. To start the discussion, it is useful to create a word list on flip charts about what the board values and what can the museum can offer. Having a pool of words to refer to is helpful when drafting a statement.

**7. Plan a follow-up session.** Before the participants leave the first session, establish the date and time of the follow-up session. Get a sense of how many people will attend the second session. (For some reason, no matter what you do, expect fewer participants for this second session.) It will last about two hours.

During the follow-up, the facilitator presents the plan's initial draft and walks the group through the format. This will include ideas from the first brainstorm session and formalized strategic goals. It may also include proposed timelines and anticipated resources. This is another opportunity for idea clarification and consideration of the priorities and timeline.

## SHOPPING LIST

- ✓ Snacks and beverages
- ✓ Lunch or dinner
- ✓ Flip charts (at least two)
- ✓ Easels (2)
- ✓ Open wall space
- ✓ Markers, two to three colors
- ✓ Masking tape
- ✓ Ink pens
- ✓ Tent cards (for participant names)

Once the group approves the first report, return to the vision statement drafted in the first session. Does it still hold water? Does anyone have revisions? If they do, take time to wordsmith, but do not allow the conversation to drag out longer than thirty minutes. You will want spend the bulk of your time in the session on developing the mission statement.

The mission statement is the most important series of words the board will consider, develop, and approve. It defines the purpose of the organization. It answers why you are here and why the museum matters to its visitors and community. The board must believe in the mission and enforce it. While the vision looks to the future, the mission establishes why the museum should continue and the strategic plan determines how it will reach the future. Your current mission statement might be aligned with your plan's direction, but the board needs to review and consider it during this process. If you decide to write a new one, it may be helpful to refer to the same list of words that the group used to develop the vision statement. Another excellent source of inspiration is to evaluate what visitors and program participants regularly say about the museum. What inspiration do they feel? What questions do they frequently ask?

As in the first session, the group should leave the table with a draft mission statement in their notes. At the next regularly scheduled board meeting, present the final draft of the plan for approval and ask them to formally adopt the new mission statement.

Overall, the strategic planning process can take between four and twelve months. We began planning in May and approved the final plan in September. For us, this short timeframe was essential because we had a great deal of "nuts and bolts" work to do immediately and the director wanted as much authority as possible to accomplish the work. The strategic plan allowed that to happen.

## *III. Formatting*

The final document is simply a formal plan that speaks about the organization's value and makes a case for its future. It outlines the organizational goals and spells out the steps to realize those goals. Once formalized, this document should be shared with community stakeholders, donors, political leaders, volunteers, and whoever is interested in the plan. Post it on your website. Create an abbreviated version and turn it into a brochure. Make presentations in your community sharing the exciting news that your plan has produced.

### The format of your plan will look like this:

**1. Introduction –** Provide information regarding how the plan was developed, who participated, and what the timeframe was.

**2. History of the Organization –** Start from the beginning. How did your museum develop? What are some of its milestones? The strategic plan is used as a way to build awareness of your organization and attract support for what you do. Present the whole picture.

**3. Vision Statement and Mission Statement**

**4. Strategic Goals –** After the first brainstorming session, the director will synthesize the ideas and themes into broadly stated strategic goals. All of the activities and projects the group decides to implement will have a relationship with these larger goals. This section requires the director to have some personal vision for the organization.

**5. Evaluation –** A plan works best when the board and staff refer to it and regularly evaluate its progress. Explain how you will track and measure the impact (see Tracking and Measuring the Plan).

**6. Implementation Schedule –** Staff develop, and the board approves as part of the entire plan, the last three sections. You may want to involve key board members in the process of assigning tasks, solutions, responsibilities, and deadlines. In this section, indicate the priority of the project. You will likely have some projects that are urgent and/or have the requisite resources to accomplish them. Assign these projects highest priority. Other tasks may be excellent ideas but funding sources are not clear at the moment and postponing the idea will not affect operations or endanger anything. This type of project will have a lower priority rating. Pick realistic timeframes—estimate on the high side—and whenever possible, assign responsibility to a person, not a committee.

**7. Task Lists –** To understand better what the institution will accomplish year-to-year, reorganize the implementation schedule into a listing of projects and activities by year and quarter. In this format, board and staff can track progress more clearly.

**8. Action Plans –** Used for major project and budget planning, action plans drill down details even further and are helpful tools for the board to review. A good action plan identifies the strategic goal addressed, solutions, action steps, deadlines, responsible parties, costs, and outcome measurements. In the final draft of the strategic plan, only include a template of an action plan. Create a new action plan each time you launch a project.

If you are still not sure how the plan should look, please email me at clegutko@ben-hur.com. I am happy to email you a copy of our first strategic plan.

## *When the Plan is Ready*

### Tracking and Measuring the Plan

Once the plan is in place and formally approved, track and measure its progress on a regular basis. Keeping tabs on the plan is a major concern of the board and staff and a formal reporting mechanism is useful. We use the task list and insert status updates on an annual or biennial basis. The board formally approves the revised task list.

On a semi-monthly basis, the director's report to the board is formatted to include each strategic goal and every item reported is placed underneath one of the goals. The staff also reviews the plan two to three times per year and makes adjustments to the regular work plan if needed. At year-end, we modify tasks not completed with a new deadline and justification for the change. This flexibility is essential because of our small staff size and funding limitations.

From the start of the plan in September 2003 to April 2006, we met sixty-eight percent of our goals. With the completion of a major capital project in 2006, we reached eighty-one percent of our goals with over a year left in the five-year plan.

## General Lew Wallace Study & Museum Strategic Plan Achievements:

- We adopted a new name and developed an identity for the museum.
- The board of trustees restructured and grew from five members to thirteen.
- Fundraising efforts resulted in a 187% increase in income for the first twelve months. Each following year has netted similar results.
- Staff size increased from two part-time seasonal to two full-time and two part-time employees.
- We completed the Carriage House Interpretive Center, a full-service office and exhibit complex located in Wallace's 1875 carriage house. This major capital project utilized nearly $250,000 in donations and grants.
- The museum introduced and sustained new and innovative annual programs, including the Lew Wallace Youth Academy, the Artists-in-Residence program, and the Winter Historic Preservation Workshop Series.
- Each year, we offer special programming inspired by the annual exhibit theme.
- Museum visitation has increased ten percent or more each year since 2003.

## Beyond the First Plan

DIY Strategic Planning is best used as the first strategic plan for a small museum. If you have implemented the first plan's goals and strengthened organizational capacity, the board and staff have greater options available when developing a second plan. For example, you may choose to use an outside consultant to facilitate and draft a new strategic plan. (Unbiased facilitation is always recommended.) Most importantly, with a fully implemented initial plan, chances are you can afford to pay for help when it is time for the second plan!

## Variations in the Process

This approach is tailored for the smallest of museum staff and boards. At General Lew Wallace Study & Museum, we were a mighty bunch of two staff members and five board members using the approach. This model will work for larger board and staff sizes, but if the group becomes larger than eighteen to twenty people, I suggest you break up the group. You could brainstorm and do vision/mission with the board (with a few staff members participating) and then separately with staff. Follow this with a session with the board where you bring the perspectives of both camps together and look for differences and similarities. This approach is especially helpful when looking for disconnects in the organization.

Another variation is to use community focus groups to gauge interest and perspective on the organization. With a smaller staff and board, include community members in the entire planning process and have everyone working through it together. Or, if there are too many individuals involved, hold independent strategic planning sessions and limit it to a brainstorming session. During the last thirty minutes, field test the new vision and mission statements and see if they resonate with the public.

## Managing Change

If this is the first strategic plan for your organization, you are facing a great deal of change over the next few years. Being sensitive to stakeholders and processes is half the battle when managing change. Once you decide to make a change, think through the impact of the change and do some troubleshooting. With a little thoughtful examination at the outset, the important changes you are making will last.

To orchestrate major changes at General Lew Wallace Study & Museum, we use charters and change documents. These tools open up communication channels and document the change. When appropriate, the board will formally approve the document, endorsing the change. Everyone starts out—literally and figuratively—on the same page.

- **Charters –** Charters are documents that outline responsibilities and structures, and they are tools for managing people, projects, and change. We use them primarily to define the purpose and goals of board and ad-hoc committees. With a charter, we make committee members aware of why they are there, chart out planned changes, promote accountability, and define budgetary impact. A charter typically has eleven components outlined and defined: project/committee overview, scope, objectives, relevant strategic goals, measures/deliverables, budget, customers, boundaries, milestones, deadlines, and supporting documentation.
- **Change Documents –** Informally referred to as a change document, these reports can be used to makes a case for change to the board, stakeholders, and government entities. The format we use defines the statement of need, the current state, and

the future state. It also offers a proposal, timeline, cost benefit analysis, barriers, and a final recommendation.

Both documents demonstrate you have done your homework and considered the impact of proposed changes. Essentially, if you cannot define what is requested in a charter or change document, you need to reconsider making the change.

## Conclusion

This is just one approach to strategic planning. Other museum and non-profit professionals may stress varying approaches that may include SWOT analyses, more extensive visioning sessions, longer timeframes, etc. As a small museum director, I found that I really didn't need to be that reflective the first time. And, with just two staff members working part-time, we were always on the front line testing what visitors wanted and making quick decisions to meet needs. In addition, in the fast-paced small museum environment, we needed this first plan in place quickly so we could make major board-mandated changes to improve operations.

In developing a strategic plan, it is really time for "first things first." What will it take to do X? What will it take to do Y? Where do we start? Invariably it always ends up with fundraising and development. If you don't have income, much less a sustainable income, how can you do innovative programming and exhibits or improve collections care? If you are struggling with timeframes and which tasks take priority, maybe it would be best to prioritize the development goals first. With the completion of a strategic plan, you have a strong case for support. Use it.

## About the General Lew Wallace Study & Museum, Crawfordsville, IN

The General Lew Wallace Study & Museum is a National Historic Landmark site owned and operated by the City of Crawfordsville and governed by the Lew Wallace Study Preservation Society. The centerpiece of the site is the freestanding study that General Lew Wallace designed. Best known as the author of *Ben-Hur*, Wallace was a renaissance man and notable Hoosier. The museum houses personal mementos from his service as a Civil War Major General, second officer of the Lincoln Conspiracy military tribunal, Governor of New Mexico Territory, and as U.S. Minister to Turkey. Wallace's artwork, violins, inventions, and library are on display, along with memorabilia from various adaptations of *Ben-Hur*.

Upon Wallace's death in 1905, the Wallace family opened the study as a museum and operated it until 1939. The City of Crawfordsville has owned the property since 1941. Today, annual visitation is over 5,000 with an annual budget of $120,000. A full time director and associate director, two part time employees, and a small corps of volunteers staff the museum. Programs are offered year round including the popular Lew Wallace Youth Academy, the fall Artists-in-Residence program, and a variety of themed programming in support of temporary exhibits. The museum also hosts the annual Taste of Montgomery County, a fundraiser for the Preservation Society.

## Resources


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# Families First!
# Rethinking Exhibits to Engage All Ages

By Anne Grimes Rand, Executive Vice President; Robert Kiihne, Director of Exhibits; and Sarah Watkins, Curator USS Constitution Museum

**The Problem:** A nationwide survey of 5,500 museum-going families in 2007 indicated that history museums are the least popular with today's families. When families chose among eight different types of museums, only twenty-three percent chose to visit history museums.[1]

**The Opportunity:** The likelihood of visiting a history museum or historic site increases in families with grade-school-age children who are beginning to learn about history. There is a window of opportunity for museum professionals to entice families to visit, especially by developing special programs and exhibits that target this audience. If museum professionals share effective techniques for engaging an intergenerational audience, history museums can appeal to more families. This demonstrates their value to the local community as fun and exciting places for hands-on learning.

**Proposed Solutions:** At the USS Constitution Museum, we wondered if there were simple, low-cost techniques to encourage family learning and conversation in the galleries that might work in different history museums.

The Institute of Museum and Library Services provided the necessary resources to explore this question through a 2004 National Leadership Grant. With the assistance of a steering committee, a study of best practices, and a prototype gallery where staff interviewed over 2,000 families, we learned a great deal about how to encourage families to laugh and learn together in a history museum. This technical leaflet is a summary of findings from three years of studying intergenerational interaction within the USS Constitution Museum's prototype exhibit in Boston. A more detailed explanation of the project findings is available at www.familylearningforum.org. While the content we tested explored seafaring in the age of sail, the techniques identified in this article and on the website are adaptable to a wide range of history museums. The goal of this publication is to share replicable techniques and approaches that have proven to be successful at engaging family audiences in history.

### Family Learning in Museums

Families are the first learning community that a person experiences. When families visit a museum, there is an opportunity to engage the family in compelling experiences. John Falk and Lynn Dierking in *Learning from Museums* observe that "museum exhibitions and programs, when done well, support opportunities for families to participate in and become more effective communities of learners, allowing group members to share, watch one another, have a new and novel experience, reinforce something they already knew, or see something in a new way.… All of this contributes to a highly personal experience, which is all important if meaningful learning is to occur." The experience of visiting an exhibition together, exploring the past, comparing it to the present, and solving problems together builds a shared memory that lasts long after the visit to the museum.[2]

Family learning in a museum may take many different forms. When visitors engage with one another, as well as the content of the museum exhibit, family learning is likely to occur. The Children's Museum of Indianapolis describes the characteristics of family learning in this way:

- Family learning is a playful, fun, and social experience.
- Family learning is influenced by the ages of the children and adults in the group.
- Families all learn in different ways.
- Families find value in their own personal observations and experiences; they learn by working, talking, and solving problems together.[3]

Increasing family visitation has benefits in both the short and long term. Falk and Dierking report that the adults who are most likely to bring their families to a museum are those who visited museums with their parents as a child. Engaging a family audience today will increase present visitation *and* build a pattern of family museum visitation into the future. Exhibits and programs that engage visitors of different ages and learning styles create greater opportunities for learning within a museum. Engaged visitors spend longer discussing the activity or exhibit, and their satisfaction increases. When visitors are engaged in a compelling experience, they are more likely to stay longer, make a donation, plan a return visit, or become a member.

## *I. Putting Families First*

When the USS Constitution Museum put families at the center of exhibit development, it led to a radical shift in our thinking and creative process. Families first meant social interaction was as important as conveying content. If visitors are bored, very little content will be delivered, much less remembered a week later. If visitors have a great experience they will remember content long after leaving.

Photos Greg Cooper courtesy USS Constitution Museum

The prototype gallery at the USS Constitution Museum offers hands-on opportunities for visitors of all ages to sample life at sea.

Families first also meant that we could not assume we knew what was best. Instead we let families tell us what they are interested in, how they want to learn about the topic, and what makes the topic compelling, memorable, personally relevant, and enjoyable. We discovered that designing a thematically organized exhibit facilitates family learning more than a chronologically organized exhibit. Thematic organization allows families to bounce around naturally and bypass areas altogether. By encouraging positive group interactions and using humor within the exhibit, families were more receptive to learning.

Allowing families a voice in the exhibit development process had an unexpected benefit for the exhibit's in-house steering committee. The USS Constitution Museum's planning team included members of the curatorial, exhibits, and education departments. We learned that letting the visitors decide eliminated a lot of interdepartmental debates. Testing ideas with the visitors was also very freeing. Instead of getting too invested in any one idea or arguing over whose idea is better, we let it go and directly asked the visitors what they thought.

## *II. Crafting a Compelling Experience*

### Use Interactive Elements to Convey Key Messages

Certain exhibit concepts or stories that are important to the museum may be difficult for visitors to grasp. There may be few if any artifacts or images to support these concepts. These concepts many be perfect candidates for interactives. Visitor tracking studies at the USS Constitution Museum demonstrated that families stop at interactives more than any other kind of exhibit.

In 2005, the museum tested an interactive that illustrated just such a topic with family visitors, recruiting a crew for the USS *Constitution* in 1812. There are almost no objects or images related to recruiting, but understanding why someone would join the crew was vitally important to the exhibit team. The recruiting station is a simple two-sided tabletop interactive with questions on one side and a related image on the other. Questions are slightly humorous and relate to a person's skills, health, and sailing


**Families at the USS Constitution Museum consider the life of a sailor in 1812 and discuss questions such as, "Are you willing to work a four-hour shift before breakfast?"**

experience, foreshadowing the exhibition to come. Questions include: Have you ever swung in a hammock? Are you willing to do it next to 200 of your closest friends who haven't taken a bath in a while? The exhibit team hoped to encourage conversation about what it meant to be a sailor in 1812.

The USS Constitution Museum designed interactive exhibit elements that met the PISEC criteria, [see sidebar] then subjected them to rigorous formative evaluation. This resulted in a series of interactive experiences that encourage family participation and conversation. Tracking studies show that families spend three times longer in this hands-on exhibition than in our larger, more traditional history display. Satisfaction is higher and visitors are absorbing exhibit themes while laughing and learning together.

### PISEC

The Philadelphia/Camden Informal Science Education Collaborative (PISEC) identified seven characteristics to promote family learning.[4]

- Multi-sided—the family can cluster around the exhibit.
- Multi-user—interaction allows for several sets of hands and bodies.
- Accessible—the exhibit can be comfortably used by children and adults.
- Multi-outcome—observation and interaction are sufficiently complex to foster group discussion.
- Multi-modal—appeals to different learning styles and levels of knowledge.
- Readable—text is arranged in easily understood segments.
- Relevant—the exhibit provides cognitive links to visitors' existing knowledge and experience.

***Try this test:*** *Take the PISEC criteria into your galleries and see how many criteria your exhibit elements meet. Are there simple modifications you could make to meet more of the PISEC guidelines?*

### Multi-sided Exhibits Take Up More Space, But That's OK!

One PISEC characteristic that can be extremely effective comes at a cost. Multi-sided exhibits take up a larger footprint, easy for a cavernous science museum, but a challenge for history museums with limited gallery space. Creating an exhibit element that is multi-sided also reduces available wall space, but it's worth it!

The benefit is changing how visitors use your museum. Families gather around multi-sided exhibits, interacting as a group rather than as individual museum-goers. The resulting conversations can be the highest form of visitor engagement.

### Integrating Learning Styles

Museums are free choice learning institutions. Understanding the different ways people prefer to learn can help us broaden our exhibit's appeal, increase visitor engagement, and spur new methods of exhibit interaction. People do not learn by reading alone. Museums are an ideal environment to teach using a variety of learning styles. Addressing a different learning style need not equal dollar signs. For example, charts or visual representations can sometimes present information in a way that appeals to visitors with strength in math or logic.

***Try This Test:*** *Print a list of learning styles, such as Howard Gardner's multiple intelligences, and see how many of these techniques you employ in your exhibitions. This is a great exhibit-planning tool to see if you are creating experiences for different types of learners.*[5]

## III. The Power of Prototypes

Prototypes can take many forms. The form depends on what the final exhibit will be and upon where you are in the process. Show a few versions of a label on a clipboard and you can quickly find out if families interpret the label as your exhibit development team intended. A paper and cardboard mock-up can test an idea with staff and a few family, friends, or visitors. Observing visitor flow near a neatly posted paper directional sign can show if your signage will do what you need it to, before investing in expensive, ineffective signage. Even a cheap plywood and laminate version of an interactive that can be tested on the floor is much less expensive than a finished version—especially if the final version is not successful.

Exhibit prototypes can test:

- Functionality—Will it work?
- Clarity—Do visitors understand how to interact with the exhibit?
- Comprehension—Do visitors understand the exhibit's key idea or story?
- Interest—Do visitors want to engage with the exhibit? Do they unexpectedly show interest in certain elements?

### Be Prepared to Revise Exhibits

Information gained from prototyping and visitor observations will most likely lead to exhibit design changes—changes that will improve the visitor experience and opportunities for learning. A favorite idea among the exhibition development team may not work and may need to be abandoned. You must know what you are prototyping for, and be open to unforeseen outcomes.

Prototyping (a form of formative evaluation) is an


Visitors scrub the deck with a holystone and discuss the life of a sailor in 1812. At the suggestion of visitors we added sand and made a more satisfying and authentic experience.

iterative process. *Draft. Test. Modify. Repeat.* Many times during prototyping, the audience may suggest changes and additions exhibit developers had not considered that improve the product significantly. To get an overall feel for visitor satisfaction, it can be helpful to ask visitors to rate each interactive (like a movie with a five-star scale). The USS Constitution Museum kept modifying each exhibit element until the average visitor ranking reached four-and-a-half stars. The museum has come to see formative evaluation as making their family audience a partner in exhibit development.

## IV. Engaging Text: Short & Sweet

Developing content for a family audience at the USS Constitution Museum challenged us to convey history in a way that appeals to both adults and children. Some people felt this would mean "dumbing down" the story. Instead it led us to think thematically, choose information that best supports the themes, and layer content in creative ways.

We knew that our visitors did not want a book on the wall. So we gave ourselves the goal to limit our text panels to fifty words. Fifty words is brutally short, but it forced us to focus. For each panel, we asked ourselves, what is the main point we want to convey?

The short segments of text carry the themes in an engaging, conversational manner that reflects the perspective of the speaker (a crew member). These labels were unlike any we had ever written. Once we gained confidence in this new method, we discovered that label writing could actually be fun. Instead of dry, academic report writing, these labels turned into a creative writing exercise. We learned to have fun with word choice (i.e. "buddy" instead of "friend"). By simply changing the voice from third- to first-

### FORMATIVE EVALUATION

Formative evaluation is conducted when you have something to show your audience.

You might try testing:

- A draft of text panels, instructions, or even object labels
- Graphics (charts or illustrations)
- Interactive prototypes (ideas in a 3-D form—cardboard & masking tape are okay)
- Rough cuts of media pieces

person, the same content suddenly came alive. Some of our NEH-sponsored scholars were our toughest critics going into the process and our greatest supporters upon its completion.

### The Proof is in The Numbers

The museum tracked and timed family visitors through two exhibitions: our traditional *Old Ironsides in War and Peace* exhibition and our family-focused prototype exhibit *A Sailor's Life for Me?* We found that family visitors spent an average of seven minutes in *War and Peace*, a 3,000-square-foot exhibit with many long text panels totaling nearly 4,500 words, sensational objects, and a few interactives. *A Sailor's Life for Me?* is only 2,000 square feet and contains about 1,500 words of text, but families spent nearly twenty-two minutes in the smaller exhibition. Just as important, families also talked to each other significantly more than in the *War and Peace* exhibition.

### Using Questions and Quotes—A Research Study

**Which technique is more effective to promote conversation?**

The museum wanted to identify questioning techniques that encourage family conversation, so we tested three types of labels. We asked if visitors preferred:

- An actual historic quotation from a sailor
- A historic question that put them back in time, "What would you do in this situation?"
- A contemporary question bridging past to present such as "Have you ever been in a similar situation?"

Three hundred families commented on label text accompanying the cut-out figures in a pilot study before the prototype exhibit opened. A first-person context label accompanied each of three cut-out figures throughout the study.

***Historic Quotation:*** "The most disagreeable duty in the ship was that of holystoning the decks on cold, frosty mornings." —Samuel Leech, 1810

Almost half of of the family members interviewed preferred the historic quote labels and sixty-three percent of males prefer historical quotations. Visitors stated they preferred historic quote labels because the content was accurate and authentic, provided a personal connection, and provided historical perspective.

***Historical Question:*** *"Can you imagine being a sailor starting off your day with a cold saltwater scrub rather than a hot shower?"*

One-third of visitors and forty-seven percent of females prefer historical questions. Visitors expressed that these labels fulfilled their need for thought-provoking content and that the questions' open-endedness was more engaging.

***Contemporary Question:*** *"What is the chore you dread the most? How often do you have to do it?"*

Fewer than two in ten visitors preferred the contemporary question. Due to this low response, we eliminated the contemporary question from the rest of the study after the pilot phase.

***Summary:*** *When shown three types of labels, visitors showed a strong preference for both historic quotations and historical questions.*

What happened when visitors encountered these labels within the exhibit? Which were more effective at encouraging conversation? Staff observed over 550 visitors and recorded their behavior in tracking and timing behavioral studies. Visitors engaged in conversation with the historical question labels three times more often than with the historic quote labels. This highlights the importance of using different research tools to understand visitor preferences and behavior. The findings are not contradictory, as a visitor may prefer to read an authentic quotation to learn about the past directly; however, if an exhibit developer's aim is to encourage family conversations about the topic, the historical question is a more powerful technique.

***Summary:*** *Posing a question is three times more likely to encourage visitor conversation than simply presenting information or a historic quotation.*

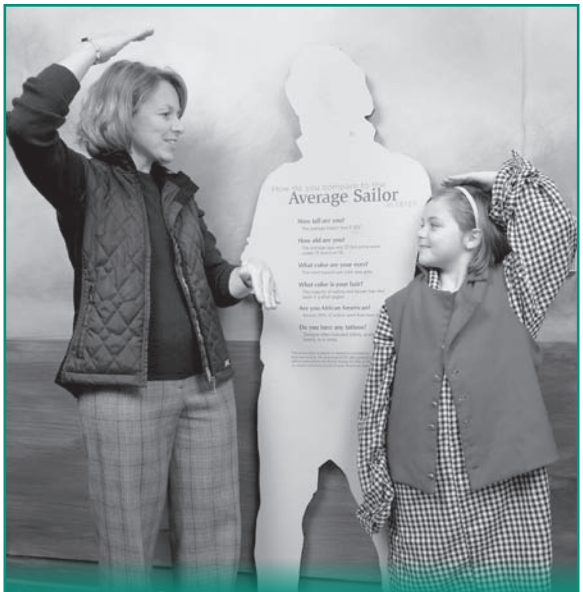
### Peopling History

Our exhibition set out to reinterpret the USS *Constitution* by offering the human perspective. This interpretive strategy resonated with our family audience. By personalizing the story and telling it through people, our visitors connect on a personal level and can feel empathy for what the sailors went through and as a result are better able to imagine themselves in the sailors' shoes. To help bring the crew to life, full-scale photo cutouts visually "people" the exhibit and the text is written as if visitors are hearing sailors' stories first-hand. Because we illustrate a diverse range of crewmembers and the families they left behind, minorities, women, and children who may not expect to see themselves in our exhibition can make emotional and intellectual connections.


Sailors from 1812 share their experience through first person text and invite museum visitors to consider how their life today compares to 200 years ago.

The audience research we conducted focused on how to present personal narratives in engaging ways to foster personal connection between visitors and stories.

We tested different types of interpretive labels




How do you compare to an average sailor in 1812? Simple, direct questions compare today's visitors to sailors in 1812 and make statistical information relevant and fun.

accompanying a photo cutout and learned that sixty-four percent of visitors preferred labels written in the first-person as opposed to a third-person curatorial voice. Visitors reported that they preferred the conversational voice because it felt like the historical cutout was speaking directly to them.

When asked about the first-person approach, one visitor to our prototype exhibit commented:

> "*When I come to a history museum I want my family to hear it from the people who lived it, not a secondhand dry account. History should be alive and this type of label gives you a chance to be a part of that.*"

## *V. Steal this Idea!*

Here is a collection of simple, cheap, effective, and tested techniques that have worked in other exhibitions and may be applicable in your museum.

### Making Work Fun

Children visiting Conner Prairie living history museum will sweep the floor, make the bed, or wash dishes when asked to by costumed interpreters. At other museums, children churn (imaginary) butter in Indianapolis, build a (foam) stone wall at Sturbridge Village, carry buckets of (imaginary) water at the Wenham Museum, and scrub the deck at the USS Constitution Museum. These full-body kinesthetic experiences are both an outlet for energy and a moment to pause and reflect on the similarities or differences between the past and the present. These activities set the seed for a conversation at home, when water rushes effortlessly from the tap, or butter comes neatly wrapped in paper.

### Try a Board Game

Board games are a familiar form that can take advantage of successful pre-visit family interactions. They can also offer seating, a welcome rest within a museum visit. Through the roll of a dice, games can also highlight the role of chance in determining the final outcome. Games can be used as a summary element, to review content presented in the exhibition. Games have proven to be effective, engaging, and inexpensive. Families sit, smile, and converse, laughing and learning together.

### Involve the Senses

An exhibit is more likely to be effective if a variety of exhibit techniques address a range of senses. Smelling the pine tar in the ship's rigging or the salted cod carried in barrels creates a more vivid experience than simply reading about life at sea. When visitors climb in a hammock or get on their knees and scrub the deck, it is a full body experience. These are the activities eliciting the most comments in exit interviews at the USS Constitution Museum, and the elements most frequently recalled, even years after a visit. The Chicago History Museum created an exhibit for children called *Sensing Chicago.* Based on front-end and formative evaluation with children, the exhibit uses the senses as a window to history—smell the fire of 1871, hear the roar of the crowd at a baseball game, or climb into a giant foam roll and see what it feels like to be a famed Chicago hot dog with all the trimmings.

***Try This Test:*** *Walk through your exhibitions and see how many senses you engage.*

### Discovery

A surprise element hidden within an exhibit becomes a family's discovery. Discoveries can trigger conversation and encourage visitors to slow down and take a closer look. Simply hiding a light-sensitive document or small item like a coin can enhance its importance; the discovery becomes a moment to share with another family member. In food barrels at the USS Constitution Museum, visitors discover a rat eating the sailors' food. In exit interviews, it is one of the elements most frequently mentioned by visitors. Offering a surprise is a reward that can encourage closer exploration of an exhibition.

### Flipbook / Questioning Interactive

The flipbook is a simple tabletop activity that consists of pages with questions or information viewable from one side of the table and a related image viewable from the other side of the table. At the USS Constitution Museum, we used this format to let visitors play the roles of recruit and recruiter, asking one another fun questions related to their suitability as a possible sailor in 1812: "Are you willing to eat bread as hard as a brick?" This questioning interactive engages both young and old visitors. It invites the audience to rest for a moment and consider the content. It links your visitors' experience to the past, providing an opportunity to compare and contrast life today with life in a past time. The flipbook works because it requires conversation. You cannot really do the activity alone. Almost any content could be adapted to this form. Many families spent significantly longer with the interactive than needed to finish because parents discussed the questions with their children.

### Comment Boards

Rather than limiting the flow of information from museum to visitor, comment boards or books offer visitors an opportunity to share their thoughts and state their opinions. It moves an exhibition closer to a discussion rather than simply a presentation from an all-knowing authority. Visitors like to see what other visitors have written. Comment boards can be very helpful tools for exhibit developers to see if key messages are reaching visitors. Positive comments are also a powerful tool to demonstrate the impact of the museum experience; to motivate staff, volunteers, and board members; and to leverage future funding.

## *VI. Conclusion*

At the USS Constitution Museum, the focus on family learning has revolutionized the organization. The audience is seen as a partner in exhibition development rather than a passive user of the end product. This mindset has spread through the institution, as we test sample signage and even fundraising appeals with members of the target audience. This approach can be liberating, as decisions fall to the audience, rather than to the team member with the strongest argument. The exhibit galleries have come to life with the active participation of museum visitors young and old. Instead of the quiet, reverential tone of a staid art museum, our galleries include conversation and active participation. We have even found visitors swinging in hammocks and singing sea songs.


**Who will be promoted first? The Constitution Challenge game quizzes visitors on the content presented in the exhibit and introduces the element of chance (bad weather, bad luck, etc.).**

### SUMMATIVE EVALUATION

Are exhibits and programs ever really finished? Summative Evaluation addresses questions such as:

- Do visitors understand which way you intend them to go?
- Can they find instructions or key text panels?
- Do graphics make sense in place?
- Are there elements of the exhibit everyone seems to miss?
- Does your audience understand the major themes of your exhibit or program?
- How much time does the average visitor spend in the exhibit or program?

***Try this test:*** *Visitor tracking, timing, and behavioral coding are simple, effective, and honest. Grab a copy of the floor plan and observe your visitors in the exhibition. Where do they stop? What do they interact with or read? Do they talk to each other about your content? How much time do they spend in each part of your exhibit?*

Trustees and staff have taken notice of two key facts:

1. Visitors to the hands-on prototype *A Sailor's Life for Me?* spend three times longer in the gallery than visitors to the traditional *War and Peace* gallery.
2. Voluntary contributions per museum visitor have increased from an average of thirty cents between 2000 and 2005 to fifty-one cents per visitor since the installation of the hands-on prototype in 2006.

Since the USS Constitution Museum does not charge admission and relies heavily on voluntary donations, an increase in visitor satisfaction that results in a sixty percent increase in per-person donations is significant. With more than 250,000 visitors to the galleries in 2007, donation box revenue topped $150,000. The Board of Trustees voted to adopt a new strategy: The USS Constitution Museum will provide a hands-on, minds-on environment where intergenerational groups seeking an enjoyable, educational experience can have fun and learn as they explore history together.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