

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 ex-

hibition. 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 if 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 clarify-

ing 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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Jill Stein is a research associate at the Institute for Learning Innovation. She can be reached at stein@ilinet.org.

Dr. Marianna Adams is a senior researcher at the Institute for Learning Innovation. She can be reached at adams@ilinet.org.

Jessica J. Luke is a senior researcher at the Institute for Learning Innovation. She can be reached at luke@ilinet.org.

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