

Audience-Based Program Evaluation & Performance Measures

Barbara J. Soren, Bonnie Callen, Anne Chafe, Laurence Grant, and Tom Reitz

Abstract

During 2002-2003 a partnership of museums in Southern Ontario (Wellington County Museum & Archives, Doon Heritage Crossroads, Guelph Museums, and Heritage Collection - City of Waterloo) embarked on a project to establish common practices for performance measures in the museum field. The project was financed by the Museums Assistance Program of the Department of Canadian Heritage and municipal employers. Our major goal was to implement a system of performance measures. The partnership represents a diversity of museum types: archives, history museum, a city collection, historic site, and living history site. Key components of the project were to be collaboration, learning from one another, and professional training. Important outcomes were: improved tracking of statistical information and reporting; the development of descriptive templates for exhibitions and special events; more skill at using performance measures in our daily work lives and planning cycles; and de-mystifying and de-stigmatizing 'performance measures.'

Performance Measures for Museums and Other Cultural Organizations

A 2-day Symposium, which was intended to initiate awareness of the importance of performance measures to cultural organisations was hosted by the Management Special Interest Group (SIG) of the Canadian Museums Association (CMA) at the Art Gallery of Ontario in January 1998. At *Great Performances: Performance Measures for Canadian Museums and Other Cultural Organizations*, sessions provided an opportunity to learn more about the potential use of performance measures across museums and performing arts organizations in Canada. A range of speakers from the public, private, and not-for profit sectors discussed the strengths and limitations of performance measures. For

instance, Greg Baeker (1998) highlighted how performance measures can provide cultural organizations with valuable and practical tools for managing change in a radically changing environment. Evaluator Arnold Love (1998) stressed that performance measurement, in practice, is a *process* that contributes to continuous improvement and increased accountability by being linked into the planning and management cycle. Love argued that performance measures for the cultural sector must be based on the sector's fundamental values.

A group of participants who attended this Symposium expressed disappointment that there were no sessions related to how to measure success for audiences and visitors, the publics who attend performances and visit museums. Barbara Soren, an audience researcher, was invited to organize a session for a follow-up Symposium entitled *Criteria for Excellence* in November 1998. *Performance Measures and Audience Response* was a two-part session to consider 'public interest' and performance measures for cultural organizations, which included a panel discussion and small group roundtables to discuss an action plan for developing audience-based performance measures.

Laurence Grant, Director of Guelph Museums, had also been to the CMA Symposium sessions. He had found that the use of performance measures seemed, in his museum experience, to be stuck at the discussion level rather than involving implementation practice. He had been part of a municipal project initiated by the City of Guelph Finance Department, but the discussion was mostly about benchmarking things that were easily measurable, and did not relate to harder to evaluate exhibition and special event performance. Grant thought it would be useful to follow through on a reflection and implementation process with like-minded museums and guided by a consultant knowledgeable in the field. He invited Barbara Soren to work as a trainer and advisor on this innovative collaboration because he believed she had pioneered unique investigative techniques to better understand experiences of audiences in museums and the performing arts. One of the areas of expertise she had been evolving was audience-based program evaluation for measuring the success of museums' exhibits and programs, both on-site and online (e.g., see Soren, 1999-2001). Grant also invited four area museums, three of

whom were interested in being involved (i.e., Wellington County Museum & Archives, Doon Heritage Crossroads, and Heritage Collection - City of Waterloo). Managers of these museums had varying degrees of experience and training in the domain of performance measures, from none to participation in a municipal project. Grant also spoke with the Department of Canadian Heritage about Museum Assistance program support, which the group applied for and received.

Guelph Museums & Partners Performance Measures Project

The Guelph Museums and partners' group proposed working out a common set of tools that would help to improve the museums in this project, as well as the broader community of museums in Canada. Collectively, the group planned to establish a process for audience-based program evaluation and performance measures and to implement the process at each museum site.

Outcomes of this project would be that partners would have a better understanding of how to improve their exhibitions, special events, and programs, as well as build audience and greater self-reliance. Learning in a meeting/workshop environment, the partnership would develop an ease with performance measures vocabulary and evolve a useful set of performance measures techniques for application in their respective museums. Once such practices were established, a set of benchmarks could be formulated. Each museum in the partnership would be able to make audience-based evaluation comparisons from year to year, and the partners could also compare visitor attendance and response to programs and activities across their institutions. Because the museums represent diverse institutions yet are within a geographic proximity, the project seemed feasible.

The following were objectives, anticipated outcomes, and activities for the audience-based program evaluation and performance measures project.

Project Objectives:

- To review methodologies for performance measures including a case study of Guelph Museums and the project of the City of Guelph undertaken in 1998.
- To establish a set of common tools (effectiveness measures) for evaluating and determining success indicators for exhibitions, education programs, special events, and general visitation that are specific, measurable, achievable, realistic, and time bound.

Project Benefits/Outcomes:

- Possession of the capability to report on the value of museum services to the public, government bodies, and other funders through demonstrable economic performance indicators and impacts.
- A broadened and more secure funding base with an improved means of communication, improved effectiveness of programs, improved revenue generation, and greater accountability and relevance.
- Broadened awareness of outcomes-based evaluation through communication of the experience to the broader museum community.
- Audience-based program evaluation templates for measuring the success of exhibitions and programs at each museum with regular and systematic review of objectives, outcomes, evaluation strategies, and success indicators.
- Improved exhibitions, programs and visitor experiences through improved effectiveness, efficiency, service delivery, and ability for innovation.

Project Activities:

- The development of a common understanding of performance measures vocabulary and methodologies.
- Use of methodologies to measure performance in a number of selected areas, such as: the tabulation of attendance in common categories; tabulation of revenues; measurement of research requests; and artifact donations.
- Use of project and exhibition briefs as a means for measuring the success of exhibits/exhibitions, education programs (including education kits), and special

events (such briefs would include the delineation of outcomes and performance indicators, and other evaluation tools).

Audience-Based Program Evaluation & Performance Measures

During 2002-2003, the group met seven times, alternating meeting locations so that staff at each museum could be involved in the project. The following describes the process the group worked through.

Related Resource Material

The starting point for the Performance Measures project was to review relevant literature. The most compelling material that partners continued to return to throughout the project was a report by the Institute of Museum and Library Services (ILMS) in 2001, *Perspectives on Outcome-Based Evaluation for Libraries and Museums*.¹ In this publication, Beverly Sheppard, Acting Director, Institute of Museum and Library Services introduces the fundamental importance of understanding how to evaluate museum exhibitions and programs based on the outcomes of the experiences of the audiences who attend them. She argues that funders of museums and their programs frequently call upon museum managers to tell their stories and to share the impact of their work as community leaders, educational resources, and guardians of our cultural heritage.

In the same publication, Stephen Weil, Emeritus Senior Scholar for the Center of Education and Museum Studies, Smithsonian Institution, describes 'two distinct revolutions' in the [North] American museum. The first revolution during the past 50 years has been a shift in focus from being inwardly oriented (i.e., on growth, care, study, and display of its collection) to outwardly focused with a range of educational and other services to its visitors and its communities. The second revolution is related to public expectations that a museum experience 'will demonstrably enhance the quality of individual lives and/or the well-being of some particular community' (Weil, 2001: 6). Weil confirms that 'Managing for results' and measuring 'outcomes' (i.e., benefits or

changes for individuals or populations during or after participating in program activities) have become important terms to understand in the present day climate.²

How to Develop Audience-Based Program Evaluation & Performance Measures

Soren then introduced the group to the Audience-based Program Evaluation model she had been evolving and the group considered the effectiveness of a Program Evaluation Form Guelph Museums staff were using.

Program Evaluation based on the results or outcomes of audiences' experiences is one way to develop indicators that demonstrate the success of exhibitions and programs. Adapted from Arnold Love's approach, the major benefits of developing outcomes evaluation templates related to museum practice are that they:

- Help link exhibition program design with outcomes evaluation.
- Provide a succinct description of exhibition-related activities, which can be linked to program standards, benchmarks, and 'best practices.'
- Document the actual exhibition program delivery.
- Assist in the evaluation of both processes and outcomes.

The categories the Guelph Museums and partners worked with in developing templates for evaluating outcomes and success indicators related to their exhibitions and programs included:

1. Name of Museum
2. Date of Template Completion
3. Person Completing Template and Contact information
4. Mission/Mandate/Aims/Goals
5. Description of Exhibition Program
6. Target Group(s)
7. Objectives for the Visitor Experience

8. Outcomes after a Visitor Experience
9. Activities for achieving Goals, Objectives, and Outcomes
10. Leadership (overall responsibility and staffing – full-time, part-time, volunteer)
11. Funding and Resources
12. Facilities for Exhibitions and Programs
13. Community Linkages (with other museums, community organizations, or programs)
14. Exhibition Program Evaluation (for continuous improvement)
15. Exhibition Program Success Indicators (directly linked to achieving outcomes).

The following are descriptions and examples for the more challenging categories.

Mission/Mandate/Aims/Goals

What are the museum's mission, mandate, aims, or goals for individuals visiting exhibitions or participating in programs?

Mission and/or Mandate

The most general statements about the exhibition and public programs. For example:

- The type of objects exhibited, interpreted, and documented.
- The subject matter focus.
- Primary activities.

Aims and/or Goals

Statements of intent, midway in generality between mission/mandate and objectives that describe the purposes for the exhibition or public program. For example:

- Target audiences for whom the museum's programming is of special interest.
- Educational expectations.
- Outreach through the museum's Web site.

Description of Exhibition or Program

A 'rich' description of the exhibition or public program as if the museum is promoting to potential funders as sponsors, encouraging people who have not yet visited to attend, or orienting new board members, staff, volunteers, or student interns. This is the beginning of creating a brand identity with target audiences related to the museum's offerings and visitor benefits.

Objectives and Outcomes for Visitor Experiences

Objectives focus on opportunities that will be provided for the visitor experiencing an exhibition or program, or intentions of museum staff designing an exhibit or program. If objectives are clearly articulated in exhibition and program planning (e.g., as behavioural, affective, physical, spiritual objectives), they should provide a basis for assessing the extent to which an exhibition or program is effective, and ways to improve.

- *versus* -

Outcomes focus on what a visitor who interacts with objects in an exhibition or participates in a program will know, do or value as a result of that experience, or the result of the visitor's experience at the museum. If outcomes are clearly articulated in exhibition and program planning they should provide indicators for measuring the success of the museum's exhibition program for visitors.

Objectives for the Visitor Experience

Specific statements of what individuals will be able to do during their experience in an exhibition or program (e.g., behaviours, performance, problems to solve, emotions, hands-on activities, and/or interactions with live interpretation).

Outcomes after a Visit Experience

What one ends up with, intended or not, after an exhibition visit or program, such as:

- A new appreciation, sensitivity, understanding.
- A strong feeling.

- Wanting to do something/find out more.
- Valuing an idea, topic, person, and object.

Exhibition Program Evaluation

How can museum staff evaluate if they are achieving the objectives they have articulated for the exhibition or public program to ensure continuous improvement? For example:

- Verbal feedback and written comments in the comment book on the success of the exhibition or program.
- A questionnaire to determine:
 - where audiences are coming from
 - individuals' interests, expectations, and previous exposure to subject matter
 - how they heard about your museum/exhibition
 - how many times they have visited
 - what their experience was of the exhibition or program
 - what their needs are in the museum
 - what other services/interpretive aids they would like or would use in conjunction with the exhibitions to enrich their viewing experience
 - what they might do as a result of their experience.
- Staff and volunteer observations of visitor response to exhibitions and programs.
- An annual meeting with local teachers, educators, and related instructors who have experienced the exhibition/program about outcomes of the educational program, and ways to continue to improve these services.
- Meetings with other community group leaders/instructors to develop ways to identify and reach new audiences, and to strive to develop appropriate interpretive activities to meet their needs.

Exhibition Program Success Indicators

What are signs or evidence indicating to museum staff that visitors have experienced what was expected during their experience in an exhibition or participation in a program?

What indications are there that individuals may use or apply knowledge gained, do something to learn more, or value their experience after they leave the museum?

Generally, these indicators can serve as benchmarks to compare the success of your museum's exhibition program from year to year. They can help staff working across departments collaborate on how the museum can better reach visitors and program participants.

The following are some quantitative indicators that can measure success (numbers tend to be the only way people think success can be measured):

- The number of:
 - Invitation/hand-outs printed and distributed for each exhibition (mailed; distributed to schools; on hand at the gallery; archival)
 - Visitors attending openings
 - People attending related talks
 - Visitors attending exhibitions and projects
 - Advanced group bookings for gallery tours annually
 - Hands-on workshops annually for school groups in conjunction with tours
 - Requests to circulate exhibitions originated by the museum.
- The extent and quality of the media coverage of museum programming, and the audiences reached through these media.
- The level of support the museum receives and from whom acknowledging the merit and value of the museum's activities (e.g., demonstrated by both increases in annual activity grants and comments from peer assessment juries).

However, to effectively evaluate exhibitions and programs and determine how successful they are, qualitative measures are equally as important as quantitative measures (e.g., Soren, 2001b).

Some of the qualitative indicators of success (typically not considered valid, credible, and reliable as a way of measuring success) can include:

- What individuals look at and how they interact with exhibit components.
- The extent to which a visitor's experience is meaningful.
- What people learn about the objects the museum displays, the creators or owners of the objects, and different interpretations of the objects.
- What people learn about themselves and/or others during their visit.
- What individuals decide to do as a result of their museum experience (e.g., buy a related book or object in the museum's gift store, share their experience with friends and family, return to the museum, visit the museum's Web site, donate an object to the museum, visit a related museum).

Most often a combination of qualitative and quantitative strategies provides multiple perspectives and the most in-depth understanding of the visitor experience. Both strategies are needed to evaluate the effectiveness of exhibitions and programs, and are useful for finding indicators of success for visitor experiences.

Collaborative Activities

The partners developed a master template that blended the above audience-based program evaluation and performance measures categories and the Program Evaluation Form that staff at Guelph Museums were using. Each museum then selected a special event, exhibition, and/or program and staff at the museum evolved a template specific to that activity.

The group also looked at each museum's visitor statistics, visitor surveys, and surveys specific to exhibitions and programs. They discussed how many templates to create based on time and resources. The partners decided which questions were most important to ask and provided the most meaningful information on program evaluation forms (e.g., school, holiday, and summer programs). Then they compared attendance forms and daily, weekly, monthly, and annual reports. They also thought about what common demographics could be collected across museums, which partners could examine periodically. Excel training

during February 2003 helped staff at each museum to model the high quality reports being produced at Guelph Museums. All the project partners wanted to learn how to use Excel, a standard software at all of the sites, to track attendance in many categories, and to show these statistics in a clearer, more understandable format. This was achieved through a series of workshops.

Finally, staff from each museum shared their experiences with the use of the Audience-Based Program Evaluation and Performance Measures template that they evolved. And the group considered how each partner museum could use their audience-based performance measures work as a benchmark, comparing visitor response and behaviours during 2002-2003 with 2003-2004.

The following highlights the nature of activities at each of the partner museums and demonstrates the value of the audience-based performance measures project across the four municipal and community museums.

The Wellington County Museum and Archives

The Wellington County Museum and Archives wanted to implement a system of performance measures at their sites using standard templates that could be altered to fit their individual site-specific program and statistical needs. For Bonnie Callen, Director, the project was two pronged. Museum staff wanted to: develop templates to help program and exhibition staff better plan and evaluate what the museum offers their visiting public; create a more accurate and versatile data base system for the statistical tracking of visitor attendance. Basically, they wanted to 'wow' their board, public, and themselves with pie charts and graphs instead of the old-fashioned single column listing month-by-month totals. They knew intuitively that to measure their performance in delivering quality programs and services, they had to learn how to track and identify the makeup of the museum's clientele.

The curatorial staff from the museum's four sites was invited to contribute to the development of the audience-based program evaluation template to make it applicable to exhibition planning and evaluation. The Wellington County Museum and Archives curator started by using it in the early stages of a new permanent exhibition, *First Story: The Neutrals of Wellington County*, which opened in June 2003. The curator was more than willing to utilize the form because it allowed her the opportunity to re-confirm on paper the overall aims and goals of this exhibition, rationalizing why the theme was chosen, describing in detail her vision of the finished product, and identifying target groups and media opportunities. The form was helpful to all the curatorial design team working on this gallery, as well as the museum activities programmer who needed to know what was being planned so she could begin her curriculum based programming. Since the opening, staff has been tracking the exhibition's success by examining improvement in the various success indicators projected on the template in the early stage of exhibition development.

Callen feels that exhibition and program templates have proven to be useful to her staff, improving the quality of what the museum offers their publics. Curatorial and program staff recognized from the outset the value of the performance measures project and by making a conscientious effort to keep them informed and consulting them along the way, their support was easy to garner and maintain. The key to implementing an effective performance measures system at a museum site is to respect the input of staff because it is based on their knowledge and experience. If all the staff is not committed, consistency in planning and evaluating and tracking will be difficult to attain.

Another vital part of measuring performance in a museum setting is developing a consistent database system for the tracking and reporting of attendance. Offsite Excel training was an excellent way for the staff to focus on the program, ask questions relevant to their own sites, and feel confident in adopting the new templates for tracking attendance. The training sessions in Excel brought about a whole new confidence and enthusiasm for the performance measures project.

City of Waterloo's Heritage Collection

As a 'team' of one, the Curator of the **City of Waterloo's Heritage Collection**, Anne Chafe relies on contract staff and volunteers to assist with the development of exhibitions and programs that are offered in various City-owned facilities such as the Canadian Clay & Glass Gallery.

A Business Measurement Project for the City of Waterloo was precipitated by the Province's introduction of the use of performance measures for municipal services in March 2001. Those measures were designed to enhance accountability to the local taxpayer and to act as service improvement tools. Throughout this City project, Chafe found it difficult to apply the measurements for the programs offered by her colleagues to those developed by the City's heritage resources unit. The audience-based performance measures project provided the focus she was looking for to assist her in measuring the success of the City's heritage programs and exhibitions.

Chafe was particularly interested in learning how performance measurement could assist her in maximizing limited financial and staff resources in order to provide quality programs. Working in a municipal climate of accountability, she was also looking for a way to expand the view within her organization of the value of the City's heritage programs other than by attendance numbers and budget figures, and to communicate the impact of their programs in a meaningful way.

Chafe discovered that embarking on performance measurement requires an extensive commitment of time to complete the exercise. She recognized that she could not possibly measure every program, so she decided for this project to concentrate on the 1,000 square foot exhibition, *Charlie Voelker: Architectural Designer, Alderman and Visionary*. Based on the success of this performance measures activity, she plans on continuing to develop performance measures for their annual exhibitions and to initiate its use for new programs. She also better understands that doing this requires a commitment for action and improvement and a willingness to learn from past experiences.

While the commitment of time was extensive, the benefits of conducting performance measurement for this exhibition were many, particularly given that there is only one person ultimately responsible for the development, installation, and promotion of an exhibition project. Benefits included, for instance:

- Articulating the aims, objectives and outcomes of the exhibition, which provided focus for the project and clarity of communication and thinking.
- Providing direction for determining the exhibition's content by identifying specific outcomes for the exhibition, and the relationship between the desired outcomes and the visitor experiences needed to lead to these outcomes.
- Creating a succinct description of the exhibition up front, which was a time saver in the end as the information was easily transferable for use in media, promotional, and sponsorship material.
- Identifying target groups, which assisted in the effective distribution of promotional material. It also directed the development of the media release content. For example, because Chafe had identified families with children as a target group, she made sure that the media release highlighted the activities available for this audience.
- Sharing the completed form with contract staff so that they also had a clear vision of what the exhibition was attempting to achieve.

For Chafe, the most beneficial part of the process was the articulation of activities and evaluation tools for achieving goals, objectives and outcomes. However, it also proved to be the most challenging for Chafe to follow through on, due primarily to time constraints. The planned publication and one of the two workshops could not be completed in time for the exhibition. She was also overly ambitious with the identification of her evaluation tools. The outcomes she had identified required a variety of evaluation methods. Inspired by the impressive Excel charts prepared by Guelph Museums, she had hoped to develop an exit questionnaire and similarly chart the results. As the opening date for the exhibition drew near, this kept getting pushed to the bottom of the 'to do' list and never got done leaving a hole in the evaluation process.

However, it was rewarding to see during the review and the critical assessment portion of process that most of the objectives for the exhibitions had been met. Documenting these successes in this format has proven to be a valuable tool. Chafe has been able to justify to her manager, who does not have a background in museum work, the resources (both staff and financial) needed for annual exhibitions. Working in an ever-increasing competitive environment for public funds to provide municipal services, the performance measurement system has assisted her in securing additional contract staffing resources for exhibition activity.

Doon Heritage Crossroads

Doon Heritage Crossroads, a living history museum in Kitchener, Ontario, recreating a rural village and two farms to the year 1914, is located on sixty acres of environmentally sensitive forest, marsh and farmland. The museum also serves as the collecting and preservation facility for a regional history collection and is owned and operated by the Regional Municipality of Waterloo.

Tom Reitz, Manager/Curator of Doon Heritage Crossroads, found that the *Evaluating and Achieving through Performance Measures* project helped museum staff discover that they have many more quantitative measures than their annual attendance figures, and they do have some existing qualitative measures. Doon Heritage Crossroads was initially daunted by the language of the world of evaluation and museum staff had no formal training or experience in evaluation.

At Doon, staff chose their *Country Christmas* event for consideration as part of the audience-based program evaluation project for several reasons. First and foremost it was opportune, as the event was one of the last of the museum's eight-month season schedule and it fit with the evaluation project time-line. More importantly, however, *Country Christmas* was a repeat event, which in December of 2002 was about to take on a potentially new focus with a change in audience demographics.

Country Christmas is one of several seasonal events that the living history museum presents in the month of December. The living history village buildings are decorated for the Christmas season and special highlights for these event afternoons include horse-drawn wagon rides, carol singing in the village's church and a visit by Father Christmas. Previous year's attendance at the event varied, but based solely on previous years, the museum anticipated that approximately 250 to 300 people would visit the museum each Sunday.

In the fall of 2002, well in advance of the start of seasonal Christmas programming, the museum was approached by the Region of Waterloo's Home Child Care Division, which provides a flexible type of licensed care and is especially suited to families who work shifts or have irregular hours of employment. The group requested complimentary passes to the museum for their clients.

Also in 2002, Doon Heritage Crossroads was writing new mission and vision statements for the museum (to be presented to Regional Council in fall of 2003 or winter 2004). Museum mission statements have traditionally focussed on the five pillars of museum functions: to collect, educate, interpret, preserve, and research. Doon Heritage Crossroads' new mission and vision suggest a 'higher' mission for the museum. The proposed vision reads:

*Doon Heritage Crossroads enriches the quality of life in the Region of Waterloo.
Doon Heritage Crossroads makes better Canadian citizens by increasing
knowledge of what Canada is, has been and will be.*

The proposed mission also includes a number of guiding principles. One of these principles relates to the concept of 'community:'

*Doon Heritage Crossroads has a unique opportunity to enrich the quality of life
in our own community and lives of individuals in the many communities Doon
Heritage Crossroads serves. Doon Heritage Crossroads does this by: being
inclusive in our programs and activities, reaching out to the community with our*

services and programs, serving as a center for community gatherings, and serving as a bridge between different communities and cultural groups.

The inclusion of statements in the proposed mission regarding the museum's role in the community is reflective of an emerging trend in museums to not just reflect the community in their exhibits and programs, but also to ensure that the museum is an active, participatory institution in the life of a community. The emphasis on community is also reflected in changes to the Community Museum Standards, reintroduced by the Ontario Ministry of Culture in 2000.

It was clear that honouring the request for complimentary admission passes from the Region of Waterloo's Home Child Care program was in concert with the museum's new mission and more specifically, celebrates and affirms the museum's role in the community. Doon Heritage Crossroads saw this performance measures project as an excellent opportunity to test the new effectiveness of the proposed vision and mission, to evaluate the impact if any of honouring the request by Home Child Care, and to get a head-start on implementing the Community Standard required in 2005.

The Audience-Based Program Evaluation form for *Country Christmas* pointed out the success of the event and the impact of the distribution of the complimentary admission passes. Museum staff distributed 1,300 complimentary passes, and 378 admission passes were redeemed (29% of the coupons available). Although Doon Heritage Crossroads did not complete a survey of visitors attending *Country Christmas*, Reitz felt it was fair to assume that most if not all of the 378 individuals who entered the museum using a complimentary admission pass would not have visited otherwise. On each of the two Sundays for which passes were distributed, the total visitation was approximately doubled by complimentary pass holders.

The Program Evaluation form indicated what the museum staff believed was a successful 'win-win' endeavour. The *Country Christmas* event would have occurred regardless of the distribution of complimentary admission passes. By offering these passes, the

museum was able to meet its newly written mission statement's guiding principles to be inclusive in their programs and reach out to the community with their services and programs.

The museum is not able to quantify beyond attendance figures the potential qualitative impact these complimentary admission passes may have in the future on the lives of those who used them. Reitz believes, however, that opportunities such as these do demonstrate how Doon Heritage Crossroads enriches the quality of life in the Region of Waterloo.

Guelph Museums

Since a system of performance measures was already in place at Guelph Museums and was being used for special event planning, exhibitions and attendance tracking, Laurence Grant, Director, and his staff were versed in both the terminology and practices. Staff made some adjustments to education program evaluation forms and attendance tracking as a result of this project, but Grant mostly focused on using the Audience-Based Program Evaluation template on an exhibition called *The Neighbourhood Store*.

Although it is not part of his usual job to do exhibitions, he had come up with the idea and proposed it to curatorial staff. They decided to go ahead with it, in part because they had a gap in the exhibition schedule, and in part because Grant saw the opportunity for a community-based exhibition. This exhibition was about the history of neighbourhood or corner stores from the mid 19th century up to the present day and includes a section of photographs by a contemporary Guelph photographer. The exhibition spoke to the changing ethno-cultural ownership of neighbourhood stores and the struggle with the big chains in maintaining a viable share of the market. There was a 'hands-on' play store for children within the exhibition.

Grant found the template very useful in thinking through the process of preparing for the exhibition. Discussions with museum staff and project partners helped him come up with ideas that really improved the final exhibition product. The form was ultimately a very

good communications tool and a time saver. It was crucial for communications with curatorial and education staff. One thought and planned first and then 'did.' It helped Grant ensure, for example, that education staff was involved in the development of an education use of the exhibition from the beginning and not just at the end, as is too frequently the case.

The audience-based program evaluation form for the exhibition was in constant evolution and changed considerably during the exhibition development process and even after the exhibition had opened. The 'Description' and 'Research Materials' sections really helped define the focus of the exhibition and sources of materials. In his experience with Guelph Museums' staff, Grant found that people have the most trouble with differentiating 'Objectives' and 'Outcomes.' The 'Leadership and Staffing' section was very important for everyone to understand their roles in this team-based project. Staff return to the 'Evaluation Tools' section following the close of the exhibition. This section of the template underlines that the form has a life far beyond its initial composition. Guelph Museums also added an 'Impacts' section, which is very important for follow-up.

Guelph Museums staff uses this form for all exhibitions, special events, and fundraising projects. It enables them to improve events and exhibitions through using the 'Impacts' section. For example, prior to a repeat event, they always get out last year's form and look at staff comments. A summary of such comments is placed on the preparation form for this year's event. Similarly, for board fundraising projects, it is very important to have down in words what the goals of the project are and how staff will know if it has been successful.

In summary ...

It is probably fair to assume that most museums, large and small, know that evaluation is a good thing; but not only will it be an endeavour with which most museum staff have little experience, it will be one more task to find time for among cataloguing projects, event planning and writing media releases. If they have not been involved in anything

more than counting bodies through the turnstiles, contemplating formal evaluation of exhibits, events and/or general operation can be very intimidating.

However, at the end of this project each museum partner articulated the following important learnings from the audience-based program evaluation:

- Early ‘buy in’ from core museum staff is essential to institute performance measures at a museum site. Once staff ‘buy in’ and audience-based performance measures templates are in place, measuring performance should be easy.
- While the time commitment required for this performance measurement system can present challenges for smaller museum operations, the effort is well worth it. With limited resources, it is important when embarking on this exercise to identify what is important to measure, attempting to measure ‘key things, not all things,’ and asking two things: ‘What would museum staff like to improve?’ and ‘How do we measure up?’
- To reap benefits from the performance measures system, it is crucial to be prepared to report and share the results in a consistent format (as the Guelph Museums and partners have developed in their Audience-based Program Evaluation template) with stakeholders, such as board, staff, members, volunteers, and funders.
- In adopting this system, museum staff must be prepared to take action towards improvement and to plan for future measurement activities in order for performance measurement to be a worthwhile investment of scarce resources and time.
- This is not only an effecting planning tool, it is also a crucial communication tool so that the entire team knows what is going on in other people’s heads as museum staff prepare for events.

The museum professionals in this partnership have worked together for years, and highly respect and value one another. They have made very important contributions to their local and regional communities, as well as provincial and national museum associations.

Meeting/workshops helped the group better understand the important contributions that

community museums make to their local neighbourhoods. The project also demonstrated how museums can work together to develop and market meaningful programs across a region. Each museum now has a better sense of how important audience-based performance measures can be for evaluating visitor response to exhibitions, special events, and programs and staff have tools for reporting these responses to stakeholders and funding agencies statistically and anecdotally. The audience-based performance measures templates and impressive statistical reports that staff has learned how to produce are testimonials to the commitment each partner museum has made and will continue to make to this performance measures process.

Notes

¹ There were also materials from a pre-conference workshop Soren attended at the American Association of Museums 2002 Conference in Dallas, TX, that Karen Motylewski from ILMS facilitated on *Measuring Outcomes: Showing the Difference You Make*. Materials included a Logic Model for Outcome-Based Evaluation for ILMS Grant Projects and important resources.

² Weil (2003) further elaborated on Outcome-Based Evaluation in *Museum News*. He argues for the importance of evaluating a museum's worthiness by examining 'the positive and intended differences that it makes in the lives of the individuals and communities that constitute its target audience.' For Weil, the critical issue is how such differences can 'become and remain an institution's central focus' (p. 42).

Acknowledgements

This audience-based program evaluation project was made possible through the generous support of the Museums Assistance Program of the Department of Canadian Heritage and the respective municipal employers of Wellington County Museum & Archives, Doon Heritage Crossroads, Guelph Museums, and Heritage Collection - City of Waterloo. During 2003-2004, the group presented at the Ontario Museum Association Conference in Sault Ste. Marie, Ontario, October 2003, and the Canadian Museums Conference in Quebec City, May 2004. The partners have also produced a CD that can be purchased from Laurence Grant at Guelph Museums for the modest charge of \$5.00 (CAD). The CD contains the Audience-Based Program Evaluation template, examples of completed exhibition and special events forms, and some of the graphs, photographs and education program evaluation forms produced.

References

Baeker, G. (1998, January). 'A Review of Basic Concepts and Issues.' Paper presented at the Canadian Museums' Association's Museum Management Conference, *Great Performances: Performance Measures for Canadian Museums and Other Cultural Organizations*, Toronto, Canada.

Institute of Museum and Library Services (ILMS). (2001). *Perspectives on Outcome-based Evaluation for Libraries and Museums* (Stephen Weil and Peggy Rudd). Washington, DC: Author. Retrieved July 1, 2003 at <http://www.ims.gov/pubs/pdf/pubobe.pdf>.

Love, A. (1998, January). 'Performance Measures in the Public, Private, and Not-for-profit Sectors: Not-for-profit Perspective.' Panel presentation at the Canadian Museums' Association's Museum Management Conference, *Great Performances: Performance Measures for Canadian Museums and Other Cultural Organizations*, Toronto, Canada.

Soren, B. J. (1999). 'Meeting the Needs of Museum Visitors.' In G.D. Lord & B. Lord (Eds.). *The manual of museum planning*. 2nd ed.: 55-67. London: The Stationary Office.

Soren, B. J. (2000a). 'Audience Research Informs Strategic Planning in Two Art Museums.' *Curator*, 43(4): 124-342.

Soren, B. J. (2000c). 'The Learning Cultural Organization of the Millennium: Performance Measures and Audience Response.' *International Journal of Arts Management*, 2(2): 40-49.

Soren, B. J. (2001a). *Obtaining and Using Visitor Feedback*. Ontario Museum Association (OMA) Tip Sheet (invited publication). Retrieved from http://www.museumsontario.com/resources/rsc_tip_visitor.shtml.

Soren, B. J. (2001b). 'Qualitative and Quantitative Audience Measures.' In G. D. Lord & B. Lord (Eds.). *The manual of museum exhibitions*: 58-66. London: The Stationary Office.

Weil, S. E. (2001). 'Transformed from a Cemetery of Bric-a-brac' In Institute of Museum and Library Services – IMLS: 4-15. *Perspectives on Outcome-based Evaluation for Libraries and Museums*. Washington, DC: Author. Also retrieved from <http://www.ims.gov/pubs/pdf/pubobe.pdf>.

Weil, S. E. (2003). 'Beyond Big and Awesome: Outcome-based Evaluation.' *Museum News*, 82(6): 40-45, 52-53.

Authors

Barbara J. Soren, PhD, is an independent consultant with a special interest in audience research and development. Correspondence to:

52 Sylvan Valleyway
Toronto, Ontario, Canada
M5M 4M3
Tel: (416)787-1986
Fax: (416)787-7548
Email: bjs@barbarasoren.ca

Bonnie Callen has been director of the Wellington County Museum & Archives since 1997. Correspondence to:

The Wellington County Museum & Archives
R.R. #1
0536 County Road 18
Fergus, Ontario, Canada
N1M 2M3
Tel: (519) 846-0916 x222
Fax: (519) 846-9630
Email: bonnie@wcm.on.ca

Anne Chafe has been curator of the City of Waterloo's Heritage Collection since 1998. Correspondence to:

Heritage Collection
City of Waterloo
Recreation & Leisure Services
c/o Canadian Clay & Glass Gallery
25 Caroline St. North
Waterloo, ON N2L 2Y5
Tel: (519) 885-8828
Fax: (519) 746-6396
Email: achafe@city.waterloo.on.ca

Laurence Grant is director of cultural services for the City of Windsor and served from 1995-2003 as the director of Guelph Museums. Correspondence to:

Manager, Cultural Services
Library and Cultural Services
850 Ouellette Avenue
Windsor, Ontario
N9A 4M9
Tel: (519) 255-6770 x 4456
Fax: (519) 255-7207
Email: lgrant@city.windsor.on.ca

Guelph Museums
Katherine McCracken, Director
Guelph Museums
6 Dublin Street South
Guelph, Ontario, Canada
N1H 4L5
Tel: (519) 836-1221, ext. 222
Fax: (519) 836-5280

Tom Reitz has been the Manager/Curator of Doon Heritage Crossroads since 1989. Correspondence to:

Doon Heritage Crossroads
Homer Watson Boulevard
10 Huron Road
Kitchener, Ontario, Canada
N2P 2R7
Tel: (519)748-1914
Fax: (519)748-0009
Email: rtom@region.waterloo.on.ca