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Museums Making Change (And Proving It!): A Case Study Developing Evaluation Plans for the Fitchburg Art Museum's Development Department

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1. Abstract

The Fitchburg Art Museum (FAM) in Fitchburg, MA has a new 2024-2028 strategic plan outlining the organization's goals and actions for the next four years. However, the museum does not have sufficient evaluation methods in place to measure the effects of these actions. To resolve this issue, this case study proposes an evaluation plan for the museum's Development department that can be used to assess their operations in the following areas: visitor services, membership and events, marketing, and funding/donor relations. In particular, the Development department's goal for this project was to better understand their stakeholders, including their motivations, values, and impressions of the museum, in a way that will eventually enable the department to make adjustments to their plans based on those assessments. This project utilized a combination of background experience and quantitative and qualitative research on museum evaluation. This case study, "Museums Making Change (And Proving It!): A Case Study Developing Evaluation Plans for the Fitchburg Art Museum's Development Department," provides a brief historical background on museum evaluation, explains the challenges facing the museum evaluation sector, and outlines evaluation best practices and recommendations identified through research. As part of the solution, surveys were determined to be a manageable and effective evaluation method for the museum. As a result, the deliverables created are four sample surveys, a list of recommended steps for the Development department to carry out, a timeline estimating the length of time for each of those steps, and a rough cost estimate for the project.

Keywords: art museums, museum evaluation, museum development, evaluation best practices, surveys

2. Methods

The Fitchburg Art Museum's strategic plan for 2024-2028 outlines the strategic goals of the museum and the steps that must be taken to reach those goals. These steps include the implementation of evaluation methods across all sectors of the museum, including the curatorial, education, and development departments, as well as within FAM's staff and Board of Trustees. This project focuses on creating evaluation plans for the Development department due to background experience and ease of access to the department's information. This department includes visitor services, membership and events, marketing, and funding/donor relations. This focus created a project scope that was narrow enough to complete within a semester but detailed enough to be readily implementable at the museum. In addition, this model for the Development department could be adapted to suit the needs of other departments with a bit of additional research and planning.

Discussions with Rebecca Wright, Deputy Director for Advancement and Administration; Susan Diachisin, Director of Education; and other members of the Development department, including Membership & Events and Visitor Services staff, helped finalize the scope of this project and pointed me towards resources to supplement research, such as the American Alliance of Museums (AAM).

The bulk of the analysis for this project consisted of secondary research. The sources for this research include peer-reviewed journal articles, books, and web articles from professional sources such as museum associations and evaluation-focused organizations. Most of these sources consist of qualitative findings, with some implementing quantitative analysis through evaluation case studies or including museum data on metrics such as visitation, membership, and events. Research sources enabled the compilation of background information on the history of

museum evaluation, information on the issues and challenges in this field, and solutions and best practices for implementing evaluation in museums.

The process of gathering background context for this case study also involved looking at quantitative research by looking at data on visitation, donorship, membership, and events numbers in Altru, the Fitchburg Art Museum's online database and comparing their data to quantitative data assessments conducted by other museums and museum organizations such as AAM. This process of data comparison established an understanding of where FAM fits into the broader picture of museum visitation and membership. Ultimately, the combination of qualitative and quantitative research revealed which evaluation recommendations and best practices would be best suited to match FAM's needs.

This case study also highlights a few key external case studies as comparisons to FAM. The first of these is the Museum of Modern and Contemporary Art (MART) in Rovereto, Italy, which conducted a study in 2009 to assess the factors that influence visitors to revisit the museum. The second is a 2006 study by the Cambridge & County Folk Museum, now called the Museum of Cambridge, in the United Kingdom, to assess whether the museum had delivered 'quality service' to its visitors. The final case study is Minnetrista, a multi-disciplinary museum and garden in Muncie, Indiana, which participated in AAM's Annual Survey of Museum-Goers and shared the results of that experience in an AAM article titled "Growing Audiences with the Annual Survey of Museum-Goers" (Gilliam, 2019).

These case studies provide examples of visitor surveys, and the results of those surveys, administered at museums. Two of the case studies are based in Europe rather than in the United States because there is more published information, and specifically case studies, on museum evaluation in Europe, a phenomenon explained in more detail in the Challenge section. Although

based in Europe, these museums are similar sizes and in similar small urban settings as the Fitchburg Art Museum, making them relevant for comparison. The final case study, Minnetrista, provides an example of a U.S. Museum that adjusted its programs based on a visitor survey, and therefore it provides a way to envision the impact that surveys can have.

Research revealed that surveys would be a relatively simple yet effective evaluation method for the museum. Based on this finding, the deliverables for this case study include a series of surveys that can be used to assess the impacts of museum operations in the development department for four different target groups: visitors, members, Annual Fund donors, and event attendees. The resources that informed survey creation are survey creation guides from ACME Ticketing, The Audience Agency, OF/BY/FOR ALL, and the American Alliance of Museums, as well as the following public online surveys: the Jordan Schnitzer Museum of Art's Sample Visitor Survey, The University of Richmond Museums Visitor Survey, and the Museum of the American Revolution's Visitor Feedback Survey.

3. Literature Review

Many internal and external factors prove museum evaluation to be necessary and affirm that the current state of the museum evaluation field is insufficient to meet that need. Much of the early available research on museum evaluation is centered in the United Kingdom. More recent research shifts to the United States, but the roots of published evaluative research on museums remain UK-based. Therefore, this literature review includes sources from the United Kingdom and case studies from a few museums in Europe, but the bulk of the research is focused on the United States to be more relevant to this specific project.

This literature review begins with a look at the historical background on museum evaluation. Next, it highlights the central issues that make evaluation necessary, challenges within the evaluation sector, uses and applications for evaluation, and specific techniques and recommendations for evaluation offered by various researchers. The section concludes with an overview of sources that informed survey development and case studies from other museums that provided comparison for this project.

Although museums have been around for centuries, modern methods of museum evaluation are rather recent. Most researchers cite the beginnings of evaluation as occurring in the late 20th century. For example, some initial steps were taken in the UK in the late 1980s to begin to establish performance management indicators, such as the Museums & Galleries Commission (MGS)'s introduction of a Museum Registration scheme with the goal of establishing a common basis of museum operation (Mylonakis & Kendristakis, 2006, p. 40). Subsequently, several sources explain that during the 1990s, museums and galleries were facing a transitional period caused by increasing pressure to guarantee value, generate income, attract more visitors, and improve services (Selwood, 2001; Kelly, 2004; Mylonakis & Kendristakis,

2006). However, Kelly (2004) asserts that early audience research reaches back as late as the 1880s, citing a museum visitor study conducted by the Liverpool Museum in the UK (p. 51), along with pioneering research for the field taking place throughout the 20th century. Nevertheless, the author clarifies that the late 1900s saw an "exponential increase in audience research" (Kelly, 2004, p. 52).

The transitional period cited by many museum researchers brought new challenges that created a need for more robust evaluation methods. Kelly (2004) describes this period as bringing a "conceptual shift" from museums "being primarily curator-driven to becoming market-responsive" (p. 48). The factors that resulted from this shift included the user-focused nature of post-industrial society, the development of information and communications technology, and changes in government attitudes, funding, and performance indicators (Mylonakis & Kendristakis, 2006; Kelly, 2004; Williams et al., 2005). Museums began needing to justify their worth to funders and policy makers (Stanziola, 2008; Mylonakis & Kendristakis, 2006; Kelly, 2004; Williams et al., 2005), for example by providing information to grant funders about how they are meeting expected outcomes (Adams, 2012). Policy trends and funding opportunities have particularly prioritized education and social inclusion and addressed how museums can contribute to these areas (Anderson, 1997; Lawley, 2003; Hooper-Greenhill, 2004), as well as how they can participate in collaborative urban regeneration programs (Galloway & Stanley, 2015, p. 126). Collectively, these expectations created a higher need for museums to evaluate their operations to provide this data to funders and policy makers.

Research has revealed other challenges, both internal and external, facing museum evaluation. Internal challenges include ambiguity when defining the goals of evaluation (Williams et al., 2005), difficulties in assessing implicit information (Davies and Heath, 2014),

and internal cost, staffing, and timing issues (Williams et al., 2005). External challenges include reduced funding for the arts leading to increased competition among museums (Basso et al., 2018), and the lack of a common theoretical framework to share resources and findings (Reeves, 2002; Kelly, 2004; Adams, 2012). Some other common difficulties are conflicts of interest arising from museum workers wanting to present their institution in the most favorable way possible (Davies & Heath, 2014; Kelly, 2004; Linn, 1983), as well as the removed position of contract evaluators and the instability of evaluation teams (Davies and Heath, 2014).

Several sources outline the particular evaluation challenges faced by small museums. Small museums have fewer staff members, who are in turn responsible for more tasks and have a shortage of time for evaluation (Galloway & Stanley, 2015), and very small museums can be partly or largely run by volunteers (Office of Arts and Libraries, 1991), leaving even less time for evaluation. In addition, evaluation skills are harder to cultivate at small museums due to shorter employment and modest salary levels (Galloway et al., 2002; Selwood, 2001, p. 354).

There is a general consensus among museum policy researchers that without evaluation, developments are based on guesswork instead of research (Birckmayer and Weiss, 2000; Peacock, 2002; Weil, 2002). Birckmayer and Weiss (2000) state that “program people make some assumptions about why a set of activities they plan will lead to desirable outcomes” (p. 426) and Peacock (2002) explains that “evaluation pulls us back to the world of the user and commits us to an active engagement with our online visitors and their needs, expectations and experiences” (pp. 2-3). Jacobsen (2016) argues that museum theory should be useful in three ways: (1) To provide a framework to evaluate what the museum is currently doing and assess the alignment between intentions and results; (2) to provide guidance to museums to make decisions

for the future; and (3) to give researchers and evaluators a shared framework for evaluating the impact and performance of museums (p. 26).

While some researchers believe that a new model should be created to assess the impact of the museum sector, Stanziola (2008) argues that evaluation efforts would be put to better use not by developing new models, but by establishing common evaluation language across museums, contextualizing cultural policy research within existing policy and political constraints, and working to adapt currently existing models to support performance management, communications strategies, and innovation in the museum sector (ibid, pp. 317-318).

Some research sources outline common forms and stages of evaluation. Jacobsen (2016) cites the most common types of evaluations as operating data, board member suggestions, visitor comment cards, exhibit time and tracking studies, visitor satisfaction surveys, and formal evaluation studies. The Audience Agency (2013) lists other popular forms of evaluation such as focus groups, in-depth interviews, non-visitor surveys, and secondary research (ibid). Davies and Heath (2014) add that recordings, specifically video recordings, can authentically capture visitor conduct. Anderson (2004) says that admission, membership, and exhibition attendance numbers are taken-for-granted metrics that museums use to crudely self-evaluate, but these metrics are poor indicators of museum quality without stronger analytical methods. Kelly (2004) provides a description of each of the four stages of evaluation for exhibitions and programs: front-end, formative, remedial, and summative. These stages demonstrate that evaluation can be conducted any time from the beginning stages of program or exhibition development all the way through its conclusion (ibid).

Some researchers have argued against using certain evaluation methods or stages. Davies and Heath (2014) attest that “summative evaluation in museums and galleries appears to have

rather little impact" (pp. 57-58). They also argue that the variations between evaluation projects and studies makes it difficult to compare information, and that evaluation as a field has not reached an efficacy level equivalent to academic research (ibid, pp. 59-60).

Despite the concerns and challenges noted by evaluation researchers, many provide suggestions to address and even solve these issues. The first step, as mentioned in several sources, is to clearly define the purpose and goals of the evaluation (Patton, 1997; Williams et al., 2005; Basso et al., 2018; ACME, 2023). Another common suggestion is to directly involve museum staff members in the evaluation process, rather than hiring external evaluators, in order to create greater buy-in for the process (Davies and Heath, 2014; Williams et al., 2005; Preskill & Torres, 1999; Adams, 2012). In addition, when providing evaluation resources to an institution, it is important to ensure that those resources are easy to use, placed in context, and readily transferable to the organization's needs (Williams et al., 2005).

Several sources stress that museum impact and value must be evaluated both quantitatively and qualitatively (Jacobsen, 2016; Basso et al., 2018; Kelly, 2004; Adams, 2012). Galloway and Stanley (2015) note the importance of distinguishing between project- or service-specific visitor feedback and more general evaluations (p. 127). Hein (1998) provides an early introduction to the barriers and benefits of using technology in evaluations, and Stanziola (2008) provides suggestions for specific questions to ask that can capture implicit information.

ACME (2023) highlights the benefits of surveys: anonymous surveys allow museums to collect honest, unbiased responses; surveys can be periodically altered to learn new information from respondents; surveys can obtain open-ended answers that paint a fuller picture of the responses; and surveys are relatively inexpensive, reusable, and flexible.

Mylonakis and Kendristakis (2006) explain that after the data collection stage, museums should determine how well they are meeting visitor expectations, work to make improvements, and share the results or follow-up information from evaluations with the public to establish a lasting image of quality service (p. 39). There were not many available recommendations for how specifically to analyze the data and implement changes in museum operations, since those results cannot be guessed in advance and individual changes are museum-specific (Williams et al., 2005). However, there is a consensus that sharing the results of evaluations can help museums identify areas that need improvements and focus their work in those areas, as well as seek help with those efforts from funders and other stakeholders (The Audience Agency, 2013; Peacock, 2002; Jacobsen, 2016).

The majority of sources discuss the importance of sharing evaluation findings widely and transparently. Doing so helps to establish a "community of practice" that allows institutions to connect and relate to one another (Kelly, 2004), helps institutions prove their worth to funders and stakeholders or identify how those stakeholders can better help the institution meet its goals (The Audience Agency, 2013), and builds a high level of trust between the museum and its visitors and other stakeholders (Mylonakis and Kendristakis, 2006). Sharing research findings can also help create the collective push to raise the profile of evaluation that is needed for it to be made a wider priority (Davies and Heath, 2014).

Alford and O'Flynn suggest sharing findings through storytelling methods, since telling a story is a valuable way to showcase importance (Alford and O'Flynn, 2009, p. 177). A few sources point to visual storytelling techniques as a particularly effective means of sharing data (Mayer et al., 2023; Dykes, 2019). In fact, the American Alliance of Museums uses "visual data

stories" to share the results from their 2023 Annual Survey of Museum-Goers (See Wilkening, 2023a; Wilkening, 2023b; Wilkening, 2023c).

Guidance for designing sample surveys came from several different survey guides, as well as example surveys from various museums. These sources include ACME Ticketing's guide "Museum Exhibition Feedback Questionnaire" (2023), The Audience Agency's guide "Visitor Guidelines Part 1: How to Design a Visitor Survey" (2013), and OF/BY/FOR ALL's guide "Who's Coming?: Respectful Audience Surveying Toolkit" (2023).

A few of the case studies examined for comparison with this project are from the Museum of Modern and Contemporary Art (MART) in Rovereto, Italy, which conducted a study in 2009 to assess the factors that influence visitors to revisit the museum (Brida et al., 2012), the Cambridge & County Folk Museum (now called the Museum of Cambridge) in the UK, which used questionnaires to determine whether they had delivered 'quality service' to their customers (Mylonakis & Kendrisakis, 2006), and Minnetrista, a multi-disciplinary museum and garden in Muncie, Indiana, which participated in AAM's Annual Survey of Museum-Goers (Gilliam, 2019). These case studies are examined in more detail in the "Solutions" section in order to learn more about best practices for administering and analyzing surveys.

4. Background Information

The Fitchburg Art Museum (FAM) in Fitchburg, MA has a new 2024-2028 strategic plan outlining the organization's goals and actions for the next four years. These steps include the implementation of evaluation methods across all sectors of the museum, including the curatorial, education, and development departments, as well as within FAM's staff and Board of Trustees. However, the museum does not currently have sufficient evaluation methods in place to measure the effects of these actions. To resolve this issue, this case study proposes an evaluation plan for the museum's Development department that can be used to assess their operations in the following areas: visitor services, membership and events, marketing, and funding/donor relations. This project focuses on the Development department due to background experience and ease of access to the department's information, and because choosing one department created an achievable scope for this project within the available time period.

FAM's Development department's goal for this project was to better understand the department's stakeholders, including their motivations, values, and impressions of the museum, in a way that will eventually enable the department to make adjustments to their plans based on those assessments. These stakeholders include the museum's visitors, members, and donors.

The target audience for this case study is primarily the staff of the Fitchburg Art Museum's Development department, who will be receiving this case study and deciding upon next steps. The secondary audience includes the rest of the museum's staff, as well as FAM visitors, members, and donors who would be participating in, or impacted by, these evaluation methods if they were to be put in place. Another secondary audience is the FAM Board of Trustees, who would also need to buy into the project if it were to be implemented.

There are several barriers that have prevented the museum from developing more rigorous evaluation methods thus far. These barriers are in line with the evaluation issues for small museums outlined in the Challenge section (see Section 6). The first of these is a lack of staff time, which has been one of the most significant assessed impacting evaluation capacity at small museums (Williams et al., 2005; Galloway & Stanley, 2015). Another issue is the large amount of work required by these employees, leading to a rapid speed of work (ibid). An additional contributing factor is limited financial resources. Finances limit the capacity of the museum to develop evaluations, since hiring an evaluation consultant needs to be justified within the budget (Adams, 2012). Underlying all these issues is the fact that evaluation has not yet been a key priority for the museum relative to its day-to-day workings (ibid).

The American Alliance of Museums (AAM) conducts the Annual Survey of Museum-Goers each year in collaboration with Wilkening Consulting. The results of these surveys demonstrate the COVID-19 pandemic's impact on national museum attendance, showing a severe drop in attendance in 2021, substantial recovery in 2022, and slower recovery in 2023 (Wilkening, 2023b). Visitation incidence is in line with pre-pandemic levels (28% have visited in the past year, compared to 25-31% pre-pandemic), but visitation frequency is not (ibid). In other words, repeat visitation is not where it was four years ago. Sustained efforts are needed to continue the rebound in post-pandemic attendance numbers, and evaluation methods can support those efforts by identifying areas in which the museum can better serve its visitors.

Creating evaluation plans for FAM's Development department will help them work toward the following strategic goals outlined in their strategic plan:

- Strategic Goal 4: Improve messaging, marketing, and communications at FAM, with emphasis on clarity, consistency, and transparency (Fitchburg Art Museum, 2023).

    - This goal includes improving the quality and reach of FAM's external and internal communications. There is also an action item to "ensure that FAM is a safe space for feedback, input, suggestions, and constructive critique" (ibid). The evaluation recommendations provided by this case study, including surveys, will assess communications metrics and provide the feedback and critiques that the museum is seeking.

- Strategic Goal 5: Steward and grow FAM's financial assets (ibid).
    - Part of this goal is to increase philanthropic giving to FAM (ibid). Another part is to improve and expand FAM's membership programs (ibid). The sample surveys presented for Annual Fund donors and for FAM members focus on identifying ways to improve interactions with both donors and members and, in turn, to grow interaction in those areas.
- Strategic Goal 6: Sustain and Build FAM's Institutional Capacity (ibid).
    - The actions listed for this goal include improving "overall accessibility for visitors by improving and maintaining a safe and welcoming environment" (ibid). Questions included in the sample surveys will help identify areas for improvement in the cultivation of that safe, welcoming, and accessible environment by asking about people's motivations for visiting, feelings and impressions of the museum, and suggestions for the future.

If stronger evaluation methods are not put in place, there will be several consequences. Firstly, the museum will not definitively know if it is reaching its intended targets as outlined in its strategic plan. Second, the museum will have trouble identifying how to alter their plans and programs to achieve their original intended goals if targets are not being met. Third, the museum

will not be able to prove that it achieved its goals. This last step will make it difficult for the museum to achieve better funding, partnerships, and overall support, and it will ultimately harm the success of the museum. Evidence is needed to encourage FAM's actions to continue or to identify areas for improvement, and this evaluation plan will provide that evidence.

The aim for this case study is to supplement the work that the museum is doing by recommending a plan for the Development department to assess the impacts of their activities, share those impacts with their stakeholders, and ultimately make improvements to their operations based on those assessments.

5. About the Fitchburg Art Museum

The mission of the Fitchburg Art Museum is to inspire creativity and learning, and to contribute to the well-being of their diverse communities in Fitchburg, North Central Massachusetts, and New England. To accomplish this mission, FAM organizes exhibitions of the work of New England contemporary artists and artworks from our art historical collections, offers programs for learners of all ages, supports public art projects, invites community participation and partnerships, and stimulates the creative economy – all in the spirit of inclusivity.

The Fitchburg Art Museum (FAM) is the leading cultural institution in North Central Massachusetts and the only art museum in the region. Founded in 1925, FAM now comprises four connected buildings with over 20,000 square feet of exhibition space. FAM features exhibitions from their art collection of more than 7,000 objects, with core strengths in photography, African Art, and American Art as well as changing exhibitions by contemporary New England artists. FAM supports artists who hold a wide variety of backgrounds and identities, with an emphasis on those whose practices have been historically marginalized and underrepresented in the mainstream art world.

FAM serves Fitchburg, Leominster, Gardner, all of North Central MA, and beyond. The only art museum in the region, FAM annually serves 15,000 visitors, and provides educational tours for over 100 school groups who, because of distance, cannot attend major art museums in Boston or Worcester. FAM offers free admission to students, faculty, and staff of Fitchburg Public Schools, Fitchburg State University, and Mount Wachusett Community College; active-duty military and family; and residents of the neighborhood around FAM (Fitchburg's Ward 4B);

among others. FAM has 24 employees (12 full-time and 12 part-time) and a current annual operating budget of $1.9 Million.

FAM's education programs include Learning Lounges (hands-on family-friendly education and art-making activity spaces); artist and curator talks; public and school group tours; art classes; workshops; and teacher training. Area schools, community groups, and artist organizations organize shows for FAM's Community Gallery, and the museum maintains active partnerships with public and private schools, including Fitchburg State University.

FAM is a bilingual museum (English/Spanish, to serve Fitchburg's 40% Latino community) and co-creates programs with local and regional partners to respond to specific community needs, including programming for people with Alzheimer's and their caregivers, and art therapy for people in recovery from opioid addiction, among others. FAM has the Mass Cultural Council's Universal Participation designation.

FAM plays a leadership role in educational, community and economic development in their neighborhood, city, and region through key strategic partnerships with the City of Fitchburg, Fitchburg Public Schools, Fitchburg State University, Mount Wachusett Community College, and MassDevelopment's Creative Cities program. FAM plans and implements community-based public art projects and operates a low-cost arts-based after-school program in collaboration with Fitchburg Public Schools.

6. The Challenge

This case study addresses the challenge of implementing useful evaluation methods at the Fitchburg Art Museum, a small regional art museum. There are several internal and external issues that make evaluation in museums difficult. The most impactful core issues in this field are limited resources in terms of time, staffing, and funding, and the lack of a common theoretical framework to share resources and findings. Other important issues include the tension between being transparent and proving museum value, and the ambiguity and variety of interpretations of evaluation goals. Small museums face additional challenges because their staff size is smaller and more often overextended, and because evaluation skills can be more difficult to cultivate and retain. The Fitchburg Art Museum is facing all of these issues, particularly those often experienced by small museums. Researching these challenges places this case study in the broader context of the challenges of the museum evaluation field.

Demonstrating evidence to funders is increasingly difficult in light of reduced funding for the arts, leading to increased competition amongst cultural institutions like museums. Basso et al. (2018) describe museums' responses to both reduced funding and the lower relative incomes of individuals as "increasingly coping with competitive situations, vying to attract both users and donors, competing with many organisations operating in the field of the free time market (p. 67). This scarcity mindset around funding contributes to issues around transparency and accountability, since museum professionals experience increased pressure to compete within a market-driven arts and culture environment (Kelly, 2004; Basso et al., 2018).

Other root challenges of evaluation are cost, staffing, and timing issues. Factors such as evaluation cost and lack of time are particularly present among smaller institutions (Williams et al., 2005, p. 546). Time limitation is one of the most significant factors assessed, with additional

concerns around staffing, focus and relevance to the organization (ibid, p.547). As museum staff members weigh costs with benefits, there is a prevailing perception that evaluation is not a necessity in comparison with other day-to-day museum functions that demand time and attention (Adams, 2012). Despite requirements from donors/funders, increased competition in the cultural sector, and the proven benefits of evaluation, limits on resources like time and money cause reservations among museum staff (ibid). Even when museums do take on evaluation projects or hire in-house evaluators, some of them "later devalue or stop those practices, or [do not] rehire for that position" due to decreasing budgets and resource scarcity (ibid). The solutions section of this paper will explore ways to overcome these challenges by ensuring that evaluation methods are prioritized while requiring as little time and money as possible.

As previously mentioned, museums today must demonstrate evidence of their worth to funders and policy makers. As Williams et al. (2005) describe, "the need to evaluate impact has been driven by a general climate of transparency and accountability to stakeholders in all public sector organisations which has increased awareness of service provision in relation to client needs and value for money" (p. 534). This has not always been the case: Kelly (2004) explains the necessity for evaluation as driven by a "conceptual shift" from museums "being primarily curator-driven to becoming market-responsive" (p. 48). For example, grant guidelines often ask grantees to identify participants' specific learning outcomes, describe assessment methods, and discuss the degree to which those outcomes were achieved (Adams, 2012, p. 26). However, the requirements of the government and of financial stakeholders are often complex and include many different priorities including social impact, learning impact, and economic impact (Williams et al., 2005). These varying priorities present a large scope for evaluation and can

make it difficult for museum professionals to know where to begin with the process and which elements to test (ibid).

In addition, the process presents conflicts of interest because museum workers are expected to be fully transparent to their funders and stakeholders, but they often wish to present their institution in the most favorable way possible, meaning that they may sometimes skew, conceal, or exaggerate the results of evaluations to present the museum in a positive light (Kelly, 2004; Linn, 1983). Kelly (2004) describes how "the need to demonstrate measurable outcomes of programs may lead to providing shallow experiences that are assessable in superficial ways" (p. 48). For example, institutions sometimes place a higher emphasis on visitor numbers than visitor experiences and learning because museums are expected "to prove their value through bringing in large numbers of visitors, along with an economic imperative to generate revenue" (ibid). In fact, this emphasis on quantitative evidence has influenced a proportion of museum administrators to demonstrate a "clear preference for quantitative data" because it can provide "evidence for management purposes, [...] for meeting targets and benchmarking (Williams et al., 2005, p. 544). However, several other studies show that a mix of both quantitative and qualitative data is important for effective evaluation, which will be examined in more detail in the Solutions section.

Another challenge is that the aims of evaluation are often not clearly defined. Even interpretations of the term 'evaluation' can vary between professionals, clients, and other stakeholders (Williams et al., 2005, p. 535). Some evaluators focus on the organization's perception of impact, while others identify the client's perception (ibid). Many organizations evaluate specific projects, usually externally funded projects, without including an evaluation of the entire or core services of the museum, nor an evaluation of internal processes (ibid, p. 541).

In addition, traditional performance measurement systems focus on the economic-financial side of evaluation, but this angle "neglects to take into account other resources that are fundamental for business development, such as the skills of the staff, the trust relationship with customers and the culture of innovation" (Basso et al., 2018, pp. 67-68). The differences in approach to evaluation necessitate "greater clarification over what any particular evaluation is intending to achieve" (Williams et al., 2005, p. 535).

This variety of approaches highlights another core issue: the lack of a common theoretical framework for museum evaluation, as well as a lack of access to data or findings between museums. Kelly (2004) explains that this deficit in a coherent research base is because "in the past museums conducted evaluation studies that were narrower in focus and not necessarily grounded in a theoretical framework," primarily due to funders requiring "specific evaluation studies to be undertaken for particular programs as a condition of receiving a grant" (p. 62). As a result of these requirements, many museums assessed some specific projects but not others, or neglected to include evaluations of the internal museum processes (ibid). Other factors that contribute to a fragmentation of knowledge that can make evaluation results unreliable are the difficulty for contract evaluators to access the information and context they need to accurately assess museum operations from outside the organization, and the tendency of evaluation teams or task forces to change or disband over time (Davies and Heath, 2014).

The unsteady research base contributed to an absence of transparency in museum evaluation (Kelly, 2004), as demonstrated by the fact that there is little open sharing of research findings among museums, especially within the United States. As Adams (2012) explains, "most evaluation studies are not published and when they are they are not always easy to locate or access" (Adams, 2012, p. 32) As a result, museum evaluators "frequently express frustration

because they cannot get access to evaluation results from other museums" that would be useful for them (ibid).

Small museums face additional challenges that are not as present in larger museums. Firstly, the size of the staff is smaller, and each staff member is responsible for more tasks. When only a handful of staff members are responsible for the collection, premises, outreach work, accessibility, marketing, and administration of a museum, among other tasks, it can be difficult to view the development of evaluation methods as something worthy of staff time (Galloway & Stanley, 2015, p. 126). In addition, very small museums can often be partly or largely run by volunteers (Office of Arts and Libraries, 1991), making time for evaluation development even harder to come by (Galloway & Stanley, 2015, p. 126). Aside from time constraints, evaluation skills are harder to cultivate at small museums. Employment contracts in this sector can be short-term or uncertain, making it difficult for organizations to benefit from accumulated skills (Galloway et al., 2002; Selwood, 2001, p. 354). In addition, salary levels are usually modest (IDS 2004), and freelancers in the cultural sector often do not have the time or funds to invest in their own professional development (Galloway et al., 2002). For all of these reasons, even if evaluations are designed with best practices to be on-going, integral to projects, and to take as little time as possible, they still require commitment and energy from staff members, and they pose particular challenges for small museums that must be acknowledged (ibid, p. 127).

7. The Solution

This section will begin with a narrative examination of best practices for museum evaluation identified through research, best practices for creating and administering surveys, and comparison case studies that helped inform the solution. Then, deliverables are presented: sample surveys, a list of recommended steps, a timeline, and a cost estimate.

Development of the solution for this case study was influenced by background experience from the author's position as an employee of the Fitchburg Art Museum and a grant writer, as well as from some past survey creation experience. The museum was involved in the early stages of this project, as discussions with staff members Rebecca Wright (Deputy Director) and Susan Diachisin (Director of Education) helped finalize the project scope and identify possible resources to support research. Rebecca Wright specifically provided materials such as Development reports and access to Altru, the museum's database. However, the bulk of the project was conducted through secondary research using peer-reviewed scholarly sources on museum evaluation, as well as sample surveys from a handful of different museums.

The final deliverables are:

- Four sample surveys: one each for FAM visitors, members, Annual Fund donors, and event attendees
- A list of steps to be carried out by the FAM Development department to finalize, administer, analyze and share the results of these surveys
- A timeline outlining estimates for the length of time each step will take
- A rough cost estimate for one year of survey implementation

This project in its entirety took three months. The first month consisted of background research and early discussions to narrow the scope of the project, identify resources, and build an

understanding of the subject. The second month included more in-depth research, an exploration of comparison case studies, and early stages of writing this final report. The third and final month included the creation of the sample surveys and list of recommended steps for the FAM Development department, further research to fill in gaps, and continued writing and editing of this report.

7.1. Best Practices for Evaluation: Design and Implementation

The first step in the evaluation process is clearly defining the purpose of the evaluation. (Patton, 1997; Williams et al., 2005; Basso et al., 2018; ACME, 2023). Patton (1997) recommends asking the following questions to 'focus' evaluations and develop maximum effectiveness: "What is the purpose of the evaluation? How will the information be used? What will we know after the evaluation that we don't know now? What actions will we be able to take based on evaluation findings?" (p. 189). In addition, Galloway and Stanley (2015) note the importance of distinguishing between project- or service-specific visitor feedback and more general evaluations in this process (p. 127).

Another important element for museum evaluation is having museum staff members be directly involved in the process themselves. Although hiring external evaluators can bring in specific expertise and an impartial view without using the time of permanent staff members (Davies and Heath, 2014), there is evidence that self-evaluation by museum staff can lead to more reflective and evidence-based practice (Williams et al., 2005; Preskill & Torres, 1999). In fact, museum practitioners often *need* to be involved in order to buy into the process and findings (ibid). Evaluation approaches can be more successful when they are viewed as a team effort, especially when those teams are cross-departmental (Adams, 2012, p. 30). As a result of these

findings, visitor studies researchers “have observed an increase in practitioners wanting to learn how to conduct evaluations themselves” (ibid).

When providing evaluation resources to an institution, it is important to ensure that evaluation tools are easy to use, and to provide as much background information as necessary. Many museum practitioners, when embarking on the evaluation process, find it useful to be provided with an introduction to the process and clear definitions of the terms involved (Williams et al., 2005, pp. 541-542). Museum staff also need methods and examples to be “readily transferable to their specific circumstances” (ibid, p. 542) in order to “enable efficient use of time by practitioners with demanding schedules” (ibid, p. 545). Suggestions by Williams et al. (2005) include having a step-by-step guide for staff members to follow, the ability to download and print tools ready to use, checklists and support resources, and comparison of different methodologies applicable to specific projects (p. 545).

Evaluators should use a combination of quantitative and qualitative methods to achieve the best results. Although many museum practitioners have the impression that their supervisors and funders want quantitative data (Adams, 2012, p. 31), that data alone fails to account for resources such as “the skills of the staff, the trust relationship with customers and the culture of innovation” (Basso et al., 2018, pp. 67-68). Qualitative analysis can take place through methods such as surveys, focus groups, literature analysis and environmental scans, and it can identify how museums communicate with their visitors, perceptions people hold about the museum, branding issues, barriers to visitation, and other issues that quantitative data cannot capture (Kelly, 2004, pp. 49-54).

Hein (1998) provides an early introduction to the barriers and benefits of using technology in evaluations. Barriers include high costs of use and the challenge of determining

what to test, and benefits include the ability to reach diverse and remote audiences (p.4). Technology is now a routine part of evaluation methods, but Hein's 1998 assessments ring true today.

Stanziola (2008) provides suggestions on how to capture implicit information from stakeholders. The author notes that "people may not tell us or indeed may not know what is in their sub-conscious, but they do very clearly reveal to us what their sub-conscious tells them to do" (p. 319). For example, evaluators can ask how far visitors traveled to get to the museum, how long they spent at the museum, whether they are planning to come back, whether they are repeat visitors, or whether they will recommend the museum to someone else (ibid). These kinds of questions may not explicitly ask visitors to quantify the value of the museum, but they can reveal subconscious clues about value that may otherwise be overlooked.

7.2. Best Practices for Evaluation: Analysis and Dissemination

Mylonakis and Kendristakis (2006) explain that after the data collection stage, museums should determine how well they are meeting visitor expectations, work to make improvements, and share the results or follow-up information from evaluations with the public to establish a lasting image of quality service (p. 39). As noted in the Literature Review (see Section 3), there were not many available recommendations for how specifically to analyze data and implement changes in museum operations, since those results cannot be guessed in advance and individual changes are museum-specific (Williams et al., 2005). However, sharing evaluation results has many benefits that can facilitate quality improvements.

Once evaluation data is collected and analyzed, it is important to share those findings widely and transparently. In order to combat the previously mentioned issue of a lack of access to data and findings between museums, museums should begin to work more collaboratively to

establish a "community of practice," which will collectively allow them to relate to other learning experiences and to explore connections across institutions (Kelly, 2004, pp. 66-67). Davies and Heath (2014) build on this idea by explaining that a collective push by the museum evaluation community to raise the profile of evaluation could help combat staffing and fragmentation issues by establishing evaluation as a higher organizational priority (p. 66). Sharing data can also allow museums to meet the stated challenge of proving their worth to funders and policy makers, or to identify areas in which funders and other stakeholders can help them better meet their goals (The Audience Agency, 2013). Finally, sharing findings can prove to visitors and other museum stakeholders that their feedback and experiences are valued, and in turn it can help to establish a higher level of trust and relationship-building between the museum and its constituents (Mylonakis and Kendristakis, 2006).

One effective means of sharing data is through visual storytelling techniques. These include story-based narrative text alongside complementing visuals to present the results of research findings (Mayer et al., 2023). Brent Dykes' book *Effective Data Storytelling : How to Drive Change with Data, Narrative and Visuals* (2019) explains why visual storytelling is an effective method for sharing data. According to Dykes, "the combination of narrative and data can help etch facts into your audience's memory and encourage them to act on your ideas" (p.38). He explains that data storytelling "gives your insight the best opportunity to capture attention, be understood, be remembered, and be acted on" (ibid, p.44). Mayer et al. (2023) outlines techniques such as "scrollability" and a simplified consumability of stories to help "[communicate] information in an understandable, interesting, and relevant way" (Mayer et al., 2023, p.1). To provide an example, the American Alliance of Museums published a series of "visual data stories" to share results from their 2023 Annual Survey of Museum-Goers (See

Wilkening, 2023a; Wilkening, 2023b; Wilkening, 2023c). Moreover, the Fitchburg Art Museum already includes a combination of photos and storytelling, as well as budget-related graphics, in their Annual Reports each year (Fitchburg Art Museum, 2021). Incorporating visual data storytelling may be as simple as a page in the annual report creatively sharing what the museum has learned from recent evaluations and how they are incorporating those findings into their plans.

7.3. Comparison Case Studies

Several case studies offer comparison with the Fitchburg Art Museum and guidance for evaluation design at FAM. The Museum of Modern and Contemporary Art (MART) in Rovereto, Italy, conducted a study in 2009 to assess the factors that influence visitors to revisit the museum. Rovereto, while in Italy rather than the United States, has a similar city size to Fitchburg - the former has approximately 39,900 inhabitants (Italian National Institute of Statistics, 2018), while Fitchburg has about 41,900 (United States Census Bureau, 2020). Both museums primarily attract regional and local visitors, making MART's study a useful comparison for this project.

MART collected data through face-to-face interviews with 350 museum visitors (Brida et al., 2012, p. 168). The participant sample was selected to reflect diversity across gender and age (ibid). The study did not mention any attempts to include diversity in race or nationality. However, most participants were local or came from surrounding regions (ibid), which is similar to FAM's audience situation in terms of visitor proximity to the museum. The questionnaire was organized in six sections and included 56 questions in total (ibid, p. 70). The questions gathered information on socioeconomic features, trip description and costs incurred by the respondent, information about the museum, motivation, satisfaction, and loyalty (ibid). A five-point Likert

scale was used, ranging from “not important” to “very important” for the motivation factors, and from “strongly in disagreement” to “strongly in agreement” for assessing tourist’s satisfaction, and from “very unlikely” to “very likely” for the loyalty factors (ibid).

The findings of the study showed that MART can benefit from strategic alliances with other cultural institutions, and that the museum could serve as the icon for the city of Rovereto in order to create an instant association of the city with the museum and facilitate marketing opportunities (ibid, pp. 168-173). The study also found that interviewees with a lower probability to repeat their visitation still had a strong intention to recommend the museum to friends and relatives (ibid, p. 173). As a result of this finding, the study recommends giving visitors tangible incentives such as discount vouchers for entry fees or museum shop purchases to incentivize return visits (ibid). This example demonstrates how survey results can identify opportunities for museums to improve their services, and thus to increase attendance and customer satisfaction, by identifying where there is a disconnect between visitor intentions and the resources that the museum provides and working to bridge that gap.

Another case study comparison was conducted by Mylonakis and Kendrisakis in 2006. The purpose of their study was to investigate whether or not the Cambridge & County Folk Museum (now called the Museum of Cambridge) in the United Kingdom had delivered ‘quality service’ to its external customers (Mylonakis & Kendrisakis, 2006). Although not an art museum, the Folk Museum is a relatively small museum that, through this study, carried out research related to visitor satisfaction, and therefore it provides a useful comparison to FAM.

The study was carried out at the museum in the first half of 2003, mostly on weekdays (ibid, p.44). As part of the project, researchers distributed questionnaires to visitors, staff members, and museum receptionists (ibid). They did not use a focus group, choosing instead to

provide all interviewees with surveys directly and to emphasize that the interviewer was not part of the museum staff, in an effort to gain "more authentic opinions" (ibid).

Participants ranked 'competence,' 'courtesy' and 'responsiveness' as the most important factors in determining museum service quality, and they cited 'access' as the area in which they were less satisfied (ibid, p. 45). About 45% of respondents said it was essential or very important that the Museum provides foreign language information (ibid, p. 48). The recommendations provided by the researchers after analysis of the survey data were to conduct research on audience needs and expectations regularly in order achieve the museum's goal of bringing in more youth and local visitors, including the languages of the museum's most frequent visitors in brochures, leaflets and labels, using high-tech features and quality website design to improve museum access and reputation, and prioritizing accessibility features (ibid, pp. 50-51).

This comparison study demonstrates that in order for the Fitchburg Art Museum to develop a more robust understanding of their visitors' needs and expectations, the museum can conduct regular surveys or other forms of evaluations to gather data and identify areas for improvement. FAM, like the Museum of Cambridge, has a bilingual program and ongoing efforts to improve accessibility, include more high-tech features in their exhibitions, and serve the local community. These similar goals indicate that FAM can benefit from conducting surveys in a manner similar to that of the Museum of Cambridge in this study.

The AAM article "Growing Audiences with the Annual Survey of Museum-Goers" (Gilliam, 2019) provides a case study from Minnetrista, a multi-disciplinary museum and garden in Muncie, Indiana. The staff recognized a need to better understand their audience's motivations, so they decided to participate in AAM's Annual Survey of Museum-Goers (ibid). The results of the survey proved that far more visitors were attending their special events, such

as farmers markets, rather than general admission or museum-focused visitor experiences (ibid). As a result, the museum took a new approach to visitor engagement and grew their visitation numbers, including for families (ibid). They are using data from the survey to guide decisions about brand messaging and imagery, their current strategic plan, and their annual priorities, and they are committed to continuing to gather data and track changes over time (ibid). This example provides a U.S.-based case study showing how surveys can help museums identify areas for improvement. Based on this example, this case study recommends surveys in general as the central step in FAM's evaluation plan and also suggests that the museum consider participating in the AAM's Annual Survey of Museum-Goers in order to further build their understanding of their visitors.

7.4. Best Practices for Surveys

Guidance for designing sample surveys came from several different survey guides, as well as example surveys from various museums. ACME ticketing has a guide titled "Museum Exhibition Feedback Questionnaire" (2023) that emphasizes, once again, the importance of identifying your goals in order to build the "most pointed and optimal questionnaire." They also explain the pros and cons of providing fully online surveys versus in-house surveys via kiosks or tablets. Online surveys enable museums to reach every visitor or member who gives their contact information, thus providing a way to build email pools, while on-site surveys "ensure that guests are giving the most recent and authentic recollection of their experience" and can make it more likely for visitors to complete the survey, since they can physically see it in the space rather than receiving it in an email (ibid).

ACME also highlights the benefits of surveys: anonymous surveys allow museums to collect honest, unbiased responses; surveys can be periodically altered to learn new information

from respondents; surveys can obtain open-ended answers that paint a fuller picture of the responses; and surveys are relatively inexpensive, reusable, and flexible (ibid).

The Audience Agency provides a guide titled "Visitor Guidelines Part 1: How to Design a Visitor Survey" (2013) that outlines the benefits of visitor surveys and how to best conduct them. They note that visitor surveys can help organizations understand their visitors better, identify necessary improvements to services or facilities, identify obstacles to visitor attendance, inform marketing activity, and validate spending or seek funding (The Audience Agency, 2013). The organization recommends that surveys be between 2-4 pages, or 1-2 double-sided pages, in order to collect enough information without confusing or wearing out the respondent. The layout and design of the survey should be simple and straightforward, and the questions should be worded clearly and simply and should flow in a logical sequence (ibid). Survey questions should generally flow from easy to more difficult, and from general to more specific. Any sensitive or personal information should be placed towards the end of the survey, and it is recommended to close the survey with an open-ended question where people can leave comments (ibid). Surveys should include a mix of multiple-choice questions, which are easy to collate and compare, and open-ended questions, which are good for collecting visitor comments (ibid). The guide advises that when designing a survey, it is important to keep in mind how you might compare these metrics to data you already have, or to data from other organizations, and to ensure that the framework you are building can be used for these comparisons (ibid). Other useful information to include in the survey is an introduction, a privacy statement, the date, instructions on how to return the survey if it is a physical version, and a thank-you to the respondent (ibid). Survey designers also include an incentive such as entry into a raffle if they believe it will allow them to

gather more responses (ibid). If an incentive is included, the survey needs to include contact details so the organization can contact the winner (ibid).

Additional survey guidance came from "Who's Coming? Respectful Audience Surveying Toolkit," created by the nonprofit OF/BY/FOR ALL in collaboration with Slover Linett Audience Research. They provide advice particularly for collecting demographic data, including suggestions for respectful ways to ask "sensitive" questions (OF/BY/FOR ALL, 2023). They also explain how to collect data from a representative random sample of respondents by, for example, approaching every fourth person who enters an exhibition space or event (ibid). Although it may lead to more randomized results, this approach involves training a team of people to spend significant time directly administering surveys to participants, rather than having a more automated process through online forms or tablets set up around the museum (ibid). Based on FAM's staff capacity, this case study recommends a more automated process rather than this hands-on approach, but directly asking visitors to fill out surveys is a potential method for the museum to use if they are not receiving many results or if they believe that they are not reaching an accurate representative sample of respondents.

As previously mentioned, the Fitchburg Art Museum is a bilingual museum, so surveys and reports must be published in both English and Spanish. This will require time to send finalized surveys to a translation service before inputting the questions into a survey tool, and to send reports to a translation service before combining text and graphics and publishing them.

Many online survey tools exist, offering both free and paid options. FAM is already subscribed to Constant Contact, a digital marketing company that also offers survey capabilities, so it is recommended that the museum use this survey tool. The company's website offers step-by-step guides on how to create surveys and view, analyze and export the results, and their

capabilities match what is needed for this kind of project (Constant Contact, 2024a; Constant Contact, 2024c). In addition, Constant Contact will utilize FAM's existing contact list and provide information on the response rates of the surveys (ibid). The tool also offers some capabilities for editing a survey page that is already active, providing the opportunity to adjust the survey as needed after distributing it (Constant Contact, 2024b).

SurveyMonkey is another popular survey tool that offers a free basic plan, but their paid plans offer more capabilities for automatically compiling and reporting on results (SurveyMonkey, 2024). If the museum wished to switch to a different survey tool for any reason, one member of the task force could subscribe to SurveyMonkey's Individual Advantage plan for $39/month, which is their least expensive individual plan (ibid). This plan offers more benefits than the free version, and it has enough capabilities to fulfill the purposes of this evaluation project without needing a more upgraded plan. However, for the purposes of this case study, Constant Contact is the best option for FAM, especially because the museum is already subscribed to a plan with the company.

There are several limitations impacting this evaluation plan, based on the research on evaluation challenges presented in the Challenge section (see Section 6). Time limitation is often the most crucial, and other impacts include staffing and cost limitations (Williams et al., 2005, p. 547). In order to compensate for these limitations, the project recommendation suggests that the museum begin by implementing two surveys - the visitor survey and the member survey. Surveys for donors and event attendees are still presented as options for future use and can be used to assess impacts for different target audiences. However, beginning with two surveys creates a more manageable project in both time and cost, and serves as a pilot survey program that can be recreated and adjusted later on.

Since smaller museums, including FAM, have fewer members, the provided plan recommends trying to reach a majority of members in the museum's database. FAM may include the option to send paper versions of the survey to members that request a paper version, since paper surveys can be more accessible to audiences who are less familiar with technology (OF/BY/FOR ALL, 2023). However, including the option for paper necessitates extra time to manually input the responses into the online survey tool, making it more difficult to compile and analyze results (ibid), so the museum should take that into consideration when offering paper surveys. In addition, paper surveys require some additional costs for printing and mailing (ibid).

The provided cost estimate (see Section 8.2) includes costs for staff time, survey translation, distribution methods, and marketing. Marketing costs are separate from staff costs because FAM is currently outsourcing all of their marketing until they hire a new Marketing Manager. The use of a survey tool, as well as data compilation, are listed as free because they are already provided through Constant Contact.

8.1. List of Recommendations

Step 1: Building a Task Force

- Create an evaluation task force with 2-3 FAM staff members who have capacity
    - Time estimates:
        - 10 hours to edit surveys as needed and input survey data into survey creation tool (total time for all task force members)
        - 2 hours per month to look over survey responses that have been submitted and brainstorm possible next steps, to be presented at upcoming Development Team meetings (time for each individual task force member)
    - Remain cognizant of time, commitment and energy required of staff members and adjust as needed

The next steps are to administer surveys to FAM visitors and members based on the examples created for this case study.

Step 2: Survey Creation

- Make any final edits to the survey as needed to reflect the metrics you want to test.
    - This can include checking with the Development Team at a team meeting to see if they have any more edits before finalizing the survey
    - Ensure that the survey remains between 1-3 pages
- Send the survey in its written form to a translator to translate into Spanish
- Transfer the survey into the survey creation tool (i.e. Constant Contact)
    - The beginning of the survey should include the option to take it in English or Spanish. Selecting either option should direct the respondent to the page of questions in the chosen language

    - Ensure that the English and Spanish versions match in terms of question type and layout in the survey tool
- Test the online survey by having a handful of FAM staff members take the survey and offer feedback
    - Taking the survey should take each person 5 minutes or less. That way, staff can tell visitors that the survey takes 5 minutes or less when asking them to take it

Step 3: Distribution

- Visitor Survey:
    - Set up the survey via QR codes posted around the museum
    - Set up handheld tablets to give out at the front desk (to be returned to the front desk upon the completion of the survey), and/or a standing tablet kiosk in the lobby of the museum, possibly between donations and concessions
- Member Survey:
    - Send out the survey via a short description and link included in FAM's E-Blast

Step 4: Analysis

- Data will be automatically compiled and ranked by the survey tool
- Once a month, or more frequently as needed/desired, the evaluation task force should set up a meeting to look over the responses compiled by the survey tool and discuss takeaways or suggestions for changes
- These takeaways and suggestions can be presented at a Development Team meeting to share the progress of the evaluations, share what has been learned from respondents, and problem-solve any issues or recommendations that have been identified

- Long-term analysis can include comparison of responses over time, especially comparing results one year later from the launch of the survey and continuing to track changes annually
- Online surveys can also be easily adjusted over time as needed

Step 5: Sharing Findings

- Anytime after the first month of survey response collection is complete, the evaluation task force can consider sharing specific data or results of the survey with museum stakeholders
- Results can be presented to the rest of the FAM Staff at an All-Staff Meeting
- Results can be presented to the Board of Trustees at a Development Committee Meeting or another Board meeting
- My recommendation is to create a brief data story to include in FAM's Annual Report. This can be a page or a half page that shares one to three specific lesson(s) learned from administering the survey or highlights a change that the museum has been working on as a result of the survey.
    - The data story can be modeled off of the examples from the American Alliance of Museums (See Wilkening, 2023a; Wilkening, 2023b; Wilkening, 2023c), although it does not need to be as long or complex as those
- Long-term, results can be shared publicly each year via the Annual Report or shared with donors, staff members, and the Board of Trustees as needed
- In addition, staff members communicating with donors/funders, applying to grants, or reporting on grant and donor-funded activities can access data for those applications and

reports from the survey results. They can also select quotes to share with funders from the open-ended responses sections on the survey.

- When sharing quotes with funders, ensure that the quote is anonymous or that the person has given permission to use their name along with their quote

Additional Notes

These steps can also be followed for the events and Annual Fund donor surveys. Based on timing and staffing limitation, this plan recommends beginning with the visitor and member surveys to get a sense of how they work and not create an overwhelming amount of work for FAM staff. If these two surveys go well, or if FAM Events staff wishes to get feedback on a particular event, the same steps apply to create and administer additional surveys. It is recommended to distribute the events survey similarly to the visitor survey, via QR codes/tablets, and the Annual Fund donor survey similarly to the member survey, as a fully online version emailed to Annual Fund donors with a cover note.

8.2. Timeline and Cost Estimates

Timeline:

- 1 week for creation of task force
- 1 week to edit the survey and get it translated
- 2 weeks to transfer the survey into survey tool and set up distribution methods (create QR code labels and/or set up tablets/tablet kiosk)
- 1 week to test the survey
- Begin collecting data! Review as a team at least once per month
- After one-three months have gone by, begin discussing possible ways to share findings

Rough cost estimates (for one year of this project):

Staff time:

- 10 hours survey creation x $20*/hour = $200
- 2 hours survey review x 12 months x $20*/hour x 3 people = $1,440

Survey translation:

- 400 words per survey x .19¢ each** x 2 surveys = $152

Distribution costs (QR code graphics and or a tablet) = $500

Marketing costs (emails and social media posts) = $400

Survey tool and data compilation = free

Total cost = $3,172

*I do not have information on the salaries of individual staff members, so this is a general estimate

**Translation costs are based on the rate previously quoted in FAM exhibition invoices

8.3. FAM Visitor Survey

Thank you for sharing your feedback with us! Your answers will help us improve our work, and they'll help us understand how our work impacts the community. All responses are anonymous.

What motivated you to visit the museum today? (Please select all that apply.)

- General interest
- See a particular exhibition (If so, which one? _____)
- Attend a particular program or event (If so, which one? _____)
- Conduct research/school assignment
- Personal fulfillment (to learn, relax, pass time, for fun, etc.)
- Spend time with friends/family
- Entertain out-of-town visitors
- I received a free pass to the museum
- My company is a corporate member at FAM
- Other: _____

How often do you visit FAM?

- Today was my first visit
- I visited a long time ago
- I visit occasionally
- I visit regularly

Are you a FAM member?

- Yes
- No
- No, but I would like to become one! (if so, please provide your email here: _____)
- I was previously a member, but I have not renewed my membership this year
- Other: _____

On your visit, who accompanied you?

- Friends
- Family
- Partner
- Coworkers
- Visited on my own
- Other (please specify)

If you chose family, what are the ages of the family members who accompanied you? (Select all that apply.)

- Child (0-5)
- Youth (6-18)
- Adult
- Senior (65+)

How did you hear about the museum?

- FAM Website
- Other website
- Print ad
- Social media
- News story
- Word of mouth (recommendation from a friend, colleague, neighbor, relative, etc.)
- Other (please specify): _____

How would you rate your visit today overall (1 = very satisfied & 5 = very dissatisfied)?
1 2 3 4 5

During your visit today, which have you done or do you plan to do? Please select all that apply.

- Engaged with a Museum Guide in the galleries, or received a tour
- Visited _____ (specific exhibit)
- Attended an artist talk, workshop, or other special event
- Engaged with the Learning Lounge (interactive art-making activities in the hallways)
- Visited the Museum shop
- None of the above
- Other (please specify): _____

Did you use the Spanish language materials in the museum (did you read wall texts and labels in Spanish)?

- Yes
- No

Would you recommend the museum to others?

- Yes
- No
- Other: _____

What was your favorite part of your overall museum experience?

_____

How can we improve the museum experience?

_____

Is there anything else you would like to share with us?

_____

Would you like to opt-in to receive FAM's monthly E-blast? The E-blast keeps you up-to-date on our current exhibitions, programs, and events.

- Yes
- No

If so, please provide your email here: _____

8.4. FAM Member Survey

Dear FAM Member,

Thank you for being part of the FAMily! We appreciate your support and membership at FAM. We hope you will take a minute to share your answers to some questions. Your input will help us improve your membership experience and understand how our work impacts the community. All responses are anonymous.

Are you a FAM member?
- Yes
- No
- I was previously a member, but I have not renewed my membership this year
- Other: _____

How long have you been a member?
- I became a member this year
- 1-2 years
- 3-5 years
- 5-10 years
- Longer than 10 years

Do you plan to continue being a member?
- Yes
- No
- Not sure

Why or why not? _____ (optional question)

Demographic questions:
What is your age?
- Under 24 years
- 25-44 years
- 45-64 years
- 65 years and over
- Prefer not to say

General questions:
What is your preferred method of contact?
- Email
- Phone
- Mail
- Text
- Other: _____

How do you prefer to learn more about FAM?

- Website
- E-Blast
- Mail
- Social media
- Personal visit

How often do you visit FAM?
- 0-2 visits per year
- 3-5 visits per year
- 6-10 visits per year
- More than 10 visits per year

How often do you attend FAM events and programs?
- I haven't been to any FAM events or programs
- Less than once per year
- Occasionally (1-3 times per year)
- Regularly (more than 3 times per year)

What kinds of events do you prefer? Please select all that apply.
- Exhibition openings
- Artist talks/panels
- Hands-on workshops
- Guided tours
- Performances
- Evening events (cocktail parties, etc.)
- Other (please specify): _____

What do you value most about being a member?
_____

Which member benefits do you value the most? Please select all that apply.
- Free admission
- Museum shop discount
- Discounted special events/evening events
- Other: _____

Are there other member benefits you'd like to see us consider?
_____

Your Story:
As a museum, we love stories! If you can, please share a special memory about FAM.
_____
_____

Can we follow up with you about your experience? If so, please provide the best way for us to contact you here: _____

Would you like to opt-in to receive FAM's monthly E-blast? The E-blast keeps you up-to-date on our current exhibitions, programs, and events.

- Yes
- No

If so, please provide your email here (unless provided for the previous question):
_____

Please add any additional comments or feedback:
_____
_____

8.5. FAM Annual Fund Donor Survey

Dear FAM Annual Fund Donor,

Thank you for being part of the FAMily! We appreciate your support and care about your opinion. We hope you will take a minute to share your answers to some questions about why you support FAM.

Your input will help us improve your donor experience and will help us to connect with additional philanthropic partners as we move forward and follow our mission.*

> *If you would like to include an incentive: "As an additional benefit for participating, all respondents will be entered into a raffle for _____."

Name: _____
Email: _____

Demographic questions:
What is your age?

- Under 24 years
- 25-44 years
- 45-64 years
- 65 years and over
- Prefer not to say

What is your zip code? _____

General questions:
What is your preferred method of contact?

- Email
- Phone
- Mail
- Text
- Other: _____

How do you prefer to learn more about FAM?

- Website
- E-Blast
- Mail
- Social media
- Personal visit

On a scale of 1-5, please rank your agreement with these statements. (1= Strongly Disagree; 5= Strongly Agree)

- I feel appreciated as a donor by FAM
- I enjoy the events and programming at FAM

- I feel properly recognized for my donations
- The impacts of my donations are well communicated to me
- I feel meaningfully engaged with FAM
- I would like to be more engaged with FAM
- FAM asks me for donations with appropriate frequency

If you answered Disagree or Strongly Disagree to any of the above questions, please provide suggestions for how we could improve your experience:

_____

Are you a FAM member?

- Yes
- No
- I was previously a member, but I have not renewed my membership this year
- Other: _____

Areas of interest:
Please check off which museum sectors interest you:

- Exhibits
- Education
- Museum events and public programs
- Other: _____

Your Story:
As a museum, we love stories! If you can, please share a special memory about FAM.
_____
_____

Can we follow up with you about your experience? If so, please provide the best way for us to contact you here: _____

Would you like to opt-in to receive FAM's monthly E-blast? The E-blast keeps you up-to-date on our current exhibitions, programs, and events.

- Yes
- No

Please add any additional comments or feedback:
_____
_____

We really appreciate you taking the time to give us your feedback. Please reach out to _____ or call _____ with any further questions or concerns.

8.6. FAM Events Survey

Thank you for sharing your feedback with us! Your answers will help us improve our work, and they'll help us understand how our work impacts the community. All responses are anonymous.

What event did you attend at FAM today?
(either fill in the blank, or include a bullet list of upcoming events)

How often do you visit FAM?
- Today was my first visit
- I visited a long time ago
- I visit occasionally
- I visit regularly

Are you a FAM member?
- Yes
- No
- No, but I would like to become one!
- I was previously a member, but I have not renewed my membership this year
- Other: _____

On your visit, who accompanied you?
- Friends
- Family
- Partner
- Coworkers
- Visited on my own
- Other (please specify): _____

If you chose family, what are the ages of the family members who accompanied you? (Select all that apply.)
- Child (0-5)
- Youth (6-18)
- Adult
- Senior (65+)

How did you hear about the museum/today's event?
- FAM Website
- Other website
- Print ad
- Social media
- News story
- Word of mouth (recommendation from a friend, colleague, neighbor, relative, etc.)
- Other (please specify): _____

How would you rate the event today overall (1 = very satisfied & 5 = very dissatisfied)?
1 2 3 4 5

In which of the following ways did the event impact you?*

- It improved my knowledge or understanding and satisfied a personal/academic/professional interest in the subject.
- I was moved emotionally, experienced fascinating and beautiful things, and felt a strong sense of personal connection.
- It stimulated my own creativity and I was able to reflect, contemplate, and recharge.
- I spent time with people in a nice place and got to visit a major attraction in the area.

*This is an example - FAM event staff can write specific event goals here or add them to a table question like the example below.

Please tell us how much you agree with the following statements regarding your visit today.	Strongly Agree	Agree	Neither/ Unsure	Disagree	Strongly Disagree	N/A - Didn't Use
I enjoyed my visit to FAM.	5	4	3	2	1	
The event improved my knowledge or understanding and satisfied my interest in the subject.	5	4	3	2	1	
The event moved me emotionally or gave me a strong sense of personal connection.	5	4	3	2	1	
The event stimulated my own creativity and I was able to reflect, contemplate, and recharge.	5	4	3	2	1	
At this event, I learned something new about my own culture or another culture.	5	4	3	2	1	
FAM staff members were helpful and friendly at this event.	5	4	3	2	1	
Bilingual materials (English/Spanish wall texts, labels, printed materials)	5	4	3	2	1	

enhanced my visit to this event.						

Based on this event, would you recommend the museum to others?

- Yes
- No
- Other: _____

Would you like to see more events like this in the future? Why or why not? _____

Please select the following Museum events you would be interested in attending in the future:

- Exhibition openings
- Artist talks/panels
- Hands-on workshops
- Guided tours
- Performances
- Evening events (cocktail parties, etc.)
- Spanish language events
- Other (please specify): _____

Is there anything else you would like to share with us?

_____

Would you like to opt-in to receive FAM's monthly E-blast? The E-blast keeps you up-to-date on our current exhibitions, programs, and events.

- Yes
- No

If so, please provide your email here: _____

9. Conclusion

The Fitchburg Art Museum faces several internal and external barriers to developing evaluation methods, especially as a small museum. In order to resolve some of these issues and support the steps outlined in the museum's 2024-2028 strategic plan, this case study presented an evaluation plan for the museum's Development department with a list of recommended actions and four sample surveys to assess their understanding of four target stakeholder groups: visitors, members, Annual Fund donors, and event attendees. In addition to providing these resources, this study outlined the scope, challenges and limitations that influence the museum's evaluation process, and it included recommendations on how to account for those challenges. Through background research, the study proved that these evaluation plans will help the department better understand their stakeholders, make improvements to their services, prove their value to funders and policy makers, and establish trust between the museum and its stakeholders.

This is the first published study outlining evaluation plans for the Fitchburg Art Museum, and it provides a unique compilation of resources to contextualize the museum evaluation field, as well as specific advice on conducting, analyzing, and sharing the results of surveys. Of course, this case study provides recommendations for evaluations within one department at the Fitchburg Art Museum, and some additional research and work would be needed to adapt these plans to a different department for a different museum entirely. Further research can help fill in gaps in knowledge about museum evaluation specifically in the United States, create a more solid theoretical framework in this field, and cultivate a "community of practice" to raise the profile of evaluation and encourage more museums to follow suit.

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