

BIBLIOGRAPHY – WORKSHOP #1 INTERPRETATION

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Telling the Story: Better Interpretation at Small Historical Organizations

by Timothy Glines and David Grabitske,
Minnesota Historical Society

INTRODUCTION:

Interpretation is a five-syllable word with special meaning for those who work or volunteer for historical organizations. It's a word often coupled with two others in our mission statements: collect and preserve.

Unfortunately, it is often the part of our mission that is given insufficient attention. Too many organizations still take the easy route: just arranging artifacts in categories, creating historic tableaux with a few labels, or letting visitors wander through our historic houses. We can do better! Because interpretive programs are the most public and visible aspect of our operations, their quality determines how our organizations are regarded. One does not need to be part of a large organization to do excellent interpretation. Organizations with a few paid employees, or even those with all volunteers, can do it effectively.

The essence of interpretation is story telling. And what can be more natural for human beings than to tell stories? Communications expert Peter Orton tells us: “Stories enhance attention, create anticipation, and increase retention. They provide a familiar set of ‘hooks’ that allow us to process the information that we hang on them.”¹

How do we tell compelling stories in historical organizations? Before we can answer that question, let us consider what interpretation is; what things to keep in mind when interpreting; and, in what ways museums carry out story telling. Planning an interpretive program is necessary, but cannot be effectively accomplished until the planners understand something about the institution, the goals of the institution and its interpretive program, and interpretation in general.

Recognizing that our organizations need to serve broad audiences makes telling our stories a lot harder. We cannot simply say that one size fits all and expect people to take it or leave it. However, an individual program might be developed by focusing on a segment of the overall audience, particularly on underserved segments.

Historical interpretation translates human stories from the past into meaningful thoughts for people in the present. It makes past experiences instantly understandable by a modern audience. At one historic site with a one-room school filled with benches, interpreters are often questioned by school children making instant associations with their own school. They ask, “How did they do their homework?” What they mean is where, since there are no desks. A clever interpreter replied, “Pupils complete their assignments on laptop chalkboards, called slates.” What this interpreter did was create an instantly recognizable concept in the child’s mind of a chalkboard the size of a laptop computer.

It can be hard for small local history museums to tell a story well. Resources are limited and small organizations often face the challenge of telling stories in difficult places such as historic houses converted to museum use. But perhaps the most serious challenge is simply a lack of familiarity with interpretative theory and technique. Too often, long-serving volunteers have become attached to certain stories and tours and are unwilling to consider changes that would serve new audiences. Even staff trained in museum studies or public history may

have had more courses in administration and collection care than in interpretation. Without effective interpretive programs, our organizations risk becoming irrelevant.

THINGS TO KEEP IN MIND: THE OPERATIONAL PLATFORM OF ‘TELLING THE STORY’

Why tell a story? The answer is usually found in most of our mission statements: to educate. Local historical societies should be educational institutions. What good is it if we are mere repositories of historical facts and objects? Local history organizations should be able to tell people what all that stuff means.

Telling a story complements our primary educational goal by responding to two major reasons people visit museums and historic sites, namely recreation and entertainment. Although local historical societies should be careful not to let these two helpers eclipse the primary goal, visiting a history museum can be a healthy diversion. At many museums, visitors get to try their hands at certain parts of historical processes by using either reproductions or expendable artifacts from the “educational collection.” Such interpretation can be seen as recreational. Other visitors are treated to dramatic vignettes, rides in old wagons and trains, and video documentaries; they are entertained. But such experiences must still tell people something about the past. Educational enrichment must always be first, or local history museums will reduce themselves to historically oriented campgrounds or theme parks.

To keep education at the forefront, keep four things in mind when planning an interpretive

It Starts with Audiences

We should always identify or define the audience for our interpretive programs. For many small organizations, particularly in their formative stages, audience identification may be an afterthought. So, how do we define our audiences? For most historical organizations with geographically defined or place based missions, the audience includes all the people who reside in our geographic service area, not to mention those who are only visiting. It is no longer feasible, especially for those of us funded by government sources, to serve a small slice of the community—for example, those whose ancestors have lived here for four or five generations. Even organizations with missions defined by subject (for example, the history of aviation, fishing, railroads, farming) recognize the need to serve more than “buffs” already knowledgeable about the subject matter.

activity: what a story is, how people learn, the potency of interpretation, and basic customer service principles. These guiding principles will keep an interpretive program on target.

What is a story? There are many definitions. One narrative theory called structural-affect,² maintains that the goal must be meaningful to the audience, that the audience develops empathy for the protagonist, and that the outcome holds a surprise for the audience. When using the structural-affect model for historical interpretation, the difference is that, rather than a surprise, we impart a human truth at the end. For example, an interpreter

[1] Quoted in Elizabeth Weil, “Every Leader Tells a Story,” *FastCompany* 15 (June/July, 1998): 38.

[2] Peter Orton, at IBM’s T. J. Watson Research Center, http://www.research.ibm.com/knowsoc/ideas_featurestructure.html.

pretending to be a spectator at a vintage baseball game approached modern spectators, saying, “I’m sure this game looks a little different from what you’re used to, but I assure you that this is an improvement to what you all played as children.” He went on to relate briefly how the rules used in 1860 either codified or altered earlier practice. In doing so he imparted the truth that human beings are constantly tinkering with things, hoping for a better result.

People learn in a variety of ways. However, scientists who study how people learn say we generally learn using our culture and prior knowledge as a platform. We take in new facts, such as antique baseball rules, through a variety of media to assist in problem solving and reasoning to draw conclusions and comparisons with things we already know, such as modern baseball rules. These new facts should spark our natural curiosity. We respond well to structure. If our visitors know the goals of the program, they will be ready to learn.³

Using the structural-affect model and understanding that people use what they are already familiar with, the interpreter can make translations with what might be termed “The Three C’s of Interpretation.” That is, compare and contrast in context. Once we establish the context of the past, we can make comparisons and contrasts with our own situations, as in the example of the “laptop chalkboards” or our familiarity with the rules of the ball game. Context enables us to understand that those who lived before were products of their own time and place just as we today are products of ours. When visitors understand context, contrast and comparison can convey a meaningful history.

Humor can be as useful as it can be troublesome. Used well, it can help further a lesson, drive home a point, and reassure an audience. One reenactor, costumed as a Civil War soldier, used humor to his benefit. He was talking to a class of school children, comparing and contrasting his historical situation with theirs. Just like the children, he had to obey two things that he wished he didn’t: time and teachers. His “teachers” were officers who had gone to a special school and received a special piece of paper called a commission. He had to obey time too, because his “teachers” wanted things in good order. In essence, this grown man was being treated like a child. He then wryly commented for the adults present, “Guess that’s why they call us Infant – tree.” The pun helped at least the adults to remember that being in the army is like being a kid in school.

Historical interpretation and comic strips have a lot in common: both are potent combinations of ideas and illustrations. Cartoonist Berke Breathed, in his introduction to *Classics of Western Literature: Bloom County 1986-1989*, explained what makes stories work for comics. Rather than surprise the audience, a good story relates a

basic human truth—the truth of anxiety seen in *Peanuts* character Charlie Brown, for instance.⁴ When interpreting history to the public, it is important to connect them to the past on a basic level; doing so builds empathy with human truth, enriching the mind and spirit.

Just as some local history programs allow recreation and entertainment to eclipse the primary goal of education, others allow artifacts either to become the story themselves or to be more important than a human story. According to cartoonist Bill Watterson, in his anthology *The Calvin and Hobbes Tenth Anniversary Book*, great ideas save boring illustrations better than great illustrations saving boring ideas. This is true for local history organizations as well. An artifact without a story or an interesting idea is not particularly educational. Many historical society collections contain the same items as the historical collection down the road. To someone who has heard about the general use of a sadiron, even the best surviving example of a sadiron will no longer be interesting. Who used this sadiron, and what was that person’s significance to your mission? Every artifact was used or made by a human being: it’s the human story that is interesting, not some obscure tool a modern person doesn’t use or recognize. The fact that some other person used the object makes translation of the story possible and meaningful. Objects must support the story you are telling.⁵

At a former state capitol building, the only two people on one tour admitted to the guide they both worked at another historic site. The guide had no stories to tell on his hour-long tour, just explanations of how curious artifacts were used. Instead of orchestrating a conversation about significant proceedings, grand architecture, interesting politicians, and important legislation, this guide knew only about the artifacts. When his visitors already knew about the artifacts, his tour was compromised and less meaningful. Perhaps because of limited training he did not know that objects could help him tell stories about the special community he was living in; and, therefore he was not able to provide a very good customer service experience. Few visitors know the meaningful local stories that we know, even if they live in our area—so it is best to take advantage of what makes our places special to live in.

The final key to effective interpretation is good customer service. We must pay attention to the interests of our visitors by telling meaningful stories, making sure not to fatigue them mentally with breathless depth or fatigue them physically with no chance to take it all in. Be kind and helpful. Take time to get to know them so you can kindle curiosity with the supremely interesting human stories you have to tell. As Watterson suggests, as long as you have the opportunity to speak to someone, you might as well say something useful.

[3] John D. Bransford, Ann L. Brown, and Rodney R. Cocking, editors. *How People Learn: Brain Mind, Experience, and School*. Committee on Developments in the Science of Learning. Commission on Behavioral and Social Sciences and Education. National Research Council. (Washington, D.C.: National Academy Press, 1999). <http://www.nap.edu/html/howpeople1/ch1.html>.

[4] Berke Breathed, *Classics of Western Literature: Bloom County 1986-1989* (Boston, MA: Little Brown & Company, 1990): two. Bill Watterson, *The Calvin and Hobbes Tenth Anniversary Book* (Kansas City, MO: Andrews & McNeel, 1995): 6.

[5] Watterson, 32. See also, Hilde S. Hein, *The Museum in Transition: A Philosophical Perspective* (Washington, D.C.: Smithsonian Institution Press, 2000), particularly chapter 4, “Transcending the Object.”

Being kind and helpful will lead you to what one interpreter summed up as “Know all, tell some.” One guide with a theatrical background saw the story she was paid to tell as being like lines in a play. She would not let visitors leave until she had concluded her “performance.” You can fatigue audiences with an exhaustive narrative. Withholding less crucial parts of the story can be a kindness. Visitors often sense when something is missing, and if their curiosity is aroused and they are so inclined, they will ask. Another interpreter described this activity as “digging holes.” Dig enough holes, and curiosity will trap the visitor in one of them. They will have to ask a question to get out.

Good customer service at our history museums means getting to know our guests even minimally so we do not bore them with things they already know. We must learn where our guests are coming from, if we expect to build on their knowledge. It means not putting up barriers to their experience. We must describe the experience ahead so the visitor is prepared to overcome challenges like stairs, long walks, no working restrooms, no water, unusual temperatures or light levels, and so on. In short, customer service is the consideration of human needs. By considering our guests’ needs, we show that we are fully engaged in their experience.

These four ideas—what a story is, how people learn, the potency of interpretation, and basic customer service skills—kept firmly in mind can produce enjoyable, high-quality interpretive educational opportunities. They can be applied to all kinds of interpretation. They drive curiosity by using the powerful combination of ideas plus good illustrations.

INTERPRETATION’S MANY FACES: VEHICLES OF INTERPRETATION AT LOCAL HISTORY MUSEUMS

Local historical organizations tell their stories in a wide array of interpretive media. We tell stories in museum exhibitions, in public programs conducted at historic sites and house museums, in programs conducted offsite in the community, and through other media, such as publications, where our interaction with an audience is indirect.

Choosing themes or subjects for interpretation should start with mission. It is certainly acceptable to do interpretive programs that go beyond an organization’s mission, but the mission should be the primary screen for program selection. Geographically based his-

torical organizations should have no problem knowing where to start, but it is important to take the time and effort to identify the historical themes that tell the story of your area. List the broad themes that help people understand the forces that have made your area what it is today. Your themes may have much in common with those of other areas in your region, but there will surely be some variations unique to your area.

Expand the list of historical themes by writing brief narratives about each one. Connect them with a timeline that includes specific people, places, and events. Then add lists of resources that you could use to develop interpretive programs. These will range from manuscripts and government records to oral histories, artifacts, and books. The information you collect about your historical themes should be dynamic. That is, you should always be adding new material and you should review the themes in light of new historical research.

While developing a list of historical themes is an essential part of planning interpretive programs, another way is to identify more universal themes that

can become a framework to connect the history of your area. Think of the big themes that apply to everyone: families, making a living, health, bereavement, and so on. Historian Joseph Amato calls on local historians to look into other themes, some so common that we don’t think about them, for instance the senses.⁶ How have the sounds and smells of a community changed over time? Amato would also have local historians study and interpret the emotional history of their communities through topics like anger and madness.

According to the National Park Service, themes connect tangible objects with intangible concepts and universals. For further information please see the NPS Web site for the online booklet *History in the National Park Service: Themes & Concepts*. www.cr.nps.gov/history/hisnps/NPSThinking/themes_concepts.htm

Museum Exhibitions.

It is not easy to create an effective exhibition. Unlike other forms of interpretation, which can be tailored to different audiences, museum exhibitions need to work with multiple audiences. They can only do so if they are well planned and executed.

The first step is to recognize that exhibitions are more than displays. A display of neatly arranged and categorized farm or fishing implements with a few labels does not tell a story. Even an arrangement of items in a recreated domestic setting, such as a 19th-century kitchen, does not tell much of a story. Neither technique does anything to engage museum visitors. National Park Service historian Freeman Tilden told us

Themes for Interpretive Programs

Given the wide range of human activity, historical organizations have no shortage of topics from which to choose. Of course, some stories lend themselves better to one interpretive medium than others. Some stories can be told well by an exhibition, for instance, but not in a walking tour.

[6] Joseph Amato, *Rethinking Home: A Case for Writing Local History*, (Berkeley, CA: University of California Press, 2002): 60. For another approach to developing historical themes, see Tom McKay, “Choosing a Local History Topic: Beginning With Concepts,” in *Exchange*, newsletter of the Wisconsin Historical Society’s Office of Local History Volume 24, Number 7 (January/February 1982). Available online: <http://www.wisconsinhistory.org/localhistory/articles/concepts.htm>.

nearly 50 years ago: information is not interpretation.⁷ Tilden defined interpretation as revelation based on information. Barbara Franco, the director of The Historical Society of Washington D.C., explains that museum exhibitions ought to create memorable experiences.⁸ When we plan an exhibition, we need to be conscious not just of what a visitor will see, but of what the visitor will do. Dan Spock, head of the Exhibits department at the Minnesota Historical Society, elaborates: “Exhibits are a mode of communication, but this process is primarily non-verbal, minimally textual, works more in the ‘gut’ than in the ‘mind’ and is inherently a two-way street, a kind of dialogue of meaning-making between visitor and museum.”⁹

Spock also recognizes that visitors bring a variety of knowledge, experience, and associations with them to the exhibition. Visitors use these things during a museum visit to create new experiences in a “personalized synthesis.” He feels that the story is the most common and natural way to move “the personal meaning into the social sphere, into the world of other people where it can be shared and understood.” Good exhibitions enable these kinds of experiences.

Isn't all of this impossible for the small historical organization with limited resources? Not necessarily. Even the smallest organization can do excellent exhibitions that address multiple audiences. Of course, it all starts with a clear goal. What is the exhibit about? What story does it tell? What are the primary messages you want visitors to take away after they have seen the exhibit?

Two key words to keep in mind while doing this are layering and interactivity. Layering recognizes that visitors will experience a museum exhibition in a variety of ways. We are all familiar with people who hurry through an exhibition and take very little time to read interpretive panels. Others, however, will spend a great deal of time and read everything. Most people are somewhere in the middle. The process of designing and fabricating exhibitions needs to consider all these visitor styles.

Visitors in a hurry need something to grab their attention. It might be large artifacts that are visually compelling. Or, spatial design can capture attention by drawing the eye to a particular area. These speedy visitors need to see exhibit headings in very large type size if we expect them to understand the message we are trying to convey.

Other visitors, those who might take more time for the exhibition, can be stimulated with other techniques. They are more likely to look at more museum objects, photographs and documents. They may also read text blocks and labels. To be effective, labels or text panels need relation to actual things in the exhibition. Too often, smaller museums retain labels for items after changing their exhibit. Also, be succinct because most visitors will not read lengthy descriptions.

Some visitors, of course, will take much more time.

We can engage them at even higher levels. They are more likely to want to share what they learn with others if they are in a group. They are the visitors who would sit down at tables with reading materials that allow them to explore more content. And they are more likely to interact with employees or volunteers who do demonstrations or portray historic characters.

Interactivity refers to techniques in which visitors are no longer passive but can take an active role in an exhibition. Interactivity is not just a passing fad. We know from numerous studies of learning development that people of all ages remember much more about an experience if they participate actively, as opposed to simply reading, seeing, or hearing something. In museum exhibitions, interactives can be simple or complicated. Most smaller organizations lack the resources to design, fabricate, and maintain complicated interactives, so it is best to use tried and true techniques. Things that work well include allowing people to handle reproductions or artifacts from the educational collections, role playing, games and puzzles, simulations of work situations, and mastering crafts and tools through “make it, take it” programs.

Spock says learning works best when it is informal. Exhibition visitors learn more when they are active participants and not preached to by an authority. Planners of good history exhibitions need to understand visitors' prior knowledge with a particular subject and use it to engage them. Spock suggests using stories of human experience common enough to be familiar to today's visitors, emphasizing the voices of real people from the past. He also advocates exhibitions representing the diversity of peoples, communities and roles to engage visitors' empathy and emotion. Spock does not avoid controversial issues in exhibitions, but presents clear, balanced accounts that do not impose one viewpoint over another. He believes visitors are perfectly able to decide for themselves, even allowing issues with contemporary parallels or implications to come to the foreground. Lastly, exhibits are to be welcoming, aesthetically pleasing, comfortable, and accessible to all.

Public Programs in Our Museums.

Public programs generally are history programs with some kind of human interaction. Every local history organization does public programming in some way. Perhaps the most common public programs are guided tours with a docent.

Researchers who study how people learn tell us that most people's tolerance for listening is limited to eight minutes. Many docents are aware of this and make sure they do not spend any longer than eight minutes at any one station. They also notice obvious body language from visitors who begin shifting their weight to relieve tired legs. When visitors are physically uncomfortable, they cannot listen as well.

[7] Freeman Tilden, *Interpreting Our Heritage*, revised edition (Nashville, TN: AASLH, 1967): 9.

[8] Barbara Franco. “What's New in Exhibits?” *Cultural Resource Management*, No. 5, (2000). National Park Service <http://crm.cr.nps.gov/archive/23-05/23-05-14.pdf>.

[9] Dan Spock, presentation titled “Exhibits: More than Displays” at workshops for Minnesota's Historical Organizations, spring 2002.

Costumed interpreters lead a growing number of guided programs. There are many variants, from strict first person, where the interpreter never strays from a certain time period, to third person that does not necessarily even need costumes. Small organizations might need to rely on community members who have developed a program well suited for its audience. Often reenactors, living historians, thespians, and interpreters are passionate about their subject and willing to provide programs at little or no cost. However, the organization should not allow just any program to happen. These sorts of programs require planning and evaluation too.

As with every other program, when you bring in someone from outside your staff or regular volunteers, it is wise to write out what you expect from, and what you will provide to the costumed interpreter. Be aware that costumed interpretation has its own language, so acquaint yourself with basic terminology. There are different kinds of costumed interpreters:

- reenactors are the basic hobbyists for whom enthusiasm knows no bounds;
- living historians study and document things often to extreme minutiae;
- thespians can give powerful and memorable performances; and,
- professional history interpreters generally value education above all.

None is necessarily better than another, but consider what each type can do for you. Each type has its pitfalls, as well. The reenactor may be enthusiastic, but can he relate well to the public? Is he well versed in his subject? The living historian, sometimes referred to as 'hardcore,' can lose sight of the broader educational message because she is far too interested in the type of stitches and the number of stitches per inch in her garments. The thespian, while powerful and memorable, may not easily interact with your audience while running the course of the 'script.' A professional history interpreter, while primarily an educator, may be willing to sacrifice some small parts of accuracy for the greater educational good.

Also be aware that the method a costumed interpreter uses may or may not be appropriate. Tom Sanders' excellent article on interpretation points out, "First person in its purest form does have some drawbacks." Cultural differences, willingness to 'play the game,' limitations of the time period or of social class being enacted, and so on sometimes get in the way of the educational goals we set for programs.¹⁰ Of course, thinking about method applies to all our programs.

Costumed interpreters often function at historic sites, historic house museums, and "pioneer/historical villages." Historical environments are often the best places for costumed interpreters to work. Visitors can easily walk with their predecessors, feel like them, and even begin to imagine themselves living as their forebearers did. Here visitors can readily learn about the lives and motivations of people in the past. Of course,

such environments also present other challenges such as adequate staffing, proper maintenance, a consistent message, staff morale, training and discipline, and the cost of clothing, reproductions, and other consumables.

Other public programs use onsite interpretation just like docents and costumed guides. Many local history organizations have regularly scheduled meetings at which there is usually some kind of program, often a guest speaker. Slide shows, documentaries, lectures, sing-a-longs, facilitated sharing sessions, book readings, and other such programs are vehicles for telling some important story of your community.

Public Programs in the Community.

Local historical organizations offer many public programs off site. These programs include tours guided by brochures or a recreational activity guided by a historian.

Many small history museums partner with local heritage preservation organizations to produce walking tours of historic downtowns. Likewise, countywide historical museums develop driving tours of historic places in their region or create historical marker systems which, when coupled with a brochure, tell a story about a much larger area. Even more broadly, multiple historical museums may create a theme tour, such as a tour of historic sites related to children's authors.

Recreational opportunities led by a historian are increasingly popular, and history museums are responding. Tour groups might ride bicycles down a path converted from an old railroad line, or through multiple historic areas in larger towns that would be impossible to cover on foot. Some specialized walking tours require a guide, especially those focusing on faint traces of historic sites long razed. In areas with snow, a historian might accompany groups on snowmobiles, snowshoes, or cross-country skis past familiar historic sites that evoke a different feeling and association than they would in the summer. Enos Mills was a tireless advocate in the 1910s for National Parks and the learning opportunities afforded in them. His many books and magazine articles are still good advice for modern guides, whether they are leading groups through pastoral or urban wildernesses. The popularity of site-specific tours today is much the same as it was in Mills' day: people are too busy to stop and consider what they are speeding past.

Cemetery walks are a popular combination of walking tours and costumed guides. Here, after extensive biographical research, volunteers and staff sometimes portray former residents who return to life near their headstones and present a brief story to tour groups. Sometimes a historian leads a cemetery walk. The tour might encounter any number of "ghosts" or markers, but they all relate to some overall theme. To that end many cemetery walks will feature themes like women activists in the community, victims of major natural disasters, railroad workers and their families, and the community's military veterans.

A combination of recreation and history occurs at

[10] Tom Sanders. "Thoughts on Effective Living History: Interpretive Suggestions," *Midwest Open Air Museums Magazine*, v. 11, n. 1 (Spring 1990): 10.

recreated “bat and ball” games. Interpreters, volunteers and the general public play “base ball,” rounders, cricket, and other versions of ball games—often in appropriate reproduced apparel, but always by the historically documented rules. While the public or demonstrators who participate may have fun and learn about the game, not many sponsoring institutions take the time to make the story of the game relevant to the public watching the event. These types of games make translating history easier because baseball is such a common experience for so many Americans.

Requiring visitors to participate is one way to ensure both a memorable and actual learning experience. A unique combination of outdoor recreation and historical experience is found at Connor Prairie, a historic site near Fishers, Indiana. They decided to address a highly sensitive subject, namely African American slavery. The program is “Follow the North Star,” and requires all the visitors to participate in the program as a group of runaway slaves. It is a somewhat physical program covering a lot of ground at night, where they meet various historical interpreters, from slave hunters to abolitionists and Quakers. Through first hand experience, visitors learn what it was like to be a runaway slave in the mid-nineteenth century.

At one Canadian museum that presented a lesson on the War of 1812, guests were randomly handed note cards on which were written quotations from original participants. The lesson focuses on an academic mystery: who held the cannons at Lundy’s Lane on July 25, 1814, and when? With the aid of a narrator, each participant stepped forward to “testify” to what was seen that night. At the end of the program, the narrator asked visitors to solve the mystery and concluded by briefly describing the academic debate. The point of the program is not only to show a past human activity, but also to show how those events still affect people today. The visitors developed empathy for multiple protagonists through individual points of view.

All public programs should carefully consider educational goals. History organizations must make sure all their programs meet the mission in some way and are evaluated to see whether the program furthers its mission. Evaluation does not have to be complex, just conducted methodically to produce meaningful feedback in guiding the future of the program.

Publications and Other Indirect Programs

One of the most common ways that local historical organizations tell stories is through research, writing and publication. Unlike the other interpretive programs discussed, publications do not require someone to visit the museum or historic site or register for a program. Much of what has been said about other interpretive vehicles applies. Just be careful to note that publications have a different impact than a temporary museum exhibition or a costumed portrayal at a historic site.

Publications are more widely accessible both geographically and temporally.

Whether books or essays, publications differ in another way from other interpretive programs. The historical writer has a fundamental responsibility to tell the reader how she knows what she writes. This means telling the reader about primary and secondary historical sources and making it clear how they are used.

Local history publications also allow for the retelling of history when new information is available. Although reprinting an old history might be a fine project, a better one—although much more difficult and time consuming—would be to undertake new histories, which, in the words of Carol Kammen, “change what needs to be altered and challenge what needs to be questioned.”¹¹

In recent years, historical organizations have begun to undertake other forms of interpretive programs such as the production of curricular material for schools and now interpretive programs on Web sites. At this time, larger organizations are mostly producing such programs, but in the future they will likely become common in smaller local organizations as well. These programs require solid planning, maintenance, and evaluation just like any other interpretive program. Additionally curricula require collaboration with the teachers whom you intend to use it.

CONCLUSION: WE CAN ALWAYS DO BETTER

Local historians know their work is never done. Just planning, researching and implementing an interpretive program is not the end. All programs need to be evaluated, and then adjusted to improve or discontinue them if need be. Large historical organizations regularly evaluate projects, but smaller organizations without the same resources can do the same. In fact, increasingly, government, foundation and corporate funders demand that evaluation be a component of every program.

Done well, interpretation helps audiences connect with the past in personal ways by drawing on first-person accounts of human activity. The best interpretive programs are well organized, based on sound historical research, and have clear objectives. They are tailored to diverse audiences and ways of learning. While keeping education at the forefront, they let audiences draw their own conclusions about the past. With interpretive programs, we play the ancient and honorable role of storyteller. When we tell stories well, no matter whether our organization is large or small, we know we are carrying out our mission.

Timothy C. Glines is Manager of Outreach Services and David Grabitske is the Grants Assistant at the Minnesota Historical Society’s Historic Preservation, Field Services and Grants Department.

[11] Carol Kammen. *On Doing Local History: Reflections on What Local Historians Do, Why, and What it Means*. (Nashville, TN: American Association for State and Local History, 1986): 38.

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LOCAL HISTORY

What Is Interpretation?

*This article originally appeared in **Exchange**, a newsletter published by the Wisconsin Historical Society. (Volume 24, Number 4, July/August 1982) It is the first in a series of articles titled Exhibiting Local Heritage. The series features information about planning, designing and constructing interpretive museum exhibits. This article was written by Tom McKay, retired local history coordinator for the Wisconsin Historical Society.*

Exhibiting Local Heritage is a project to assist local historical societies in developing better interpretive exhibit skills. Clearly the place to begin the project is with the words "interpret" or "interpretive." Dictionary-style definitions of "interpretive" talk about explaining the past or creating understanding, but a quicker way of getting at the meaning of "interpretive" may be a short thought exercise.

Presume for a moment that Abraham Lincoln came back to life today. He would know nothing of our modern world. He would need to learn about all the things we take for granted as part of today's world, and he would need help. As a member of the local historical society and a civic-minded person with an interest in the past, you are asked to help Mr. Lincoln.

One of the first things Abraham Lincoln encounters in your home is a television set. You identify it by name, a television set, but Mr. Lincoln still knows little about it. You decide to take him to an appliance store and show him many televisions calling each a console or portable, color or black and white, etc. Although he has more information, Mr. Lincoln still understands little about the TV. Next you turn one of the televisions on. He doesn't know how it works, but he sees what it does. A television set delivers messages, pictures and sound.

When Mr. Lincoln mentions that the telegraph was the great communications breakthrough of his day, you suggest a trip to the historical society. There you show him a picture of the old telegraph office, early telephones, radios, and the town's first television. You place each breakthrough in chronological order and explain how and when each came to your town. As you think about television coming to your town, you begin to discuss the effect it had on the community: the closing of the town theater; declining group activities; its recent use as a teaching device in the school. Mr. Lincoln is drawn into the discussion thinking about the effect such a powerful communication device would have had on his life. It certainly would have changed his presidency. As a matter of fact, would he have been president at all?

The task presented by Mr. Lincoln and the TV was interpreting the present to someone from the past. However, most of the principles are the same for your historical society's task of interpreting the past to people from the present. Simply naming an object, a television or a teapot, does little to interpret either the object or the past. Displaying groups of like objects is only slightly more interpretive. In the case of Mr. Lincoln and the TV, explaining or showing what a television does was a way to begin interpretation. Showing the television in relationship to other communications breakthroughs achieved an additional interpretive step. Finally, discussing the effects of the television on local community life made the historical significance of the TV more understandable and specific, and Mr. Lincoln began to raise questions about the effect television would have had on his own life.

Interpretive exhibits don't just display objects; they use objects to teach history. They do more than name them or group them or even show their functions. Interpretive exhibits use objects to help us understand and explain community history. Good interpretive exhibits present sequences, study effects, explain relationships, make comparisons, and raise as well as answer questions. To improve skills at doing these things in exhibits is the purpose of *Exhibiting Local Heritage*.

**LOCAL
HISTORY****Choosing a Local History Topic: Looking at Objects**

*This article originally appeared in **Exchange**, a newsletter published by the Wisconsin Historical Society. (Volume 23, Number 6 November/December 1981) It is the second in a series of articles titled Exhibiting Local Heritage. The series features information about planning, designing and constructing interpretive museum exhibits. This article was written by Tom McKay, retired local history coordinator for the Wisconsin Historical Society.*

Good exhibits begin with ideas. In the planning and preparation of exhibits, no step is more important than choosing a topic. Reading, hearing, and researching local history stimulate ideas for exhibit topics. However, knowledge of local history, though absolutely essential, brings a museum only partway to selecting a good exhibit topic. Interpretive exhibits present history by using artifacts: the objects, pictures, and documents of the past. They use these artifacts to illustrate and explain important events, facts, and ideas. An important part of choosing good local history exhibit topics is thinking about the variety of historical meanings an artifact may represent. Both knowledge of local history and the meaningful use of artifacts are vital to the success of exhibits.

Because artifacts or objects are so important to choosing good topics, analyzing objects for their potential use in exhibits is a skill that should be constantly improving. In most museums, some exhibit topics have been suggested primarily by the availability of appropriate objects in the collection. Exhibits that come about in this manner commonly concentrate on explaining what the objects are. They less often explore the interpretive question: what do these objects mean?

To illustrate the difference between explaining what an object is and what an object means, let's use an example focusing on a specific type of object. Antique toys frequently appear in local history museums. Because they are fun, many museums devote a case, room, or area to an exhibit of toys. It might be entitled "19-Century Toys" or "The Playroom." The exhibit displays many toys and identifies them according to name, date, maker, basically what the objects are.

What toys mean involves further analysis. Certainly they mean children. Toys were one part of a child's life in the 19th century. But where did they fit in? What was a child's life like? Those questions suggest both the idea and title for an interpretive exhibit, "A Child's Life in Smithville: The 1890s." The exhibit would interpret the story of growing up in Smithville in the last decade of the 19th century. It would include not only toys and children's play but also the other aspects of their lives such as education, work, and health. What toys did children have and where in Smithville were the swimming hole, ball field, and other special places of children's play? Was there a brand-new school in town at that time? What chores were the responsibility of children? Toys would be a major part of the exhibit, but it would involve many other kinds of objects: a castor oil bottle, school books, a butter churn, a picture of the old Smithville drug store soda fountain. "A Child's Life in Smithville" started with the question, "What do these toys mean?" but it culminated in a local history exhibit exploring many aspects of growing up in Smithville in the 1890s.

What other exhibit ideas do toys suggest? Surely there are many. Late 19th-century toys were mostly mass produced. The development of mass-produced objects including toys had a major effect on Smithville. It no doubt brought about changes in retailing and stores. Did mass production signal an end to the businesses of local craftsman, or did a new mass production factory in Smithville open up economic opportunities? Did mass production make goods cheaper in Smithville? Could more people afford them than before? Again, the exhibit would use a variety of objects such as mass-produced household goods, a retailer's account books, or a factory worker's lunch pail. The toys might have only a minor part in the exhibit as one example of mass produced goods, even though analyzing what toys mean as objects suggested the exhibit idea.

Every object from the past has a variety of meanings and relationships to the past and to other objects. The greater the skill a local history museum develops at analyzing these meanings, the more useful its collection becomes. There will always be a place in museums for exhibits that identify and explain what objects are. To successfully *interpret* local history we must ensure a place for exhibits that consider what objects *mean*.

**LOCAL
HISTORY****Choosing a Local History Topic**

*This article originally appeared in **Exchange**, a newsletter published by the Wisconsin Historical Society. (Volume 24, Number 7 January/February 1982) It is the third in a series of articles titled Exhibiting Local Heritage. The series features information about planning, designing and constructing interpretive museum exhibits. This article was written by Tom McKay, retired local history coordinator for the Wisconsin Historical Society.*

Although an oversimplification, a useful way to think of an interpretive exhibit is as an equation. On one side of the equation is a historical concept or event. On the other side is a group of objects, graphics and labels. An interpretive exhibit says that this group of objects, graphics and labels equals this historical concept. In the last issue of *Exchange*, we discussed exhibits suggested primarily by the availability of appropriate objects. This issue looks at the other side of the equation: exhibits suggested primarily by an important concept or event in local history.

Good local historians can identify many significant topics from a community's history. Settlement by a particular ethnic group, development of an important industry, the course of a local man's political career, or the coming of the railroad are but a few examples. The question is: which topics make good interpretive exhibits. From our equation for interpretive exhibits, the answer is: those for which objects and graphics can be found and combined with labels to represent the historical concept or event.

Let's apply our equation to a specific example. The local historical society knows that the coming of the railroad had a tremendous impact on the history of Smithville. However, Smithville's collection of railroad materials consists of only a coupling pin, two railroad lanterns, and a photograph of a crew working on the railroad bed. Do they drop this potential exhibit topic? The easy answer is yes; the stubborn answer is no; and the best answer is maybe. Before any answer, the Smithville Historical Society needs to dig a little deeper.

Two things will help the society make a decision about doing an exhibit on the coming of the railroad. The first is research. The second is remembering that history is about people. Beginning with research, the society finds in census records that the population of Smithville increased 70 percent during the 10 years following the coming of the railroad. Of further interest, the records show that a portion of the new residents were Irish immigrants originally attracted to work on railroad construction. Surveying the society's photographic collection yields three pictures of the main street during the decade of growth. A shop sign, given to the society several years ago, appears on a business in one of the pictures. A closer look at the lone railroad photograph reveals the work crew holding picks similar to one in the society's tool collection. Research continues in the railroad's annual reports. They clearly demonstrate that the railroad has made the community a local center for grain shipping and provided a stable source of employment to the present day.

The railroad's role as an employer is a reminder that history involves people. The Smithville Historical Society decides to interview several longtime railroad employees. The interviews lead not only to useful information but also to a man who collects railroad materials. His collection becomes a resource from which to borrow railroad tools, timetables, photographs and clothing. During 118 years of operation, the railroad has affected the lives of its employees and all other residents of Smithville. The mercantile emporium, opened on the main street in the 1870s, symbolized some of those effects. The business began in response to population growth stimulated by the railroad. It also carried a greatly increased line of consumer goods made available in town largely by rail transportation.

By digging deeper, the Smithville Historical Society discovered that important concepts connected with the coming of the railroad could be represented by a variety of objects and pictures: memorabilia of an Irish immigrant family, an old pick, 19th-century consumer goods, a shop sign, the society's few railroad items, and the larger collection of a former railroad employee (later donated to the society because of the interest created by the exhibit). Eventually, their problem was not whether they had enough material to do an exhibit on the coming of the railroad, but how to edit such an exhibit to emphasize the most important concepts and fit in the space available.

Will the experience of the Smithville Historical Society be repeated by your organization? The answer is familiar: maybe. However, there is only one way to find out. When your society thinks of an important local history concept or event but the collection seems inadequate for an exhibit, dig a little deeper. Do more research, and think about the topic in terms of the people it affected. Often these steps will lead to objects and graphics that represent the important historical concepts and complete the equation for an interpretive exhibit.

**LOCAL
HISTORY****Balancing Your Exhibit Program**

*This article originally appeared in **Exchange**, a newsletter published by the Wisconsin Historical Society. (Volume 24, Number 2, March/April 1982) It is the fourth in a series of articles titled Exhibiting Local Heritage. The series features information about planning, designing and constructing interpretive museum exhibits. This article was written by Tom McKay, retired local history coordinator for the Wisconsin Historical Society.*

The last three issues of Exchange have discussed interpretation and choosing topics for interpretive exhibits. Upcoming columns will discuss effective techniques for the production of interpretive exhibits. This article seems an appropriate place to emphasize another way to get the most out of interpretive exhibits: by making them part of a balanced exhibits program that includes exhibits of other kinds.

There are three basic types of historical exhibits: period settings, special collections, and interpretive exhibits. Each type serves different needs and interests of visitors. People come to a local historical society expecting to learn about the history of the community it serves. Interpretive exhibits fill this role well. They present themes that place a community's history in a wider historical context. They do so by relating information through a limited number of carefully selected ideas and objects. However, visitors also come to a museum expecting to see a large number of historic objects. To many people, the sheer number and variety of objects on exhibit provide part of the enjoyment of the experience. Immersing themselves in an environment filled with historic objects is one way visitors can learn about the past. Special collections and period settings fulfill this expectation in a way that interpretive exhibits do not.

A special collections exhibit is a display of related objects. They are grouped together because they were made of like materials or used for a similar purpose. A special collection exhibit could be a case of pressed glass, a wall of blacksmith's tools, or a temporary display of quilts. Interpretive exhibits are generally structured with a beginning, middle, and ending that visitors should see in order, but viewing a special collections exhibit can often be more flexible and informal. They invite visitors to enjoy comparing like items, and they highlight the importance of preserving historic objects.

Period settings depict surroundings as they might have appeared at a time in the past. The setting could be the soda fountain from the old town drug store, a parlor of an 1890's home, or a recreated pioneer village. Period settings evoke a sense of the past that makes them among the most popular exhibits in a history museum. They are potentially a powerful educational tool. But a word of caution is necessary. Period settings are the hardest type of exhibit to do well. They require an accuracy in details that is difficult to achieve. Inaccurate period settings promote a misleading sense of the past. Local historical societies that want to do good period settings should be guided by professional standards.

Both special collections and period settings fulfill visitors' expectations of seeing a large number of interesting objects in a museum. They present an important part of the historical record, but in a generalized way. A collection of dolls or a turn-of-the-century kitchen might vary only marginally between many localities in Wisconsin or even between Iowa, Minnesota, and Wisconsin. Every good local history museum should also present and explain specific factors and events from its community's past. This is the role of interpretive exhibits. One of the keys to a good exhibit program is balance. A well-conceived mixture of period settings, special collections, and interpretive exhibits will work together to give visitors the educational and entertaining experience they hope to find when they visit a local history museum.

*Some excellent resources are: Nina Fletcher Little, *Historic Houses: An Approach to Furnishing*, Technical Leaflet #17. Nashville: American Association for State and Local History, 1970.; William Seale, *Re-creating the Historic House Interior*. Nashville: American Association for State and Local History, 1979.; and Wilson H. Faude, *The Renaissance of Mark Twain's House*. Larchmont, N.Y.: Queens House, 1978.

Exhibit Makeovers: Do-It-Yourself Exhibit Planning

By Alice Parman

Do you remember the first time you visited a museum? How old were you? Who was with you? What impressions and memories can you conjure up? There may be a connection between those long-ago experiences and your current involvement with a museum or historical site. Tapping into your personal history can help you identify and empathize with your visitors—a necessary first step toward planning engaging, memorable exhibits.

As part of your volunteer or paid museum work, you may have the opportunity to develop a new exhibit a case, a group of displays, or even an entire gallery. With time, thought, and imagination, you and your colleagues can create visitor experiences that are eye-opening, mind-opening, even heart-opening. Few museum-based activities are as labor-intensive, or as rewarding, as exhibit development. An effective exhibit nurtures a bond between the visitor and your institution, and has the potential to inspire a lifelong love of museums.

This technical leaflet is a call to reflection followed by action. Whether you work through this introduction to exhibit planning on your own or with a group of colleagues, these observations and experiments may inspire you to tackle your own “exhibit makeover.”¹

WHAT ARE EXHIBITS FOR?

In answer to this fundamental question, Barry Lord identifies *meaning* and *authenticity* as key factors that make exhibits transformative for visitors. “The purpose of a museum exhibition,” he writes, “is to transform some aspect of the visitor’s interests, attitudes, or values affectively, due to the visitor’s discovery of some level of meaning in the objects on display—a discovery that is stimulated and sustained by the visitor’s confidence in the perceived authenticity of those objects.”²

The late Freeman Tilden, who first applied the word “interpretive” to visitor experiences in parks and other informal educational settings, incorporates similar factors into his definition of interpretation, “an educational activity which aims to reveal meanings and relationships through the use of original objects, first hand experience, and by illustrative media, rather than simply to communicate factual information.”³

Consider these perspectives in light of a critique overheard years ago at Chicago’s Field Museum. Two middle school students were filling out a paper-and-pencil worksheet (required by their teacher) in an exhibit hall. One said to the other in disgust, “This is just like school!” Clearly, those boys had been hoping to experience something *different* from school. Museum visitors expect to find an informal learning environment, without entry requirements, assignments, tests, or grades. Visitors are free to explore and discover; John Falk and Lynn Dierking have aptly named this core quality of the museum experience “free-choice learning.” With thoughtful planning, exhibits can give all visitors—including students—opportunities to choose their own pathways, focus on topics and activities that interest them, and express their own ideas and opinions.

ROMANCE: THE KEY TO PLANNING REWARDING EXHIBIT EXPERIENCES

On your own or with colleagues, take time to recall and reflect on a frustrating experience you have had in a museum. Contrast that memory with a rewarding experience as a visitor. Begin to build your own list of exhibit planning dos and don’ts, based on your analysis of those very different encounters.

In his essay “The Aims of Education,” Alfred North Whitehead offers a useful touchstone for planning rewarding exhibit experiences. Whitehead made his mark as a mathematician and philosopher. Along the way, he wrote essays about how people learn. His concepts of Romance, Precision, and Generalization correspond to levels of interest and expertise among your visitors.⁴

Whitehead believed that no matter how old you are, in order to learn something new, you must first fall in love with the subject matter. Dinosaurs, princesses, a basketball team, horses, a series of historical novels, nature photography—most people can identify a turning point that opened a door to a new fascination. Whitehead calls this mind-opening experience the stage of *Romance*.

When you fall in love with a person, everything about him or her becomes interesting. You ask, “What is your favorite flavor of ice cream? Where were you living in the fourth grade? Do you like cats?” The same holds true when we fall in love with a subject. We are hungry for information. We effortlessly absorb and remember every fact, no matter how detailed. This is what Whitehead calls the stage of *Precision*. Most kids who love dinosaurs don’t grow up to be paleontologists. But their love affair with fossils may teach them that they can master a body of knowledge,

Experiment #1

EXPLORATION

Please follow these directions one step at a time, without reading ahead.

1. Stand by yourself near the front entrance to the exhibit gallery.
2. Relax. Spend one or two minutes clearing your mind and using all your senses to become as attentive as possible to your environment.
3. Let yourself be drawn in any direction toward any one of the exhibit spaces.
4. Explore the exhibits until you find an object that you really like. Move around and look at this object from different points of view.
5. Make a drawing of the object. _____
(Use blank side of this page.)
6. List any words that will help you describe the object to another person. _____
7. What are some questions you have about this object? List them. _____
8. How does this object make you feel? _____
9. How is it like you? _____
10. How is it different? _____

or convince them that even the biggest and strongest critters may turn out to be vulnerable. For Whitehead, this is the culminating stage of learning, *Generalization* of a set of principles to other areas of one's life.

Romance is the essential ingredient in exhibit planning. Most people come to the museum in search of romance. They hope they'll fall in love with something in the course of their visit. It's very frustrating to run up against a welter of facts (such as a display case full of old tools) or a generalization ("Pioneer Tools"). Whoever planned those exhibits was already in love with tools, but neglected to do the essential matchmaking that would enable others to discover the romance of tools. Without romance, precision is just wasted breath and generalization becomes "this is just a bunch of old stuff and has nothing to do with me."

This technical leaflet alternates between information-sharing and hands-on, minds-on activities. Some might call them exercises, but it's more fun to think of them as experiments in creative exhibit development. The first experiment, *Exploration*, will help you fall in love all over again with the objects in your institution. Viewing your own collection through this new lens of romance, you'll be better equipped to help visitors connect, relate, and want to know more.

EXHIBIT PLANNING STEP BY STEP

Keeping in mind the overriding goal—to create entry points that allow your visitors to connect, relate, and fall in love—you are ready to dive into exhibit planning. First, become familiar with the elements that make up an exhibit plan. Then try an experiment in exhibit planning—on your own, or with your colleagues.

< Step 1 >

Mission statement, take-home messages, and storyline

Exhibit planning begins with your institutional **mission statement**. The mission statement summarizes why your museum, historical society, archives, and/or site exists, and identifies the people you serve. It reflects your distinct identity and purpose. Write your mission statement on a whiteboard or large sheet of paper, and refer to it throughout exhibit planning. Your exhibits and programs should be consistent with your mission. Ideally, they advance and contribute to fulfillment of your mission.

The next step is to decide on the big ideas that you want all visitors to take home from their experience.

Take-home messages don't necessarily appear anywhere in the exhibit. They are the moral, the summing-up, and the memory that visitors take

home and apply to their own lives. Take-home messages are specific. They are also noble and inspiring. Like your museum's mission statement, take-home messages will guide you throughout the exhibit development process.

Don't skip this step! If you don't choose your take-home messages, they will choose you. Exhibits without clear, intentional take-home messages run the risk of being confusing, frustrating, incomprehensible, or even insulting to visitors. Some might conclude, "This museum makes me feel stupid," or "History is boring," or "A five-year-old could make better art than this."

In a museum setting, take-home messages fall into three main categories:

- 1) *The story*. The Columbia River Bar is both a gateway and a barrier to the Pacific Northwest. Though jetties and dredging have stabilized the Bar, it can still be dangerous and even deadly. (Columbia River Maritime Museum)
- 2) *The museum*. The Museum at Warm Springs is about our values and traditions. (Confederated Tribes of Warm Springs)
- 3) *Myself, the visitor*. People like me are welcome at this museum. (Northwest Museum of Arts & Culture)

The storyline is the "so what" of your exhibit. The storyline expands on the take-home messages, encapsulating the core meaning of the exhibit in a succinct and compelling way. The storyline is the premise of the exhibit, and answers the question: "So what? Why go to all the time and trouble to create this experience for visitors?"

Some examples:

The Panhandle Plains Historical Museum in Canyon, Texas, tells a regional story. To outsiders, the Texas panhandle seems a desolate and inhospitable place. Yet people have lived there successfully for at least 12,000 years. How have they managed this? An exhibit titled *Experiments in Living* compared how people have addressed core life problems, from prehistory through the present day. (This approach was intended to challenge visitor assumptions about the superiority of contemporary panhandle cultures, by placing today's lifestyles on the same plane as earlier cultural experiments.)

Treasures from the Trunk: Quilts of the Oregon Trail, a 1993 temporary exhibit, brought ten heritage quilts to the Douglas County Museum in Roseburg, Oregon. Each quilt was made or owned by a woman who journeyed across the Oregon Trail in the mid-1800s. Quotes and historical evidence powerfully conveyed the message that none of these women had wanted to leave their homes and families. It was their husbands' idea to undertake the perilous journey across the Plains.

As you brainstorm ideas for your exhibit storyline,

think of kindling a romance between your visitors and the subject matter. Aim for juicy ideas, with built-in drama and human interest. Remember, you are not writing this sermon with the choir in mind. The idea is to tell your story in a way that will engage and motivate people who are new to your museum—including some who have never before set foot in any museum. The next two experiments are warm-ups to get your creative energies flowing.

< Step 2 >

Organize your storyline into “galleries of thought”

In a well-planned exhibit, visitors can follow the storyline as it unfolds in a series of “chapters.” Exhibit designer Craig Kerger calls them “galleries of thought.” Each chapter or gallery of thought presents an aspect of the subject matter you are interpreting. This arrangement helps visitors make sense of this unfamiliar material, as they view it from a variety of perspectives.

There’s almost no limit to the number of ways you can organize an exhibit. The only limit is your creativity. To get you started, here are some types of organizing concepts that many exhibit planners have found useful:

Category: If you have a fine collection that relates to your storyline—military uniforms, obsolete business machines, tea-party china, branding irons, cameras—consider including multiple examples in your exhibit. But bear in mind that the fact that you

Experiment #2

POCKET ARCHAEOLOGY

Warm up the romance juices, and let your imagination roam, by brainstorming storylines for an imaginary exhibit. With a group of colleagues, choose a few everyday objects from your pockets, purses, and desktops. Put them all together on a tabletop. Work as a group or in pairs.

Imagine that you are archaeologists in the year 3000. These assembled objects are the findings of your latest dig. You have dated the site to about 2000, a little-known period in human history. You are planning a small exhibit to interpret this previously unknown culture to museum visitors. Using only these objects, brainstorm as many storylines as you can.

Allow 15 or 20 minutes. If you’re working in pairs, share your storylines with the whole group. How many different approaches did you come up with? (Remember this time-honored principle of exhibit design: “There’s more than one way to skin a cat.”)

Experiment #3

TELLING MEANINGFUL STORIES

Each person brings an object or image from home that is special to him or her. (Ask people not to share personal information about their special item until later on.) Arrange the objects and images on a table where everyone can study them. Use white gloves, or establish “no handling” rules.

As a team, focus on one object or photograph at a time. Everyone uses their observational and brainstorming skills to share viewpoints on the meaning of each item. What clues does each image offer about particular people and families, and the historic context of their lives? What can each object tell you about how, where, and when it might have been made? How does each object and image relate to regional, national, or global events and issues?

Following the general discussion of each item, invite the person who brought that object or image to share the inside story. What makes it special to the person who knows the most about it?

find a category of objects fascinating doesn’t mean those objects will automatically appeal to visitors. Think about how you first fell in love with branding irons, etc. Then figure out how to offer your visitors a similar opportunity.

An exhibit on African hats (*Crowning Achievements: African Arts of Dressing the Head*, High Museum of Art, 1997) displayed amazing hats from all over Africa in four-sided cases. For each hat, four illustrated labels explained who made the hat, how it was made, how it was used, and how it ended up in the museum’s collection. Visitors read each label completely, and looked carefully and repeatedly at each hat. Whoever organized this exhibit understood that people are insatiably curious, and capable of learning just about anything!

Chronology: Does your storyline have a beginning, middle, and end? If so, you may decide to organize the content along a timeline. (Warning: some people demand a timeline because they feel lost without it. Others find that timelines make their eyes glaze over.) An alternative solution is to contrast “then and now.” What was the floor plan of a typical family home in 1600 and today? When did men wear beards and when did they shave them off? How did people in North America cook their food in pre-contact Native cultures, in the pre-industrial era, in the nineteenth century, and before microwaves?

Analogy: To help visitors understand a complex process, use analogies to familiar processes. An exhibit on adaptation at the University of Oregon Museum of Natural & Cultural History invited visitors to

compare different types of bird beaks to tools such as pliers, a hammer, and tongs.

Observation/deduction: Visitors like to solve problems. Is there a special object in your collection that has a story behind it? Consider including that object in your exhibit, along with helpful hints (other objects, images, quotes, information) to help visitors discover what it all means.

An exhibit on Africa at the Field Museum of Natural History included a mysterious wood object the size of a bowling ball, with dozens of nails pounded into it. Through text and photos, visitors had the opportunity to learn that in this particular African culture, when two people had a dispute, they were brought together in front of the whole village to work it out. When they had come to agreement, each person pounded a nail into the piece of wood as a sign of his/her commitment. What an “a-ha” moment for visitors, to learn that such an apparently nondescript object could carry so much social meaning, and that a community could resolve conflict in such a creative way!

Comparison/contrast: An object that seems familiar to exhibit planners may be a mystery to many visitors. Children whose shoes come from the mall may not be aware that people can make shoes for themselves, by hand, from natural materials. A pair of flip-flops displayed next to woven sagebrush bark sandals can help visitors make the connection. How are they similar? How are they different?

Theme: A theme is a concept that shows up repeatedly throughout an exhibit. Deeply embedded in the subject matter, a theme expresses the essence of a person, group, or situation. For example, the Museum at Warm Springs celebrates the traditions and values of the Confederated Tribes of Warm Springs, Oregon. The importance of elders is a core value, represented by words and images of tribal elders throughout the exhibit gallery.

Watchword: English speakers say, “Two heads are better than one.” Masai speakers say, “One head cannot hold all wisdom.” In the United States people say, “It’s raining cats and dogs.” Greek speakers say,

“It’s raining tables and chairs.” Look for proverbial expressions, song lyrics, jokes, rhymes, and other quotes that sum up familiar and unfamiliar ways of understanding the world. These intriguing sayings show why cultural diversity is essential. They add meat and zest to your storyline.

< Step 3 >

Inventory the content and pin down the most important facts

Which objects and images must be displayed?

Are there some hidden treasures in the storerooms, always shown during behind-the-scenes tours but not available to general visitors? Are some objects and photos so controversial that you’re afraid to display them? Those may be the ones that will be most interesting to visitors. Do some objects and images lack information? Putting them on display and inviting visitors to share their ideas and opinions may help you decipher some mysteries!

Facts: invite visitors to observe and guess... then tell them something fascinating!

Either in label text or in the course of a docent tour, invite visitors to be “history detectives.” Suppose a length of rope is a centerpiece object, dramatically displayed and lit. All the clues say this rope is important. Why? Ask visitors what they think the rope is made of. This could be a lift-board interactive; visitors might study the rope through a magnifying glass. Main point: it’s made of a natural fiber; it’s not made of nylon. This is a fact that visitors can *observe*. Then ask whether the rope was made before or after the 1950s. This question requires visitors to *guess*, based on observation.

Now they’re ready for some juicy facts that awaken the “romance” of this object: this rope was used in a hanging in Lane County, Oregon in 1899; and this was the *first legal execution* in Lane County. At this point, visitors may be ready to move to the “precision” stage: interested, attentive, and hungry for information.

< Step 4 >

Find ways to motivate and engage your visitors

Multiple perspectives: People are insatiably curious about everything, especially important things—the whys and wherefores of history, natural history, art, and science. At the same time, each person brings a unique set of experiences and perspectives to your exhibit. How can you make the most of your visitors’ curiosity and knowledge? One way is to let them know that their questions and knowledge are valued, accepted, and encouraged in your museum.

Experiment #4

DEVELOP AN EXHIBIT PLAN

Develop an exhibit plan that includes:

- Take-home message(s)
- A storyline that delivers the take home messages
- One or more organizing concepts
- Must-display objects and images
- A couple of juicy facts

A single viewpoint—especially in relation to a controversial issue—will quickly be perceived as a party line. Offer multiple perspectives, inviting visitors to consider various viewpoints and come to their own conclusions. Use first person voices, in the form of quotes, eyewitness accounts, and oral histories, to illustrate multiple perspectives.

Who knows the stories? Open up the process. An exhibit about a particular group must be developed in consultation with members of that group. They know the juicy facts. They also know what stereotypes and misconceptions are out there that you should try to correct.

Interactives: Identify “bullet-proof” objects, or use replicas, to allow visitors to touch, explore, manipulate. Find opportunities to add sound and smell to the experience. Adapt simple games such as I Spy. Exhibit mystery objects and mystery photos and invite visitors to comment. Visit a nearby children’s museum to get ideas; they’ll be appreciated by visitors of all ages.

Invite visitors to contribute: Visitors can write, draw, or audio-record in response to changeable questions. A moving array of responses was posted when the Minnesota History Center asked, “What is a family to you?” Visitors can contribute photos of family members and friends who live in other countries, and loan treasured objects, with accompanying stories. They can give you feedback on current and proposed exhibits. Some may decide to join your museum, volunteer...even serve on the board! The key here is to think of exhibits as a way to *communicate* with your visitors.

< Step 5 >

Plan the “look and feel” of your exhibit

The following information and guidelines on exhibit design (Step 5 and Step 6) were written by Jeffrey Jane Flowers, and are excerpted and adapted from Parman and Flowers, *Exhibit Makeovers*:

A well-designed exhibit—whether large or small—has a distinct visual style that communicates key messages about the content to viewers from across

Experiment #5

EXPAND YOUR EXHIBIT PLAN

Add these components to your exhibit plan:

- Multiple perspectives on an aspect of your exhibit
- An interactive experience
- A way for visitors to contribute something to the exhibit

Experiment #6

IMAGINE YOUR EXHIBIT PLAN

To imagine what your exhibit will look like and how visitors will experience the space, try some thought experiments. Imagine must-display objects and images as...

- Actors in a play. What kind of stage set will help visitors get into the mood and spirit of the story they will act out?
- Hosts of a party. What’s the theme of this party? How will you furnish the room so that visitors will feel comfortable and at home? What would make the party fun for them?
- Part of a story that is set in a particular time and place. How can you use colors, textures, furniture, materials, graphic and typography styles, sound and light, and other elements to transport people to another era or a different part of the world?
- Reflections of human experience and emotion. How could exhibit elements express the essential emotions of your story, such as joy, fear, sadness, or courage? What props and décor could proclaim what this exhibit is all about—family, work, sport, overcoming challenges, or other dimensions of life?

the room. This is usually accomplished through the use of one or several design tricks that you can use in your display.

Scale: If you have many small or similarly sized objects to work with, consider enlarging one element to draw people in. This could be accomplished by photographing or scanning an object or image and enlarging it to use as a backdrop for a section of your display.

Color: Gather your objects on a table with a neutral (white or off-white) background. Cover a table with clean butcher paper, available at craft stores on rolls, or a simple white table cloth. Ideally, your table would be about the same size as your case. If not, consider approaching this exercise in sections. Study the colors of the objects and discuss what might be complementary or contrasting color options. Perhaps a darker or lighter neutral color is needed to allow the natural variety of colors and forms to be seen clearly. Or perhaps the color range is a little dull, so a bright or dramatic color is needed to liven up the objects.

Craft and art supply stores sell sheets of drawing papers in 18” by 24” sheets in a large variety of colors—once you have some colors in mind, purchase a few of these to try out colors as part of your display in the backdrop, headlines, or text areas.

Active Dimensions: Often our first impulse is to think of our display cases as flat or one-dimensional spaces with elements arranged horizontally in line

with the edges of the display unit. This arrangement tends to lead to a static, or inactive, layout. In addition to scale and color, simply taking one element of your display, such as a headline or object, and “breaking out” of the flat, right-angled grid adds activity and interest to the case. For example, an object or text panel that is suspended away from the back panel of the case appears to step forward toward the visitor. Similarly, objects and/or text panels that overlap instantly add a sense of depth to the case. Objects can appear float in a case either by being suspended with monofilament line, being set out from a backdrop on wire. A flat object can be pushed out from the back of a case with layers of foam core cut somewhat smaller than the object’s dimensions.

Dynamic Angles and Groupings: While you have your objects out on the table, take some time to explore some playful and unusual arrangements of the pieces. A good exercise would be to start with them in the most static, even arrangement you can think of—as if each one was in a little compartment by itself with no sense of organization other than being placed neatly on a set of evenly spaced shelves.

Now consider your organizing concepts. Which of these concepts can be represented by the placement of your objects on the table? Which makes the most sense with the story that you are telling? Some examples:

A time line: Where the objects tell the story in a chronological order.

Context: Some objects may belong together since they were all owned by the same family or were part of the same historical event.

Compare and contrast: A dozen examples of different objects that are related by function that are interesting to see side by side.

Which of these arrangements is the most visually pleasing, or tells the story best? Take digital images of groupings that you particularly like, so that you can easily re-create them in your final case.

This is also a good opportunity to think outside the case if there is a blank wall that adjoins your display area. You might add a headline, graphic panel, or model, or create an oversized cutout object that relates to your topic and grabs attention from across the room.

< Step 6 >

Produce and install your exhibit

Create a blueprint: Take accurate measurements of your case and create a scale drawing of your space. If you are using a wall area near the case, be sure to include this area as well. Make this drawing as large as possible and practical for the team to share—you’ll find it easier to visualize things when they are closer

to the actual scale of your final display. Use paper cut outs, also to scale, to approximate objects, images, text panels, and groupings that will form the display. Work from measurements so that your shapes reflect the real dimensions of your elements. If you are using large sections of color, use colored paper to approximate these areas as well.

Arrange and rearrange these pieces until you feel that you have found a balance of objects, images, and text that tells your story, and shows off the objects and images well. If things seem too crowded, consider editing out part of the story. If things seem a little sparse, consider enlarging some of your images or creating a backdrop that complements the period or message of the display. When you find the perfect balance, tape your papers down, and use this as a master guide to prepare for your installation.

Assemble the pieces: Graphic panels and backdrops are often the first sections of an exhibit installation. Keep graphics simple; use one font or typeface with a minimum of bold and italic variations. Avoid white type on a dark or black background; it’s difficult to read. Mount your graphic panels on acid-free board and trim them neatly.

Some of your objects or images may need to be propped up or held in place to show well, or may need protection if a case can be bumped or shaken. Consider each object before you begin and consult with a curator or conservator in your region for ideas about archival-quality materials to hold these pieces in place. Various kinds of tape that you might use at home (including duct and scotch tape) are not compatible with museum displays.

Take time to think through and jot down a schedule with a list of installation tasks. Note which of the parts can be prepared in advance (text panels, mounting and framing), as well as what needs to be done on site (painting, hanging objects). Are there tasks that require two or more sets of hands to complete safely or special tools or hangers that you assume are in the toolbox?

If space and security allow, assemble all of your elements in a staging area a day or so before you install everything. Review the installation plans to be sure that there aren’t any holes in your schedule, equipment, or materials. Installing a new exhibit is stressful enough without three trips to the hardware store!

Practice common sense installation. If this is your first installation, allow lots of extra time. Don’t install the day before the opening—install three days before. Install when the museum is closed if possible. If not, block the space around the case so that visitors are not in the area. This will protect your objects from accidents and your visitors from tools, drop cloths and ladders.

Be thoughtful about lighting. Direct sun and bright incandescent lights can be harmful to many materials

and possibly the inks in your graphic panels. A lower level of fluorescent light or indirect, filtered natural light outside of a case will be much safer.

Wear gloves (white cotton) when handling delicate objects. This will also protect your display panels from fingerprints. Secure everything carefully. Don't worry if a pin or wire shows—it is more important that artifacts are safe from things that go bump in the night. Clean the inside of the case with non-toxic glass cleaner as you work through sections—it may be impossible to reach a section of glass after elements are arranged. Clean the outside of the case thoroughly once you are finished. Clean every day for dust and fingerprints once the exhibit is open.

Congratulations! You've completed this experiment in exhibit planning. For further guidance on exhibit planning, design, and installation, consult the reference list below; and ask advice from museum colleagues in your community and region.

By starting small (with a single case or two), you'll learn skills and methods that are applicable to an exhibit gallery, or even an entire museum. And remember: the most important goal of any exhibit makeover—single-case, gallery-level, or museum-wide—is to offer engaging and meaningful experiences to your visitors.

Alice Parman, Ph.D. is an interpretive planner based in Eugene, Oregon and is author of *Exhibit Makeovers: A Do-It-Yourself Workbook for Small Museums*, part of the AASLH at AltaMira Press (www.altamirapress.com). Contact Alice at alice@aparman.com or find other information and resources at www.aparman.com.

Useful References for Exhibit Planning

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Footnotes

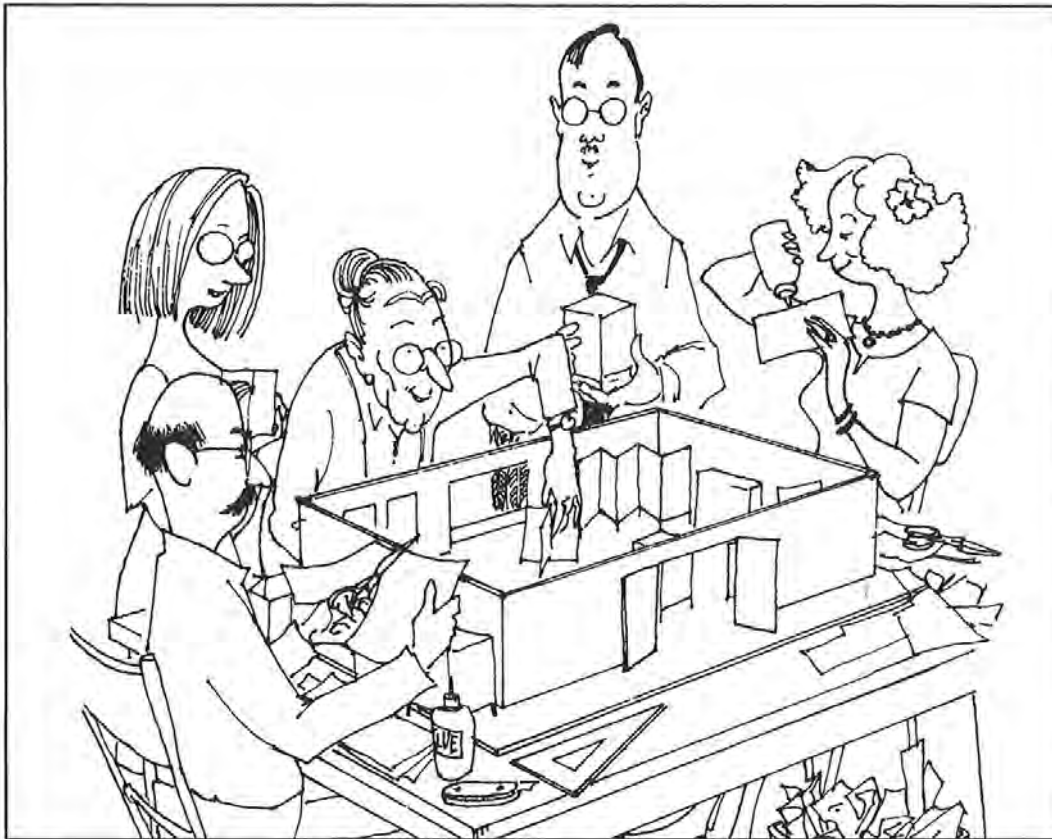
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MUSEUM on Main Street



Exhibition Planning Guide

Museum on Main Street (MoMS) is a partnership between the Smithsonian Institution Traveling Exhibition Service and state humanities councils nationwide that serves small-town museums and their patrons. This innovative program provides one-of-a-kind access to Smithsonian exhibitions, scholarship, and humanities-based programming. Most importantly, MoMS provides community museums and libraries an opportunity to showcase their strengths and reinforce their meaningful contributions to small-town life. MoMS projects are specifically designed to meet the needs of small organizations.

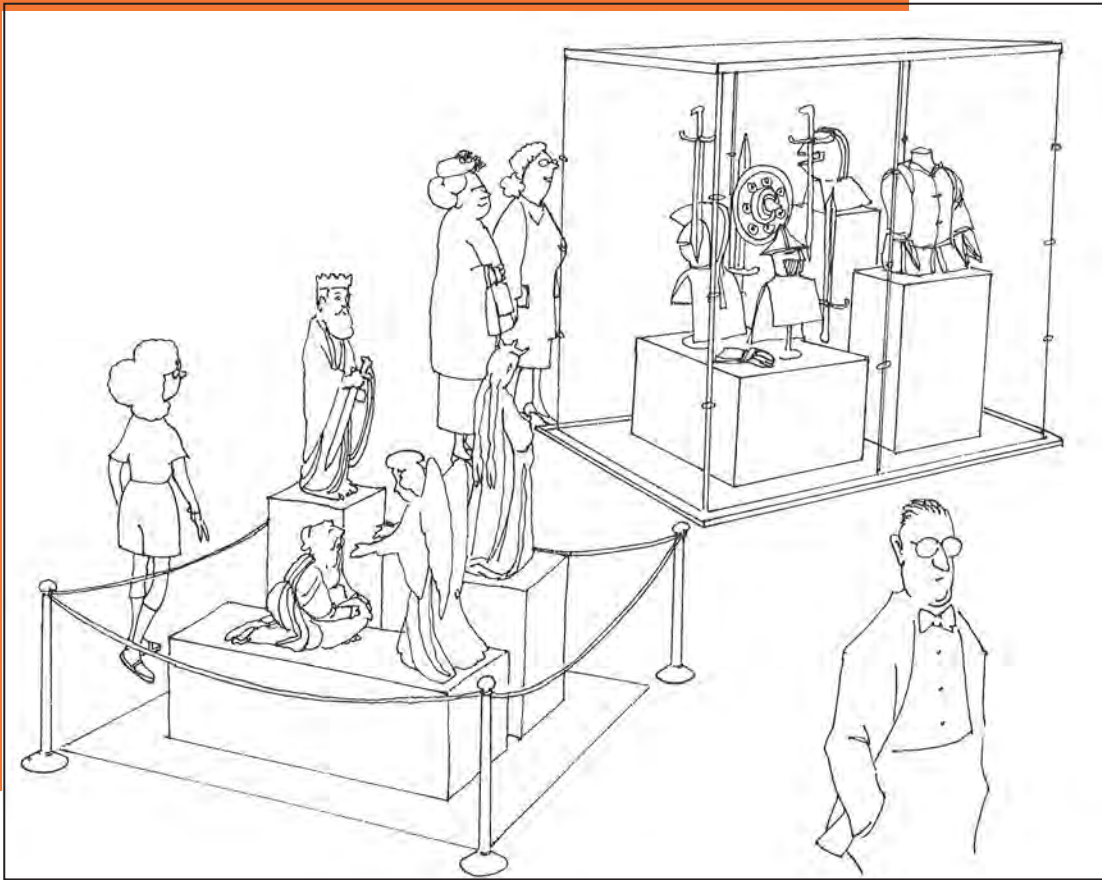
For information about other Museum on Main Street exhibitions, visit www.MuseumonMainStreet.org.



Welcome

Welcome to the Exhibition Planning Guide, a tool we hope will help you systematically think through the process of planning an exhibition. It will guide you through the steps required to do conceptual planning, helping you to:

- look at your own collection and tell your community's story
- be relevant to your audiences
- develop an engaging, thoughtful, accurate exhibition



What is an exhibition?

At its most basic, a history-focused exhibition is a display that tells a story. It is a communication medium. The key to developing a successful exhibition is understanding how the exhibition medium is different from other communication media. An exhibition should not be a book on the wall or a series of videos.

What draws a person to visit an exhibition as opposed to staying at home and watching a television program about the topic or going online to study a topic? How is an exhibition a unique medium, an experience people cannot get other places? There are three principles of museum exhibitions that are universal to all:

- The main business of exhibitions is to tell a story with things.
Whether artifacts, images, or original documents, there is an intrinsic power in seeing the real thing. There is also great appeal in seeing something rare, an artifact or photograph that you cannot see anywhere else. The selection of things you display is very important. The objects and images help tell the story.
- Exhibitions are a medium for communication. T
They communicate not only through words on labels, but through the combination of multi-media incorporated into the exhibition. The key to successful communication is ensuring that the message is received and understood.
- Exhibitions are experiences, not products.
What audiences do and feel in an exhibition is as important as what they learn.

Characteristics of effective exhibitions include:

- They are strongly dimensional, meaning they usually include objects, props, and other three-dimensional components and exist within a physical environment.
- They are designed to communicate to a general audience and should have components that speak to different learning styles and preferences and make them accessible to many people.
- They are able to engage different senses and should take advantage of this opportunity.
- They present a clear message.
- They do not require extensive prior knowledge of a topic and are designed so individual components can stand alone.
- They are designed to accommodate multiple users at a time and encourage social interaction¹¹¹.

Who should be involved in the planning process?

Exhibitions can be a complicated endeavor. Often a team of people will come together to complete the task. Content experts may be the people who did the research or who care for the collections. Designers bring the skills of both graphic design (laying out the text and images and objects) and 3-D design (how the visitors move through the space and what the overall space looks like). Education specialists understand how audiences learn in an informal environment and know how to reach different types of audiences. Often it is a good idea to form advisory panels to offer guidance on key elements. If you want teachers to use the exhibition, it might be good to form a teacher advisory panel. If your topic involves history of a specific community not represented in the core team, it is vital to engage with advisors from that community. For example, if your topic includes Native American history, it is important to reach out to advisors from this community and invite their participation in the exhibition development. This can be an ideal time to develop new partnerships. Your partners may not be history-focused. Sometimes the best partnerships are not obvious at first. These partnerships may be cultivated beyond the run of the exhibition and allow you to expand your collections, programming or research capabilities in the future.

Purpose statement

At the very beginning, it is helpful to write a short purpose statement, up to a few sentences, that states the reason why you are doing the exhibition and what you want to accomplish by doing it. Is it about educating your audience, inspiring them to do something, making them aware of a specific topic or of your organization, or fostering partnerships? There can be many reasons why you develop an exhibition. With this internal goal as a guide, the work can move forward with clear purpose.

What is your main message?

A key to an effective exhibition is keeping the message simple. Begin by asking the question, “What story do we want to tell?” The discussion should end with drafting a main message, sometimes called the “big idea” under which all content fits. It is not necessarily a message for external publication, but one that your development team should refer to constantly throughout the development process. Your main message is one of the most important pieces of conceptual planning. The task of writing this message can be a challenge. A big idea is defined as “one complete, noncompound, active sentence that identifies a subject, an action (the verb), and a consequence (“so what?”).” It is one idea, not several ideas crammed into one sentence. Exhibition expert Beverly Serrell notes in *Exhibit Labels: An Interpretive Approach*, “A big idea is big because it has fundamental meaningfulness that is important to human nature.”ⁱⁱ

Examples of a main message:

“When they encountered each other, Lewis and Clark and the Indians made discoveries about their respective worlds.”

“During the Industrial Revolution, Americans harnessed natural forces and simple machines to build canal systems for transporting goods and materials cheaply.”

“World War II impacted the development of aviation technology and aviation technology changed the scope of warfare forever.”

As part of your discussion about the main message, ask these questions:

- Why is this topic important to your community, to your exhibition audience?
- Why should someone care about this? This question gets at relevance.
- Are we considering different sides of the topic/story? Any topic in history, any event, person, or idea, can be viewed from multiple perspectives. How will you incorporate these?
- How does this topic allow you to feature local people and stories?

Who is your audience?

Another important step in producing a successful exhibition is identifying your audience. It may be easy to assume it will be a general audience—whoever comes through the door. But the more you can identify specific audiences, the stronger the exhibition will be and the easier it is to target your message. If you've produced exhibitions in the past, who visited? With every exhibition you produce, it is important to do some kind of demographic study to create a record of the types of audiences the topic attracted.

Devote some time to think about who your audiences are. With the new exhibition, who do you want to visit? Do you want more families, more students? Are there audiences you would like to visit who don't typically visit your site? There may be a certain group of people who you would like to see visit the exhibition. If so, what components can you include that will attract that audience? What topics or concerns do they have that could be reflected in your exhibition story?

For example, if you don't typically include components for younger ages, but would like to see more families, you will need to consider what experiences you can offer for people from different generations to do together. If you haven't attracted many school groups in the past but think the new topic is important for 5th graders to understand, then you will need to consider special components for that age.

Other specific types of audiences include:

- Military veterans
- Senior adults
- People with physical challenges (sight, hearing, mobility, etc.)
- People for whom English is not their native language
- International visitors
- Enthusiasts who know your topic very well
- People of different religious faiths
- College/university students

From the beginning, it is important to consider all of the types of people who may visit your exhibition and who you hope will visit.

Other items to consider

Impact

How do you want to affect your audiences? This question gets at emotion. Do you want them to leave inspired to change something? Do you want to encourage them to do further research or to talk to others about their experiences? Do you want them to feel proud, angry, or empathetic?

Tone can be closely tied to impact. What is the tone? You convey tone through the writing and design. While it is possible to mix several kinds of tone, it is usually best to pick one or two. Several examples include authoritative, serious, whimsical, formal, and casual.

Organization

Organization includes both physical and conceptual layout. How will you organize the content? Is the format linear, free-flow, or thematic? In many ways the answer is linked to traffic flow in the exhibition. Many history exhibitions are chronological and follow a timeline. This linear format encourages visitors to all move in one direction. In a free-flow organization, there is no one way through and visitors can choose their path. A thematic format may be the same as free-flow. Rather than a linear story, the topic may be organized by main themes. If the topic is work, the themes might be outside work, white-collar work, medical work, aviation work, education work, etc. Ultimately, the exhibition's three-dimensional design helps to dictate traffic flow. Walls can funnel traffic and one clearly marked entrance can also help orient visitors.

Also, do you need to include any orientation to the topic? Often places like national parks produce an orientation film to give visitors an overview of the site's significance. As you assess the foundational knowledge of your visitors, you can consider how to ensure that a proper historical overview is included, whether an introduction panel is adequate to set the scene of your story, or whether you need to produce other types of components such as audio-visuals.



Telling a good story

What is your content?

Content can refer to the subject matter of the exhibition or the materials you use to tell the story. It includes the label text (called the exhibition script), photos, images, objects, audio, video, and interactive experiences.

Once you have decided what the main message/big idea is, you need to develop several other messages to support the main message. These messages are statements you want visitors to learn from the exhibition. They may be called primary messages or take-home messages. Like the main message, they are usually woven throughout the entire exhibition and supported with examples.



For example, your main message is: “When they encountered each other, Lewis and Clark and the Indians made discoveries about their respective worlds.” This infers that the expedition traveled through a peopled landscape and that the different cultures interacted with and influenced each other. Under this message could be additional messages such as:

“The encounters between Indians and Lewis and Clark demonstrate the difficulties and the rewards of cross-cultural exchange.” (This gets at relevance, it takes the main message and helps apply it to the present. It also reminds the team to be sure to include examples of both difficulties and rewards in the exhibition)

“Lewis and Clark traveled through a land inhabited by established cultures that were rich, diverse, and complex.” (This targets misconceptions; based on front end research, the team knows most people think Lewis and Clark traveled through a vacant landscape or encountered primitive native peoples)

“Historic objects can be interpreted in diverse ways, and each object conveys a cultural message.”ⁱⁱⁱ (This reveals historical process and aims to help visitors understand some of the complexity of studying the past. It reminds the team to include multiple perspectives and show how objects convey messages.)

A story is usually told from the teller’s perspective. It is the teller’s interpretation of what happened. With history exhibitions, the story (or interpretation) should rest on solid history scholarship with facts at the core surrounded by interpretation of the historical evidence or primary sources. These sources can include documents, journals, business records, advertisements, oral histories, photographs, maps, or artifacts (objects).

The attributes of solid scholarship:

- Is built on accurate historical evidence and incorporates a variety of sources. There is no magic formula for the number of sources a history exhibition should include. But including a variety of kinds of sources (photos, maps, legal documents, personal letters, artifacts, and oral histories) makes the experience richer and helps to support multiple perspectives. Accurate historical evidence has been authenticated as an original source.
- Places story within historical context, both at the local level and to some extent at the national level. No historical event occurs in isolation. It’s important to provide context. What else was happening that shaped the outcomes and decisions involved in an event? How did the pieces of the story connect within the community? Are they connected to the wider world? Are there connections you can make at the national level? Were there similar events in other places? If not, what were the conditions in place so that it occurred where and when it did?

- Considers multiple perspectives and finds good balance. There are usually at least two perspectives to most events, often more. History can be compelling because it offers a range of viewpoints. You don't need to be talking about a controversial topic to find different perspectives. Solid history research attempts to provide a balance between perspectives.
- Acknowledges when evidence doesn't provide answers. Often, for various reasons, the historical evidence leaves holes in the story. We don't know a particular perspective or what someone was doing at a given time. It is important to acknowledge when this is the case.
- Presents evidence and acknowledges discrepancies between sources if they exist. Sometimes our sources offer conflicting views and they both seem valid. It's important to say this. Or one source may be more valid because other sources can corroborate its interpretation. Then make this point. Being transparent adds authenticity to our work, teaches the public about the historical process, and offers people a behind-the-scenes peek at research.
- Draws on the expertise of scholars, staff, community leaders and members. It often takes a team to develop a good exhibition. Many people beyond those with research experience can contribute knowledge and insight into historical topics. It benefits the entire project when a variety of voices are included in development.

When deciding the main message and stories you want to tell, you have an opportunity to research previously unknown stories and unearth artifacts in private collections. Are there stories you have not told in the past? This may be an opportunity to collect new stories from previously unheard voices.

The more relevant you can make an exhibition to your community the more powerful and valuable it will be. Relevance is the condition of being related or useful to what is happening or what people are talking about. On a personal level, relevance makes an individual feel connected. It answers the deep questions of "Why does this matter? Why should I care?" Value and relevance are intertwined. If something is not perceived as relevant, it usually does not have high value.

The more relevant you can make an exhibition to your community the more powerful and valuable it will be.

In her book *The Art of Relevance*, Nina Simon writes: “Something is relevant if it gives you new information, if it adds meaning to your life, if it makes a difference to you. It’s not enough for something to be familiar, or connected to something you already know. Relevance leads you somewhere. It brings new value to the table.”^{iv}

You also want your audience to see themselves reflected in your exhibition. By including higher level themes or universals, those topics that apply to everyone, you can be more inclusive and relevant to broader audiences. For example:

- If you are doing an exhibition about Shaker history, it might be hard for someone to relate to a group of religious, celibate, furniture makers. But by talking about community, sacrifice, and the desire to protect the environment, you can begin to draw your audience into your topic because they can more likely relate to these subjects.
- A museum doing an exhibition about the history of commercial aviation asked the question “who flew?” in the early 1950s. The photographs they planned to use showed wealthy, white travelers. Yet, black travelers were also beginning to fly. This led to the question of segregation in air travel. Additional research revealed some interesting material about this little-studied topic and allowed the exhibition developers to include photos of black air travelers and describe a letter campaign by a Congressman to the presidents of the major airlines describing the discriminatory treatment he received while flying, and requesting an end to segregation in airports.
- If you want to engage younger visitors, try to include images of children in the exhibition and to include material that relates to them.

The other crucial question to ask as you consider your story is what materials will illustrate the story. Before you move forward, you must assess whether or not you have the materials you need. The “things” are crucial in an exhibition

medium. You are not writing a book. If the materials are not in your collection, can you borrow them, or acquire them? Many collections have holes and most museums face this problem at some point. Perhaps your community demographics have changed over time and your collection doesn't reflect this. Or your collection focuses on history of technology and you want to tell people stories with more focus on social history. You don't necessarily need a budget to acquire new objects. By cultivating relationships and establishing partnerships with new groups in your community, you may find people eager to contribute to your collections with objects or with personal experiences. By involving key community advisors in the planning process, you gain their influence and access to their networks of potential contributors.

Audience Evaluation

One of the hardest tasks when developing a successful exhibition is knowing where to start your story and how much background information to provide. This requires gaining an understanding of your audience's base knowledge of the topic. If you're talking about the Cold War, you can't assume that younger generations know what it is. In fact, they don't. You will need to offer a description of the Cold War. But you need to know how much description is necessary. A segment of your audience will always include people who know much about your topic. Obviously audience members bring differing degrees of knowledge into the exhibition; you are looking for a base line.

There are several simple ways to assess audience knowledge and interest in a topic before you start developing an exhibition. This kind of evaluation is called front-end evaluation. To collect this data, you can either go to audiences already visiting your institution or you can go outside to potential audiences, say at a shopping mall or park or local cultural institution.

There are three main points in the development of an exhibition where it is helpful to collect audience feedback using evaluation.

Front-end evaluation – collected at the beginning of development; can help you understand visitor knowledge of your topic and expectations

Formative evaluation – collected during development; this allows you to make improvements and can focus on label design or format, exhibition title, hands-on and interactive elements, or other components in development

Summative evaluation – collected after completion of the exhibition; this allows you to better understand how effective you were with your purpose statement, main message, and other components. Combined with demographic information from exhibition attendance, it will tell you if you reached your target audiences and will help inform future exhibitions

Evaluation does not have to be a lengthy, labor-intensive, or expensive process. The sample size is the number of evaluations you collected and may be a small number when compared with your anticipated or actual attendance numbers. There is no ideal target sample size since it varies with each project. After you begin evaluation, you often quickly see a pattern emerge in audience answers.

The main methods of audience evaluation are:

Survey/questionnaire – filled out by visitors or used by an interviewer. A series of questions that can be multiple choice or scaled ratings (quantitative) or open-ended questions (qualitative).

Interview – collected by an interviewer. A series of open-ended questions. Requires more work to tabulate the answers because they are all different.

Focus group – conducted by trained personnel. A facilitated conversation with a group of people featuring a series of open-ended questions.

Observation – collected by trained personnel. Usually does not include direct interaction with the audience. May include observations of visitors in the exhibition, how they travel through it, which videos they watch, how much time they spent in it.

Engaging your audience

Since exhibitions are a medium for communication, you want to do as much as you can to make the exhibition as physically and intellectually accessible as possible. This requires a certain understanding of various audiences and their needs. Generally, when you make something more accessible to a specific audience, it usually improves accessibility for other audiences as well.

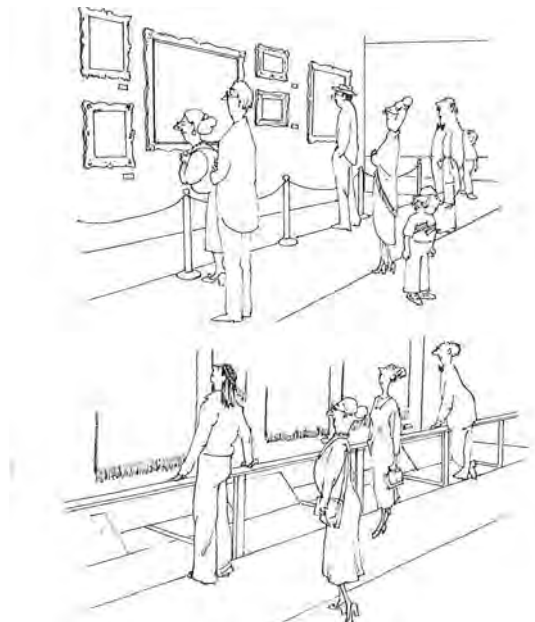
Physical access:

Blindness and low vision – audio components are important as are tactile components whenever possible. Tactile interactives, including models and reproductions, should reference the major themes of the exhibition. Color contrast should be clear and font styles should be easy to read. Lighting should allow ease of seeing artifacts. If a map with small print is vital to your story, find ways to make it accessible with a magnifying glass, or printed sheets showing it enlarged. Videos can contain special narration which gives viewers with low vision detailed descriptions of the actions and images on the screen.

Hearing loss – videos can be open-captioned and/or closed-captioned. Open-captioning displays the video transcript on the screen readily for easier viewing. Audio experiences could also be made available as hard-copy transcripts for these visitors.

Mobility loss – labels and cases should allow for ease of viewing for someone seated in a chair. If a space within the exhibition requires movement up stairs, ensure that there is an alternate way for chair users to access the information.

Autism Spectrum – consider what you may be able to provide for visitors on the autism spectrum, who may need special “sensory-friendly” times to visit or interact with the exhibition.



For more information regarding physical accessibility and Americans with Disabilities Act guidelines for museum exhibitions, see the Smithsonian Guidelines for Accessible Exhibition Design at <https://www.si.edu/Accessibility/SGAED>

Intellectual access:

How will you ensure an active learning experience? A deeper learning experience requires that the audience is engaged in and directing its own discovery. According to the Museum Educator's Manual, active learning in exhibitions "promotes reflection, dialogue, and closer inspection. It uses inquiry [questions] and interactive elements embedded in exhibitions to help visitors explore, discover, and construct meaning as they engage with the museum's collections."^v

Knowing how people learn or process information is important. There are many learning theories. One model that describes learning preferences, called IPOP, identifies people according to the information they seek out and find compelling.

The Smithsonian Institution's Office of Policy and Analysis developed IPOP to frame exhibition development and visitor preference. IPOP stands for:

- Ideas (concepts, abstractions, linear thought, rational reasoning and facts)
- People (emotions, stories, and social interactions)
- Objects (things, aesthetics, craftsmanship, ownership, and visual languages)
- Physical experience (physical sensations, including movement, touch, sound, lights, and smells)

A visitor might first be attracted to a strong idea, an emotional connection, a striking object, or a physical experience. IPOP also argues that visitors can "flip" and have a strong reaction to an experience different than those that usually attract them. This flipping can leave a memorable imprint for the visitor.

Interactives are often part of the exhibition experience and appeal to many types of learners, not just children. Museums define interactivity in many different ways. A tactile or hands-on component is not necessarily interactive. A good interactive requires a mental response, not just a physical response. According to Kathleen McLean, "Interactivity is about being reciprocal." She says qualities of effective

interactives include:

- Focused – one clear learning objective
- Simple directions
- Requires a thoughtful response
- Provides an outcome based on visitor input
- Clearly relates to and reinforces exhibition’s main ideas
- May ask the visitor to:
 - Conduct activities
 - Gather evidence
 - Select options
 - Form conclusions
 - Test skills
 - Provide input
 - Alter a situation based on input^{vi}

Interactives come in all shapes and sizes, from digital to mechanical. One common misconception is that they always cost a lot to develop and fabricate. Sometimes just simulating the weight of a block or ice to discuss keeping food cool or the weight of a backpack that a soldier was required to carry offers a new appreciation for people from the past. For example a label can state that an average bucket of water used to do laundry in the 1800s weighed twenty-one pounds. But when a visitor can lift a twenty-one pound bucket and learns that the average load of laundry required twenty buckets of water, they suddenly have empathy for a laundress from the past and understand that strength was required to do the laundry.

A good interactive requires a mental response, not just a physical response.

A simple interactive in an exhibition at the Smithsonian National Air and Space Museum featured a circular plastic disc that visitors could put onto two different surfaces, one smooth and one rippled. They are asked to compare the surfaces and to evaluate on which surface it was easier to remove the disc. The disc represents a sea plane and the surfaces represents calm and choppy water. Pilots of sea planes face the challenge of taking off from smooth water, something that

seems counterintuitive. The interactive explains the concept of hydrostatic friction in an easy way.

The key to effective interactives is testing. The more complex they are, the more they should be tested while under development to ensure that visitors understand how to manipulate them and receive the learning objective.

Writing the script

Writing the exhibition labels (the exhibition script) is not easy because it requires knowledge of both the content and the audience, plus requires excellent writing skills. While the content specialist may want to draft an outline or write a rough draft, he or she may not be the best person to write the final script. Whoever writes the script, a content expert and an education specialist should review the draft.

There are generally two main types of labels, interpretive and noninterpretive labels. Interpretive labels tell the story, noninterpretive labels don't and include donor and credit panels, navigation information (wayfinding) and identification labels listing object names and date. Within these two categories are different types of labels that vary greatly from museum to museum. The important point is that all labels should work as part of an integrated system; pieces of the whole exhibition.

Within the interpretive label category are titles, introductions, section labels, group labels and captions. Each type of label may have a different font size and word length, but again, they must fit into an integrated



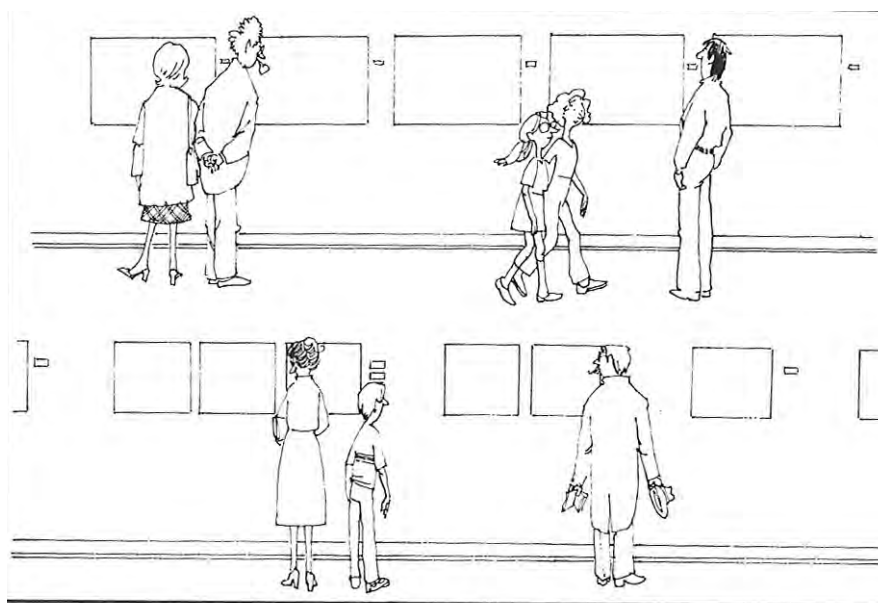
system. They each have a different role as well. Titles should attract attention, section labels introduce a topic for an area within the exhibition, and captions highlight a specific object or image.

It is important to remember that visitors will often not proceed through the exhibition in the “ideal way” your team envisions. In fact, according to Beverly Serrell, sometimes the only labels visitors will read are captions. When an object catches a visitors attention, the visitor want to know what it is and other related information. For this reason, it is important that captions start with visual, concrete information that describes what visitors can see. Move from this specific information to more general information. Keep information specific to what visitors are seeing. ^{vii}

Example from the National Air and Space Museum:

Juan Trippe’s Globe

From his office in New York City, Pan American president Juan T. Trippe used this globe to plan his airline’s expansion around the world. Trippe often would stretch a string between two points on the globe and calculate the distance and time it would take to fly between them. Made in the mid-1800s, this globe was featured prominently in many publicity photographs of Trippe. It became part of Pan Am’s and Trippe’s public image.



One of the biggest challenges for anyone writing an exhibition script is staying concise and determining the correct balance of information that is most effective. Some people prefer not to read labels, others desire much information. Beverly Serrell suggests five words per second as an average museum reading speed. She advises to write labels so that they can be read quickly—ten seconds or less. While label length varies greatly among museums, Serrell suggest the following in her book *Exhibit Labels*:

Exhibition title	1-7 words
Introductory labels	20-125
Group labels	20-75
Caption labels	20-75

Psychologist Stephen Bitgood has studied how visitors interact with museum labels and he lists three factors that help visitors increase their focus during the visit:

- Minimize the perceived effort to read —this means delete jargon, check readability level (should be no more than eighth grade level), and avoid large chunks of text.
- Provoke interest in the subject matter — combine questioning strategies with unexpected content; ask “why” questions.
- Minimize distracting factors — this is where a designer is helpful to ensure no shadows on text or difficult color contrasts on labels.^{viii}
- Two additional points could be added to his list:
- Help visitors make personal connections to content —this can be accomplished with questioning strategies.
- Direct visitor’s attention to specific objects or artworks, called directed looking.

Unfortunately inquiry (questioning strategies) is absent in many exhibition labels. Inquiry and directed looking are both strategies to increase visitor focus. Consider using these strategies for a more active approach to labels:^{ix}

Layered text — write information in chunks, with the most important sentence in a large font or with a question as the title, then provide more detail in smaller text chunks below

Questions — look for places to ask a question, ask what a visitor notices about an artifact, promote discussion among family members,

Directed Looking — write statements that direct visitors' attention to specific features of objects, ask visitors to make comparisons, and direct them to take a closer look for a detail

Asking good questions is not easy. There are two main types of questions: cognitive, which help people process and apply information, and affective, which challenge people to feel or imagine. Posing provocative questions within an exhibition panel encourages visitors to engage in conversation with their group or prompts self-reflection. Social interaction is one motivating factor often cited for museum visits.

As stated in *The Museum Educator's Manual*, “One challenge to incorporating inquiry into exhibitions is making the questions clear, direct, and easy to understand; otherwise, visitors will not invest their valuable time. The answer needs to be readily available or the problem solvable.”^x

Examples of inquiry and directed looking:

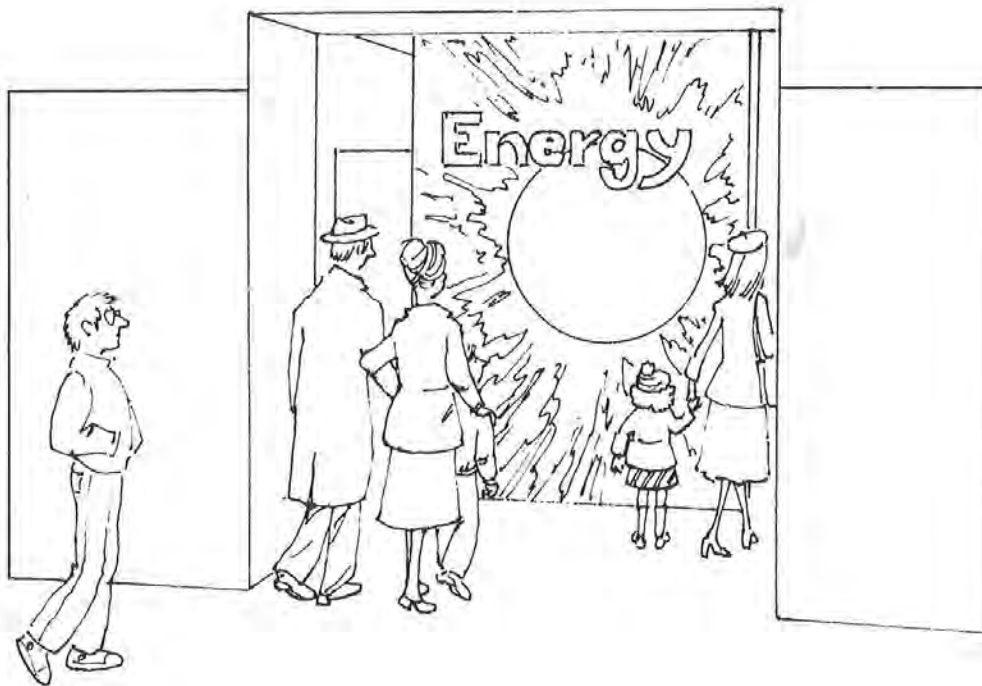
“Historians think this photo was staged, what do you think?” The surrounding context helps visitors easily answer the question.

Image of a newspaper headline and several paragraphs of an article: Along with flying, what other activities were prohibited for Hollywood stars in the 1930s?

A wall of advertisements for train and airplane travel to the same destination. The label reads: “If you were deciding which method of transportation to use, compare the cost, comfort and time required for each type of travel. Which would you choose?”

One challenging audience to plan for is multi-generational families. Writing for different ages and educational levels can be daunting. There are various approaches to ensuring that even younger visitors are engaged in your content:

- Create a specific place in the exhibition where the family group can work together to solve a historical or scientific problem, put a puzzle together, or construct something.
- Write a series of child-friendly labels, clearly identified, that address items of interest to the target group.
- Create a separate printed family guide that is given to adults in a group and helps them make content accessible to younger ages or provides complementary content for younger ages.
- Family programs scheduled throughout the run of the exhibition.



Knowing what motivates visitors is important. Often museum staff assumes that people visit an exhibition because they want to learn. This is not necessarily true. They may be on a social outing with friends or family. Maybe they want to see something rare or beautiful. A study done for the Smithsonian National Museum

of Natural History in 2009 identified six key elements that lead visitors to view an exhibition experience as particularly interesting, memorable, engaging or inspiring:

Relevance – Visitors must be able to relate their experience to their own life. It should offer something they can apply to their life.

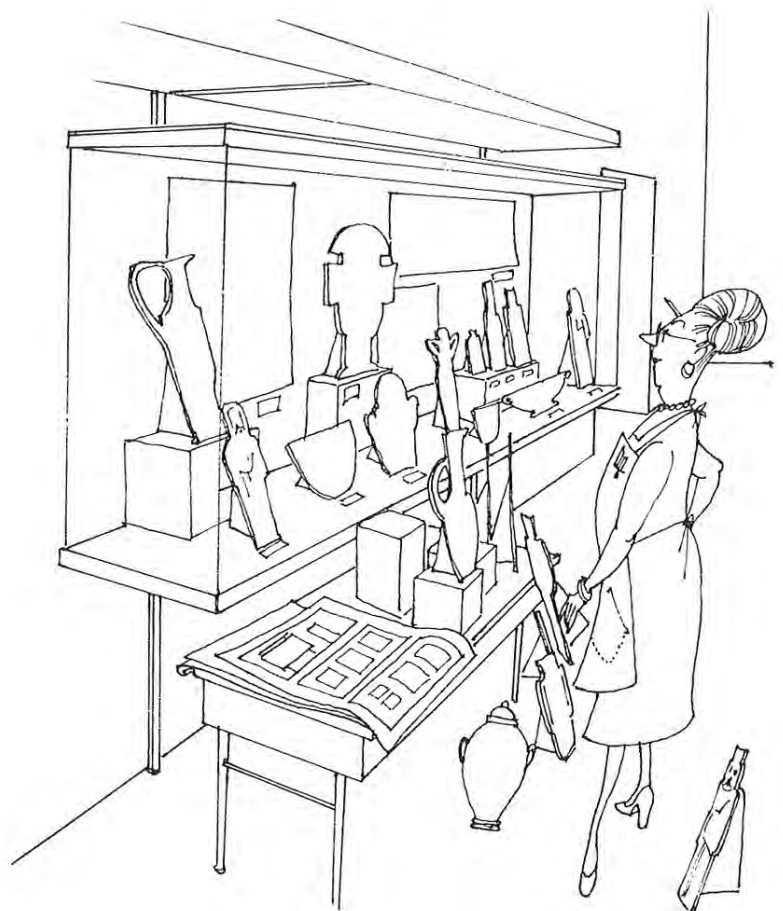
Customization – Visitors want a degree of flexibility to customize their experience to suit their personalities, interests or moods.

Immersion – Visitors appreciated being fully immersed in the content by a component that took them out of the museum setting and into another place/time.

Dynamic content – Visitors desire to see or experience action, movement and change.

One-of-a-kind experience – Rare objects or new technology or something uncommon in everyday life.

A sense of wonder – Information and ideas that haven't encountered before or unexpected experiences.



Beyond the exhibition

Many exhibitions include supplemental experiences or products that enhance the exhibition. These should be considered near the beginning of exhibition development as funds or space or other resources may need to be raised or allocated for them. Some of these are:

- Educational/curriculum materials – another reason a teacher advisory panel could be useful
- School program/tour
- Programs such as lecture series, film series, or concerts – you may want to consider programming space adjacent to the exhibition
- Website
- Publication – catalog or newsletter or magazine devoted to the exhibition
- Family event

End note

Every exhibition is an opportunity to tell a unique story and to introduce new audiences to your research and collections. Exhibitions call for creativity and for thinking outside the box. They also offer a chance to experiment and try new methods and technologies. When you reveal stories that haven't been told and voices that haven't been heard, you show a desire to be relevant to all. Exhibitions allow you to connect more deeply with your community as you find new partnerships, work with new advisors, and demonstrate your willingness to be a vital part of the fabric of society.

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- ix *The Museum Educator's Manual*, 72
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USING INTERPRETIVE THEMES AND OBJECTIVES WILL MAKE YOUR PROGRAM PLANNING EASIER AND MORE EFFECTIVE

By John A. Veverka

John Veverka is president of John Veverka & Associates and is a *NAI Certified Interpretive Trainer* and *Certified Interpretive Planner*. For more of John's articles on Interpretive Planning, Interpretive Theme Development, and related topics, visit his web site LIBRARY at: www.heritageinterp.com. You can reach John at jvainterp@aol.com, or by phone at (517) 347-2166 (517) 347-2166.

Perhaps two of the areas where there is often the most confusion in planning for interpretive programs or services is that of developing interpretive themes and interpretive program or services objectives. Here are a few ideas and examples that may help making this part of the interpretive planning process easier and more effective.

What is an Interpretive Theme?

A theme is the central or key idea of any presentation. When communicating with your visitors, the audience should be able to summarize the main point of the program in one sentence. This sentence would be the theme. Development of a theme provides organizational structure and clarity of purpose of the program. Once the main interpretive or story line message theme has been decided, everything you do in presenting the program or service to the audience falls into place. The main strategy then of the interpretive program is to **illustrate the theme statement**.

Themes should:

- Be stated as a short, simple, complete sentence.
- Contain one main idea if possible.
- Reveal the overall purpose of the program or activity.
- Be interestingly and motivationally worded when possible.

Here are some examples of themes:

- Exploring caves is a sensual experience.
- We manage our habitats to benefit both people and wildlife.
- Backyard wildlife needs your help.
- Our forest has many plants that heal.
- Living in the Smith homestead was full of daily challenges.
- We need to preserve wetlands for five reasons.
- Steam engines changed our lives in three ways.

It is important not to confuse themes with **topics**. Examples of topics that **might be mistaken for themes** might be:

- Birds of the Park.
- Seasonal Wildflowers
- Bird migration.
- Cooking with native plants.

Be sure your themes are "complete sentences" – and meet the other criteria noted above.

Interpretive Objectives

Many interpretive programs or services are planned without objectives or "real" outcomes. I find it hard to successfully plan any interpretive program, service or media without clearly understanding just what it is the interpretation is supposed to accomplish.

Objectives vs. goals.

There is often some confusion between the two. I usually don't use goals, as goals aren't measurable, like "it is my goal to go to Florida someday".

Objectives are outcome driven and measurable. For example if we had the interpretive theme: "***Wetlands benefit us in amazing ways.***" then we need to develop interpretive objectives that would help illustrate that theme, such as: ***At the completion of this program all participants can identify three ways that wetlands benefit us.***

This objective statement can be pre tested with visitors to see if they already know or can name three benefits, and then post tested after the program to see if they can name three benefits. If they can't – the program didn't accomplish its objectives. You can't really evaluate the success of any interpretive program or service without first understanding what the outcomes - objectives - of the program or service were.

I use three kinds of objectives in interpretive program/service planning, Learning, Emotional and Behavioral. Here are some examples.

Upon the completion of the program,

Learning objectives: The majority of visitors will be able to (name, list, describe) three reasons that wetlands should be protected.

Emotional objectives:

- The majority of visitors will FEEL good about the preservation work we are doing here to protect wetlands.
- The majority of visitors will feel that protecting wetlands does indeed benefit them, their community and the environment.

Behavioral objectives:

- The majority of visitors will want to see the wetland exhibits in the Nature Center.
- The majority of visitors will consider contributing to our "preserve the wetlands" fund.
- The majority of visitors will want to walk our wetlands trail looking for the wetland features from the program.

These **Learn – Feel - and Do** objectives are central to interpretive program planning – particularly the Feel and Do objectives. You can have as few or as many objectives as you want. They are your guidepost to what is really important for the program to accomplish and how you want the program to affect your visitors. Two hints in making sure your objectives are marketable (people will want to come to the program). Ask yourself:

1. Why would my visitors want to know this information?
2. How do I want my visitors to USE this information (from the program)?

The answers to these questions may help guide your objective (program content and proposed outcomes) development.

Summary:

With your theme in hand, and your objectives in place, you are now ready to develop the various teaching aides, demonstrations, slide presentation, and program presentation to illustrate your theme, and then evaluate the effectiveness of your program.

Remember that the theme is the one thing that - by gosh if nothing else – the visitor remembers from the interpretive program or service. You begin the program by stating the theme – and then summarize the program at the end by again stating the theme "**Now you have seen three examples of how protecting wetlands benefits you**".

The objectives will focus the content of the program, help you plan the total presentation, and will be used to evaluate the program to see if it was really successful – or just entertaining. Now you know, and can hopefully describe why:

Using interpretive themes and objectives will make your program planning easier and more effective.

PLANNING TRULY 'INTERPRETIVE' PANELS

By John A. Veverka

John Veverka is president of John Veverka & Associates and is a *NAI Certified Interpretive Trainer* and *Certified Interpretive Planner*. For more of John's articles on Interpretive Planning, Interpretive Theme Development, and related topics, visit his web site LIBRARY at: www.heritageinterp.com. You can reach John at jvainterp@aol.com, or by phone at (517) 347-2166 (517) 347-2166.

Are your boards "boring"?

If your interpretive boards or panels are boring, then you can be sure of one thing - they are NOT interpretive. Truly "interpretive" panels are planned and designed to be exciting, provocative, revealing and memorable. There is a big difference between interpretive and informational panels. This short article will reveal the difference and give you some ideas as to how to make sure that your interpretive panels effectively communicate with you visitors - and accomplish their purpose.

What does it mean to be "Interpretive"?

Today almost everything we toss out in front of visitors is called "interpretive", yet most of the communications we give them are informational not interpretive! The definition of interpretation I prefer to use - and have taught for many years - is:

Interpretation is a communication process designed to reveal meanings and relationships of our cultural and natural heritage, to the public, through first hand involvement with objects, artifacts, landscapes, or sites.

The communication process in the definition is the use of Tilden's Interpretive Principals which state that to be "interpretive" the communication process must:

- Provoke the attention, curiosity or interest of the audience.
- Relate to the everyday life of the viewer or reader.
- Reveal the theme or key point of the message through a unique or creative viewpoint, design or perspective.
- Address the Whole - the interpretation should illustrate a higher theme or message.
- Strive for message unity - use the correct graphics, colors, textures, design elements to support the theme of the interpretive message.

This process is also the basics of a good advertisement. When you look at or read a provocative ad in a magazine or on TV, you are seeing interpretive principals at work. Interpretation has come from, and utilizes communication strategies and techniques from: advertising, marketing, consumer behavior, psychology of the audience, recreational learning theory, journalism, as well as other support areas.

Planning Interpretive Panels

Plan for your total site interpretation and your media mix.

Before you begin planning for one or more interpretive panels you should first consider the main story or theme of your total site and other interpretive media and services that will make up your message media mix. What is a media mix? To illustrate and interpret the total site story to your visitors you may use a variety of media including printed leaflets, visitor center exhibits, outdoor demonstrations, living history, guided tours, self-guiding audio devices and interpretive panels. The variety of media you use for interpreting your total site is your media mix.

In the interpretive plan for your total site you should have determined that for a given site, resource or location, interpretive panels were the best or most cost effective media for interpretation at that location. But the panel(s) is only one of many different media you may be using to illustrate/interpret your total site theme. So, you should consider, as good planning practice, where and how the panel will fit into your total media mix presentation of your site story. Is a panel the best media? Do you need an interpretive panel? Remember, you are interpreting the "whole site", and a panel(s) for an individual location should be planned and designed to fit into the total site story presentation and design look (media graphic standards). The bottom line - the interpretive panel should fit in and help illustrate your total site interpretive message.

Interpretive panel planning considerations

Once you have decided that an interpretive panel(s) is the BEST media for interpretation at a particular site or resource, here are the key steps I recommend in planning and designing interpretive panels.

- 1) Story and theme analysis. Identify the key concept that this particular panels will be designed to interpret. The best way to determine the theme is to ask yourself "if a visitor only remembers one thing or message from this panel, I want that one thing to be _____". The answer is the theme. Note that there is a big difference between a theme and a topic. A theme is a complete sentence and a topic isn't. For example:

Topic: Birds of the park.

Theme: We manage this habitat to attract three species of migratory birds.

The THEME is what the panel graphics and text will "illustrate".

- 2) Audience analysis. Once you have the theme you want the panel to interpret, you also need to consider just who will be reading the panel. Will the audience be: experts or people with little knowledge; local residents or tourists; children or retired folks, etc. The market group that the panel is designed for will translate into the kind of text, graphics, and "relate" approaches you use in the final design.
- 3) What are the objectives of the panel? This is the area where most planning falls short. I would guess that most panels in the countryside today are "objectiveless" panels. That means that no one can explain why they are there other than that "we got funding for 5 boards and had to do something!" The ONLY way you can be sure that your panels are working are to have objectives for them. I like to use three different objective levels in panel planning:

* Learning objectives:

Upon completion of reading/looking at the panel, the majority of the visitors will be able to list the three ways that wildlife preserves benefits wildlife and people.

* Behavioral objectives: These are the most important of the objectives as they determine the real results or purpose of the panel.

Upon completion of reading the panel, the majority of the visitors will use this resource in a safe and stewardship-like manner.

Upon completion of reading the panel, the majority of visitors will stay on designated trails only.

*Emotional objectives: These are the objectives where you describe how you want the audience to FEEL upon completion of their interaction with the panel. It is the emotional objectives that drive the Behavioral objectives quite often.

Upon completion of reading the panel, the majority of the visitors will feel that protecting natural areas is important for them and their children.

Upon completion of reading the panel, the majority of the visitors will feel the desire to help support the (agency, etc.) that manages this preserve.

The true success of the interpretive panel is dependent upon you having clear and accomplishable objectives. How can you "plan" a panel if you don't know what it is you want the panel to accomplish?

4) The two questions!

After you have developed your objectives, or as you consider what you want the objectives of the panel to be, ask yourself these two questions:

* Why would the visitor want to know this? This is my "who cares? Or so what?" question. If you cannot answer these questions - you will have a problem in the panel being successful. Be careful not to have your panel giving answers to questions that no one is asking! If you can think of a good reason that the visitors will want to know this information - use that statement as part of the panel header (Provoke). For example: This plant can save your life! Would you want to know more?

* How do you want the visitor to USE the information you are giving them? If you don't want the visitors to use the information on the panel in some way, then why are you giving it to them? The answer to this question can become your behavioral objective(s), such as to "have a safer experience", or to "consider becoming a volunteer at the Centre". Again, there is not a right answer. But you need to consider the question carefully. You have spent a lot of time and money on developing this panel - WHY? What do you want as a result of your panel investment?

5) Determine How/When/Where to Use Interpretive Boards or Panels. This planning consideration concerns itself with such issues as selecting the panel materials that would be best for your site/use. Kinds of materials can range from Fiberglas and porcelain signs to photo metal, lexan, and other materials. Each sign material has its benefits and limitations. It's good to ask for material specifications and samples from different sign manufactures to see what your options and costs are. Remember, the visitors don't care what kind of panel material you use - they only care about the quality of the message presentation! How/When/Where questions you also need to consider are:

- Panel locations. What kind of mounting system will you need, what will the impact on the panel mount have on the environment or on the "view"?

- Panel maintenance. Can the panel and mounting system be easily maintained should any vandalism occur or the panel needs to be changed in the future?

- What is the "life" of the Panel - how long do you intend to have it in place as is? The answer to this question might reflect on your choice of panel manufacture materials.

- Will the panel topic be for a seasonal presentation or a year round presentation?

- Will any of the information presented on the panel be likely to change in the near future?

- 6) Evaluation. This is an important step in the interpretive planning process that is almost always left out. Before you spend \$2000.00 on a panel or board, wouldn't you like to be sure that it works (that its objectives are being accomplished)? I recommend that you make a simple photo copy of the proposed draft panel and pre-test it with a sample of your visitors to see if they understand the message, etc. When you have the panel text and graphics working at a 70% of greater level of objective accomplishment - then send it out for final production.
- 7) Implementations and Operations. This part of the planning process focuses on the real costs, time and logistics involved in getting from the "let's have a panel" stage to the final installed product. Some of the questions you need to consider include:
 - What is the budget, and what are our media fabrication options for that budget.
 - When do we need it by, and how long does it take from plan to fabrication?
 - Who will do the contract, manage the contract, etc.
 - Who will do the research, write the label copy, select graphics, do final design, and do the actual fabrication?
 - Who is responsible for approvals (drafts, text, design, etc.)?
 - Who (will you) do any pre-testing evaluation studies?
 - Who will install the panel(s) and maintain them?

Remember the visitor!

In planning and designing interpretive panels it is important to remember some basics about how visitors learn and remember information.

- People learn better when they're actively involved in the learning process.
- People learn better when they're using as many senses as possible.
- People retain about:
 - * 10% of what they hear.
 - * 30% of what they read.
 - * 50% of what they see.
 - * 90% of what they do.

Make sure that the visitors use the panel to help them look at and understand the resource the panel is interpreting. Use behavioral considerations in the panel design and text such as: "look for the...", or can you find the... in the site in front of you", "go ahead and touch the...", "listen for the...". These action steps will help design some "minds on and hands on" activities for the "90% of what they do" communication information retention process.

Dare to be CREATIVE!

If you have had some time to go out and look at interpretive panels you might have noticed some things that many have in common. They might be un-inviting, un- exciting, un-memorable, and probably un-successful! How many of the panels you have seen in the past can you remember anything about? Do you want your panels to be the same? Do you really want to spend \$1000 or more for your panels' message to be a blur in your visitors' site experience? Then dare to be creative!

Depending on the particular panel topic: consider using cartoons; use "hidden picture graphics" (how many birds can you find in the illustration?); challenge the visitor to look for, find, smell, touch, THINK; use riddles or puzzles and have the visitor check with staff, at a visitor center, etc. to see if they had the correct answer.

Consider using a 3-D panel - using sand-blasted wood to create an elegant presentation of shape, color and text. Design a vertical panel with a "peep hole" so the visitor can look through the panel to see a resource. Use clear vertical panels with sand blasted historic illustrations on it so that a visitor can look at/through the panel at the historic site and see super imposed on the site, through the clear-etched panel, what the resource might have looked like 100 years ago - 500 years ago! Dare to be Creative!

Use the panel mounting or frame as an exhibit element too! You can use solar powered digital sound boxes in the frames to include bird calls, sound effects or other messages; or use 3-D Fiberglass impressions built into the frames for visitors to touch.

Don't be so comfortable with the way that "it has always been done". There is not a wealth of evidence showing that the way "we've always done it" has actually worked! Try new ways, new strategies, and new perspectives. And pre-test before you build. The visitors should be the ones to tell you if it is a good idea or not.

What if it fails?

- * *"A ship in port is safe, but that's not what ships are built for."* - Grace Hopper, Inventor.
- * *"There's as much risk in doing it "the way it's always been done" as there is in trying something new"*
- John Veverka, Interpretive Planner.
- * *"Behold the turtle who makes progress only when he sticks his neck out."* -Old Chinese proverb.

The point to all this is that there are lots of new, exciting and creative ways to tell a story with a panel. You shouldn't feel restricted in your individual creativity - it may be just the thing needed to help make an potentially boring story really come to life for the visitor. Remember, the chief aim of interpretation is provocation - NOT instruction.

Summary

This short article focused on the key components to planning and designing a successful interpretive panel. The planning process should consider: 1) the main theme of the panel; 2) the intended audience; 3) the objectives of the panel; 4) How/When/ and Where you intend to use the panel; 5) how you will evaluate the panel to make sure that its' objectives are being accomplished; and 6) implementation and operations considerations.

Interpretive panels must use interpretive principals: Provoke, Relate and Reveal the essence of the message. And finally, consider the visitor; they are not out on a holiday to read a book on a stick. Make sure that the panel content relates to them and considers the two questions: 1) why would the visitor want to know this and 2) how do I want the visitor to use the information I am interpreting to them.

Interpretive panels don't just happen, they are carefully planned. For the time and investment involved producing them, interpretive panels are more effective than panels not using interpretive techniques or principals. Their product is your success - if done correctly.

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Thinking Evaluatively: A Practical Guide to Integrating the Visitor Voice

By Jill Stein, Marianna Adams, and Jessica Luke

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

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

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

WHAT IS EVALUATION?

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

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

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

WHY DO EVALUATION?

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

Evaluation helps you define goals.

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

of the visitor experience. As a result, the project has a much greater chance of being more effective.

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

Evaluation can save time and money.

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

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

Evaluation can help leverage funding and support for projects.

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

Evaluation can enhance staff communication and curiosity.

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

FIVE COMMON MISCONCEPTIONS ABOUT EVALUATION

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

- 1 Evaluation is something you do at the end of a project.** Evaluation is most useful when it is incorporated into all stages of a project—allowing useful changes at any point in project development. Seeing it as the final grade of a project limits the true value of evaluation.
- 2 Evaluation is a written survey.** A written survey is only one technique for gathering information. Other tools include interviews, discussions, focus groups, observations, and timed tracking of visitor behavior.
- 3 Evaluation is about finding fault with something or someone.** Evaluation can be as much about finding out what works as what does not work as well. Evaluation does not lay blame, but rather helps project teams define their goals and objectives, create effective implementation, and shift directions based on visitor feedback.
- 4 Evaluation won't tell me anything I don't already know.** While staff may have hunches about what's working and what's not, evaluation offers valid evidence and insights. When staff relies solely on assumptions, they may be puzzled and disappointed by visitors' reactions.
- 5 To be valuable, evaluation projects need to be BIG (and expensive).** Large, complex evaluation projects are not necessarily better than smaller, focused projects. When implementing evaluative thinking, start small. Once evaluation becomes a habit, it can expand according to need.

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

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

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

Evaluation can be a stimulus for change and growth.

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

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

WHEN SHOULD YOU DO EVALUATION?

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

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

Front-End Evaluation

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

hibition. These studies are exploratory in nature and typically seek information about visitors' interests, expectations, and understanding of proposed topics.

Formative Evaluation

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

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

Summative Evaluation

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

A summative evaluation conducted for the American Philosophical Society suggested that while

visitors preferred authentic objects to reproductions, they also saw the importance of using reproductions as an educational tool—as long as it was made clear that the objects were reproductions. While these findings were useful for the specific exhibition being assessed, they also informed the institution's future practices.⁶

WHO SHOULD DO EVALUATION?

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

Doing it Yourself

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

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

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

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

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

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

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

5. Embrace the process more than the product.

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

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

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

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

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

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

- 1 Spend time On the Floor.** Spending time observing visitors—provides valuable insight into how visitors use the space, engage with exhibits, read labels, and have conversations. Draft a checklist of behaviors you are interested in, or simply write down what you see and hear.
- 2 Distribute simple survey cards.** Use simple survey cards to gather basic information about your visitors, such as age, gender, race/ethnicity, education, prior visitation, and residence. Design a half-page, attractive survey card to hand out to visitors or use as a tool for a quick interview.
- 3 Create multiple opportunities for visitors to leave comments.** Many museums have comment books available, but they are often easy to miss. Be creative with the media you use—such as cards in a variety of shapes and colors, or anything visually compelling. To avoid assembling random information, consider using prompts for specific feedback.

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

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

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

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

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

WORKING WITH OUTSIDE EVALUATORS

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

1. An Educated Consumer is the Best Customer.

Even if you plan to work exclusively with an outside evaluator, your work will be far more effective if you are well informed about the nature and rationale for integrated evaluation studies.

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

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

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

4. Good Contracts Make for Good Services. A responsible evaluator will require that the two of you develop a written contract and a work plan/timeline for the evaluation. Either party may initiate the contract, but be sure to define expectations, as well as a means to address the unexpected. Time spent clarify-

ing outcome goals and evaluation questions is the best safeguard for staying on track.

5. Establish a Realistic Working Relationship.

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

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

THINKING EVALUATIVELY: ENGAGING YOUR WHOLE STAFF

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

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

2. Engage staff in a visitor role-play exercise. The key to thinking evaluatively is being able to walk in the visitor's shoes. As this can be a difficult task, role-playing activities can help staff shift their thinking in a fun, engaging way. For example, Institute researchers conducted a workshop with staff from the Art Gallery of Ontario focused on evaluative thinking. They broke staff into groups and assigned each team

a visitor type (such as an older Asian couple interested in architecture; or a family with children aged two, six, and thirteen). Each team was then asked to think about the ideal experience for this visitor group and describe it in an imaginary letter/email. This activity allowed staff to clarify what they truly wanted visitors to experience. Surprisingly, many staff found that they did not focus as much on learning content, but on having the visitors feel excited, curious, comfortable, and welcome.

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

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

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

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

visitor experience, challenge people's assumptions, and simply make evaluation fun!

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

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

EVALUATION ACTION PLAN WORKSHEET

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

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

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

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

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

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

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³ Marianna Adams and Hava Contini, "Front-End Evaluation Study for the San Diego Natural History Museum New Exhibition Design Process," Technical Report (Annapolis, MD: Institute for Learning Innovation, 2001).

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