Interpretive Planning for Museums

Integrating Visitor Perspectives in Decision Making

Marcella Wells,
Barbara Butler,
and Judith Koke

ROUTLEDGE

INTERPRETIVE PLANNING FOR MUSEUMS

This page intentionally left blank

INTERPRETIVE PLANNING FOR MUSEUMS

Integrating Visitor Perspectives in Decision Making

Marcella Wells, Barbara Butler,
and Judith Koke

Routledge
Taylor & Francis Group
LONDON AND NEW YORK

First published in 2013 by Left Coast Press, Inc.

Published 2016 by Routledge
2 Park Square, Milton Park, Abingdon, Oxon OX14 4RN
711 Third Avenue, New York, NY 10017, USA

Routledge is an imprint of the Taylor & Francis Group, an informa business.

Copyright © 2013 Taylor & Francis

All rights reserved. No part of this book may be reprinted or reproduced or utilised in any form or by any electronic, mechanical, or other means, now known or hereafter invented, including photocopying and recording, or in any information storage or retrieval system, without permission in writing from the publishers.

Notice:
Product or corporate names may be trademarks or registered trademarks, and are used only for identification and explanation without intent to infringe.

Library of Congress Cataloging-in-Publication Data:

Wells, Marcella D, 1953-
Interpretive planning for museums : integrating visitor perspectives in decision making / Marcella Wells, Barbara Butler, and Judith Koke.
pages cm
Includes bibliographical references and index.
ISBN 978-1-61132-156-2 (hardback : alkaline paper) — ISBN 978-1-61132-157-9 (paperback : alkaline paper) — ISBN 978-1-61132-158-6 (institutional eBook) — ISBN 978-1-61132-673-4 (consumer eBook)
1. Museums—Planning—Decision making. 2. Interpretation of cultural and natural resources—Planning—Decision making. 3. Museum visitors—Attitudes. 4. Museums—Social aspects. 5. Museums—Educational aspects. I. Butler, Barbara H. II. Koke, Judith, 1958- III. Title.
AM121.W45 2012
069—dc23
2012035359

ISBN 978-1-61132-157-9 paperback
ISBN 978-1-61132-156-2 hardback

Contents

List of Figures 7

List of Tables 9

Preface 11

1 Introduction 13
- 1.1. True Story: Developing without a Plan 13
- 1.2. The Need for This Book 15
- 1.3. The Purpose of This Book 20
- 1.4. Audiences for This Book 22

2 Conceptual Foundations 25
- 2.1. Museums as Learning Institutions 25
- 2.2. How We Have Come to Understand Visitors 27
- 2.3. Theoretical Foundations of Interpretation 30
- 2.4. Planning for Interpretation and Learning 33

3 Interpretive Planning 37
- 3.1. Definition 37
- 3.2. Scope and Scale of Planning 40
- 3.3. Planning Team Considerations 44
- 3.4. Integrating Visitor Perspectives into Interpretive Planning 45

4 The Outcomes Hierarchy 51
- 4.1. Visitor Perspectives and the Nature of Outcomes 51
- 4.2. The Outcomes Hierarchy 54
- 4.3. Developing Outcomes and Impacts 62

5 Integrating Visitor Perspectives in Master Interpretive Planning 71
- 5.1. Introduction 71
- 5.2. Situation and Need 72
- 5.3. Purpose and Goals 78
- 5.4. Inventory 79
- 5.5. Analysis 83

5.6. Themes and Visitor Experiences 89
5.7. Recommendations 95
5.8. Implementation Guidelines 99

6 Integrating Visitor Perspectives in Project Interpretive Planning 103
6.1. Introduction 103
6.2. Situation and Need 106
6.3. Purpose and Goals 107
6.4. Inventory 108
6.5. Analysis 113
6.6. Themes and Visitor Experiences 114
6.7. Recommendations 118
6.8. Implementation Guidelines 124

7 Concluding Thoughts 129
7.1. Revisiting Issues 129
7.2. Outcomes, Impact, and Public Value 132
7.3. Twenty-First-Century Planning 138

Appendix A Example of Outcomes Hierarchy Used as an Executive Summary of Visitor Perspectives 141

Appendix B Sample Tables of Contents of Interpretive Plans 145

Notes 153

Glossary 155

References 161

Index 169

About the Authors 175

List of Figures

1.1	Learning Landscape	18
3.1	Scope and Scale of Interpretive Planning	40
3.2	Sequence of Interpretive Planning Discussions and Decisions	46
4.1	Outcomes Hierarchy	55
6.1	Context for Exhibit or Project Planning	104
6.2	Activity Phases of the Exhibition Development Process	104
6.3	Sample Theme and Visitor Experience Organizer	116
6.4	Concept Map of Maharaja Visitor Experience	117
6.5a	Floor Plan Schematic	122
6.5b	Elevation Schematic	123
6.6	Sample Bubble Diagram Schematic	123
6.7	Sample Budget Summary	125
6.8	Sample Simplified Time Scheduling Chart	126
6.9	Sample Implementation Guideline Table	127
7.1a	Five Clusters of Benefits	136
7.1b	A Map of Art Experience Benefits	137
7.2	As the (Museum) World Turns . . .	139
A.1	Outcomes Hierarchy Basic Structure	141

This page intentionally left blank

List of Tables

4.1	Cognitive (Intellectual) Domain Hierarchy	67
4.2	Affective (Emotional) Domain Hierarchy	68
4.3	Psychomotor (Behavioral) Domain Hierarchy	69
4.4	Social (Interpersonal) Domain Hierarchy	69

This page intentionally left blank

Preface

This book started on a cocktail napkin. Following our 2001 workshop called Understanding Visitors—The How and Why of Visitor Research,[1] two of us, Barbara and Marcella, met for happy hour, and The Triangle was conceived over drinks. This triangle developed into our Outcomes Hierarchy: a model that arrays visitor experience outcomes in progressive tiers of a triangle and is designed to help museum practitioners plan, and consider the effects of, their interpretive efforts. In 2002, we published the hierarchy as the Visitor-Centered Evaluation Hierarchy in an article in *Visitor Studies Today!* (Wells and Butler 2002); a second article, in which we revised the hierarchy slightly, appeared in *The Public Garden* (Wells and Butler 2004). No fewer than a dozen revisions and refinements later, the Outcomes Hierarchy serves as the centerpiece of this book. In our discussion here, however, we take the hierarchy a step further by exploring its usefulness for integrating visitor perspectives in interpretive planning for museums.

Often visitor research and interpretive planning are pursued independently of one another. On the one hand, visitor studies specialists are interested in how their evaluation results will be used to achieve more effective visitor experiences. On the other hand, educators and interpretive planners are interested in, but are sometimes uncertain about, how to pursue or apply visitor studies. Our discussion and recommendations are intended to help informal learning institutions integrate visitor perspectives into interpretive planning by drawing strongly on the Outcomes Hierarchy. We hope that readers will hold the hierarchy in their minds as they encounter crucial moments of decision throughout the process of planning visitor experiences. Although this book is not specifically about evaluation, it aims to ensure that visitor perspectives are considered throughout planning. Our emphasis on the importance of integrating visitor perspectives into the practice of interpretive planning is based on the belief that the greater our understanding and use of visitor perspectives and input, the more likely we are to develop and realize relevant and engaging programs and exhibitions.

We three authors all are fortunate to have had careers that span multiple disciplines that, in turn, support an integrated approach to visitor experience planning. We have spent our professional lives questioning: What can we learn from visitors and our communities that will help us

develop a successful project and document our success? How do desired outcomes help shape a project? How do we decide what to eliminate in tight budget or schedule situations? We advocate for thoughtful and intentional interpretive planning that integrates visitor perspectives, believing that this approach is the next step in working with, rather than for, our communities, a step toward becoming truly visitor-centered and effective as essential learning institutions of the twenty-first century.

Examples of interpretive plans in museums are somewhat rare at present. We hope that this book will ignite enthusiasm for planning and stimulate increased interest and practice in a more integrated approach to planning visitor experiences. We would like this to be the beginning of a dialogue with our colleagues, and so we welcome contact, critique, and discussion. Perhaps a revised edition will shortly be required as this dialogue continues.

Sincere thanks go to our reviewers, Daryl Fischer, Charlie Walter, and Kelly McKinley, for providing valuable feedback on drafts of this book. Their perspectives on our perspectives proved immensely helpful in clarifying our ideas. Second, we would like to thank our graphic artists, Sue Sell and Michelle Cerise, and illustrator Mickey Schilling for their parts in creating images that aid readers in visualizing our ideas. Third, we want to thank the institutions that granted us permission to use excerpts from their interpretive plans as examples in the latter chapters of the book and Appendix B. Finally, we thank our respective husbands, Alan and the two Glenns, for their patience and encouragement throughout the book's genesis.

Chapter 1

Introduction

1.1. True Story: Developing without a Plan

A well-established, successful, midsize history museum begins a process for mounting a new permanent exhibition. Having received a planning grant from a national foundation, the curatorial and education staff meet to begin "planning"—in this case, beginning with a topic, a list of possible objects and photos from the collections, and a brief content outline.

As the staff continues to develop the objects list and content outline, planners contract with a local exhibit design firm to develop schematic ideas and eventual design drawings. Some weeks later they hire an evaluator to conduct an evaluation of exhibit concepts and possible interactive elements. A few months later they submit a planning grant report to the foundation containing a theme document, design drawings, object lists, final label copy, and the evaluation report.

This scenario is all too familiar in some museums and informal learning settings: exhibit ideas are spawned, often prompted by the collections, and the development process begins. A grant proposal is submitted, funding is secured, and artifact selection, content development, and design development begin. Depending on the institution or the situation, sometimes an outside contractor (e.g., exhibit designer, evaluator, content specialist) is brought into the process. An exhibition is installed leaving many decisions undocumented and often leaving fundamental questions unanswered. Questions such as why the exhibition is important, who are the intended audiences, and what are desired visitor outcomes may be addressed in a grant application, but too often responses to these questions are not clearly articulated and made transparent to stakeholders of the project including museum staff, contractors, institution partners, and other funders.

Wells, Marcella, Barbara Butler, and Judith Koke. "Introduction." In *Interpretive Planning for Museums: Integrating Visitor Perspectives in Decision Making*, 13–23. ©2013 Left Coast Press, Inc. All rights reserved.

The impetus for a new exhibit or interpretive project can come from any of a number of sources—donors, board members, museum staff, a community leader, or a "friend" of the institution. For example:

- Has a new CEO or board president, passionate about a favorite topic, ever directed the staff of your institution to develop a new exhibit on that topic?
- Has one of your staff rediscovered a fascinating object in the collection and approached the director about wanting to develop an exhibit on that object or that part of the collection?
- Has a wealthy patron offered a gift with the stipulation that the museum should develop an exhibition about that topic?
- Has a donor wanted to control the content of the exhibit because he or she holds the purse strings?

Despite the reality of these and similar situations, we contend that planners need to consider, from the start, questions such as: Why do this project at this time? How does this exhibit fit within the mission of the institution (or within the vision for the institution in the community or in society at large)? What community need would it fill? Who are the audiences and what do they know or care about the proposed topic? What role does the institution want the exhibit to play in public understanding of, or engagement with, the topic? What resources, issues, and ideas led up to the decision to go ahead with the exhibition? What do we want this exhibit to be about—in general and specifically? Who is the team that will to work on this project? How should the process of realizing this exhibit be organized? Who will coordinate or manage the process?

This book is about deliberate and systematic planning for visitor experiences—interpretive planning. We define interpretive planning, underscoring the importance of integrating visitor perspectives and input into that planning as well as the need to be systematic and logical in decision making as it relates to visitor experiences in and with museums. We advocate critical thinking, deliberation, and collaboration. At the same time, the approaches we present take into account the need for institutions to remain nimble, honoring the need for flexibility in decision making. Although we describe processes, we also recognize that, depending on an institution's mission, size, location, audience, and community, the ability to adapt the processes to idiosyncratic situations and needs is essential.

1.2. The Need for This Book

Issue 1. Arbitrary Decision Making

Traditionally, museums have been object-centered institutions, and thus it is not unusual for the genesis of an exhibit to come from a director, donor, funder, individual staff member, or political leader who has an affinity for a particular idea, topic, or object. This situation can result in decision making that is arbitrary, inefficient, ineffective, or unsustainable.

In our opening story, the institution was compelled by a particular topic and a set of objects. They probably had a well-intentioned and reasoned audience-based purpose, but if conversations about that purpose did take place, the institution did not formally document their thinking about visitor perspectives or other related factors that shaped their decisions. If deliberations did indeed take place prior to launching into the exhibit development process, the logic and written record of those deliberations were not apparent. A written record may not immediately seem important to the institution's staff, but through the life of the project the implications of decisions may affect numerous stakeholders, including board members, funders, educators, designers, evaluators, community leaders or partners, and contractors, and writing them down will add considerably to accountability and transparency. Money and time are wasted and professionalism is threatened if any of these stakeholders has to probe the institution to address rationale, outcomes, target audiences, or other impact-related issues. In this book we present recommended processes for discussing and recording intentional and thoughtful decisions related to visitor experiences with museums.

Issue 2. Government Performance and Results Act (GPRA)

In 1993 the U.S. Congress passed the Government Performance and Results Act (GPRA), legislation that refocused the attention of federal funding agencies to accountability and outcomes. Gradually, throughout the 1990s, the trickle-down effect of this legislation began to be felt in museums, initially resulting in new expectations for federally funded projects but also affecting how museums thought about, tracked, and demonstrated success. Consequently, federal funding agencies, including the National Science Foundation (NSF), Institute of Museums and Library Services (IMLS), and the National Endowments for the Arts (NEA) and Humanities (NEH), began mandating that informal learning grants address outcomes for all informal learning initiatives.

Around the same time, during the 1980s and 1990s, the growing field of visitor studies was focusing its attention on all things visitor:

understanding who visitors are (demographically and psychographically); exploring visitor conceptions, misconceptions, and perspectives related to exhibit topics; and researching visitor needs and the outcomes of visitor experiences. Some of these efforts, particularly front-end evaluations, targeted what we can learn about visitors before their museum visit. Other visitor studies (formative evaluation efforts in particular) target what we can learn about visitor perspectives during exhibit design and development processes. Still other visitor studies efforts (i.e., summative evaluation) target what visitors take away from their experiences in museums or how they are changed or transformed by those experiences. Although the passage of GPRA catalyzed visitor studies by spotlighting outcomes and impact, the ideas related more broadly to visitor perspectives have been slow to make their way into the lifeblood of museums.

Issue 3. Leisure Time and Choice

Chubb and Chubb, in their book *One Third of Our Time?* (1981), embraced the notion that, in the United States, one-third of people's time is discretionary, and some of that time is likely to be spent on leisure pursuits. However, according to Juliet Schor, in the past several decades leisure time has become a "conspicuous casualty of prosperity" (1991, 2). Schor's leisure research documents a gradual but steady rise in the amount of time Americans spend at their jobs, and, because the total time spent per day at work is now greater than it was in the 1940s, time for leisure pursuits has diminished. At the same time, and for a variety of reasons, not the least of which is technology (e.g., social media, gaming), people today have a much larger array of leisure choices than ever before.

Indeed, leisure choice is complex. A full discussion of that topic is beyond the scope of this book, but it is germane here to recognize that, afforded precious little time for leisure, people desire different things at different times to fulfill different leisure needs. As Marcella and her colleague Ross Loomis (Wells and Loomis 1998) offer, museum opportunities involve multiple and concurrent choices related to activity (museumgoing versus other possible activities), setting (e.g., science center, history museum, art museum), experience preferences (e.g., be with friends and family, explore, have fun, be active), and perceived benefits (e.g., skill enhancement, family solidarity). Collectively, museums compete with sporting events, outdoor recreation, shopping, travel, movies, and technology to gain a foothold in people's leisure time. Without doubt, museums are among Americans' leisure opportunities, but they are only one of myriad (and increasingly diverse) leisure choices that