# Museum Exhibition Planning Tool

*Developed by the Jordan Schnitzer Museum of Art and sponsored by a grant from the Oregon Cultural Trust*

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# MUSEUM EXHIBITION PLANNING AND EVALUATION TOOL

## GENERAL INFORMATION

TITLE

CURATOR / PROJECT LEAD

GUEST CURATOR (contact information)

EXHIBITION ON-VIEW DATES

EXHIBITION OPENING RECEPTION

GALLERY (or galleries)

SIZE (approximate linear feet; approximate square feet)

## NATURE OF THE EXHIBITION / PROJECT

DESCRIPTION, BRIEF/ABSTRACT, CONTENT

POLICY AND CONTEXT
*How does the exhibition relate and support the museum's mission and strategic objectives?*

PURPOSE OF THE EXHIBITION
*The exhibition purpose should be stated in general terms and made clear through an enumerated list of aims and objectives. These may reference such topics as educational value, promotional role, commercial significance, and political aspects. Aims and objectives for the museum (e.g., to reach a certain demographic of visitors, to engage certain stakeholder groups, to generate media mentions) and for the visitors (e.g., to increase understanding of a certain topic, to stimulate creativity, to experience certain emotions) should be listed separately.*

AIMS AND OBJECTIVES FOR THE MUSEUM
1.
2.
3.
4.

AIMS AND OBJECTIVES FOR THE VISITOR
1.
2.
3.
4.

AUDIENCE
*Information on the audience for whom the exhibition is intended. Aspects to consider may include age, gender, motivation, cultural background, language, target community, level of knowledge, or if this exhibition is in conjunction with an external course or event, etc.*

## OBJECT INFORMATION

CHECKLIST
*Attach a checklist of objects for the exhibition that includes title, artist, date, dimensions, media, and loan source.*

Is the exhibition to be loaned from another institution or traveling exhibition service? ☐ Yes ☐ No
*If yes, list source(s)*

Is the exhibition to be produced from within the museum's collection (in-house)? ☐ Yes ☐ No
*If yes, from which collection(s)*

Will the exhibition include objects from lending institutions? ☐ Yes ☐ No
*If yes, list the institutions*

If the exhibition is produced in-house, is it to travel from the museum? ☐ Yes ☐ No
*If yes, attach an outline of the travel proposal*

## PUBLICATIONS AND GRAPHICS

CATALOGUE ☐ Yes ☐ No
*If yes, attach a specification sheet outlining number of pages, overall dimensions, color or black/white, other graphics, etc.*

OTHER PUBLICATIONS (gallery guides, posters, brochures, cards, announcements, etc.)
*Provide descriptions/specifications:*

ELECTRONIC MEDIA
*CD/DVD, Video, Audio, Electronic Tours, etc?  Describe:*

TRANSLATIONS
*Specify which publications and/or exhibition graphics and in what languages:*

EXHIBITION GALLERY DIDACTICS (summarize components):

## PROGRAMS AND EVENTS

OPENING RECEPTION ☐ Yes ☐ No
*If yes, provide details*

WORKSHOP(S) ☐ Yes ☐ No
*If yes, provide details*

SPECIAL DONOR RECEPTION(S) ☐ Yes ☐ No
*If yes, provide details*

SEMINAR/SYMPOSIUM ☐ Yes ☐ No
*If yes, provide details*

LECTURE SERIES ☐ Yes ☐ No
*If yes, provide details*

OUTREACH PROGRAMS ☐ Yes ☐ No
*If yes, provide details*

FILMS ☐ Yes ☐ No
*If yes, provide details*

GALLERY TALK(S) ☐ Yes ☐ No
*If yes, provide details*

OTHER (Specify)
*If yes, provide details*

## MARKETING

MARKETING PLAN
*Identify specific strategies for engaging audiences noted above and describe a marketing strategy overview*

PAID ADVERTISING ☐ Yes ☐ No
*If yes, provide details*

FREE MARKETING (traditional) ☐ Yes ☐ No
*If yes, provide details*

FREE MARKETING (social media) ☐ Yes ☐ No
*If yes, provide details*

COLLATERAL PUBLICATIONS ☐ Yes ☐ No
*If yes, provide details*

MARKETING COLLATERAL AND MATERIALS

☐ Invitation card  ☐ Mailing envelope  ☐ Donor invitation  ☐ Calendar of events
☐ Program card  ☐ Poster  ☐ Table tent  ☐ Print ads
☐ Lobby banner  ☐ Website banner  ☐ Exterior banner  ☐ E-vite
☐ Other (specify):

## EVALUATION

PLANNED EVALUATION ACTIVITIES
*Check all of the data collection activities planned for the exhibition.*

☐ Focus groups  ☐ Small scale sample surveys and questionnaires
☐ Informal feedback from visitors  ☐ Large scale sample surveys and questionnaires
☐ Feedback sheets  ☐ Computer surveys, online surveys
☐ Community days/workshops  ☐ Cued and non-cued visitor observations
☐ 'Workshopping' with staff and/or special interest groups  ☐ Media/critical reviews
☐ Unstructured and semi-structured interviews  ☐ Critical appraisal
☐ In-depth interviews  ☐ Visitor numbers/counts

- Front-end Evaluation:
  (What activities will be undertaken *before the exhibition* to help the planning process?)

- Formative Evaluation:
  (What activities will be undertaken *during the exhibition*?)

- Remedial Evaluation:
  (What activities will be undertaken *just before the exhibition ends* to inform modifications?)

- Summative Evaluation:
  (What activities will be undertaken *after the exhibition* to assess its impact?)

EVALUATING PROGRESS TOWARD EXHIBITION GOALS
*Describe the metrics (measureable events) and data sources to assess progress toward each exhibition goal*

| Exhibition Aims (From Exhibition Purpose Section) | Metric (How will we measure progress toward the goal?) | Data Source(s) (Which Evaluation Activity will provide the data?) |
|---|---|---|
| *Museum-level Aims* | | |
| *Ex.: Attract visitors of diverse cultural backgrounds, especially Native American visitors* | *% of visitors who identify as Native American will be compared to the percentage in previous years* | *Large scale visitor survey; Visitor numbers/counts* |
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| *Visitor-level Aims* | | |
| *Ex.: Increase understanding of cultural trauma among Native American tribes* | *% of visitors who report that their understanding of cultural trauma has increased* | *In-depth interviews with visitors* |
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |

## BUDGET AND FUNDING

TOTAL OVERALL BUDGET
*includes PR/Marketing, Publications, Programs and Events, Loans, Shipping, Insurance, Object Preparation, Display/Design, Installation & Fabrication, Contracted Services or Labor and Curatorial/Fees for Exhibition*

☐ Less than $10,000

☐ $10,000 to 50,000

☐ $50,000 to 100,000

☐ $100,000 to 500,000

☐ $500,000 to 1,000,000

☐ $1,000,000 or more

ATTACH BUDGET SHEET

PROPOSED FUNDING SOURCES AND STRATEGIES:

# MUSEUM EXHIBITION PLANNING AND EVALUATION TOOL: COMPANION DOCUMENTATION

## Purpose of the Tool

The Museum Exhibition Planning and Evaluation Tool provides a framework for museum curators, managers, and staff to plan for the implementation and evaluation of exhibitions. The Tool collects and organizes information across various sectors within the museum that are involved in the preparation and execution of exhibitions—including, for example, curation, programming, marketing, and evaluation. This enables museum managers and curators to effectively coordinate the multiple moving parts of a successful exhibition.

Importantly, the Tool helps to clarify the purpose of an exhibition. Curators are asked to articulate the specific goals of the exhibition for both the museum and the individual visitor. Identifying clear and measureable goals at the beginning of the planning process can help focus and coordinate other exhibition tasks. Also importantly, the Tool incorporates evaluation by establishing relevant metrics and sources of data for each articulated exhibition goal. By identifying these elements during the exhibition planning process, basic principles of evaluation are seamlessly embedded throughout museum operations.

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Example: Museum is planning an exhibition of artwork by a renowned Native American artist.

1. Exhibition goals are clearly articulated early in the planning process:

    *Goal: To attract a higher proportion of Native American visitors.*

2. Exhibition tasks across various museum areas are coordinated and unified behind goals:

    *Marketing plan includes outreach to Native American organizations and communities.*

    *Programming plan includes events specific to Native American community members.*

    *Evaluation plan includes metric of Native American visitor engagement.*

3. Evaluation of the exhibition shows data that reflect any progress toward (or achievement of) the exhibition goal (i.e., reaching the target audience):

    *Evaluation data show in increase in the proportion of museum visitors who identify as Native American, suggesting the effectiveness of the marketing and programming plans.*

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## Use of the Tool

The Tool provides a framework to clarify tasks within each area, identify overlap between areas, and coordinate efforts across the entire team. Using the Tool as a guide, the curator can work with the responsible individuals in each area to ensure the collaboration and coordination of efforts, unified behind the stated goals.

The Tool is a planning document and its clearest utility is during the early stages of exhibition preparation, but it should be considered a living document that will evolve throughout the course of the exhibition preparation, implementation, and closure. In fact, returning to the document at the closure of an exhibition to enter the "final" information—the evaluation findings, in particular—will create a very convenient and useful exhibition summary report.

# Completion of the Tool

*The text below describes the information collected in the form.*

*1. Nature of the Exhibition/Project*

<u>Description, Brief Abstract, Content</u> – Briefly describe the exhibition, its relevance, and its contents.

<u>Policy and Context</u> – Explain how the exhibition relates to and supports the museum's mission and broad strategic objectives.

<u>Purpose of the Exhibition</u> – List the aims and objectives of the exhibition both for the museum and for the visitors. The aims might relate to educational value, promotional role, commercial significance, political significance, and academic value. It is important that aims are measureable and realistic, because they provide the structure of the evaluation.

> *Museum-level aims* refer to the expected results for the museum, broadly, from hosting the exhibition. These may be ways in which the exhibition is expected to reflect or further the museum's mission and/or strategic objectives. For example, these aims might include impacting the demographics of the visitorship (e.g., attracting more Hispanic/Latino visitors or visitors from a certain area), establishing relationships with other groups or institutions (e.g., connecting with local college that offers a related class or a local organization that works in a related area), or advancing the museum's reputation (e.g., increasing media attention).

> *Visitor-level aims* refer to ways in which the individual visitor may be impacted as a result of experiencing the exhibition. Whereas some museum-level aims may apply to multiple exhibitions (e.g., attract more Hispanic visitors, increase media attention), the visitor-level aims will likely be more unique to the contents and context of the particular exhibition. For instance, these aims might involve the visitor learning specific content, experiencing certain emotions or shifts in perspective, understanding themselves or the world differently, becoming acquainted with a different culture, or appreciating a particular artistic medium.

<u>Audience</u> – Describe characteristics of the target audience, such as age, gender, racial and/or cultural background, specific community, and level of knowledge regarding the subject matter.

*2. Object Information*

Provide a detailed list of the objects included in the exhibition (with specifics such as artist, dimensions, media, and loan source). Address whether objects will be loaned from or to other institutions.

*3. Publications and Graphics*

List any publications or materials to be created for the exhibition, including catalogues, other printed materials, electronic media, and exhibition gallery didactics. Consider the need for translation and languages necessary.

*4. Programs and Events*

List any planned programs or events associated with the exhibition, including receptions, lectures, films, workshops, symposia, and other outreach programs.

*5. Marketing*

Provide an overview of the marketing plan related to the exhibition. Identify specific marketing strategies for each of the targeted audiences mentioned in the Nature of the Exhibition section.

*6. Evaluation*

Indicate the types of evaluation activities planned for the exhibition. Check each data collection activity planned, such as focus groups, interviews, small scale surveys, large scale surveys, visitor observation, and media scans.

Next, briefly explain your plans to address each type of evaluation (e.g., front-end, summative) by describing which, if any, data collection activities will be undertaken at each level. For exam

> Front-end Evaluation is undertaken during the exhibition development process to collect information to support planning--in particular, information about audiences' needs and interests, their misconceptions about the topic, and effective delivery methods. One example is conducting focus groups to learn about visitors' knowledge of an exhibition topic or reactions to ideas for exhibition experiences.

> Formative Evaluation is conducted during the early stages of the exhibition to monitor its implementation, describe its functioning, and formulate recommendations for improvement for stay aligned with stated goals. One example is the performance of cued and non-cued brief interviews with visitors.

> Remedial Evaluation is undertaken during the later stages of the exhibition to inform any modifications or improvements in implementation. For instance, this might include visitor observations.

> Summative Evaluation is completed once the exhibition has ended, although it will use data collected throughout the exhibition, such as large scale visitor surveys, in-depth interviews, and media reviews. Findings will reveal whether and to what extent the exhibition goals were achieved.

Lastly, for each of the goals listed in the Nature of the Exhibition section (both the museum- and visitor-level aims), describe how the aim will be measured (the "metric") and which of the evaluation activities will collect the relevant data (the "data source").

Completing this table during the exhibition planning process will encourage the identification of exhibition goals that are measureable and realistic, clarify existing information sources that can be used to assess each goal (and identify any gaps in data collection plan), and establish feedback loops within the exhibition team whereby data collected early in the process (front-end or formative evaluation activities) can be fed back to the team so that improvements and adaptations to the exhibition can be made in a coordinated and efficient way.

Clarifying goals and their associated measurement early in the planning process embeds evaluation principles in the exhibition development and implementation, enhances the integration of tasks and unification of perceptions across team members, and provides an streamlined process for assessment results and feedback.

7. *Budget and Funding*

Provide an estimated budget for the exhibition, including all of the associated components (e.g., marketing, programming, publications). Describe potential targeted funding sources and strategies.