A Responsive Evaluation in Two Hampton Roads Museums: The Development of a Performance Assessment System for Museum Volunteers

Joan Fishman Hecht
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A RESPONSIVE EVALUATION IN TWO HAMPTON ROADS MUSEUMS: THE DEVELOPMENT OF A PERFORMANCE ASSESSMENT SYSTEM FOR MUSEUM VOLUNTEERS

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A RESPONSIVE EVALUATION IN TWO HAMPTON ROADS MUSEUMS: THE DEVELOPMENT OF A PERFORMANCE ASSESSMENT SYSTEM FOR MUSEUM VOLUNTEERS

by

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ABSTRACT

The purpose of this study is to evaluate volunteer performance in two Hampton Roads museums. The research question was: How can managers of museum volunteer services evaluate volunteer performance? The research design was a naturalistic, responsive, utilization-focused evaluation in response to the research question. The data was collected with a systematic examination of volunteer performance activities using techniques of in-depth interviews, participant observations, a questionnaire, documents and records. The data was analyzed by categorizing, sorting and characterizing the categories, conducting member checks, and prioritizing the data. Triangulation was used to verify the collected information. This study determined important traits, performance expectations, and performance standards for museum volunteers. The evaluation resulted in the development of a performance appraisal system for the managers of museum volunteer services to use in assessing volunteer performance. This information will assist the museums in meeting program objectives, in improving the effectiveness of volunteer training programs, and in enhancing educational programs.
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Dedicated

TO MY SON DAVID

whose love and patience was a source of power that encouraged me to pursue and complete this goal
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PREFACE

For many years I dreamed about entering a doctoral program to further my training. Before enrolling at Old Dominion University, I volunteered at various institutions to help find direction in my life. During my previous professional career I volunteered as a tutor, recreation director for mentally handicapped young adults, girl scout leader, and more. However, I did not take the time to look at the depth and breadth of volunteer contributions.

As a result of extensive research and my personal experiences, I developed a new appreciation for the dedication and expertise volunteers bring to their positions. I truly believe that volunteerism in our country is the reason for the quality of life we are able to enjoy.

I hope that this study assists managers of volunteer services and volunteer coordinators to improve their volunteer programs and serves as an advocate to all those people who are dedicated and determined to make this a better world.

To all those who volunteer--Thank you so very much; you are appreciated.
In his article, "Children, Curiosity, and Museums", Bruno Bettelheim stated:

...the museum’s greatest value to the child, irrespective of the museum’s content may be: to stimulate his imagination, to arouse his curiosity so that he wishes to penetrate ever more deeply the meaning of what he is exposed to in the museum, to give him a chance to admire in his own good time things which are beyond his years, and most important of all, to give him a feeling of awe for the wonders of the world, because a world that is not full of wonder is one hardly worth the effort of growing up in. (Bettelheim in Nichols, 1984, p. 19)

The function of the American museum has gone through many stages--from being a repository for personal collections, to being an institution for the elite and scholarly, to being a public facility in which all people can participate. Museums today are
Museums are dedicated to the education of their visitors. They "not only enrich; they strengthen basic skills, basic knowledge, basic comprehension and basic understanding" (American Association of Museums (AAM, 1984, p. 57). There has been a dramatic increase in museum attendance in the past few decades, and this change is due to the increase in population, urbanization, mobility and increase in leisure time (AAM, 1968). The museum audience no longer consists just of the elite and wealthy, but it comes from the multi-ethnic diverse population. An active museum sees hundreds of visitors each day, and museum volunteers provide an important link between the museum and the visitor.

Museums are faced with the challenge of reaching new audiences and developing the means to communicate with the urban constituency. The expansion of educational programs in the museums and throughout the neighboring communities exemplifies the extent of this involvement. Outreach programs are circulating throughout the adjacent communities. Public programs, special events, workshops and conferences are scheduled on a regular basis. Summer enrichment programs, including day camps, have been established. Reciprocal
associations between the urban universities and local museums now exist. Museum education courses, internships, and university extension classes in the urban museums have been designed. Public and private schools are bringing more and more school children to local museums to supplement the information provided by the museums' collections and curricula. These developments emphasize the efforts of museums to meet the educational needs of the diversified population in urban areas.

The world of museums lends itself to study from many different points of view. The literature is replete with data concerning the museum visitor, visitor fatigue, and exhibit design (Screven, 1974; Borun, 1982; Loomis, 1987). Effective museum education is dependent upon careful research about museum learning; yet the research in this area is in its infancy.

Early museums were not considered appropriate places for the general public to visit. When public museums were formed in the United States, their priorities were other than for public education. They were intended as educational centers for students and
scholars. A few museum leaders, however, speculated about the influence of museums on the public in order to "educate and refine a practical and laborious people" (Grinder and McCoy, 1985, p. 12). A dialogue began among museum leaders which provided a focus for community education. The goal of education was eventually accepted by most museums.

In 1984, the Commission of Museums for a New Century made education one of its top priorities. Today, museums are employing more staff, hiring trained educators, and using educational methods in programming and touring. Just as museum education is an important and growing concept in the United States, so, too, is volunteerism. The roots of volunteerism are as old as the country itself. Volunteerism can be found in almost every type of agency or organization in which education plays a part. Perhaps volunteerism is needed more today because of our complex and dynamic society.

Benjamin Ives Gilman, Secretary of the Boston Museum of Fine Arts from 1890-1923, was the innovator of the volunteer docent program. His intention was to use the talents of volunteers to improve society and enable the community at large to be aware of the
collections. Today museum volunteers do all kinds of work including researching, cataloging, restoration and maintenance of collections. Docents, interpreters, guides or volunteers--those who explain or describe exhibits--meet the public and provide ideas and concepts. Other volunteers work in the libraries and in the publications department and provide clerical services. There is virtually no aspect of museum operations unassisted by volunteers. In many cases, the effectiveness of the museum programs depends on the volunteers. To adequately train museum interpreters, the manager of volunteer services or the volunteer coordinator needs to blend subject matter with methods. With optimum learning experiences, volunteers have the opportunity to make useful contributions. Volunteers who are genuinely interested in the subject/exhibit and in the museum visitors will be able to encourage visitor enthusiasm and participation, will facilitate learning in the museum visitor, and will provide insight and pleasure to the museum experience.

Statement of the Problem

The purpose of this study was to evaluate
volunteer performance in two Hampton Roads museums so that an appropriate and applicable evaluation system, The Review of Volunteer Performance, could be developed and implemented by the volunteer service managers/coordinators.

One of the challenges to strengthen volunteer programs is to enhance the effectiveness and accountability of volunteer services. The issue of accountability, referred to so often in the educational arena, extends to organized volunteer programs as well. However, because of the nature of the volunteers and the special sensitivities which accompany this group, the following must be remembered: "While it is critical to set standards, it is also critical not to violate the essential spirit of volunteerism" (Ellis and Noyles, 1978, p. 272).

The research in volunteerism and museum education indicate that some interpreters, docents, or volunteers resent the question, "How can volunteer performance be evaluated?"; yet others state that the evaluation of performance is necessary. Volunteer performance evaluation, nevertheless, is one objective of volunteer training programs. Job performance is a complex concept and can be influenced by factors such as job design, supervision,
co-workers, reward practices, working conditions, training evaluation, feedback, individual ability and motivation. In many museums, volunteers learn about their performance through informal means. Performance appraisal or a formal structured system of evaluating job-related attributes, behavior and outcomes, would describe how well the volunteer performs his/her job. Performance appraisals, discussed in personnel administration and management theory, have been developed to increase management knowledge, to understand employee strengths and weaknesses, to establish dialogue between management and workers, and to understand what the organization must do to be effective. Performance appraisals, developed for use with volunteers in museums settings, would assist in meeting objectives of the volunteer program and would also assist in improving the effectiveness of volunteer training. Evaluation does not need to be a threatening process; by incorporating into an appraisal system methods and criteria sensitive to this unique environment, evaluation can be perceived as an opportunity to learn and to improve.

Volunteer service managers have as a high priority the evaluation of volunteers, yet evaluation is carried out
infrequently. Managing a program that provides beneficial human service to the organization’s audiences and the community, is the goal of volunteer programs. According to Fletcher (1987): "Successful volunteer programs serve their volunteers...by giving them the opportunity to be needed, to make a contribution of time and energy to meaningful work, and to grow in both technical and interpersonal skills" (p. 86). Applying evaluation techniques and creating a professional role for volunteers will inspire better performance of volunteers, better staff involvement and better service to the audiences.

**Questions to be Explored**

The main purpose of this study was to explore the performance of volunteers in two museum settings, in order to develop a practical and useful volunteer performance appraisal system. Through a naturalistic/responsive evaluation, descriptive data was gathered by employing techniques utilizing observations, informant interviews, a questionnaire, and existing records and documents. Triangulation methods validated the data.

The following questions were given careful consideration during the data collection processes:
1. How can the manager of volunteer services evaluate the performance of volunteers?

2. Who are the stakeholders that need to be considered when developing a performance assessment system for museum volunteers?

3. What traits are important for being a museum volunteer?

4. What performance standards need to be considered when evaluating volunteer performance in museums?

5. Who will conduct the performance evaluation: the supervisor, the manager of volunteer services, peers, the volunteer, and/or the museum visitors?

When considering the development of an evaluation system two additional questions needed to be addressed.

6. What type of non-threatening performance appraisal system can be developed to evaluate volunteer performance in museums?

7. How can an evaluation system be implemented so it is accepted by the museum volunteers?

**Significance of Study**

Volunteer programs in museums are responsible to the museum, the museum visitor, and the volunteers. In 1978, S.
Dillon Ripley, Secretary of the Smithsonian Institute, noted that volunteers provided 345,593 hours of service worth approximately three million dollars. According to a survey on volunteerism conducted by the Gallop Organization in 1990, about 98.4 million people contributed about 20.5 billion hours, or 170 billion dollars (Erickson, 1990). Volunteers play a significant role in museum education projects and programs. As a result of the diversification in the utilization of museum resources and the programs available to the public, there is a trend to recruit more and more individuals with a variety of skills and talents.

The training and evaluation of volunteers are directed at improving skills as well as improving the volunteer program. According to Wilson (1976), Grinder and McCoy (1985), Fletcher (1987), and Brudney (1990), the basic components of a successful volunteer program include recruitment, placement, training and evaluation. Harriet Naylor (1985), a pioneer in the field of volunteer administration wrote: "Volunteers have the right to expect orderly and appropriate placement, orientation and training, supervision in the sense of a knowledgeable person to turn to, and recognition for their uniqueness, abilities, accomplishments, growth and changing objectives" (p.29).
Management practice recommends evaluating performance and assessing what volunteers accomplish. Evaluation provides meaningful long-term recognition of the volunteers' contributions, and it demonstrates that these services are important to and taken seriously by the organization. The evaluation process provides feedback from all those involved, and as Susan Ellis (1987) wrote: "The process is inherently positive and enables everyone to move forward together" (p. 68). Even though the experts agree that evaluation is an important management tool, evaluation is often overlooked or disregarded.

As one's work progresses, new strengths and new learning needs arise. A pattern of periodic review can assist the managers as well as the staff to examine appropriate placements and/or necessary adjustments. For some, termination might be the result, but for most, new and challenging opportunities may be provided. Evaluation needs to be a standard procedure with all volunteer programs and for all volunteers. According to Cull and Hardy (1976), "No training program can move forward without the use of the evaluation process...As a standard device for measuring the progress of a worker, paid or volunteer, evaluation must be carried out by supervising personnel, with the help of any
others associated with or related to the worker's performance..." (pp. 55-56).

Only in the past twenty years has there been serious concern in the field of voluntary action research. In Volunteerism: An Emerging Profession (Cull and Hardy, 1974), the authors stated:

Formulating policy and selecting among alternatives is always difficult, more an art than a science. But once goals have been set, research, knowledge, and practical information are the best guides to action. Without the necessary research and information to guide it, volunteer action can never fulfill its promise and potential. Considering the importance of voluntary action and the billions of dollars and hours of valuable time involved, it is extremely negligent not to provide voluntary action and the voluntary sector of society with an adequate and continuing information-knowledge base for learning and evaluation. (p. 183)

National goals, local objectives and common sense demonstrate that documented information is necessary.
Voluntary action is all around us. It goes largely unmeasured and unevaluated, if not unnoticed. The result, then, is a great waste of our precious resources (Cull and Hardy, 1974, p. 183).

Museum education is a relatively new field and contemporary museums are expected to provide information and interpretation about the exhibits. In many cases, museums rely on the volunteer for this experience. Museums today are learning about their audience, and people are more knowledgeable about their heritage. In a major report prepared for the American Association of Museums, the Commission on Museum For a New Century addressed education as a high priority: "Museums not only preserve our culture but they must assume the responsibility for passing it on to new generations by becoming centers of learning in their own right. In this context, museum interpreters, as spokespersons for museums and historic sites become critical sources of educational information" (p. 20). The following list is a summary of the responsibilities of the museum interpreter as presented in The Good Guide, A Sourcebook for Interpreters, Docents and Tour Guides (Grinder & McCoy, 1985):

1. To know oneself, including strengths and weaknesses.
To acknowledge the extent of one's dedication to the subject matter, the museum, and the community, and to make commitments that one can keep.

2. To maintain a professional attitude, keeping a mature outlook that does not reveal personal opinions or personal problems. To carry out, in a willing manner, the responsibilities that are assigned.

3. To learn the educational philosophy of the institution.

4. To understand different learning styles.

5. To understand museum visitors in terms of intellectual differences and possible physical disabilities.

6. To understand interpersonal communication skills in order to bring the message across.

7. To know the subject within the institution.

8. To have detailed information about the exhibit being interpreted.

9. To have a variety of interpretive strategies for explaining the exhibit.

10. To be able to react to unexpected situations as they arise.

11. To be gracious, friendly and warm with all visitors. (p. 9)
An effective volunteer program matches desire, skills, and interests of the volunteers with the requirements of the organization for voluntary assistance. Matching the needs of the volunteer and organization requires identifying tasks and job descriptions, elaborating responsibilities, recruiting and screening applicants for positions, and appropriate placement. During the initial interview, job expectations need to be clarified. The philosophy of the institution and basic procedures and training requirements need to be discussed.

The involvement of volunteers in the public sector is not new. Many consider volunteers to be the intricately involved in the basic fabric of American democracy and culture. The 1970s and 1980s saw an increase in the reliance on volunteers (Brudney, 1990, p. 7), and budget deficits and cutback measures have been catalysts for increased interest in volunteer involvement. Volunteerism has served as one answer to pending problems. In the book *Fostering Volunteer Programs in the Public Sector*, Brudney (1990) wrote: "As a relatively inexpensive form of labor, volunteers offer government the potential to maintain or even enhance the amount and quality of services with a minimal investment of public resources. Thus, citizen
participation in the delivery of services has emerged as an attractive option for financially stripped governments to augment capacity and reduce dependence on paid employees" (p. 11).

Brudney (1990) suggested that even though evaluation and recognition are an important function of volunteer programs, evaluation is carried out less often and less well than the other central elements (p. 114). Systematic research concerning volunteers is needed and results of such studies will have implications for present and future practices. Brudney, Wilson, Grinder and McCoy, Vineyard, and others endorse the concept of evaluation as a means of fostering accountability, improvement and responsiveness. Evaluation helps create an atmosphere in which volunteers are valued members of the organization.

Fletcher (1987) stated:

Evaluation is a powerful tool for assessing effectiveness and bringing about constructive change. To be worthwhile, careful evaluation must be followed by action—putting into practice those changes suggested by analysis of the results. If you do this, you will avoid obsolescence and keep the program growing. You will also inspire better
performance in your volunteers, which leads to better service for your clients and more positive staff involvement with volunteers... (p. 80)

Volunteer program managers, including those who coordinate and direct volunteer programs in museums, need to be concerned with the evaluation process of their volunteers. Volunteer responsibilities are so varied and important to the institutions in which they serve that training and evaluation need to be monitored carefully. Because museum education is such a new field, and since volunteer programs in museums are also young, evaluation of museum volunteer performance, a priority objective for museum volunteer programs, is now under scrutiny.

The performance appraisal system, developed from the research, data collection and data analysis of this study, assisted two South Hampton Roads museums, the managers of the museum volunteer programs, and the museum volunteers in knowing more about the needs and wants of the volunteers, in knowing more about performance standards for volunteers, in determining training procedures which need to be incorporated in the already existing programs, and in improving the volunteer programs, in general. Included in this appraisal system are evaluation components for the
managers of the volunteer programs, for the supervisors of the volunteers, for the volunteers, and for visitors to the museums. Thus, this study advocates incorporating volunteer performance appraisal systems into museum volunteer programs. It is a contribution to the fields of volunteerism and museum education, since both are now struggling with determining performance standards, improving volunteer training, and developing performance evaluation systems which are useful yet not threatening.

Research Design

Qualitative evaluation or naturalistic inquiry is the type of research conducted in this dissertation. Responsive evaluation is an emergent form of educational evaluation that Patton (1980), Guba and Lincoln (1981), Borg and Gall (1983), and Wolf, Andis, Tisdal, and Tymitz (1979) describe in the evaluation literature. Evaluation strategies become responsive if they: 1.) are oriented more directly to program activities rather than program intents; 2.) respond to staff and audience requirements for information and; 3.) refer to different value perspectives. The naturalistic inquiry paradigm using qualitative techniques is appropriate to support this approach.
Naturalistic responsive evaluation strategies begin with issues that are discussed and clarified by a sampling of stakeholders—program participants, administrators, staff and others. From these discussions new needs arise, more data is sought, feedback is provided, and so on. For such studies, the evaluation design is not formulated in advance and continues to evolve as the evaluator interacts with people in and about the setting. Guba and Lincoln (1981) identified four major phases that occur in an evaluation of this type: initiate and organize the evaluation; identify concerns, issues and values of the stakeholders; convert field notes from interviews, observations, documents and records into systematic categories; and prepare reports, results, and recommendations.

A responsive evaluation is also utilization-focused when there is a concern for how the decision-makers will use the evaluation information (Patton, 1982). According to Patton (1978): "Utilization occurs when there is an immediate, concrete and observable effect on specific decisions and program activities resulting directly from evaluation research findings" (p. 24). Therefore, the direction of the inquiry is shaped by the audience; data is gathered; and judgements follow, leading to concrete actions.
and decisions.

A naturalistic, responsive, utilization-focused evaluation is the most appropriate approach for this study for the following reasons:

1. The purpose of naturalistic inquiry is to uncover the multiple realities and multiple perceptions that exist from different people who are exposed to common experiences, in this case the stakeholders.

2. Naturalistic evaluation is more interpretive than judgmental and it requires participation from the people who are to be served from the study effort. Those affected have the opportunity to describe the meaning of their experiences.

3. A responsive evaluation will offer an understanding of what is going on from different points of view, concerning the performance of museum volunteers as well as the process of the volunteer experience.

4. In the past three decades, classical/experimental studies focused on psychological variables (visitor fatigue and time spent viewing exhibits), and these did not provide insight into the complex impact of the museum volunteer experience. Naturalistic inquiry depends on relating the natural behaviors in the context in which they occur.
5. An in-depth understanding of the volunteer experience, volunteer performance, and their linkage to museum programs, would assist in the decisions that need to be made about performance appraisal.

**Limitations**

1. Some biases may have been created by the individual personalities of the informants and by the presence of the researcher in the interview process. These biases were decreased by incorporating multiple sources into the data collection process.

2. Human social situations are always in flux, and there is more than one way to view any social situation.

3. In responsive evaluation, the evaluator is the instrument, thus, there are problems with reliability. However, these are overcome by including methods of triangulation.

4. There is a possibility of theoretical contamination but the study was conducted with the firm commitment to many theoretical possibilities.

5. The qualitative research design for this study does not allow for generalization of results to other populations. The intent of this study was to determine how
to evaluate volunteer performance and to develop a performance assessment system that could be the foundation for future research.

**Definition of Terms**

**Museum**—an organization and permanent non-profit institution, essentially educational or aesthetic in purpose, with professional staff, which owns and utilizes tangible objects, cares for them, and exhibits them with the public on some regular basis. (Swinney, 1978, p. 25)

**Volunteering**—a helping action of an individual that is valued by him/her, and yet is not aimed directly at material gain or mandated or coerced by others. (Till, 1988, p. 6)

**Qualitative research**—a systematic examination of activities using the techniques of in-depth, open-ended interviews and participant observations. It relies on qualitative data—holistic analysis of detailed descriptions and explorations of situations, event, people, interactions and behaviors.

**Naturalistic evaluation**—a process by which an evaluator seeks to know and understand the evaluand. The aims is
to understand the experience and to increase conviction about that which is known.

Naturalistic/responsive evaluation—a process by which issues are discussed and clarified by a sampling of stakeholders. From these discussions new needs arise; more data is sought; feedback is provided; and so on. The evaluation design evolves as the evaluator interacts with people in and about the setting.

Utilization-focused evaluation—a type of evaluation where there is a concrete, observable effect on how the decision-makers will use the evaluation information. (Patton, 1978)

Stakeholders (also referred to as key informants)—the participants of a program who have knowledge and perceptions about the subject being studied and who may be directly affected by the evaluation results.

Triangulation—a process using several methods of collecting data to study the same subject to cross-check data and interpretation in order to achieve confidence in the research.

Performance appraisal—the evaluation of a worker’s knowledge, skills and abilities which have been determined by job analysis and discussions between
manager and worker to decide the how job performance can be more effective in the future so the organization and the individual can both benefit. (Beck, 1986; Lefton, et al., 1984)

Performance appraisal system—a set of processes or procedures which consist of standards, criteria and forms in which performance appraisal data are gathered, implemented and monitored.

Summary

The design of this study is a responsive/naturalistic evaluation which emerged in response to the research problem: How can the manager of museum volunteer services evaluate volunteer performance? Observations, interviews, questionnaires, documents and records were used to collect the data. Observations of volunteers occurred first in the data collection process, followed by interviews with stakeholders. The data from the observations guided the interviews, and a questionnaire was developed from the observations and interviews. According to Guba and Lincoln (1981): "Interviewing is the backbone of field and naturalistic research and evaluation" (p. 154). Structural corroboration or triangulation was used to
establish links that eventually create a whole picture. Thus, multiple data sources—observations, interviews, questionnaires, documents and records—were used to provide credible data.
CHAPTER 2
REVIEW OF THE LITERATURE

Overview

Museums today are dedicated to the education of their visitors. They are faced with the challenge of reaching new audiences and developing the means to communicate with the urban constituency. The development and expansion of educational programs, audience research, and volunteer services exemplify the efforts made by museums to meet the educational needs of a diversified population.

The result of the research for this dissertation was to develop a useful and practical performance assessment system for managers of volunteer programs to implement when evaluating the performance of museum volunteers. In order to understand the complexities of the various components of this research, museum education, visitors studies research, volunteerism, volunteerism in museums, evaluation research, performance assessment and evaluation of volunteers were be reviewed.

The museum as a learning environment and the nature and purpose of museum education will be discussed in the section Museums as Learning Environments. In order to understand
the sensitivities and critical issues of volunteers, volunteerism and volunteerism in museums have been researched in detail. Visitor studies, also referred to as audience research, is a newly developed aspect of museum education which deals primarily with the reactions of the museum visitors to the museum experience. Since the museum volunteers are the representative of the museum and may be the only personal contact the visitor has, visitors studies research needed to be explored. In addition, one of the important concerns confronting urban museums is the optimum performance of volunteers. Thus, a review of evaluation research, performance assessment and evaluation of volunteers follows. Volunteers assist in every aspect of museum operations, and often, the effectiveness of museum programs depends on the volunteers. Performance appraisal systems indicate that work merits review; and the development of a performance appraisal system for volunteers services, a goal of museum volunteer coordinators and museum volunteer programs, would assist in improving volunteer performance, would assist in improving training, and would assist in improving educational programs offered by the museums. Volunteers are a unique group and the literature demonstrates that evaluation of volunteer performance needs
to be considered with sensitivity. Thus, this review of the literature thoroughly investigates several components which are critical to developing a performance assessment system for museum volunteers.

**Museums as Learning Environments**

Museums are complex institutions (AAM, 1973). They serve not only as curatorial and scholarly functions but also as classrooms and laboratories for teaching (Swinney, 1977, p. XI). The purpose of museums is to convey information and to establish desirable attitudes by collecting, recording, preserving, interpreting and increasing understanding. The interpretation of museum collections reaches the public through publications, exhibits, lectures, tours, and field trips. Educational programs meet the needs and interests of the community while remaining consistent to the museum mission. Since its creation in the last century, the educational public museum has been devoted to research. The world's largest museum complex, the Smithsonian Institution, was founded by James Smithsonian, who, upon his death in 1829, left money to Joel R. Poinsett to establish a museum "for the increase and diffusion of knowledge among men" (Burcaw, 1975, p. 109).
Low (1942) illuminated the museum mission:

No one can deny that museums have powers which are of the utmost importance in any war of ideologies. They have the power to make people see the truth, the power to make people recognize the importance of the individual as a member of society, and, of equal importance in combating subversive inroads, the power to keep minds happy and healthy. They have, in short, powers which should be far more effective in their truth and eternal character than those of the axis which are based on falsehoods and half-truths. Museums with their responsibility of reaching millions of our citizens must not fail to recognize their responsibility (p. 28).

In 1978, a special committee of the American Association of Museums developed a program for accreditation for American museums called Professional Standards for Museum Accreditation. For purposes of accreditation, the AAM defined a museum as: an organization and permanent non-profit institution, essentially educational or aesthetic in purpose, with professional staff, which owns and utilizes tangible objects, cares for them, and exhibits them to the
public on some regular basis (Swinney, 1978, p. 25). Museums which are educational institutions study their collections and interpret them. All museums do research concerned with their own region, subject matter or public, each responding to its special uniqueness. However, the collections alone, without explanation, selection, and organization would not support the basic aim of the educational museum; interpretation is basic to the concept of the educational museum (Burcaw, 1975, p. 135). Museums today are in the forefront, "enlightening and educating the world about the forces at work" (Low, 1942, p. 28). Museums have changed from the passive institutions serving a small elite, to a dynamic and active place with education as a primary function (Winstanley, 1967, p. 4).

The struggle for education to gain entrance into the museum world has been long and hard. In 1939, Low wrote:

...the purpose of museums is education in all its valued aspects from the most scholarly research to the simple, arousing curiosity; that education must be active, not passive, and it must always be intimately connected with the life of the people...To fulfill this purpose, the museum must find its own place and then and only then can it
make its own contribution to life itself. (p. 21)

During the past twenty five years there has been a growing emphasis on the museum's educational function. Early studies were concerned primarily with museum fatigue (Robinson, 1928), visitor traffic patterns (AAM, 1977) and the educational effectiveness of exhibits (Elliott and Loomis, 1985). Recent studies, such as exhibit design research (Carlisle, 1985; Greenglass, 1986) and audience studies research (Screven, 1974; Diamond, 1988) have sought to gain insight into how visitors learn in museums. Watts (1983) studied the recruiting and retaining of volunteers and discussed the motivational aspects including flexible scheduling, training, expenses of volunteers and increased responsibilities. Carlisle (1985) studied what children look at, how long they look, and the level at which they interact with each exhibit. According to Carlisle, the visit to the exhibition is a highly social experience, with children talking to children, museum representatives interpreting the exhibits, and adults and teachers accompanying the group. Carlisle's research confirmed the work of Winstanley (1967) which accounted that activity rather than principle forms the attraction for children.

The Greenglass study (1986) attempted to determine
whether different instructional approaches (non directed discovery mode or direct teaching model) in museums produce differential learning effects. The results demonstrated that there is a wide range in the museum of information processing ability among adult museum visitors, and performance is a function of information processing and the degree of structure of the learning environment in the museum (Greenglass, 1986, p. 60). Diamond (1988) confirmed the view that learning in museums is dependent not only on effective exhibits but also on the social environment that is created from the exhibits. This study supported the idea that all exhibits should be highly structured, and that there is a need to develop criteria for describing museum environments in terms of degree of structure.

The American Association for Museums Commission (1984) illuminated "what museums have to offer, how they can be utilized as laboratories for new technology, forums for bold ideas, and showplaces for artistic experimentation" (p.10). The demand for museum education to supplement the schools and the development of new methods of teaching have led to museums which are devoted "both in name and role to the museum as a teaching center with education as its principle purpose and activity" (Belmont Report, 1969, p. 15). In
1969, the Commission on Museum Needs (Belmont Report, 1969) presented a report which laid the groundwork in the museum profession. In 1982, the Commission on Museums studied and clarified the role of the museum in American society, their obligation to preserve and interpret our cultural and natural heritage, and their responsibility to an ever-broadening audience (AAM, 1984, p. 11). The focus was what museums are to our culture and how they contribute to the quality of life (p. 11). These ideas, actually described by Dana (1917) in the Gloom of the Museum, paved the way for museums. Dana wrote that the museum world was not ready to become conscious of its public's needs and wants (Low, 1942, p. 127); yet he believed that education was a museum's social responsibility and should be its primary mission (AAM, 1984, p. 55). Today, museum professionals are striving to put Dana's ideas into practice, that is "to form an alliance with present teaching agencies, public schools, the colleges and universities and art institutes of all kinds" (Low, 1942, p. 11). Museums are realizing that the real justification for the existence of a museum lies in its usefulness to society as a whole.

According to the Environmental Committee of the AAM (1971): "Museum exhibits and displays are designed to reach
people of various ages and widely differing educational backgrounds and that museums can make an invaluable and unique contribution in aiding society to adapt to the new values, develop new attitudes and to become dedicated to update information" (p. XI and XII). On October 13, 1970, Congress passed the Environmental Education Act which enabled the United States to take a leading role in environmental education within our country and in other parts of the world (p. XIII). This act was the first federal legislation which designated museums as educational institutions. On January 14, 1971, Russell Train, Chairman of the Council of Environmental Quality in the Executive Office of President Nixon wrote:

The Environmental Quality Education Act of 1970 recognizes that America's 6,700 museums have a unique opportunity to serve the educational demands aroused by our interest in ecology. Through the use of the national treasures they house, museums are in a position to exhibit not just a collection of superficially related specimens, but to demonstrate the complex and changing interrelationships among the plants, animals, and inorganic materials that
compose our environment.

A proliferation of educational resources, coupled with the fact of skyrocketing museum attendance, points up the necessity of museums becoming involved in telling the message of the ecological crisis....

It is my hope that we are entering an era where museums will not only preserve the past--but where they will help to preserve the future. (AAM, 1971, p.1)

Ripley (1982), another advocate of the educational museum, wrote:

...museums must establish themselves as essential institutions equal to or supplementary (but still essential) to all levels of educational activities from preschool to post-doctoral. They must make known that they supplement and enrich teaching at elementary and secondary levels in science, history, and art. A conscious effort must be made to interrelate museums' education programs with school and college programs of instruction. This effort is a considerable one for a variety of reasons. Education today is a highly organized
phenomenon. More and more, departments of education at the city, state, and Federal level are organizing the accrediting of teachers, the teaching of teachers, and finally, the content of instruction. There is nothing wrong with setting standards for constantly improving the quality of education while trying to keep up with the boom, the crisis of quantity. But in this effort, to give some sort of diploma into a new, happy, free world, a great society indeed, the values and the exposure that museums have to offer tend to get left out of the reckoning. There is an omission, a gap here, and it must be closed. (p. 86)

The gap referred to by Ripley (1982) has been carefully investigated in the Belmont Report (1969) and in Museums for a New Century (1984). These two documents clearly and specifically present ways in which museums can live up to their potential. The growth and development of educational programs which arose during the past decade are an obvious enhancement to the casual museum visit. As museums are expanding in numbers, they are also expanding in their educational roles. About two hundred museums existed in the United States in 1876; six hundred in 1919; twenty-five
hundred in 1940; five thousand in 1965 (Burcaw, 1975, p. 28); and more than seven thousand in 1991 (AAM, 1991, p.A-9). More than sixty percent of our museums have guided tours; about forty-five percent have lectures; about thirty-five percent have temporary changing exhibits; and about twenty percent have children’s programs (Ripley, 1982, p. 85). Museums with up-to date goals intend to make the visit of school groups a truly educational experience.

Museums educators (professional teachers and/or volunteers) interpret the exhibits. The teacher of the school groups makes reservations in advance and is encouraged to prepare their class ahead in the subject being discussed.

Volunteerism in Museums

In 1983, the National Science Board Commission on Precollege Education in Mathematics, Science and Technology, issued *Educating Americans for the 21st Century* in which it commended museums for their educational efforts. It encouraged an increase in teacher training, recommended that museums have informal learning about science and technology, and suggested offering activities and training with weekend and evening programs, special events for children and hands on experiences. Recognizing that the financial
ramifications put a tremendous burden on museums, the National Science Board Commission asked the federal government to allocate twenty-five million dollars for these recommended activities (AAM, 1984).

In terms of finances, there are not enough resources to provide the demands for expanded museum services. The museum, like other American institutions has been hurt by rising costs of goods and services. In many cases, museum volunteers/interpreters/docents are used to fill the gaps: "Volunteer services are so important that without them museums would have to curtail their programs or even close their doors" (Burcaw, 1975, p. 41). According to the AAM (1984):

...the museums network of this country has been made possible almost entirely by the work of capable, knowledgeable volunteers, and even in large cities, the role of volunteers has always been a crucial one. Many important components of our education system would not be in existence without those volunteers who helped set them up, got them going and kept them in operation. (p.193)

Volunteers are of two main types: those who work as individuals, directly for and under the supervision of a
member of the museum staff; those who must first belong to an officially sanctioned volunteer organization. The organization may exist solely as a volunteer arm of the museum (often called Museum Volunteers) or it may be an organization with a broader purpose which includes museum work as one of its functions (Burcaw, 1975, p. 41).

On July 1, 1979 the Virginia State Government Volunteers Act became law (Strauss, 1977). Strauss (1977) wrote the following statements which promoted the volunteer professional:

Prior to the development of any new program or presentation of any budget requests...efforts should be made to explore avenues of community involvement through the use of volunteers....Each budget request...shall be accompanied by a volunteer impact statement outlining the number and types of services volunteers will provide during the budgetary period and the fiscal savings occasioned by such services. (p. 26)

The law requires guidelines and standards for volunteer programs. According to the act (Strauss, 1977), every department in the state of Virginia using volunteer services shall:
1. Enlist the services of the Virginia State Office of Volunteerism to assist in the development of volunteer services.

2. Take such actions necessary and appropriate to develop meaningful opportunities for volunteers involved in its programs and to improve public services.

3. Develop written rules governing the recruitment, screening, training, responsibility, utilization and supervision of volunteers.

4. Take such actions as are necessary to ensure that volunteers and paid staff understand their respective duties and responsibilities, their relationship to each other, and their respective roles in fulfilling the objectives of their department.

5. Take such actions as are necessary and appropriate to ensure a receptive climate for citizen volunteers;

6. Provide for the recognition of volunteers who have offered exceptional service to the commonwealth;

7. Recognize prior volunteer service as partial fulfillment of state employment requirements for training and experience established by the division of personnel.

In museums, volunteers are an extension of the museum
program. They are not a substitute for staff. Volunteer efforts usually consist of guiding tours through exhibit areas, teaching visiting school classes, and providing exhibit interpretation to the general public. The training of museum interpreters, also referred to as docents, is preparation for all aspects of their duties. The training is administered by the museum staff, or by a cooperative effort. The docent becomes familiar with the museum's operation and philosophy, receives instruction in subjects pertinent to his/her position, and needs training in techniques of managing groups and teaching children in the museum context. The volunteer experience requires commitment on the part of the museum as well as commitment on the part of the volunteer.

Volunteers make enormous contributions to museums. In some museums, steps have been taken to develop a more professional relationship between the staff and the volunteers. For example, some museums ask their volunteers to sign an agreement which states the commitment of the volunteer to the program as well as the commitment of the museum to the volunteer for participation of approximately four hours per week, study in related fields, or research of new programs. Training includes lectures by the director.
and assigned subject reading. In other cases, the volunteers

...often feel exploited and out of touch with the museum goals. It is unquestionably true that the self-image and status of the volunteer need upgrading. Volunteers should be provided with day-care, reimbursement for out-of-town expenses, insurance, social security and tax credits. These benefits are not yet common, but some of them are beginning to be offered. (Strauss, 1977, p. 25)

The volunteer community in the United States, including museum volunteers, received national attention from the President and other governmental leaders by their advocating volunteerism in times of drastic budget reductions. According to C. Gregg Petersmeyer (1989), President Bush is a national leader committed to making community service a national policy (p. 2). As promised, Bush has advocated volunteerism. The Points of Light Foundation, established by the President, has the purpose of raising the awareness of the public about the needs and benefits of community involvement; and the establishment of the Office of National Service has the objectives of increasing the scale
and effectiveness of community problems (Petersmeyer, 1989, p. 1,2).

**Visitor Studies Research**

The emerging field of visitor studies presents a multi-dimensional view of specialists from public relations, marketing, education, recreation, exhibit design, visitor sciences and evaluation. The visitor studies perspective is primarily concerned with questioning how the exhibitions or programs impact on the visitors, yet it is beginning to be concerned about the performance of volunteers since volunteers are the representatives of the museum and are the individuals who relate the museum's mission and interpretations to the visitor. The conduct of the volunteer often determines the reaction the visitor has to the museum visit. Although theory building is in its infancy, a few visitor studies were accomplished in the 1920s and 1930s. In 1925, the American Association of Museums received a grant from the Carnegie Corporation to study museum fatigue. In 1929, Marguerite Bloomberg studied the differential effect of various ways of preparing school children for museum visits. She concluded that the best format was a pre-visit lesson and the formation of questions
by students themselves. According to the Museum for a New Century (AAM, 1984), "Bloomberg’s work is a fine example of sound methodology employed to examine elements of museum-school programs" (p. 65).

The research in visitor studies, however, was dormant until the late 1960s and 1970s when there was a revival of activity in museum studies. In 1968, Shettel wrote an article judging the quality of museum science exhibits; and in 1968 Shettel, Butcher, Cotton, Northrop, and Slough published "Strategies for Determining Exhibit Effectiveness." Later studies by Shettel (1973, 1976) helped teach how to evaluate exhibits from the visitor’s perspective. Screven (1973) was one of the first authors to conduct experimental research in public museums. His findings specify the importance of developing learning outcomes, breaking exhibit content into instructional elements, and providing some kind of visitor reaction that allows for response and feedback (AAM, 1984, p. 65). In 1977, Minda Borun, from the Franklin Institute Science Museum in Philadelphia, researched the cognitive and affective components of the museum experience. This one year pilot study dealt with motivation for visitors, visitor interest, exhibit attendance, exhibit preferences and
orientation to the museum. In more recent research, she confirmed that school children increase their knowledge of science content during a museum visit.

The development of additional publications also reflects current interest in visitor studies. *Visitor Behavior*, published by Steven Bitgood has offered a systematic means of communication for people engaged in visitor studies. In 1987, *Museum Visitor Evaluation* was published in which much of the work in the field was reviewed. In addition, the Annual Visitor Studies Conference which began in 1988, has provided an opportunity for professionals in the field to discuss and evaluate recent developments and issues. The *ILVS Review* and the *ILVS Bibliography and Abstracts*, Second Edition, are devoted exclusively to the understanding of visitors while *Curator* and the *Journal of Museum Education* contain many relevant articles.

**Research in Volunteerism**

A record number of Americans are volunteering. According to a 1987 Gallop Poll: "About five in teen adults donate at least four hours per week...the value of this volunteered time is estimated to exceed $100 billion dollars
per year" (Moore, 1988, p. A5). The "third sector" (Til, 1988) also called nonprofit, voluntary or independent sector, contribute 6% of the national economy (p. 50). In order to acknowledge and celebrate the extent of volunteer services, President Bush, on April 12, 1991, signed to proclaim April 16 as the Points of Light National Celebration of Community Services, which was a special tribute to volunteerism in America and to the millions of Americans who contribute their services.

In the book, Mapping the Third Sector (Til, 1988), volunteering is defined as a helping action of an individual that is valued by him/her, and yet is not aimed directly at material gain or mandated or coerced by others (p. 6). Til reviewed twelve years of papers published in the Journal of Voluntary Action. His findings corroborate with Daily (1968) that few studies give volunteerism systematic study (p. 24). According to prominent volunteer administrators such as Ellis and Til, and others, the study of volunteerism is of academic interest as well as of practical usefulness to volunteer professionals. In 1985, Susan Ellis wrote:

One way to describe the needs for research in volunteerism is to say that everything is left to do. As a professional field, volunteer
program management is less than 20 years old. While volunteers have been around since the days of the Mayflower, formal volunteer programs with trained leadership are a recent development. Volunteers themselves have largely been taken for granted. It is a new phenomenon to consider them a subject worthy of study. This is compounded by the fact that until only a few years ago, no academic major, either at the bachelor or advanced degree level, offered students courses in volunteer program management. Therefore, the subject was not even considered for serious attention. (p.11)

An in-depth review of the literature and research on volunteerism, presented by Chambre (1989), traces the past thirty years of volunteer experiences in discussions concerning level of participation, motivation, time devoted, tasks performed, and the organizations worked for. In 1984, Robert Daily presented several studies (from 1977-1988) on personality traits of volunteers. His own research profiles the characteristics of volunteers while also researching organizational commitment in relationship to job satisfaction.
Smith's research (1981) concentrated on why people participate in volunteerism and concluded that most volunteer activity resulted in "multiple causation, with altruism being a very minor factor in most organized volunteerism" (p. 25). Smith (1981) suggested that satisfaction and psychic benefits are expected by the volunteer, and that there is little systematic knowledge of precisely what constitutes job satisfaction from volunteer work (p. 22). However, Gidron (1983) found that overall satisfaction of volunteer work was related to achievement, conveniences, and absence of job stress factors. According to Gidron and Johnson (1974), volunteers found a job satisfying if they perceived it as challenging and interesting, if it made use of their skills and knowledge, if it allowed for independence and required responsibility, if the job was convenient in terms of hours and location, and if there were no organizational or other obstacles hampering the work. According to Watts and Edwards (1983), the need for achievement and the need for affiliation play a modest part in predicting job involvement.

**Evaluation Research**

The professional literature in evaluation has grown
during the past twenty years. Manuals, textbooks, and journals like *Evaluation*, *Educational Evaluation and Policy Analysis*, *Evaluation Review* and the *Evaluation Studies Review Annuals* are indications of the extent of the development in this field. In addition, the Joint Committee on Standards of Evaluation, created in 1975, developed standards for *Evaluation of Educational Programs, Projects, and Materials*. In 1982, the Evaluation Research Society established a second set of standards to guide program evaluation practices. These standards specify the guidelines that evaluators need to apply in the practice of their profession. The standards have four features: utility, feasibility, propriety, and accuracy. *Practical Evaluation*, by Michael Quinn Patton (1982), focuses on the feasibility aspect of conducting practical evaluations. The concern for feasibility refers to an evaluation process that is doable; propriety refers to the legal, moral, fair, and professional manner in which an evaluation is conducted; utility and accuracy apply to those criteria which need to be followed so that the evaluation is useful and the findings are accurate.

Because evaluation is real-life research, it requires cooperation from researchers and non-researchers. The
evaluation usually takes place in the natural setting, performed by an outsider providing the recommendations for decisions or actions. Thus, a working relationship needs to be established between those requesting and those performing the evaluation. Evaluation has become a major activity of social service programs, and within education, evaluation plays a leading role in research and development activities. In museum education, evaluation is surging as a critical element.

According to Worthen and Sanders (1987), evaluation is the determination of a thing's value. Guba and Lincoln (1981) define evaluation as a process for describing an evaluand and judging its merit or worth (p. 35). Patton (1982) defines evaluation as the "systematic collection of information about the activities, characteristics, and outcomes of programs, personnel, and products for use by specific people to reduce uncertainties, improve effectiveness and make decisions with regard to what those programs, personnel, or products are doing and affecting" (p. 15). The focus of evaluation, in general, is to improve program effectiveness. In education, it is the formal determination of the quality, effectiveness, or values of a program, product, project, process, objective or curriculum.
Evaluation uses inquiry and judgment methods, including:
1.) determining standards for judging quality and deciding whether those standards should be relative or absolute;
2.) collecting relevant information; and 3.) applying the standards to determine quality. Evaluation can apply to either current or proposed enterprises.

Patton, a renown expert in the field of evaluation, indicated that evaluation strategy must meet the needs of the evaluation problem (Patton, 1975) and that evaluation research ought to be useful and practical (Patton, 1978, 1982):

Evaluations...that are to be useful to specific practitioners must be focused at the local level. They must include description and analysis of local settings. They must take into account what happens in programs on a day-to-day basis....The major value of this kind of program evaluation at this local level is its contribution to program development, not its labeling of success and failure. The possibility for meaningful and useful feedback can occur only if evaluation research is tied to specific programs....(Patton, 1975, p. 38).
Patton (1975) also stated that "a commitment to get close to the data and a willingness to capture participants in their own terms implies an openness to the phenomena under study that is relatively uncontaminated by preconceived notions and categories" (p. 27).

In addition, Patton (1978) and Fletcher (1987) stated that evaluators should be concerned with designing evaluations in which there is a need to identify the user audiences and to tailor recommendations or action plans to these groups. Patton referred to these types of evaluations as "utilization-focused." He stated: "Utilization-focused evaluation emphasizes what happens in a study to determine its eventual impact before a final report is produced. The key to utilization will be found on the path the evaluation takes before the findings are exposed to the general light of public scrutiny" (Patton, 1978, p. 21). Patton also wrote: "The utilization-focused approach is aimed at increasing the likelihood that evaluation input be substantial, meaningful, and relevant" (p. 34). Thus, prominent qualitative researchers like Patton, Bogden and Biklen, and Guba and Lincoln agree that in this type of qualitative research the data collected are rich in description of people, places and conversations, and is not
easily handled by statistical procedures. These researchers are concerned with understanding the complex environment and/or behavior from the subject's own frame of reference, so the data is collected through sustained contact with the people in the settings where the subjects normally spend their time. According to Patton (1978): "Utilization is enhanced when the decision-makers understand, believe in and have a stake in the evaluation data" (p. 237). In agreement, Dobbert (1980) stated:

It is generally agreed that good informants share the following characteristics: they appear comfortable and unstrained in interactions with the researcher; they are not hurried; they are generally open and truthful although they may have certain areas about which they will not speak to where they will cover up; they stay on the topic or related important issues; they are thoughtful and willing to reflect on what they say. (p. 263)

The evaluation research advocated alternate methodological approaches. The Evaluation Research Society Standards Committee identified six categories of evaluation and within each category listed about one-hundred types (Patton, 1982, pp. 45-47). This demonstrates the complexity
and diversity within the profession. One alternative is Robert Stake’s responsive approach to evaluation. Patton (1978) described responsive evaluation as "process-oriented, holistic and dynamic in perspective" (p.227). Patton (1980), Guba and Lincoln (1981), Borg and Gall (1983), and Wolf, Tisdal and Tymitz (1979) describe responsive evaluation as an emergent form of educational evaluation. Evaluation studies become responsive if they: 1.) are oriented more directly to program activities rather than program intent; 2.) respond to staff and audience requirements for information; and 3.) refer to different value perspectives. The naturalistic inquiry paradigm using qualitative techniques is appropriate to support this approach.

Naturalistic responsive evaluation strategies begin with issues that are discussed and clarified by a sampling of stakeholders--program participants, administrators, staff and others. From these discussions new needs arise; more data are sought; feedback is provided, and so on. For such studies, the evaluation design is not formulated in advance and continues to evolve as the evaluator interacts with people in and about the setting. Responsive evaluation is also utilization-focused when there is a concern for how the
decision-makers will use the evaluation information (Patton, 1982). Thus, according to Patton (1978), utilization occurs when there is an immediate, concrete and observable effect on specific decisions and program activities, resulting from plans before the data is collected. Thus, the audience for the study shapes the direction of the inquiry; data are gathered; and judgements follow, leading to concrete actions and decisions.

In 1982, Bogden and Biklen wrote a book which linked qualitative methods with the study of education. They described the stages of entree into the field, data collection, analysis, and the reporting of the findings. In the forward, Ray C. Rist stated, "Bogdan and Biklen provide us with a systematic introduction to the qualitative method. They have not provided a cookbook that will answer every question nor prescribe a procedure for every situation. Instead, we have a benchmark against which those doing qualitative work can judge their own procedures and gain insights on alternatives..." (p.X).

The major theme that runs throughout the evaluation literature is that evaluation situations, program decision makers and individual evaluators are unique. Developing an evaluation that is doable, implementing a design that is
feasible, and presenting findings that are applicable and relevant to the specific audiences are the goals. The evaluation standards which were developed provide guidelines and direction for conducting professional work.

According to Patton (1982):

The field of evaluation encompasses all the higher functions of the human mind: sensory experience, observation, analysis, categorization, comparison, synthesis, interpretation, judgment, problem solving and decision making, to name but a few. Evaluation embodies our highest aspiration as a species: our desire to make sense of the world, to understand, and perhaps, even to control it, or at least parts of it for short periods of time. Evaluation does this specifically in the hope of improving the quality of human existence by improving the programs, services, and organizations that so drastically affect the quality of life in modern society. (pp.306-307)

**Performance Assessment or Performance Appraisal**

Performance review is an important administrative tool for the management of human resources (Patten, 1982, p.3).
According to Pratt (1985):

Staff appraisal probably has a greater unfulfilled potential than any other area of activity involving the human resources of an organization. The arguments for the regular review of staff performance, development, and potential are virtually irrefutable in the prevailing social and economic climate. (p. v)

Performance, itself, is a complex subject and can be influenced by factors such as job design, supervision, co-workers, compensation and reward practices, working conditions, training, evaluation, feedback, individual ability and motivation. Morf (1986) defines performance as the product of competence (motivation x ability) and work environment. Connellan (1978) defines performance or behavior as an activity that can be seen, measured or described (p. 28). In any case, measuring performance is a complicated and challenging task.

Much of the recent literature discusses measurement of performance in terms of performance assessment or performance appraisal (Patten, 1982; Schuler, 1984; Berk, 1986). Patten (1982) defined performance appraisal as "a formal method of evaluating employees that assumes that
employee performance can be observed and assessed although it cannot be objectively measured by units produced in elapsed time" (p.10). Schuler (1984) defined performance appraisal as "a formal structured system for measuring, evaluating and influencing an employees' job-related attributes, behavior and outcomes, and level of absenteeism to discover at what level the employee is performing on the job (p. 236). Berks's definition of performance assessment included the evaluation of workers' behavior (knowledge, skills and abilities) that have been determined by job analysis which contribute to the quantity and quality of work performed (Berk, 1986, p.53). Lefton, et al (1984) discussed performance appraisal as the formal discussion between manager and worker to discover the how and why of performance on the job, how the worker can perform more effectively in the future so worker, manager and organization can all benefit (p.2). In addition, these experts stated: "The final purpose of performance appraisal is to develop people who are steadily growing, enlarging their skills, and learning new and better ways to do things" (p.3). They agreed that the appraisal of performance needs a set of processes or procedures which consist of standards, criteria and forms in which performance appraisal data is
gathered, implemented and monitored. Where applicable legal constraints need to be considered.

Robert Guion (in Berk, 1986) stated that there are three purposes for the evaluation of performance: 1.) as a criterion measure in research, 2.) as a basis for decisions about people in the organization (in regard to promotions, special opportunities and administrative actions, and 3.) to reveal strengths and weaknesses in order to guide training, strategies, and consulting. Schuler (1984) and Berk (1986) both referred to the purpose of evaluation as being divided into two categories: 1.) evaluation (salary increases or decreases, demotions, layoffs, promotion and termination) and 2.) developmental (spotting training needs, monitoring employees to improve, providing feedback, counseling of employees and spotting performance deficiencies).

A review of the literature (Lefton et al, 1977; Locke and Latham, 1984; Morf, 1986; Berk, 1986) revealed that the experts consider performance appraisal to be a legitimate device for measuring on-the-job behavior and should be used to do so. There also appeared to be a consensus that job analysis is the foundation or key to performance appraisal and that assessments which are effectively conducted can contribute to the goals of each organization. Even though
the experts do not agree as to the best methods, approaches, and forms to be implemented, they do concur that each organization needs to first identify its purpose for the performance assessment. Once the purpose is determined, a job analysis follows.

Job analysis, the foundation of the appraisal, identifies the knowledge, skill and behavior that is essential to performing a given set of tasks. Sredel and Rothwell (1987) stated that "in the simplest sense, performance is dependent on the opportunity to perform, the knowledge and skill that the individual possess or can be taught, the nature of performance required, the outcome associated with the performance, and feedback on the outcome" (p. 40). In addition, they stated that individual performance is influenced by physiological, environmental, psychological and motivational variables (p.197). Job analysis provides the necessary information about work behavior for performance appraisal. From this information the appraisal instrument can be developed with regard to assessing the person in relationship to those specified tasks. Thus, job analysis is used to develop performance criteria which captures the essential aspects of performance on the job. Morf (1986) stated: "Without good criteria it
is impossible to evaluate..." (p. 99). According to Til (1988): "The development of criteria, however, is no simple process. Criteria themselves vary in their forms and implications with the social theory held by the evaluator..." (p. 194). Nevertheless, it is suggested that once the criteria are developed, standards for each criterion need to be established. Standards decide the level of acceptable performance, or the "requisite level of performance expected on the job" (Williams, 1972, p. 11). According to Guion (in Berk, 1986), "Performance standards provide the critical link in the process. Performance standards represent the levels of performance deemed acceptable or unacceptable for each of the job-relevant, critical areas of performance identified through job analysis" (p. 361).

Schuler (1984) summarized several types of standards: comparative standards, absolute standards, objective-based approaches, and direct index approaches. These standards identify whether the individual is measured by comparing the best to the worst, evaluating the individual independent of other, using output performance measures, or using objective, impersonal criteria such as absenteeism and turnover. Berk (1986) suggested that standards for
performance should be based on a job analysis, evaluation should be based on specific job dimensions, ratings should be behaviorally based, and documentation should be accurate.

In any discussion of job analysis, the Standards for Educational and Psychological Testing (1985), jointly prepared by the American Educational Research Association, the American Psychological Association and the National Council on Measurement in Education needs to be addressed. As Nathan and Cascio (1986) stated: "Although the Standards apply primarily to constructed performance tasks, questionnaires, and structured behavior samples, it may also be applied usefully in varying degrees to the entire range of assessment techniques" (Berk, 1986, p. 1) The Standards are divided into four sections: Technical standards for Test Construction and Evaluation, Professional Standards for Test Use, Standards for Particular Applications and Standards for Administrative Procedures. Chapter 10 addresses the guidance for choosing performance criteria and job analysis information; Chapter 1 deals with issues concerning development of performance assessment instruments; Chapter 3 discusses behavior-based rating scales; and Chapter 9 is the section concerning appraisal interviews and disseminating the information though
constructive feedback.

There are many approaches to evaluating work performance mentioned in the literature. In *How to Improve Human Performance*, Connellan (1978) discussed the human performance and systems theory and stated that input, outputs, feedback, and goals are basic steps to examine performance. Williams (1986), discussed management behavior objectives as a way of managing a company and its people and resources. It is concerned with setting and achieving performance objectives and improving performance in a planned systematic way. Locke and Latham (1984) recommended goal setting as the tool to appraise performance. They stated: "The evidence is overwhelming: goal setting gets results. But these results are not automatic. Like any tool it is no better than the people who use it. Used properly, it can improve productivity, clarify role expectations, stimulate creative problem solving, and increase satisfaction, pride and confidence..." (p. 171).

In consideration of the utilization of the performance appraisal, once the appraisal data is gathered, the information needs to be reviewed with the individual being assessed. Feedback works for the following reasons: 1.) It can improve specific behavior to be performed; 2.) It can
improve role clarity and task-specific ability; 3.) It can improve specific outcomes to be produced. Objective feedback reduces role ambiguity and prompts appropriate behaviors and/or outputs. It also enhances motivation. This, often, is where breakdown in the process occurs; yet this aspect of the performance appraisal system is essential. The appraisal interview is the arena for communicating, articulating, and examining the work performance and the recommended actions to improve performance.

Goal setting is one approach to help improve performance. Locke and Latham (1984) stated: "The empirical data showed clearly that a specific, challenging goal results in higher performance than does a generalized goal such as 'do your best'; that a specific challenging goal leads to higher performance than an easy goal; and that variables such as participation in decision-making affect performance only to the extent that they lead to the setting and/or acceptance of specific hard goal" (p.101). Specifying a goal is important because it enables an individual to attend to a specific aspect of performance, providing a basis for regulating one's efforts and evaluating how one is doing (Patten, 1982, p.28).
According to Patten (1982), appraisal is a lever which assists in improving performance, coaching employees on how to do better, or taking action in regard to people who have reached plateaus or declined in performance. The formal setting or the interview is the place to clarify and reiterate the objectives and expectations of the program as well as encourage efforts toward mutual understanding and cooperation. The formal review would record the highlights of what has been perceived as the work behavior of the individual so the individual formally knows how he or she is doing. For managers of volunteer programs, performance appraisal would provide data based on performance potential, identify the high performers, and sets the standards for accountability. It would give a realistic assessment of strengths of the volunteer program and would help develop an understanding of the administrative philosophy. The performance appraisal and the appraisal system are important in helping an organization identify needed human resource talent, to establish positive dialogue between management and its employees, to interpret the goals of the organization and the goals of each employee for mutual understanding, and to develop an identity and knowledge of
what the organization must do to be effective (Schuler, 1984, p. 235).

**Evaluation of Volunteers**

The profile of the volunteer of the 1990s is different from that of years ago. The volunteer was often described as a middle-aged, middle class, middle income woman (Ellis and Noyes, 1978; Schindler-Rainman, 1983). This is no longer true. The profile of the volunteer is in transition (Schindler-Rainman, 1983, p.23). Today, volunteers are all ages and all backgrounds, giving their time and energy and skill to causes of their own choices. The new type of volunteers includes working people, retirees, and executives. Businesses are encouraging company-sponsored projects, offer time-release plans, and encourage career education and internships. Youth are more able to explore careers, gain new skills, develop leadership potential, know communities better, and acquire social awareness. They obtain these real life experiences through school-community arrangements. The senior citizen is also more involved in volunteering. With better health and longer life span, many citizens are retiring with many years with which to look ahead. The unemployed look to volunteerism as a transition
to new sources of employment and as an way to test their skills. Today, racial, ethnic and economic minorities are included in the volunteer pool (Ellis & Noyles, 1978, p. 257).

There are many challenges in developing ways to utilize, recognize, and develop volunteers and volunteer programs, while insuring cooperation and preserving the goals of the organizations they serve (American Association of Museums, 1984, p.79). Because of the time, money, and other resources expended on volunteers, "it is good management practice to evaluate whether the expense is justified. It is also important to access what the volunteers accomplish and how effective they are. This information is of special interest to the volunteer as well as the managers"... (Ellis, 1985, p.67).

According to Loomis (1987): "Making professional demands on volunteers will enhance the importance of their commitment" (p.259). However, the volunteer component is often not considered when the organization conducts its evaluation study. As Ellis (1985) stated: "It is assumed that the volunteer worth is self-evident, needing no assessment" (p.68). Nevertheless, the volunteer program needs to be included in evaluation in order to obtain a true
picture of an organization's effectiveness. In addition, if goals and objectives of a program are identified, it is meaningful to the recognition of the volunteer and the volunteer program to assess whether or not these goals were achieved (Ellis & Schindler-Rainman, 1983, p.34).

For some volunteer programs, evaluation is correlated with the tally of volunteer hours. Quantity of hours does not demonstrate quality of performance. Often, there is resistance to using evaluation. Some managers are uncomfortable with evaluation methods or results. According to Ellis (1985), many organizations are reluctant to evaluate individual volunteers because of a belief that "gratitude for donated service must override concern for whether or not such services are worthwhile" (p.68). According to Flanders and Flanders (1979), the threat of evaluation of the individual docent can be reduced when the purpose of evaluation focuses on the docent's interpretation of the exhibit, the tour or docent activities, and the responsibilities and expectations of the volunteers themselves. Examining each volunteer contribution is one way of insuring the productive efforts of volunteer services. In the evaluation process, these contributions can be demonstrated and not just assumed, since evaluation
would monitor level of performance, help communicate the standards of performance, and would induce thinking about goals and standards. The evaluation of volunteers needs to be considered carefully. It can be thought of as an opportunity to praise and be supportive as well as to provide constructive criticism. It can be a forum for feedback and a motivating force for the volunteer.

Over 70,000 volunteers are active in museums in the United States. According to the American Association of Museums (1978): "Volunteer participation is a strong American tradition, and many museums could not exist without the contributions and personal involvement of devoted volunteers" (p. 25). People volunteer in museums for interests which vary from person to person. Some want to learn or gain expertise; some want social contact and activities; some want involvement in educational or cultural centers; some want to fill a personal need; and some want to share their talents. Museums use volunteers to supplement the staff; they enable the museum to expand their services to the public, to do additional research and to maintain a positive community image. Thus, the volunteer serves as an advocate of the museum, a facilitator of the museum work, and a communicator of the appreciation of the particular
educational or cultural interest. In many cases, the volunteer is the only personal contact a visitor has in the museum.

Gidron's findings (1983) suggest that volunteers need a task in which self-expression is possible, where skills and abilities can be developed, where the work is challenging, and where achievement can be seen. Thus, as the literature indicates, careful attention needs to be paid to job placement. In turn, this suggests the need for a periodic review of volunteer attitudes toward his/her work, and if need be, changing or enriching the work. The challenge and responsibility of the volunteer program administrator, then, is to sustain the volunteers' interests and to encourage constructive contributions. The following is a summary of some standards and guidelines which can facilitate management of volunteer programs.

1. The job description is important in providing the volunteers with role definition, an outline of duties, clarification of responsibilities and lines of authority, and a vehicle for job enrichment to challenge his performance.

2. Individual motivational needs must be considered in recruiting and placing volunteers.
3. Volunteers and staff should be included in recruiting and placing volunteers.

4. Volunteers and staff should be included in the planning and evaluation process to ensure cooperation and high level of participation.

5. Training is important to instill the basic skills and knowledge needed to perform the job and to build confidence.

6. Open communication between paid staff and volunteers must exist to disseminate pertinent information. Volunteers need to express their opinions and to maintain contact with the staff. (Moses, 1981, p. VI-1)

   In 1981 Moses wrote: "Volunteers are people, and each volunteer is an individual. It is a mistake to think of volunteer workers... in terms of a homogenous group" (p.VI-1). Volunteer efforts are most often recognized in a formal or ceremonial manner-luncheons, dinners, reward ceremonies. However, not all volunteers are satisfied with the same type of reward. Regular opportunities for information and idea exchanges need to be scheduled so both volunteer and staff can share opinions, personal experiences, and recommendations for improvement. This can be accomplished through regularly scheduled evaluations.
Thus, evaluation is a necessary and on-going process in the planning and development of programs, but it is often ignored (Moses, 1981, p. VII-1). Cost benefit analysis is one tool to assess volunteer program efficiency, effectiveness and administrative adequacy (Moses, 1981, p.II-2); yet the ratios and figures suggests that cost effectiveness analysis only serves as a basis for an annual comparison of program costs and benefits. However, according to Moses (1981):

Volunteer programs need a more pragmatic approach to evaluating their effectiveness. One type of self-assessment system utilizes an inventory of program characteristics considered essential to the functioning of a successful volunteer program. The system gauges the function, performance, commitment and satisfaction levels of those involved in the volunteer program: administration, volunteer coordinator, staff, volunteers and clients....Yet, evaluation is more than the checking off of program characteristics on a list of standards or counting the number of volunteer hours donated. (p.VII-4)

A simple yet practical method of program evaluation is
an annual reaffirmation and redefinition of goals and objectives. Susan Ellis (1987) states that there are several concrete indicators which can be evaluated: attendance patterns, willingness to do extra work, number of newly recruited volunteers, the number of year volunteered, and others. According to Moses (1981), the evaluation process must determine that the program is meeting the needs and expectations of the volunteer, the institution and the public (p. VII-6). However, to some volunteers and their supervisors, performance evaluation presents a threatening situation:

So often the evaluation process is misunderstood. Evaluation is not a critical examination of the individual's foibles and shortcomings. Evaluation is behavior, not personality oriented. It is a developmental process, not punitive. Evaluation builds on strength, not weakness. Performance evaluation provides the volunteer with the sense of accomplishment....Evaluation is not a one-sided function in which the volunteer is judged with program image and institution reputation at stake. (Moses, 1981, p. VII-10)

The appraisal process is a two-way communication in
which the volunteer is provided feedback on his performance. The evaluator and the volunteer jointly identify areas which need improvement and develop ways to achieve improvement. Similarly they identify the volunteer's areas of strength and build on those. Evaluation is designed to encourage personal growth and job skills and to reinforce the favorable characteristics of a volunteer's performance.

At the 1978 American Association of Zoos and Parks Annual Conference, delegates agreed that evaluation of volunteer performance should be accomplished yearly. However, as stated previously, little formal evaluation takes place within volunteer programs. Just as the profile of volunteers is changing, so, too, is the volunteer purpose. Museum volunteers and volunteers in general expect greater responsibility, personal growth, and rigorous training. Museums are also asking more of their volunteers. Thus, the pool of volunteer workers present a versatile group of individuals who are willing to provide and perform integral services in all kinds of settings. Through credible data-based information, performance evaluation can be useful in guiding both the volunteers and the volunteer programs to utilize their creative potential. It can also
serve to satisfy an institution's need for reports and decisions and improve public reaction.

Summary

The review of the literature supports the need for a performance appraisal system for museum volunteers. The contributions made by museum volunteers are extensive. Without them many museum programs would not exist. Volunteer administrators and museum educators address the need to develop performance assessment systems to record accomplishments and strengths, to recommend actions for the improvement of each volunteer's performance, and to encourage improvement of the museum volunteer programs. Visitor studies research is concerned with the performance of volunteers since volunteers work so closely with the public and affect the total museum experience. The evaluation literature advocates evaluating volunteer performance since monitoring performance would communicate standards of performance, would encourage managers and volunteers to think about goals and objectives, and would provide an opportunity for motivating and giving feedback to the volunteer. The link among museum education, audience research, evaluation research and performance assessment is
volunteerism. Volunteers represent the museums and advocate the museums' mission. Their performance, their knowledge, and their interaction with the public require commitment on the part of the institution as well as commitment on the part of the volunteer. Volunteers make enormous contributions. Performance assessment or evaluation of volunteer performance is a way of ensuring that the volunteer component in the museum is being identified as critical, important and worthwhile.
CHAPTER THREE

DESIGN OF THE STUDY

A qualitative study has an approach which assumes that understanding a program's content and context is essential for understanding the program. A naturalistic, responsive, utilization-focused evaluation is the research design for this study. The design is emergent, taking shape as the evaluator interacts in the environment with specific identified audiences.

The museum volunteer experience is complex. It is essential to understand the complexities to develop and implement a performance assessment system. Evaluation of performance is a goal of many museum volunteer programs and the important aspects of volunteer performance need to be determined. Therefore, the naturalistic paradigm and qualitative techniques were used in this study, to uncover the multiple realities of the world of museum volunteers.

**Background of the Study**

According to Fletcher (1978): "Evaluation is a powerful tool for assessing effectiveness and bringing about constructive change. To be worthwhile, careful evaluation
must be followed by action—putting into practice those changes suggested by analysis of the results" (p.80).
Evaluation of performance can lead to improved motivation, improved service to the audience, and improved relationships between the volunteer and paid staff. Susan Ellis (1986) pointed out that evaluation is actually a form or compliment, while Brudney (1990) stated that "performance appraisal indicates that the work merits review and that the individual has the capability and will to do a better job" (p.81).

There are a variety of forces which have an impact on making museums more accountable to the public they serve. Museum evaluation studies contribute to the understanding of a museum’s educational and socio-cultural impact by raising new questions and providing new information, while evaluation methods such as naturalistic/responsive strategies are suited to the dynamic and complex museum context. According to New Perspectives on Evaluating Museum Environments, an evaluation that is naturalistic and responsive best serves the people involved in or affected by museum programs, since the evaluation guides and gives information about decisions that need to be made (Wolf, Andis, Tisdal, and Tymitz, 1979).
From the 1970s to the present time, there has been abundant work in museum visitor research. C. G. Screven compiled an extensive bibliography of education evaluation research in museums. A large portion of the work cited has appeared since 1970. Little of this research, however, discussed the museum volunteer. In order to gain a greater understanding of the nature of the work of the volunteer in the museum setting, qualitative research was conducted in this study.

Qualitative research is a systematic examination of activities using the techniques of in-depth, open-ended interviews and participant observations. It relies on qualitative data—holistic analysis of detailed descriptions and explorations of situations, events, policies, interactions and behaviors. Researchers use qualitative methods to understand phenomena as a whole, in the natural setting, with no pre-existing expectations. Evaluators use qualitative methods to understand programs as a whole.

A qualitative study has an approach that assumes understanding a program's content is essential for understanding the program. It begins with specific observations and builds toward general patterns. Categories of analysis emerge from content analysis. Thus, a
qualitative study uses a naturalistic inquiry paradigm and relies on field study as a fundamental technique.

Museums need evaluation methods which respond to program activities and are useful to the museum. They need an understanding of the museum context (what is going on and why), and they need an understanding of the differences among various audience points of view toward particular problems or concerns. These needs were confirmed by Wolf, Andis, Tisdal and Tymitz (1979):

Because museum environments are perhaps our society's last refuge for meaningful, nonformal, and creative learning to transpire, they demand comprehensive evaluation methods which do justice to their mission and potential. As stated, museum evaluation efforts have traditionally followed experimental/statistical research designs which too often focus on a narrow range of issues, and thus, ignore the dynamic complexity of museum environments. This type of study frequently produces results that neither adequately describes the situation being examined nor provide meaningful insights for modification of programs and future planning efforts. It is our belief
that in order to best serve people involved in or affected by museums programs, evaluation must guide and inform decisions that need to be made.

(p.3)

The customary use of quantitative data in evaluation provides useful information, but it cannot supply answers to the many qualitative questions. Guba and Lincoln (1985) pointed out that qualitative methods are preferable to quantitative methods when phenomena being studied are complex human and organizational interaction and therefore not easily transferable into numbers. There has been an increasing interest in qualitative methods in evaluation research (Guba & Lincoln, 1981, 1989; Patton, 1975, 1979, 1980, 1982; Bogdan & Biklen, 1982). The debate between qualitative and quantitative research or evaluation stems from philosophical and conceptual differences in the qualitative and quantitative paradigm. In short, the quantitative paradigm's approach employs assumptions of the natural science positivist model, while the qualitative paradigm has a humanistic cast to understanding social reality which stresses an evolving, negotiated view of social order within an interpretive process (Locke, 1986, p. 35-36). According to Bogdan and Biklen (1982), there
are five features of qualitative research:

1. Qualitative research has the natural setting as the direct source of data and the research as the key instrument.

2. Qualitative research is descriptive.

3. Qualitative researchers are concerned with the process rather than the outcomes or products.

4. Qualitative researchers tend to analyze their data inductively.

5. Meaning is of essential concern to the qualitative approach.

This type of evaluation research attempts to "ground the theory" (have the theory emerge from the data) and "sensitize concepts" (use description of the events to clarify facets of the concepts) through participant observations, in-depth interviews and unstructured or semistructured interviewing. The open-ended nature of the qualitative approach allows the subject to answer from their own frame of reference rather than from a structured and prearranged set of questions (Patton, 1980; Dobbert, 1982; Bogdan & Biklen, 1982). Such methods use tacit as well as propositional knowledge to ascribe meaning to that which is uncovered. Data are analyzed as they are
collected and these preliminary analyses guide additional data collection. According to Skrtic (in Lincoln, 1985), the three most weighty techniques for establishing the credibility of an inquiry are persistent observation, triangulation and member checks.

Research Design

Naturalistic/responsive evaluation is the research design for this study. Naturalistic/responsive evaluation strategies begin with issues that are discussed and clarified by a sampling of stakeholders—program participants, administrators, staff and others. From these discussions new needs arise; more data are sought; feedback is provided; and so on. For such studies, the evaluation design is not formulated in advance and continues to evolve as the evaluator interacts with people in and about the setting. Responsive evaluation is also utilization-focused when there is a concern as to how the decision-makers will use the evaluation information. According to Patton (1978): "Utilization occurs when there is an immediate, concrete and observable effect on specific decisions and program activities resulting directly from evaluation plans for utilization before the data is
collected" (p.24). Thus, the audience for the study shapes
the direction of the inquiry; data are gathered; and
judgements follow, leading to concrete actions and
decisions.

According to Bogdan and Biklen (1982), the common
threads in natural evaluation include: the collection of
descriptive data in the natural setting, the evaluator
serving as the inquiry instrument, a focus on the issues as
perceived and experienced by people, and the utilization of
the inductive analytic process that focuses and narrows as
the evaluation proceeds (Bogdan & Biklen in Guba, 1987,
p.26).

significant works in which they described and advocated the
naturalistic evaluation method; Worthen and Sanders (1987)
stated that this approach included inductive reasoning,
multiplicity of data, no standard plan but an emergent
design with multiple realities and many perceptions
determining the complexities. Patton (1979) advocated
building in a utilization component appropriate to the
unique circumstances of the environment. Patton elaborated
this concept by stating that utilization-focused evaluation
is "...a creative, challenging process. It involves people

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in that most splendid of human enterprises—the application of intellect and emotion to search for answers that will improve human effort and activity" (p.96).

According to the above researchers, responsive/naturalistic evaluation focuses on addressing the concerns and issues of the participants and being "responsive" to the realities of the programs and the reactions, concerns and issues of the constituents. The focus of the responsive evaluation emerges from interactions in the evaluation setting, and those interactions and observations result in a progressive focusing on the issues. The advocates of this approach view those who participate in the program as "central to the evaluation process" (Worthen and Sanders, 1987, p. 129).

**Sampling Procedures**

Responsive evaluations were conducted in two Hampton Roads museums, the Virginia Marine Science Museum and the Living Museum. These museums are comparable on the following: goals, educational programs, volunteer training, volunteer responsibilities and procedures, job descriptions, and size of the volunteer force. Both are urban museums dedicated to the purpose of stimulating knowledge and
promoting understanding and awareness of the physical and biological world. They accomplish this purpose by providing living exhibits and interpretive programs to educate school groups as well as the general public. Both museums train volunteers to share their knowledge and skills with the museum visitor and have as a priority goal the development of a performance appraisal system to evaluate their volunteer force.

In responsive evaluation the central focus is addressing the concerns and issues of the stakeholder audience. According to Worthen and Sanders (1987), stakeholders are those who may be directly affected by the evaluation results. In order to optimize the information received, the evaluator used a purposive sample of the key informants. In this study the list of stakeholders included the museum director, education specialist, manager of volunteer services and museum volunteers. Additional subjects were included as the study progressed. The total population of active volunteers in each museum is approximately 200. Ten percent of each group were randomly selected to be included in the list of stakeholders since ten percent of the target population is considered
appropriate for questionnaires, interviews and observations (Gay, 1978; Hood, 1986).

**Instrumentation**

In responsive evaluation the evaluator is the instrument. "The evaluator as an instrument provides a multi-dimensional quality which is responsive, flexible, adaptable and holistic" (Guba and Lincoln, 1981, p.138-138). There are problems with reliability of the human as an instrument but these are overcome by including methods of triangulation. Guba and Lincoln (1981) stated that "the shortcomings of human beings as an instrument are more than compensated for by the quality and richness of the data they can gather" (p.151).

The evaluator of this study worked with museum volunteer programs since Fall 1988 at which time a program assessment and a program evaluation were developed for the volunteer program at the Virginia Marine Science Museum. An internship, required by the doctoral program at Old Dominion University, was completed by working with the Volunteer Training Coordinator/Education Specialist at the Virginia Marine Science Museum. Subsequently, in April 1989, a
volunteer training curriculum was developed. In addition, this researcher consulted with the manager of the volunteer services at both the Marine Science Museum and the Living Museum and received support in this research effort. The researcher is a member of VAM (Virginia Association of Museums), the Visitor Studies Association, and DOVIA (an organization for directors of volunteer services sponsored by the Volunteer Connection of South Hampton Roads), and since 1988, has attended annual national and local conferences sponsored by these organizations. In addition, in February 1992, the evaluator began participating as a consultant for the newly established Evaluation Review Committee of the Virginia Marine Science Museum of Virginia Beach.

**Data Collection Methods**

The data collection procedures in this study included information gathered from interviews, observations, and a grounded questionnaire. The evaluator in a naturalistic paradigm must generate descriptive data responsive to the concerns and issues of the key informants. The task of identifying concerns and issues about volunteer performance emerged from initial observations and interviews, initial
data analysis, member checks, and reiteration of interviews through grounded questionnaires.

Observation techniques, which enhance the observer’s ability to understand complex situations (Guba and Lincoln, 1981), and participant observations, defined as "a period of intense social interaction between researcher and subject in the milieu of the latter" (p. 189), were conducted. The evaluator of this study recorded, with running notes and a tape recorder, the behavior and events of museum volunteers as they occurred.

Unstructured interviews allowed the information to unfold. The evaluator used the initial interview to identify issues and concerns about volunteer performance in museums. The evaluator examined the interviewee’s discussion of the topic in order to determine what was relevant. Multiple perspectives, therefore, emerged.

A questionnaire was developed and grounded from the analyzed responses of the observations and interviews. Several responses were requested:

1. A list of questions concerning general information was given to the stakeholders. Each respondent was asked to indicate the response which most accurately described his/her situation.
2. Each subject was asked to check the phrases that he/she considered to be important traits of a museum volunteer. Then using these same phrases, the respondent was asked to choose ten of the most important traits and to put them into priority order, (1 being the most important and 5 being the least important). Items receiving a consistently low rating on validity were eliminated from further consideration. Items with conflicting scores deserved further study. A descriptor or issue was considered when a majority of respondents agreed about its validity or priority or when respondents disagreed.

3. Included in the next section were questions referring to experiences as a volunteer. Using a scale from one to five, the respondents were asked to circle the response which most accurately described their feelings.

4. Statements pertaining to evaluation of volunteer performance were included in the next section of the questionnaire. The respondent were asked to use the scale provided and to circle the response which most accurately described their feelings.

5. A list of possible performance standards were provided for the subjects to consider. These respondents were asked to choose, on a scale from one to five, the
response which best described their feelings. In addition they were asked to indicate, on the same type of scale, if they felt it was reasonable to be evaluated on this particular standard.

6. Another section included issues and concerns of some museum volunteers. Subjects were asked to respond, on a scale from one to five, whether they agreed or disagreed with these concerns and issues.

7. The final section of this questionnaire was optional. The subjects were asked to choose a name for an evaluation system for museum volunteers. Five choices were provided.

**Procedures**

The researcher of this study began with an openness to whatever emerged for the data. The first concern, however, was to gain access into the institutions (Guba and Lincoln, 1986; Bogdan & Biklen, 1982). The second step was to establish rapport. In this case, the manager/coordinator of volunteer services at each museum was contacted. A meeting discussing volunteer performance and the need/objective for establishing a volunteer appraisal system were discussed. The importance of these issues was confirmed. The managers
at both museums were concerned with the concept of volunteer performance and how it could be evaluated. Additional administrative concerns included: How could volunteer performance be evaluated without offending the volunteers? Would a formal evaluation be effective? Would a formal evaluation process take too much time? What surfaced as a primary concern was whether or not to develop and implement a performance evaluation system for volunteer workers. As Guba and Lincoln (1985) so aptly stated: "One of the deeper contradictions involves the tension between actions that are professionally desirable and actions that the public finds desirable" (p. 169). Thus, the naturalistic/responsive evaluation and the data collected would help clarify these concerns and help establish the implementation procedures.

A proposal of my study was discussed with and distributed to the managers of volunteer services in the two museums in which the data would be collected. Approval was then sought from the directors of these two agencies. Subsequently, personal interviews by the evaluator with the directors were conducted in order to clarify the purpose of the study as well as to collect important information. Once entrance into the settings was confirmed, the initial data collection process began. Observations were conducted so
the researcher could become immersed in the volunteer experience, get a feel for the sites themselves, and learn about the work of the volunteers. According to Guba and Lincoln (1986): "The researcher enters the field with some general question in mind but uses the first part of the fieldwork to discover questions which are important in the particular context" (p.96). Observations were made at both sites in order to maximize the information and perspectives obtained and to develop a broad and deep understanding of the volunteer experience. The same procedures, rules and regulations for volunteers were followed as the researcher moved through the museum, observing each and every volunteer station. Most of the time unobtrusive observations were made while standing in the background, watching and listening to what was being said and done. At the same time, a friendly attitude was maintained, and assistance with simple tasks was offered. Questions were asked at times when it was not bothersome, in order to learn about the specific situation being observed. Explanations were made about who the observer was and why the observations were being conducted. Most of the volunteers were easy to talk with and were eager to learn about the research. This approach provided an open-ended, nondirected introduction to
the volunteer experience and provided a foundation for the interview process.

Participant observation is considered a basic method of qualitative research (Dobbert, 1982). However, most researchers (Guba and Lincoln, 1981, 1989; Lincoln, 1985) advocate data collection by more than one method, called triangulation. Triangulation incorporated several perspectives of the topic under investigation to help demonstrate validity. Therefore, in this study, the next step was to establish a list of possible respondents to interview. The unstructured interview, where the interviewer has almost complete latitude in deciding what questions to ask, "best fits the qualitative paradigm" (p.397). Key informants such as the agency directors, coordinators, and education specialists were identified. A list of all volunteers from both settings (approximately 400 total) was furnished and then names were systematically selected. According to Hood (1976): "Sampling 5 - 20% of your population is a good rule of thumb" (p. 272). In addition, informants were identified by other volunteers.

Forty respondents were randomly selected, and letters were mailed, explaining that a follow-up telephone call
would be made to set up an appointment to meet. In this study, interviews were used as a main strategy in the data collection process. The interviews were conducted to gather descriptive data in the subjects' own words and to develop insight about the evaluation of volunteer performance.

The following three elements were considered important in the interview process: 1.) The specific purpose of the interview was stated so that both parties knew where the interview was going and served as a guide toward the channels to discover relevant knowledge of the informant. 2.) An explanation was given as to why writing and recording information were taking place. The informant was encouraged to describe the answers to questions in his/her own terms. 3.) The quality of field notes was determined by what questions were asked, how questions were asked, and how answers were explored.

The interviews were conducted in the following manner. The "warm-up" consisted of a friendly introduction and light conversation. The evaluator's interest in volunteerism and in this project were reviewed and the interviewee was asked general questions about his/her past volunteer experiences. A brief discussion informed the subject of the purpose of this project and assured complete confidentiality. The
interview focused on information gathered from the observations. Open-ended questions were asked, a wide range of topics were discussed, and descriptions of the volunteer's role in the museum were pursued. In addition, we explored relationships with staff members, administrators, and other volunteers, as well as how the channels of communication and accountability work. At first the interviews were unstructured. They became more focused as additional data was gathered. Before ending each interview the researcher asked for permission to contact the individual, by phone or by mail, at a later date.

The interviews served the purposes of understanding how volunteers viewed volunteer performance evaluation, introducing the idea of evaluation as a non-threatening process, and diminishing the administrators' uncertainty of the next step to take next in the evaluation process. The interviews clarified volunteers' perceptions of volunteer performance evaluation.

When the interviews were completed, the coordinators of the programs were contacted to explain the data gathered from the interviews, to re-connect and validate the goals for the evaluation and to informally clarify the evaluator's perceptions and observations to make sure they fit with the
ideas and ideals of the program manager. According to Patton (1980), this strategy provided the "framework out of which the practical tactics are developed and in which the actual field procedures are grounded. Holistic induction analysis, based on natural inquiry constitutes the strategy of qualitative methods and would provide a framework for the guidance in making practical, tactical decisions about the evaluation" (p.47).

In addition to the above, the researcher attended training sessions, meetings, seminars and recognition dinners scheduled for the volunteers, in order to learn about the program components in their natural setting. Thus, the researcher became immersed in the total program. From time to time it was necessary to withdraw and become distanced from the natural setting, another qualitative technique, before the immersion process would begin again. Each step brought a different level of intimacy or discovery with the program, prior to verification of the data. The verification process meant going back into the empirical world under study to examine the extent to which the emergent data fit and explained the observed.

In this dissertation the naturalistic methods emerged as the guiding direction in the utilization-focused
evaluation. According to Patton (1980) utilization-focused evaluation is a strategy for making evaluative decisions. Identification of relevant decisionmakers, key informants, and important information users is the focus in the utilization-focused approach. The evaluator worked with volunteers, coordinators, directors and educators to determine the relevant evaluation questions. What made this evaluation utilization-focused was the plan to utilize the data even before the data was collected. Thus, when the proposal for this study was presented, it was decided that the development of a performance appraisal system, representing the values of the people who would use it, would be the end result. Chapter five discusses this evaluation system in detail.

Data Analysis

The following steps were used in interpreting the data: categorizing the data; looking for recurring regularities called patterns, sorting the categories, called convergence, characterizing the categories with titles and descriptors; assessing the category sets; conducting member checks; and prioritizing the data by use of a questionnaire grounded in the analyzed information from the stakeholders.
Triangulation as described in other sections was used to verify information and to produce confidence in the data collected.

Summary

In this dissertation, the qualitative research design, a responsive, naturalistic, utilization-focused evaluation was conducted to clarify concepts concerning museum volunteer performance. This research was conducted in the natural setting, through participant observations, by interviewing a random sample of fifty participants, by analyzing the collected data using an inductive analytic process, by developing a questionnaire to validate the data, and by analyzing the responses from the questionnaire in order to develop a practical and useful volunteer performance evaluation system for two local museums. Chapter Four, the next chapter, will discuss in detail the complete data analysis process used with this research design.
CHAPTER FOUR
DATA ANALYSIS

Introduction

Data analysis in qualitative research is continuous and involves several levels. It occurs in the field and guides the direction of the data collected during observations and interviews, and while in search of relevant documents. Data analysis also assists in organizing the data and in writing the final report. Patton (1981) described the task of data analysis (identifying concerns and issues) as consisting of a number of stages or phases which include interviews, initial data analysis, member checks, dealing with misinformation, reiteration of interviews, and use of grounded questionnaires. He stated that the phases go on concurrently, and that the analysis is thought of as conceptual rather than operational (p. 311).

The information presented in this chapter will explain the stages and methods of data analysis that occurred in this study. Thus, analyses of the observations, interviews and questionnaire will be discussed in detail.
**Data Analysis Approaches**

This study, *A Responsive Evaluation in Two Hampton Roads Museums* employed several data analysis approaches. The notes from the initial observations were analyzed concurrently with the data collection. Observation and interview data were analyzed by unitizing and categorizing, also referred to as convergence, and the category sets were analyzed. Credibility of data was tested through a grounded questionnaire sent to the original stakeholders and key informants. This process is also referred to as member checks. In addition, statistical analysis of the questionnaire was conducted.

**Analysis of Observations**

A variety of sources and resources were utilized to build on the strengths of the data collection, while minimizing the weaknesses of one approach. A multi-method approach to fieldwork increases the validity and reliability of evaluation data (Bogdan and Biklen, 1982). The analyzed notes from observations gave direction to the data collection. The physical spaces of two Hampton Roads museums were explored to get a broad understanding of the parameters of the setting, the subjects, and the issues.
involved in evaluating volunteer performance. Approximately fifteen minutes was devoted to each observation. Observations took place approximately three hours per day, several times per week, for about two months. These persistent (repeated and continuous) observations allowed the evaluator to differentiate between typical and atypical situations. They helped develop a focus to narrow the scope of the study and to get a sense of what the volunteers accomplished in their respective positions. The information was collected with running notes and informal conversations, and then were analyzed. They generated a basic understanding of the volunteer experience and helped develop analytic questions to be used during the interviews.

**Selection of Stakeholders**

After several weeks, approximately fifty hours, of conducting observations and taking field notes, individuals were randomly selected to be part of this study. The names of the volunteers from each museum were listed in groups, according to work stations at the museum. Once the lists were completed, the number seven was used for random selection of individuals. The sample population included individuals ranging in age from 16 to 80 and individuals
from all the various jobs at both museums. In addition to this sample, additional key informants were contacted. A key informant was considered when his or her name was repeatedly referred to as a significant volunteer or leader or as an individual who had a particular interest in the outcome of this study. Once the selection of the sample was conducted, each volunteer to be interviewed was contacted by a letter which explained the purpose of the study (see Appendix A). Follow-up telephone calls were made to set up appointments for the subsequent interviews. Time, place and date of the interviews were determined with respect to the convenience of each respondent. Most were willing to meet, and at the interview, permission was requested to take notes and to tape-record the sessions. The interviews lasted approximately thirty minutes to ninety minutes, and at the end of each interview, the evaluator requested additional permission to contact the respondent again. In addition, a personal thank you note was written and mailed to each participant, expressing appreciation for his or her time, effort and help.

Analysis of Interviews

Unstructured interviews were conducted. Questions
concerning the volunteer’s experience in general, as well as his/her experiences at the museum, were discussed. The concept of performance evaluation was recognized, and each volunteer was asked to identify important traits of a volunteer, possible performance standards, and other issues and concerns. These ideas guided the interview while additional information pointed to specific concerns of the volunteer.

The interview data were analyzed concurrently during the interview process. In addition, the recorded interviews were listened to and analyzed after all interviews had been completed. Thus, this aspect of data analysis took place before, during, and after the interview process and consisted of unitizing and categorizing the data.

**Unitizing and Categorizing the Data**

Upon completion of all observations and interviews, data were analyzed by unitizing and categorizing. The purpose of unitizing was to identify and record essential information into a single piece of information able to stand by itself (Lincoln, 1985, p.19). Information is self explanatory when, if a portion of the unit was removed, the remainder would be seriously compromised. In this case, if
a sentence spoken by an interviewee was relevant to the broad mission of the research, it was entered onto a 3x5 index card so that another person could understand it. The purpose of categorizing was to bring together the information, presented on cards, relating to the same contexts. This process, also called analytic induction analysis, enabled the discovery of a set of categories for the unit cards. It involved sorting the unit cards into groups of like content and devising a system to describe the nature of the content to be included in each one. As the process continued, several cards could be and were placed in more than one category; therefore, cards were duplicated, noted as cross reference cards, and placed in all appropriate categories.

Developing Coding Categories

Coding "is the process whereby raw data are systematically transformed and aggregated into units which permit precise descriptions of relevant content characteristics" (Holsti, in Guba and Lincoln, 1982, p. 243). There are five canons of category construction (Guba and Lincoln, 1982): 1. Categories reflect the purposes of the research. 2.) They must be exhaustive. 3.) Categories
should be mutually exclusive. 4.) Categories must be independent. 5.) They must be derived from a single classification principle. In this study, the categories emerged from the data, with the intent of a well-grounded classification system.

The fieldnotes were read. Words and phrases, patterns of behavior, ways of thinking, and events were repeated and stood out. To develop the coding system, regularities and patterns were looked for. Word and phrases representing these patterns were written down. This process is a means of sorting the collected descriptive data. The following is a list of categories developed during analytic induction: 1.) Evaluation (what is to be evaluated, by whom and for what reasons); 2.) Administrative involvement with volunteers; 3.) Feedback on volunteer performance; 4.) Relationship between staff and volunteers; 5.) Reasons for volunteering; 6.) Training of volunteers; 7.) Expectation by the museum for the volunteers; 8.) Goals of the volunteers; 9.) Traits of the volunteers; 10.) Suggestions/changes/new experiences/problems in relationship to the volunteer experience.
**Triangulation**

Triangulation was used to verify information, to produce logically consistent data, and to provide confidence in the data. The information collected through several methods (observations, interviews and a questionnaire) were compared for consistency. Thus, cross-checking was used to compare and contrast information drawn from different sources and determined by different methodologies.

One of the most important strengths of triangulation in natural inquiry is its ability to remove itself from the "unidimensional, value-consensual paradigm" (Guba and Lincoln, 1981, p. 259) that has guided social action research and evaluation. It allows many perspectives to emerge from the same context, thus, producing more confidence in the data generated from and grounded by different methods.

**Member Checks**

Another approach in the data analysis of this study involved member checks. Through informal discussions and a standardized questionnaire, the interpreted data was taken back to the stakeholders, or original audiences, for verification. The questionnaire was developed from the
analyzed data provided by the observations and interviews (see appendix B). Thus, the alternate strategies of observations and interviews in the collection of the data produced emergent concerns and issues identified in the questionnaire. The questionnaire was developed to test the data for consistency, reliability, and credibility. It was hoped that through the triangulated data (or cross-checking) the interpretations would be confirmed.

Additional Qualitative Data Analysis

One plan during the data collection phase was to pursue leads to determine what shape the study was to take. Thus, at certain instances it was necessary to spend more time observing the various volunteer stations in the museums; at other times it was necessary to arrange to see specific activities (for example an animal show, animal feeding, horticulture activities, or demonstrations at the touch tank); it also was important to plan particular interviews with specific questions in mind. The field notes contained objective observations as well as the researcher’s feelings, comments and/or needs. The purpose of this type of analysis is "to stimulate critical thinking about what you see and to become more than a recording machine" (Bogdan and Biklen,
The process of on-going analyses during the data collection stages, reading over the data, and writing memos and feelings, helped develop the link between what was observed, the observers’ comments, reflections on issues and how they related to the larger theoretical, methodological and substantive issues, and the particular setting or subjects being studied.

In addition to the strategies mentioned above, the researcher, investigated the theoretical framework of this study through a complete literature review. After being in the field for a while, going through the substantive literature in the area one was studying enhances analysis (Bogdan and Biklen, 1982, p. 153). Thus, after collecting the data and before formal data analysis, the review of the literature clarified the need for and the importance of this study. It also clarified the stages of data analyses.

Developing the Questionnaire

The questionnaire developed for this study (see Appendix B) was the result of carefully reading and re-reading the fieldnotes recorded during observations, notes recorded during the interviews, and notes recorded from tape recordings of each interview. As the data was collected it
was analyzed. The evaluator looked for repeated regularities or patterns. Sets of categories were refined as further field data was collected.

Once the categories were identified index cards were used to list the words and phrases used by the stakeholders. For example, some responses from discussing evaluation of volunteer performance were: "depends on how it is done"; "review instead of evaluation"; "would help understand the job"; "for dialogue between administrators and volunteers". When discussing feedback, the stakeholders used phrases such as: "there is none"; "with no feedback there is burnout"; "feedback would be helpful." The following are some of the phrases used to discuss staff/volunteer relationships: "wonderful"; "no relations"; "volunteers are amazing people." The analyzed data, in the form of a questionnaire, were taken to the sources from which they were drawn, in order to test the validity and credibility of the categories. This type of questionnaire was grounded in the analyzed information from the stakeholders.

Pre-Testing The Questionnaire

Prior to the distribution of the questionnaire to the forty systematically selected museum volunteers and the ten
additional key informants, it was pretested by eight people--two managers of museum volunteer programs and six museum volunteers. The questionnaire was checked for clarity of directions, ambiguous questions, format, and recommended suggestions. According to Gay, (1980 and 1987), pretesting the questionnaire yields data concerning instrument differences as well as suggestions for improvement.

The following list indicates the responses from the pretest:

1. Prioritize the ten most important traits of volunteers since all those presented are important.

2. Add to the questionnaire that a reason for volunteering might be to gain new information.

3. Consider that a volunteer might want to switch between or among several volunteer positions. There is no question/statement addressing this issue.

4. Eliminate the question, "The conditions under which a volunteer works are appropriate to the assignment." The statement was considered vague.

5. Put the criteria of volunteers before questions concerning who does the evaluating.

6. Consider removing the question concerning communication between the administration and the volunteers.
One volunteer did not understand the reason for such communication.

Only one volunteer expressed a total dislike for a performance evaluation, yet, she filled in the questionnaire. Another volunteer questioned whether an evaluation of volunteer performance was requested by the museum or if it was generated by my study. The remaining pretest participants filled out the forms and were willing to discuss format, style and purpose of the questionnaire.

Careful consideration was given to all the concerns. All but one of the suggestions were followed. The question concerning communication between volunteers and administration reads, "It is important for there to be open communication between staff and volunteers." The answer requests a response that one agrees or disagrees with this statement. The volunteer had an understanding of the question. What she did not understand was the need for such communication. It was decided that the question should remain with no changes.

Once the changes/corrections were made, the questionnaire was prepared in its final form, envelopes were addressed and stamped, and response cards were enclosed. The packets were brought to the museums for mailing on March
3, 1992. It was requested in the cover letter that the packets be mailed back to me on or before March 15. Thirty-eight of the questionnaires were returned by March 21. Two of the questionnaires were not filled in, although notes of explanation were included. Analysis of the questionnaire will be discussed next.

**Statistical Analysis of the Questionnaire**

Statistical analysis of the questionnaire was conducted using the SAS Computer Program. Frequency counts and percents were calculated for all the questions. Thirty-eight of the fifty questionnaires, or 76%, were returned. Thirty-one responses were from volunteers and five responses were from administrators/educators/volunteer managers. Two questionnaires were returned unanswered but were accompanied by a written explanation. These two were not included in the statistical analysis. Chi square statistical procedures confirmed that the subjects in the study represented a true random sample.

The following discussion presents a detailed description of the data analysis. Percentages and frequency distribution of the responses to each statement or question are listed. Tables 1, 2, 3, 4, and 5 explain the results of
questions concerning current position, preferred position, length of time at the museum, length of time as a volunteer (in general), and age.

**TABLE 1**  
**YEARS AS A MUSEUM VOLUNTEER**

<table>
<thead>
<tr>
<th>Years</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>less than 1</td>
<td>4</td>
<td>12.5</td>
</tr>
<tr>
<td>1-3</td>
<td>14</td>
<td>43.8</td>
</tr>
<tr>
<td>4-6</td>
<td>13</td>
<td>40.6</td>
</tr>
<tr>
<td>7-10</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>more than 10</td>
<td>1</td>
<td>3.1</td>
</tr>
</tbody>
</table>

Frequency Missing = 4

**TABLE 2**  
**YEARS AS A VOLUNTEER (in general)**

<table>
<thead>
<tr>
<th>Years</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>less than 1</td>
<td>2</td>
<td>6.7</td>
</tr>
<tr>
<td>1-3</td>
<td>9</td>
<td>30.0</td>
</tr>
<tr>
<td>4-6</td>
<td>8</td>
<td>26.7</td>
</tr>
<tr>
<td>7-10</td>
<td>4</td>
<td>13.3</td>
</tr>
<tr>
<td>more than 10</td>
<td>7</td>
<td>23.3</td>
</tr>
</tbody>
</table>

Frequency Missing = 6
### Table 3: Current Volunteer Position

<table>
<thead>
<tr>
<th>Position</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>gift shop</td>
<td>1</td>
<td>3.3</td>
</tr>
<tr>
<td>interpreter</td>
<td>15</td>
<td>50.0</td>
</tr>
<tr>
<td>animal care</td>
<td>4</td>
<td>13.3</td>
</tr>
<tr>
<td>support staff</td>
<td>2</td>
<td>6.7</td>
</tr>
<tr>
<td>other</td>
<td>8</td>
<td>26.7</td>
</tr>
</tbody>
</table>

Frequency Missing = 6

### Table 4: Preferred Position

<table>
<thead>
<tr>
<th>Position</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>gift shop</td>
<td>1</td>
<td>3.3</td>
</tr>
<tr>
<td>interpreter</td>
<td>15</td>
<td>50.0</td>
</tr>
<tr>
<td>animal care</td>
<td>4</td>
<td>13.3</td>
</tr>
<tr>
<td>support staff</td>
<td>2</td>
<td>6.7</td>
</tr>
<tr>
<td>other</td>
<td>8</td>
<td>26.7</td>
</tr>
</tbody>
</table>

Frequency Missing = 6
Table 5 shows the analysis of data concerning important traits of a museum volunteer.

**Table 5**

<table>
<thead>
<tr>
<th>Age</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>14-19</td>
<td>2</td>
<td>5.6</td>
</tr>
<tr>
<td>20-39</td>
<td>13</td>
<td>36.1</td>
</tr>
<tr>
<td>40-59</td>
<td>8</td>
<td>22.2</td>
</tr>
<tr>
<td>60-79</td>
<td>13</td>
<td>36.1</td>
</tr>
<tr>
<td>over-80</td>
<td>0</td>
<td>0.0</td>
</tr>
</tbody>
</table>

**Table 6**

<table>
<thead>
<tr>
<th>Volunteer Traits</th>
<th>Frequency</th>
<th>Percent</th>
<th>Frequency Missing</th>
</tr>
</thead>
<tbody>
<tr>
<td>be creative</td>
<td>23</td>
<td>65.7</td>
<td>1</td>
</tr>
<tr>
<td>have a sense of humor</td>
<td>31</td>
<td>88.6</td>
<td>1</td>
</tr>
<tr>
<td>be flexible</td>
<td>31</td>
<td>88.6</td>
<td>1</td>
</tr>
<tr>
<td>interact with visitors</td>
<td>33</td>
<td>94.3</td>
<td>1</td>
</tr>
<tr>
<td>politely greet visitors</td>
<td>30</td>
<td>85.7</td>
<td>1</td>
</tr>
<tr>
<td>support staff and administrators</td>
<td>28</td>
<td>80.0</td>
<td>1</td>
</tr>
<tr>
<td>follow policies and procedures of the museum</td>
<td>32</td>
<td>91.4</td>
<td>1</td>
</tr>
<tr>
<td>attend meetings/seminars/training sessions</td>
<td>28</td>
<td>80.0</td>
<td>1</td>
</tr>
<tr>
<td>demonstrate enthusiasm</td>
<td>34</td>
<td>97.1</td>
<td>1</td>
</tr>
<tr>
<td>impart knowledge about the exhibit</td>
<td>29</td>
<td>82.9</td>
<td>1</td>
</tr>
<tr>
<td>apply skill and ability to the volunteer position</td>
<td>30</td>
<td>85.7</td>
<td>1</td>
</tr>
</tbody>
</table>
Table 6 (continued)

<table>
<thead>
<tr>
<th>Volunteer Traits</th>
<th>Frequency</th>
<th>Percent</th>
<th>Missing</th>
</tr>
</thead>
<tbody>
<tr>
<td>be supervised</td>
<td>18</td>
<td>51.4</td>
<td>1</td>
</tr>
<tr>
<td>be reliable</td>
<td>35</td>
<td>100.0</td>
<td>1</td>
</tr>
<tr>
<td>be prompt</td>
<td>29</td>
<td>82.9</td>
<td>1</td>
</tr>
<tr>
<td>relate to staff</td>
<td>28</td>
<td>80.0</td>
<td>1</td>
</tr>
<tr>
<td>relate to administrators</td>
<td>22</td>
<td>62.9</td>
<td>1</td>
</tr>
<tr>
<td>relate to other volunteers</td>
<td>29</td>
<td>82.9</td>
<td>1</td>
</tr>
<tr>
<td>demonstrate friendliness to staff</td>
<td>29</td>
<td>82.9</td>
<td>1</td>
</tr>
<tr>
<td>demonstrate friendliness to museum visitors</td>
<td>31</td>
<td>88.6</td>
<td>1</td>
</tr>
<tr>
<td>receive recognition</td>
<td>22</td>
<td>62.9</td>
<td>1</td>
</tr>
<tr>
<td>be tactful</td>
<td>27</td>
<td>77.1</td>
<td>1</td>
</tr>
<tr>
<td>be committed to the volunteer position</td>
<td>32</td>
<td>91.4</td>
<td>1</td>
</tr>
<tr>
<td>understand the mission of the museum</td>
<td>31</td>
<td>88.6</td>
<td>1</td>
</tr>
<tr>
<td>take initiative</td>
<td>26</td>
<td>74.3</td>
<td>1</td>
</tr>
<tr>
<td>put forth effort</td>
<td>30</td>
<td>85.7</td>
<td>1</td>
</tr>
<tr>
<td>cope with various situations</td>
<td>30</td>
<td>85.7</td>
<td>1</td>
</tr>
<tr>
<td>cooperate with staff</td>
<td>32</td>
<td>91.4</td>
<td>1</td>
</tr>
<tr>
<td>be neat and clean</td>
<td>30</td>
<td>85.7</td>
<td>1</td>
</tr>
<tr>
<td>practice safety skills</td>
<td>27</td>
<td>77.1</td>
<td>1</td>
</tr>
<tr>
<td>operate equipment properly</td>
<td>23</td>
<td>65.7</td>
<td>1</td>
</tr>
<tr>
<td>be eager to learn</td>
<td>28</td>
<td>80.0</td>
<td>1</td>
</tr>
<tr>
<td>practice teamwork</td>
<td>27</td>
<td>77.1</td>
<td>1</td>
</tr>
<tr>
<td>other</td>
<td>4</td>
<td>11.4</td>
<td>1</td>
</tr>
</tbody>
</table>
The following interpretations were developed from the data presented above. At least 50% of the sample responded that all the listed traits were important. The majority of the responses (twenty-three) considered the following traits to be important: 1.) Reliability received 100% of the responses. 2.) 90% or above checked the following as important traits of a museum volunteer: Interacts with visitors; follows museum policies and procedures; demonstrates enthusiasm; is committee to volunteer position; and cooperates with staff. 3.) 80-89% of the respondents stated that the following traits were important: Has a sense of humor; is flexible; politely greets visitors; supports staff and administration; attends meetings/seminars/training sessions; imparts knowledge; applies skills and abilities to the volunteer position; is prompt; relates to other volunteers; demonstrates friendliness to staff; demonstrates friendliness to museum visitors; understands mission of the museum; puts forth effort; copes with the various situations; is neat and clean; is eager to learn. 4.) 62% to 79% of the responses indicated that the following were important: is creative; relates to administrators; receives recognition; operates equipment properly practices teamwork. 5.) 51.4% indicated
that being supervised is important.

Respondents were also requested to list, in priority order, the ten most important traits of a museum volunteer. The following list represents the results: 1. be reliable, 2. demonstrate enthusiasm, 3. interact with visitors, 4. follow policies and procedures of the museum, 5. be committed to the volunteer position, 6. cooperate with staff, 7. have a sense of humor, 8. be flexible, 9. demonstrate friendliness to museum visitors, 10. understand the mission of the museum. Numbers four, five, and six received the same count. Numbers seven, eight, nine and ten also received the same count.

From the section concerning traits of museum volunteers, respondents were also requested to list, in priority order, the ten most important. The following list represents the results: 1. be reliable, 2. interact with visitors, 3. be committed to the volunteer position, 4. follow policies and procedures of the museum, 5. impart knowledge about the exhibit, 6. be enthusiastic, 7. understand the mission of the museum, 8. demonstrate friendliness to museum visitors, 9. be flexible, 10. attend meetings/seminars/training sessions. The only discrepancies between the two lists above were: cooperate with staff,
have a sense of humor, attend meetings/seminars/training sessions, and imparts knowledge about the exhibit. Therefore, when comparing both lists and putting them together, the twelve most important traits for museum volunteers include: be reliable, interact with visitors, be committed to the volunteer position, follow policies and procedures of the museum, impart knowledge about the exhibit, be enthusiastic, understand the mission of the museum, demonstrate friendliness to the museum visitors, attend meetings/seminars/training sessions, cooperate with the staff, and have a sense of humor.

Table 7 shows the data from general questions concerning the volunteer experience. The results concluded that 73% of the respondents intended to remain at their present positions; approximately 70% of the respondents indicated they would not like to change positions; 90% indicated they volunteer at the museum because of interest in the subject; and 74% indicated the subject/mission of the museum was not new to them.
### TABLE 7

**VOLUNTEER EXPERIENCE**

<table>
<thead>
<tr>
<th>Experience</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>I intend to remain at my current volunteer position.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Agree)</td>
<td>22</td>
<td>73.3</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>00.0</td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>16.7</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>3.3</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>2</td>
<td>6.7</td>
</tr>
<tr>
<td>I would like to change my current volunteer position.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Agree)</td>
<td>1</td>
<td>3.3</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>6.7</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>20.0</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>6.7</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>19</td>
<td>63.3</td>
</tr>
<tr>
<td>I would like to work at more than one volunteer station.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Agree)</td>
<td>6</td>
<td>20.7</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>20.7</td>
</tr>
<tr>
<td></td>
<td>7</td>
<td>24.1</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>00.0</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>10</td>
<td>34.5</td>
</tr>
<tr>
<td>I need assistance in developing new skills at the museum.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Agree)</td>
<td>5</td>
<td>16.7</td>
</tr>
<tr>
<td></td>
<td>4</td>
<td>13.3</td>
</tr>
<tr>
<td></td>
<td>9</td>
<td>30.0</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>10.0</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>9</td>
<td>30.0</td>
</tr>
<tr>
<td>I volunteer at this museum because of my interest in the mission/subject.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Agree)</td>
<td>28</td>
<td>3.2</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>12.9</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>00.0</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>00.0</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>0</td>
<td>00.0</td>
</tr>
<tr>
<td>I volunteer at this museum because the subject is new to me.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Agree)</td>
<td>1</td>
<td>3.2</td>
</tr>
<tr>
<td></td>
<td>4</td>
<td>12.9</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>9.7</td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>16.1</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>18</td>
<td>58.1</td>
</tr>
</tbody>
</table>

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The analysis from the questions concerning who/whom would conduct an evaluation of volunteer performance indicated variance in results. Table 8 illustrates the statistical analysis. When reading these results, recall that Table 6 indicated a 51% response to the importance of volunteers being supervised. The results suggest that there still may be resistance to the evaluation of performance of museum volunteers, and that a flexible evaluation system may be needed.

**TABLE 8 EVALUATION OF VOLUNTEERS**

<table>
<thead>
<tr>
<th>Evaluation</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Evaluation</td>
<td>(Agree)</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>10</td>
<td>32.3</td>
</tr>
<tr>
<td>Evaluation by Peers</td>
<td>(Agree)</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>9</td>
<td>25.0</td>
</tr>
</tbody>
</table>
TABLE 8 (continued)

<table>
<thead>
<tr>
<th>Evaluation by Supervisor</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Agree)</td>
<td>13</td>
<td>36.1</td>
</tr>
<tr>
<td></td>
<td>8</td>
<td>22.2</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>16.7</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>5.6</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>7</td>
<td>19.4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Evaluation by Manager/Coordinator of volunteer Services</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Agree)</td>
<td>11</td>
<td>30.6</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>16.7</td>
</tr>
<tr>
<td></td>
<td>9</td>
<td>25.0</td>
</tr>
<tr>
<td></td>
<td>4</td>
<td>11.1</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>6</td>
<td>6.7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Evaluation by Visitors</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Agree)</td>
<td>10</td>
<td>28.6</td>
</tr>
<tr>
<td></td>
<td>7</td>
<td>20.0</td>
</tr>
<tr>
<td></td>
<td>9</td>
<td>25.7</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>(Disagree)</td>
<td>9</td>
<td>25.7</td>
</tr>
</tbody>
</table>

When considering the possible performance standards discussed in the data, the following list, in priority order, was established.

1. It is important for museum volunteers to behave in a friendly manner.

2. It is important for volunteers to work with staff and administrators to reach museum goals.

3. It is important for volunteers to follow policies and procedures of the museum.

4. It is important for the museum volunteer to show
sensitivity to the needs of the visitor/group.

5. It is important to have eye contact with visitors.

6. It is important for the museum volunteer to give accurate information about the exhibit or display being discussed.

7. It is important for volunteers to have open communication with staff.

8. It is important for volunteers to have a clear understanding of museum goals.

9. It is important for museum volunteers to make the commitment to work the regular schedule of four hours per week.

10. It is important for museum volunteers to encourage visitor questions.

11. It is important for museum volunteers to be able to change work situation when the need arises.

12. It is important for museum volunteers to ask real questions.

The two questions with the lowest positive responses were:
It is important for museum volunteer to pace a tour for a person/group; and it is important for the museum volunteer to allow visitors to test his/her ideas.

After analyzing the results, it needs to be noted that
the sample population does not conduct formal tours. Thus, this item is not important to the localities in this study. In addition, questions 6 and 8 suggest some variation. This may be due to the resistance to being evaluated on these items. However, the variance may be due to the lack of expertise in knowing how these items would be evaluated. Further investigation needs to be done to determine more complete answers.

### TABLE 9 POSSIBLE PERFORMANCE STANDARDS

<table>
<thead>
<tr>
<th>Standards</th>
<th>Frequency</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. It is important for the volunteer to have a clear understanding of museum goals</td>
<td>25</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>It is reasonable to be evaluated on this standard</td>
<td>19</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>2. It is important for a museum volunteer to make the commitment to work the regular schedule of four hours per week</td>
<td>22</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>It is reasonable to be evaluated on this standard</td>
<td>16</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Agree</td>
<td>Disagree</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>-------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>3. It is important for volunteers to follow the policies and procedures of the museum.</td>
<td>29</td>
<td>6 1 0 0</td>
<td></td>
</tr>
<tr>
<td>It is reasonable to be evaluated on this standard.</td>
<td>28</td>
<td>6 1 0 0</td>
<td></td>
</tr>
<tr>
<td>4. It is important for volunteers to work with staff and administrators to reach museum goals.</td>
<td>30</td>
<td>3 2 1 0</td>
<td></td>
</tr>
<tr>
<td>It is reasonable to be evaluated on this standard.</td>
<td>22</td>
<td>5 6 0 2</td>
<td></td>
</tr>
<tr>
<td>5. It is important for volunteers to have open communication with staff.</td>
<td>26</td>
<td>4 4 0 1</td>
<td></td>
</tr>
<tr>
<td>It is reasonable to be evaluated on this standard.</td>
<td>20</td>
<td>6 6 2 1</td>
<td></td>
</tr>
<tr>
<td>6. It is important for the museum volunteer to be able to change work situations when the need arises.</td>
<td>22</td>
<td>7 4 2 2</td>
<td></td>
</tr>
<tr>
<td>It is reasonable to be evaluated on this standard.</td>
<td>13</td>
<td>10 7 3 2</td>
<td></td>
</tr>
<tr>
<td>7. It is important for the museum volunteer to encourage visitor questions.</td>
<td>22</td>
<td>6 3 3 1</td>
<td></td>
</tr>
<tr>
<td>It is reasonable to be evaluated on this standard.</td>
<td>21</td>
<td>2 8 4 0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agree</td>
<td>Disagree</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>-------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>8. It is important for the museum volunteer to ask real questions</td>
<td>21 1 9 2 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard</td>
<td>12 3 11 2 6</td>
<td></td>
</tr>
<tr>
<td>9. It is important for the museum volunteer to allow the visitor to test his/her ideas</td>
<td>12 5 10 2 6</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard</td>
<td>12 4 8 3 6</td>
<td></td>
</tr>
<tr>
<td>10. It is important for the museum volunteer to give accurate information about the exhibit or display being discussed</td>
<td>27 2 5 0 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard</td>
<td>27 2 5 0 0</td>
<td></td>
</tr>
<tr>
<td>11. It is important for the museum volunteer to show sensitivity to the needs of the visitor/group</td>
<td>29 7 0 0 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard</td>
<td>24 9 2 0 0</td>
<td></td>
</tr>
<tr>
<td>12. It is important for a museum guide to pace the tour for the person or group</td>
<td>17 7 9 1 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard</td>
<td>13 7 10 2 2</td>
<td></td>
</tr>
</tbody>
</table>
TABLE 9 (continued)

<table>
<thead>
<tr>
<th></th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>13. It is important for the museum volunteer to behave in a friendly manner</td>
<td>30</td>
<td>4 1 0 1</td>
</tr>
<tr>
<td>It is reasonable to be evaluated on this standard</td>
<td>29</td>
<td>6 2 0 0</td>
</tr>
<tr>
<td>14. It is important for the museum volunteer to have eye contact with visitors</td>
<td>28</td>
<td>6 2 0 0</td>
</tr>
<tr>
<td>It is reasonable to be evaluated on this standard</td>
<td>17</td>
<td>5 10 3 0</td>
</tr>
<tr>
<td>15. It is important for the museum volunteer to listen to the visitors</td>
<td>30</td>
<td>3 1 1 1</td>
</tr>
<tr>
<td>It is reasonable to be evaluated on this standard</td>
<td>32</td>
<td>6 5 1 0</td>
</tr>
</tbody>
</table>

The following list is the analysis, in priority order, of responses to what is reasonable to evaluate:

1. To behave in a friendly manner
2. To follow policies and procedures of the museum
3. To give accurate information about the exhibit or display being discussed.
4. To show sensitivity to the needs of visitor/group
5. To listen to the visitors
6. To work with staff and administrators to reach museum goals
7. To encourage visitor questions
8. To have open communication with staff
9. To have a clear understanding of museum goals
10. To have eye contact with visitors
11. To make the commitment to work the regular schedule of four hours per week
12. To be able to change work situations when the need arises

The following three standards received responses which indicate discrepancies: To pace the tour for the person or group; to ask real questions; and to allow the visitor to test his/her ideas. When informally discussing the questionnaire with volunteers, it was stated that the concept of asking real questions was not clearly understood. This question needs to be investigated more thoroughly. Perhaps the question needs to be eliminated from the questionnaire; or perhaps there needs to be training seminars for museum volunteers on how to ask and answer questions, and how to encourage visitors to ask questions.

Issues and concerns were included in another section of the questionnaire. 50% or more of the subjects agreed that it is important: To understand the museum’s policy concerning the role to the museum volunteer; that expectations of volunteer performance be clear; that duties and responsibilities at the museum be clear; that tasks
performed at the museum give volunteers the opportunity to develop skills and abilities; that the volunteer has the opportunity to develop new skills; that the volunteer receives adequate training; that volunteers would like to watch presentations by staff; for volunteers to have open communication with the staff; that volunteers can assume as much responsibility as they want; that the museum volunteer is the representative/link to the public; that the volunteer presents positive experiences to the visitors; that the volunteers know who their immediate supervisor is; that volunteer services are appreciated. The table presented next shows these results.

**TABLE 10  ISSUES AND CONCERNS OF MUSEUM VOLUNTEERS/STAFF/ EDUCATORS/ ADMINISTRATORS**

<table>
<thead>
<tr>
<th>Issues and Concerns</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>I understand the museum’s policy concerning the role of the museum volunteer</td>
<td>25  5  4  1  0</td>
</tr>
<tr>
<td>The museum’s expectations of volunteer performance is clear to me</td>
<td>29  4  2  0  0</td>
</tr>
<tr>
<td>My duties and responsibilities at the museum are clear to me</td>
<td>31  2  1  1  0</td>
</tr>
</tbody>
</table>
### TABLE 10 (continued)

<table>
<thead>
<tr>
<th>The tasks I perform at the museum give me the opportunity to develop my abilities/skills</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>25</td>
<td>7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>As a volunteer I am informed about changes that take place at the museum</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>17</td>
<td>8</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>As a result of volunteering I have the opportunity to develop new skills</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20</td>
<td>7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The tasks I perform are a challenge</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>17</td>
<td>9</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>It is important to me that the tasks I perform are a challenge</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>16</td>
<td>11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The training I received adequately prepared me to carry out the responsibilities of my volunteer position</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>23</td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>As part of my training I would like to listen/watch presentation by staff</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>27</td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I feel I can communicate openly with staff</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>24</td>
<td>6</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I have the opportunity to assume as much responsibility as I want</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>19</td>
<td>3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>My working conditions as a volunteer are equal to those enjoyed by paid staff doing similar work</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>22</td>
<td>8</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>As a museum volunteer I am a representative of the museum and a link to the public</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>32</td>
<td>2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>As a volunteer it is my responsibility to provide a positive experience for the museum visitors</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>30</td>
<td>2</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>14</td>
<td>6</td>
</tr>
<tr>
<td>14</td>
<td>6</td>
</tr>
<tr>
<td>31</td>
<td>3</td>
</tr>
<tr>
<td>16</td>
<td>5</td>
</tr>
<tr>
<td>11</td>
<td>6</td>
</tr>
<tr>
<td>16</td>
<td>3</td>
</tr>
<tr>
<td>25</td>
<td>6</td>
</tr>
</tbody>
</table>

According to this data, more than 50% of the respondents agreed: that volunteers do not experience feedback from the supervisors/staff; that it is not an important to volunteers that tasks be a challenge; that an evaluation of volunteer performance would not necessarily provide an opportunity for dialogue between the
administration and the volunteers.

The last section of the questionnaire was optional. The subjects were asked to choose, among five titles, the one they felt was the best for an evaluation system for museum volunteers. Review of Volunteer Performance was considered the best name, with a 38% response. The second choice, with a 32% response, was Developmental Appraisal System for Museum Volunteers.

Summary

In 1982, Bogdan and Biklen described the data analysis process. They stated:

Data analysis is the process of systematically searching and arranging the interview transcripts, fieldnotes, and other materials that you accumulate to increase your own understanding of them and to enable you to present what you have discovered to others. Analysis involves working with data, organizing it, breaking it into manageable units, synthesizing it, searching for patterns, discovering what is important and what is to be learned, and deciding what you will tell others. For most, the end product of research are
Data analysis moves you from the rambling pages of descriptions to those products. (p. 145)

In a qualitative study, the researcher is concerned with techniques for establishing rigor of the data, interpretation, and putting the data into procedures. Guba and Lincoln (1981) described this process as a challenge of ingenuity and insight, which incorporates at least three checks. These checks include 1.) Using the process of prioritizing in a questionnaire technique. 2.) Using different audiences which generates different concerns and takes different positions on the issues. 3.) Testing the interpretations with audience members. As described previously, the present study used all these methods.

In addition, Guba and Lincoln (1981) suggested that the following criteria need to be met to establish structural corroboration: truth value, applicability, consistency, and neutrality. To test for truth value, time was devoted to repeated and continuous observation which allowed the researcher to differentiate between typical and atypical situations. To test for applicability, the evaluator needed to determine that what was true in one context was also true in another. In testing for consistency the alternate
strategies of observations, interviews and questionnaires were used to produce or test concerns of the issues that emerged. Thus, the purpose was to determine overlap or to test for reliability. If the same concerns were identified from several methods, then reliability of the findings are improved. Neutrality occurred by triangulation of the data and confirmation of the data and interpretations through member checks. The data was re-introduced through the questionnaire method which cross-checked the collected data and determined if the same concerns were identified and corroborated. This method limited the chance that biases were undetected, and established rigor of the data. The results of the cross-checking in this study repeatedly demonstrated that some standards were identified; some issues and concerns were corroborated; and some traits were determined. There were discrepancies as to who/whom would conduct the evaluation and discrepancies concerning the importance of interaction between volunteers and administration. Thus, additional research of these issues is suggested.

Chapter Five of this dissertation will illustrate how the results of the analyses were utilized to develop a system to review performance of museum volunteers.
CHAPTER FIVE

CONCLUSIONS

Introduction

Museums are regarded as centers of learning, and the role of the interpreter/docent/volunteer is becoming more and more significant. As credible, informed representatives of the institution, museum volunteers/interpreters/docents have tremendous impact on the visitors' experience, earned income and daily operations of the museum. Ways to formally evaluate performance are becoming increasingly more important. When discussing evaluation, one must have a clear understanding of what to expect from volunteers, what the volunteers expect from the museum, how to train the volunteers, and how performance standards will be used. After all these aspects are considered, the result will be a performance assessment system which is accepted, understood, and appreciated by all those involved.

A review of volunteer performance is an important step in linking job elements, acceptable levels of performance, an action plan for enhancing performance, and communication between the administration and the volunteers. An essential part of the performance plan for managers of volunteer
services is the development of performance expectations; thus, volunteers will clearly understand and know what is expected of them.

Findings

According to the findings of this study, less than 50% of the respondents indicated they received feedback from supervisors or staff. This was a concern or issue of the volunteers, staff, and/or administrators. Volunteers need feedback to know how well they are doing. A performance evaluation system, which includes periodic performance appraisal and a performance interview, would require on-going dialogue and would provide an important source for feedback. The performance interview, one part of the evaluation system, refers to the process by which the administrator (evaluator) and the volunteer (interpreter/docent) discuss the volunteer's performance goals and objectives, as well as the performance review.

Many of the expectations, standards and traits determined by this study may seem to be common knowledge. They are, however, often overlooked in training; they need to be attended to and included in a performance review. The reality of volunteer resistance to evaluation and the
need to change evaluation to a less threatening concept of performance review was confirmed. This study also demonstrated the necessity to introduce the idea of evaluation in stages; the importance of volunteer input in the planning, implementation and training stages cannot be overlooked. The members of the volunteer staff need to know that their opinions are valued and their viewpoints count.

A system which reviews volunteer performance needs to be introduced so that it meets the expectations of the volunteer, attends to the organization's needs, introduces goals that recognize a volunteer's individuality, and assesses the performance of volunteer services. A performance appraisal system needs to review the degree to which the mutual objectives of the volunteer and the organization have been fulfilled. As we know, evaluation of volunteer performance is important, yet, it needs to be introduced with sensitivity. The information and forms included in Appendix C are intended to assist in reaching these goals.

Performance appraisal or the review of performance is a complex concept which could require large blocks of time. Because the managers of volunteer services or coordinators of volunteer programs have so many responsibilities, an
evaluation system needs to provide them with a system that is efficient and effective. The information included in this system has been devised with careful consideration of the needs of the museum, the needs of the manager of volunteer services, and the needs of the volunteers.

**Interpretations**

As the data collection and data analysis processes unfolded, notes of my reactions and insights were recorded. Introductory conversations with the managers of volunteer services indicated the goal of developing and implementing a performance assessment system, and they indicated a preference for self-evaluation forms and procedures. Their concerns, however, also included the preferences of volunteers. Two original purposes, then, of this study were: 1.) to develop a system to evaluate performances and 2.) to determine who would conduct the evaluation. The additional questions evolved as the study progressed.

An important part of being in the field was the personal contact with administrators and volunteers and the building of trust and confidence. The stakeholders in this study were willing to provide information about their work and personal reactions and insights about their museum.
experiences. Nevertheless, it was clear that the concepts of performance evaluation was met with discomfort. In many cases, evaluation was viewed as a threat. In order cases, evaluation meant that the museum would be ungrateful for the work accomplished. The administration reiterated the importance of not offending the volunteers and emphasized that evaluation was a delicate topic.

What surfaced from the data was that volunteer work needs to be meaningful; a supportive, relaxed environment is desired; personal interaction and feedback are important. What surfaced as significant to the administration was establishing volunteer commitment, providing meaningful experiences to the volunteers in exchange for their time and effort, providing recognition that volunteer contributions were valuable, and establishing an easy to use non-threatening evaluation system.

Apprehension was the initial reactions from museum volunteers regarding performance evaluation. Evaluation was viewed as critical and threatening. However, through open, non-judgmental discussions about the word evaluation, and by proposing that evaluation be considered in terms of improvement and as a construction process, the participants became more receptive and relaxed. The volunteers even
suggested that evaluation might help create professionalism in the volunteer effort. When reassured that the intention of evaluation was not to create a competitive atmosphere, nor to be critical, and that input from volunteers into the evaluation process was crucial, participants demonstrated more enthusiasm. The idea of mutual efforts among administrators, manager and volunteers, to create a system for doing a better job, seemed to alleviate the original resistance.

Personal interest by the managers of volunteer services seemed to make a difference to the museum volunteers. The reactions regarding self evaluation, peer evaluation, evaluation by supervisor or other administration depended upon the relationships among these individuals. Thus, additional research concerning management styles of museum volunteer administrators is recommended.

In summary, it is suggested that evaluation of volunteer performance be discussed openly with paid and nonpaid staff; that evaluations be discussed as a non-threatening means for improvement; that an evaluation system or an easy to use system for communication, recognition and feedback; and that volunteer administrators take a personal
interest in demonstrating that museum volunteers make a real contribution.

Recommendations

The evaluation process, also called an action plan, is a combination of written forms and a personal interview. The following are the suggested steps to implement the plan.

1. Applicant Interview—The manager of volunteer services needs to discuss job descriptions, expectations, responsibilities, performance standards, in additions to polices and procedures.

2. Formal Evaluation—The evaluation schedule would be as follows: When a volunteer first begins, he/she would be evaluated after one month, after six months, and after one year. Experienced volunteers would be evaluated yearly. (Ellis, 1987)

3. Evaluation Forms—The manager of Volunteer Services would discuss with the volunteer the evaluation forms. They would discuss the various methods of evaluation: self-evaluation, peer evaluation, and evaluation by supervisors and/or manager of volunteer services. According to the results of this study, it is preferable for the immediate supervisor or the manager of volunteer services to
4. Evaluation Interview--The administrator and the volunteer would be present at the evaluation interview. Each relate his/her points of view. The completed evaluation forms would be discussed and the action plan (goals) for the future would be determined. (Locke and Latham, 1984)

5. Action Plan--At this time it would be decided if the volunteer would remain at the same assignment or change to a new assignment. Strengths of the volunteer as well as needs for additional training, assistance in weak areas, and objectives for the next year would be discussed.

6. Evaluation Signatures--The evaluation would signed by the parties at the evaluation interview and action plan meeting. This agreement would be referred to at the next assessment interview.

In addition to helping the volunteer focus on contributions to the museum, the evaluation process would help management make decisions about the volunteer program, volunteer assignments, recruitment, additional training needs. An opportunity for all volunteers to give suggestions for the volunteer program, for the assignment areas, and for the organization to work better would be provided. This process would allow some volunteers to leave
Important challenges for museums are to accept volunteers as partners in attaining the organization's mission, to find way to build on the positive attributes of volunteer work, and to develop communication awareness among all parts of the system. Evaluation helps create this goal.

Introducing an evaluation system into an organization requires several steps. Some people who volunteer will resent or resist the idea of being evaluated. However, with careful consideration and with sensitivity, such a system can be implemented. Involving the volunteer staff in the decision-making and implementation processes are important so the acceptance of an evaluation system will be accomplished more smoothly and with less resistance.

The following suggestions need to be considered when implementing a performance appraisal system for museum volunteers.

1.) Begin the process by casually discussing the concept of assessing volunteer performance. This step encourages feedback about evaluation.

2.) Use the enclosed questionnaire (see Appendix B), or develop another, to survey the issues and concerns of volunteers, as well as to learn about expectations of their
responsibilities, ideas concerning important traits needed to be a volunteer, and standards which are reasonable to be evaluated. Be clear that this data will be used to develop a system to review the performance of volunteers. The information collected will be the actual thoughts and feelings of the people for whom the evaluation is meant. Thus, acceptance will be accomplished with more ease.

3.) Establish an Evaluation Review Committee. This committee would consist of the manager of volunteer services, an individual who has some expertise with evaluating museum volunteers, several (approximately six) volunteers who represent the museum volunteer staff, and, as necessary, other museum administrators. The committee would review information included in the appraisal system and would have input into its implementation.

4.) Revise the volunteer training program to include any missed or neglected areas determined by the collected data. For example, the collection of data concerning the evaluation of volunteers has influenced changes in the volunteer training program at one of museums under study. Last fall, the education specialists developed job descriptions, and presently they are developing additional training workshops addressing the expectations and
standards of volunteer performance. At the end of each new workshop/seminar/training session, the attenders would receive a certificate of completion, indicating that the volunteer had achieved a particular level and was ready to actively participate as a museum volunteer. This is another method of recognizing volunteer skills and abilities. In addition, the museum would recognize that the individual had completed the training process for his/her station. The second museum in this study is beginning to make curricula changes in the existing orientation program, and it is considering implementation stages of the evaluation system.

5.) Implement the plan to review volunteer performance. It must be remembered that during the entire process, the needs of the volunteers and their sensitivities must repeatedly be recognized. Including the non-paid staff in the implementation process is essential to the success of the system.

Developing a plan to review volunteer performance is an important step in the evaluation process. The administrator (manager of volunteer services, coordinator of the volunteer program, or the immediate supervisor) needs to consider the importance of the job elements and needs to decide on the acceptable levels of performance. (During the course of
this evaluation, the coordinators of volunteer services needed to establish or update job descriptions. Clear job descriptions are essential to the development of a performance evaluation plan, since they describe the responsibilities and duties of the volunteer positions.

The administrator also needs to develop and recommend to the volunteers a plan for enhancing or improving performance.

The Review of Volunteer Performance (see Appendix C) can be used for both planning and evaluation. The forms can be used in the volunteer program to develop a performance plan, as well as to complete each volunteer's performance assessment. An essential feature of a system to review performance of museum volunteers is the development of performance expectations. By clearly and directly stating the expectations and standards for which volunteers would be held, and the performance review schedule, volunteers would know on what criteria they will be assessed.

Another important step in developing any performance plan is to define the critical job elements or to describe the major responsibilities and/or objectives of the position. Job elements are determined by reviewing the duties and objectives discussed in the written job descriptions. There needs to be at least two but no more
than seven duties or objectives. One goal of the Evaluation Review Committee would be to review the job descriptions and determine needed changes in the objectives, duties or expectations associated with the specific position. There is space on the Volunteer Performance Review Form for job descriptions. Only key words are needed to identify the elements. In addition, in order to understand the relative importance of each element of the job, the job elements can be listed in priority order. Thus, the jobs listed for each volunteer position provides guidance as to the museum’s expectations volunteer performance.

Performance expectations are another important consideration in an evaluation system. A performance expectation is the statement indicating the acceptable level of performance for each job element. Expectations need to be expressed in terms of quality, quantity and timeliness whenever possible. However, some do not lend themselves to these measures. Some may be expressed in terms of goals or objectives based on the specific job position, since in some instances, job activities change within the designated time-frame for performance review. Thus, the objectives may be project-oriented. Nevertheless, performance expectations need to be reasonable, attainable and as specific as
possible. From this study it was determined that the twelve most important expectations for museum volunteers are: Be reliable; interact with visitors; be committed to the volunteer position; follow policies and procedures of the museum; impart knowledge about the exhibit; display and/or museum; be enthusiastic; understand the mission of the museum; demonstrate friendliness to the museum visitors; attend meetings/seminars/training sessions, cooperate with the staff; have a sense of humor. Additional expectations were validated and listed in chapter four.

The evaluator, when conducting the performance review, needs to keep in mind that external factors can influence performance. Examples of external influences are poorly operating equipment, decrease in budget, newly required training program, new policies requiring adaptation of new information. Thus, external factors need to be determined when considering performance expectations.

Performance standards (see Chapter Four) were also identified in this study. These standards have been included in the Volunteer Performance Review (Appendix C). The respondents in this study agreed that these standards were reasonable for evaluation purposes.

The performance interview is a critical and useful
part of an evaluation system, and when carried out effectively, can increase efficiency and help the individual work to his/her full potential. The interview is a planned interpersonal situation, conducted at a specific time and place, with no interruptions, and with a clear understanding of the purpose. The reasons for the interview are to improve job proficiency, to clarify job responsibilities, to increase one’s personal growth and to assess one’s work priorities. It gives an individual the opportunity to compare the last performance review with the current appraisal in order to evaluate results and to establish new or current objectives. Establishing objectives are a critical part of joint commitment and action, which ultimately demonstrates the compatibility between the individual’s and the organization’s goals. The intention of the performance interview is to help benefit the organization; to create a better understanding between managers and volunteers in what constitutes important job performances; to help the volunteer apply untapped talents to the job and to develop the potential for more significant contributions; and to provide another avenue for recognizing the contributions of the volunteer staff. Lastly, the performance interview would present the opportunity to
complete the appraisal forms and to discuss performance strengths and weaknesses.

A performance appraisal system that meets the mutual expectations of the volunteer and the organization can introduce negotiated goals, can recognize a volunteer's individuality and can assess the performance of volunteer services. In short, performance appraisal can review the degree to which the mutual goals of the volunteer and the organization have been fulfilled.

Recommendations for Further Study

It is suggested that further investigations ascertain how the information from this study influences the establishment and implementation of an evaluation system in the respective museums. It is recommended that findings of this study and the Review of Volunteer Performance be presented to the DOVIA organization for review. It is also recommended that these results be presented to the American Association of Museums, The Virginia Association of Museums, and/or the State Office of Volunteerism in Richmond for their opinions. Furthermore, similar responsive evaluation studies could be conducted in a variety of volunteer program settings to determine similarities and differences in the
results. Perhaps a Code of Expectations and a Code of Performance Standards for Museums Volunteers could be developed from a more generalized and universal population. The results from this study cannot be generalized to other institutions, but the data and methods of gathering information can assist in determining the evaluation concerns of other institutions. The naturalistic, responsive technique did prove to be an effective way to become involved in the museum environments and allowed the researcher to become closely involved with the data under study.

Summary

Cultural institutions, including museums, are facing budgetary constraints, and administrators are giving much attention to volunteers and the importance of volunteer services. The field of volunteer management is growing and developing and the concerns and issues of volunteers and volunteers managers are being addressed. Volunteer training programs need to be accountable for their successes. Methods of evaluation based on training, job descriptions and expectations need to be developed and utilized to identify strengths and weaknesses and to guide modification
of programs. Particular needs of volunteers, characteristics of the individual, several techniques for evaluation, and acceptable standards for performance can be developed, adapted, and used as assessment criteria.

Evaluation is a two-way process which needs to provide communication and feedback. It must be conducted in conjunction with goals, objectives and expectations of the volunteers' roles. It needs to concentrate on strengths rather than shortcomings, with the philosophy of encouraging individuals to develop their potential.

Evaluation of volunteers is a very delicate issue and many individuals would leave if their work was not appreciated. The goal of museum volunteer work is to enrich the lives of the museum visitor and to be the link between the museum and its audience. Helping the volunteer to accomplish this task through a sensitive, cooperative, mutually satisfying system is the ultimate goal. Such a goal is realistic and can be accomplished, but both the volunteer staff and the administration need to be open to the concerns of each other and need to work together in understanding the mission, expectations and objectives of evaluation. It was the intention of this research to provide information which is needed in determining how to
assess volunteer performance and in assisting in the development of a time-efficient, sensitive, clear evaluation system which provides recognition, feedback and evaluation of the performance of museum volunteers.
APPENDIX A

LETTERS TO RESEARCH PARTICIPANTS
Letter Introducing Questionnaire

Joan Fishman Hecht  
Ph. D. Candidate  
Old Dominion University  
1205 Botetourt Gardens  
Norfolk, Virginia 23517  
February 24, 1992

Dear (name of participant):

Your participation in a study concerning the performance of volunteers in museum settings is requested. Because of the thousands of hours provided by museum volunteers, the key to success for this project is the contributions of volunteers.

The attached questionnaire reflects the outcome of many hours of discussions with museum docents, interpreters, educators, administrators and staff members. Your response to each statement is important to the validation of this study, and your participation will be of significant value in the development of a system which will evaluate volunteer performance. All information provided has been and will be confidential.

Please take your time to respond to the items listed below. Answer all statements and/or questions. Please put the completed questionnaire in the enclosed self-addressed stamped envelope and mail it on or before MARCH 10. If you have any questions concerning the questionnaire or the study, please contact me at the above address or call me at 804-623-4118.

Name of Participant
Address of Participant

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If you would like a summary of the findings, complete the enclosed card and mail it separately. In advance, thank you for your cooperation and assistance. Without your help this project cannot be completed.

Sincerely yours,

Joan Fishman Hecht
Ph.D. Candidate
Old Dominion University
167

Address of Participant
May 12, 1992

Dear (name of participant):

Thank you for sending back the questionnaire validating information collected during observations and interviews. I received a 76% return. The data analysis of my research has been completed, and I am now in the process of developing a system which is intended to assist in assessing volunteer performance.

I anticipate that this project will be completed, in its final form, by the end of the summer. I will contact each person who indicated he/she wanted the findings of this study.

Again, thank you so very much for all your assistance, cooperation and support. I truly appreciate your effort.

Sincerely yours,

Joan Fishman Hecht
Ph.D. Candidate
Old Dominion University
APPENDIX B

QUESTIONNAIRE
VALIDATION OF INFORMATION CONCERNING
VOLUNTEER PERFORMANCE

DATE: __________________________

VOLUNTEER POSITION: __________________________
The following questions concern general information. Please **check ( )** the response which **most accurately** describes you or your situation.

1.) I have been a museum volunteer for:
   - [ ] less than one year
   - [ ] 1-3 years
   - [ ] 4-6 years
   - [ ] 7-10 years
   - [ ] more than 10 years

2.) I have been a volunteer (in general) for:
   - [ ] less than one year
   - [ ] 1-3 years
   - [ ] 4-6 years
   - [ ] 7-10 years
   - [ ] more than 10 years

3.) I currently volunteer in the following position:
   - [ ] gift shop
   - [ ] interpreter
   - [ ] animal care
   - [ ] support staff
   - [ ] other (please list)

4.) I prefer to volunteer at the following position:
   - [ ] gift shop
   - [ ] interpreter
   - [ ] animal care
   - [ ] support staff
   - [ ] other (please list)

5.) My age is:
   - [ ] 14-19
   - [ ] 20-39
   - [ ] 40-59
   - [ ] 60-79
   - [ ] over 80
Please put a check ( ) next to the phrases that you consider to be important traits of a museum volunteer. You may check as many as you feel are appropriate.

The museum volunteer needs to:

___ be creative
___ have a sense of humor
___ be flexible
___ interact with visitors
___ politely greet visitors
___ support staff and administrators
___ follow policies and procedures of the museum
___ attend meetings/seminars/training sessions
___ demonstrate enthusiasm
___ impart knowledge about the exhibit
___ apply skill and ability to the volunteer position
___ be supervised
___ be reliable
___ be prompt
___ relate to staff
___ relate to administrators
___ relate to other volunteers
___ demonstrate friendliness to staff
___ demonstrates friendliness to museum visitors
___ receive recognition

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Using all the phrases listed, choose ten traits you feel are the most important. Write these traits on the lines provided. Next, put these ten traits into priority order. Write a number from 1 to 10 in the space provided. 1 is the most important trait and 10 is the least important.

<table>
<thead>
<tr>
<th>Trait</th>
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<th>Trait</th>
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This section concerns your experiences as a museum volunteer. At the top of the page you will find the words AGREE and DISAGREE. Next to each statement you will find a scale from 1 to 5. Using the scale, please circle the response which most accurately describes your feelings about the following statements. If you agree with the statement, circle 1. If you disagree with the statement, circle 5. Circle number 2, 3 or 4 depending on how much you agree or disagree with the statement. Circle only one number.

1. I intend to remain at my current volunteer position. 1

2. I would like to change my current volunteer position. 1

3. I would like to work at more than one volunteer station. 1

4. I need assistance in developing new skills at the museum. 1

5. I volunteer at this museum because of my interest in the mission/subject. 1

6. I volunteer at this museum because the subject is new to me. 1
The next few statements pertain to evaluation of volunteer performance. Using the scale below, please circle the response which most accurately describes your feelings. If you agree with the statement, circle 1. If you disagree with the statement, circle 5. Circle 2, 3, or 4 depending on how much you agree or disagree with the statement. Circle only one number.

<table>
<thead>
<tr>
<th>AGREE</th>
<th>DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. If an evaluation of volunteer performance is incorporated into the volunteer program, I prefer that it be conducted as a self-evaluation. ---------------------1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>2. If an evaluation of volunteer performance is to be incorporated into the volunteer program, I would prefer it be conducted by my peers.--1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>3. I prefer that an evaluation of volunteer performance be conducted by my supervisor.---------------------1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>4. I prefer that an evaluation of volunteer performance be conducted by the manager/coordinator of volunteer services.----------------------1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>5. I prefer that an evaluation of volunteer performance be conducted by museum visitors.---------------------1 2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>
The following is a list of possible performance standards described by volunteers. Please consider each phrase carefully. Decide if you feel it is important for museum volunteers to perform these tasks. Using the scale below, circle the response which best describes your feelings. If you agree with the statement, circle 1. If you disagree with the statement, circle 5. Circle 2, 3, or 4 depending on how much you agree or disagree with the statement. Circle only one number.

1. It is important for the volunteers to have a clear understanding of museum goals. It is reasonable to be evaluated on this standard.

<table>
<thead>
<tr>
<th>AGREE</th>
<th>DISAGREE</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>2 3 4 5</td>
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</table>

2. It is important for a museum volunteer to make the commitment to work the regular schedule of 4 hours/week.

<table>
<thead>
<tr>
<th>AGREE</th>
<th>DISAGREE</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>2 3 4 5</td>
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</table>

3. It is important for volunteers to follow the policies and procedures of the museum.

<table>
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<tr>
<th>AGREE</th>
<th>DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2 3 4 5</td>
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</table>

4. It is important for volunteers to work with staff and administrators to reach museum goals.

<table>
<thead>
<tr>
<th>AGREE</th>
<th>DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td></td>
<td>AGREE</td>
</tr>
<tr>
<td>---</td>
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</tr>
<tr>
<td>5.</td>
<td>It is important for volunteers to have open communication with staff.</td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard.</td>
</tr>
<tr>
<td>6.</td>
<td>It is important for the museum volunteer to be able to change work situations when the need arises.</td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard.</td>
</tr>
<tr>
<td>7.</td>
<td>It is important for the museum volunteer to encourage visitor questions.</td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard.</td>
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<tr>
<td>8.</td>
<td>It is important for the museum volunteer to ask real questions.</td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard.</td>
</tr>
<tr>
<td>9.</td>
<td>It is important for the museum volunteer to allow the visitor to test his/her ideas.</td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard.</td>
</tr>
<tr>
<td>10.</td>
<td>It is important for the museum volunteer to give accurate information about the exhibit or display being discussed.</td>
</tr>
<tr>
<td></td>
<td>It is reasonable to be evaluated on this standard.</td>
</tr>
</tbody>
</table>
11. It is important for the museum volunteer to show sensitivity to the needs of the visitor/group. 1 2 3 4 5
It is reasonable to be evaluated on this standard. 1 2 3 4 5

12. It is important for a museum guide to pace the tour for the person or group. 1 2 3 4 5
It is important to be evaluated on this standard. 1 2 3 4 5

13. It is important for the museum volunteer to behave in a friendly manner. 1 2 3 4 5
It is reasonable to be evaluated on this standard. 1 2 3 4 5

14. It is important for the museum volunteer to have eye contact with visitors. 1 2 3 4 5
It is reasonable to be evaluated on this standard. 1 2 3 4 5

15. It is important for the museum volunteers to listen to the visitors. 1 2 3 4 5
It is reasonable to be evaluated on this standard. 1 2 3 4 5
The following are issues and concerns of some museum volunteers. Please read each statement carefully. At the top of the page you will find the words AGREE and DISAGREE. After each statement you will find a scale from 1 to 5. Please circle the response that most accurately describes your volunteer experience.

<table>
<thead>
<tr>
<th>Statement</th>
<th>AGREE</th>
<th>DISAGREE</th>
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</thead>
<tbody>
<tr>
<td>I understand the museum's policy concerning the role of the museum volunteer.</td>
<td></td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>The museum's expectations of volunteer performance are clear to me.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>My duties and responsibilities at the museum are clear to me.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>The tasks I perform at the museum give me the opportunity to develop my abilities/skills.</td>
<td></td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>As a volunteer I am informed about changes that take place at the museum.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>As a result of volunteering I have the opportunity to develop new skills.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>The tasks I perform are a challenge.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>It is important to me that the tasks I perform at the museum are a challenge</td>
<td></td>
<td>2 3 4 5</td>
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<tr>
<td>The training I received adequately prepared me to carry out the responsibilities of my volunteer position.</td>
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<td>2 3 4 5</td>
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<tr>
<td></td>
<td>AGREE</td>
<td>DISAGREE</td>
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<tr>
<td>10. As part of my training I would like to listen/watch presentations by staff.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>11. I feel I can communicate openly with the staff.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>12. I have the opportunity to assume as much responsibility as I want.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>13. My working conditions as a volunteer are equal to those enjoyed by paid staff doing similar work.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>14. As a museum volunteer I am a representative of the museum and a link to the public.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>15. As a volunteer it is my responsibility to provide a positive experience for the museum visitors.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>16. I am periodically evaluated in an informal manner.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>17. I am periodically evaluated in a formal manner.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>18. I make recommendations and suggestions for improvements for the museum.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>19. I make recommendations and suggestions for improvements for the volunteer program.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>20. I know who my immediate supervisor is and to whom I am responsible.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
<tr>
<td>21. I receive feedback about my volunteer performance from supervisors and/or staff.</td>
<td>2</td>
<td>3 4 5</td>
</tr>
</tbody>
</table>
22. An evaluation of volunteer performance would provide an opportunity for dialogue between the administration and the volunteers.  

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5

23. An evaluation of my performance as a volunteer would help me to improve my skills at the museum.  

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5

24. The staff/administrators appreciate the services provided by the volunteers.  

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5

----------

OPTIONAL

Please indicate which ONE of the following you consider to be the best name for an evaluation system for museum volunteers. Put a check ( ) next to your response.

[ ] Volunteer Assessment Evaluation

[ ] Performance Appraisal System for Museum Volunteers

[ ] Developmental Appraisal System for Museum Volunteers

[ ] Volunteer Appraisal System

[ ] Review of Volunteer Performance
DATE:

REGARDING: SUMMARY OF FINDINGS CONCERNING EVALUATION OF VOLUNTEER PERFORMANCE

Please send me a copy of the findings from the study, An Evaluation of Volunteer Performance in Two Hampton Roads Museums. Please send the information to:

NAME:

ADDRESS:

TELEPHONE (OPTIONAL):
APPENDIX C

REVIEW OF VOLUNTEER PERFORMANCE
A REVIEW OF VOLUNTEER PERFORMANCE

prepared

by Joan Fishman Hecht

as partial requirement for degree of doctorate of philosophy
at Old Dominion University

for managers/ coordinators of volunteer programs in
two Hampton Roads Museums

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At its November meeting in Washington, D.C., the AAMV Board of Directors endorsed the following guidelines, prepared by Joan Larson and Patricia Sands:

The volunteer understands and supports the purpose, structure and policies of the institution or organization and of the related volunteer group; offers the use of his or her special skills or experience; conducts himself or herself in accordance with the standards of conduct and ethics of the institution or organization; completes any orientation, training course or on-the-job training requirements; endeavors to be flexible in accepting assignment, performs assigned responsibilities willingly and courteously to the best of his or her ability; and accepts the guidance of his or her manager or supervisors; complies with the time and dress requirements of the institution or organization; obeys all security and safety rules of the institution or organization; respects the confidentiality of sensitive or proprietary information; provides timely notification to his or her supervisor or manager of absence or termination; serves as a goodwill ambassador generally and a communicator of the role and activities of the institution in the community. (AAMV, Winter 1992, p.7)
INTRODUCTION

The 1990s brought new concerns to the area of volunteer performance in museums. After several years of research and observations, it is clear that one goal of museum volunteer programs is to develop and implement a plan for evaluating volunteer performance. The plan, however, needs to incorporate sensitivity with expertise.

In the fall of 1991 a proposal was brought before the administration of two Hampton Roads Museums to develop a performance appraisal system. Additional research, data collection, and data analysis were completed in the Spring of 1992. The intention of this project was to assist managers of volunteers services in evaluating volunteer performance. The project included gathering pertinent information from museum volunteers, education specialists, managers of volunteer services, and administrators. The data included information concerning performance expectations, performance standards, traits of volunteers, and indications of what was reasonable to evaluate. The design of this doctoral dissertation was a responsive/naturalistic evaluation which emerged in response to the research problem: How can managers of museum volunteers
evaluate volunteer performance? Specific attention was paid to the following questions:

1.) Who are the stakeholders that need to be considered when developing a performance assessment system for museum volunteers?

2.) What traits are important for being a museum volunteer?

3.) What performance standards need to be considered when evaluating volunteer performance in museums?

4.) Who will conduct the performance evaluation?

When considering the development of an evaluation system, two additional questions were addressed:

5.) What type of non-threatening performance appraisal system can be developed to evaluate volunteer performance in museums?

6.) How can an evaluation system be implemented so it is accepted by the museum volunteers?

Multiple data sources—observations, interviews, a questionnaire and documents were used to establish credible data. This qualitative research was conducted to clarify concepts concerning performance of museum volunteers. It was conducted in the natural setting using a systematic sample of fifty participants which included museum
administrators, education specialists, managers of volunteer services, and museum volunteers. The collected data was analyzed by using an analytic induction process, by developing a questionnaire to validate the data, and by analyzing the responses from the questionnaire in order to develop a practical and useful evaluation system.

The data analysis was continued throughout the research process and involved several levels. It occurred first in the field and guided the direction of the data collected during the observations and interviews. The observations and interviews were analyzed by sorting and categorizing the data. Credibility of the data was tested through a questionnaire sent to the original stakeholders (participants). Descriptive statistical analysis of the questionnaire was conducted.

This study determined the performance expectations, performance standards, important traits of volunteers and helped determine what was reasonable to evaluate. The performance plan presented in this handbook contains the results of this research project and was developed as a flexible evaluation system which can be tailored to accommodate individual volunteer needs as well as individual management styles.
A performance appraisal system, properly used, is one of the most powerful management tools available. In this case, it is a means to help develop one's potential for significant contributions and to recognize these contributions. In short, a performance appraisal system is a process of communication between people, not a measurement process.

The goals of performance appraisal are to clarify personal objectives and to coordinate them with the institutional goals. A clear understanding of group and individual goals would increase morale and provide greater personal satisfaction. The following is a planned approach: knowing what is expected (duties and standards), observing performance, comparing performance with expectations, determining causes of deviations from the expectations, developing an interview to motivate, and carrying out goals and objectives. This approach includes a planned interpersonal situation, at a specific time and place, with a clear understanding of its purpose. This process reaffirms the joint commitment of the administration and the volunteer to action. It demonstrates the compatibility between the individual’s and the organization’s goals.

This performance appraisal system for museum volunteers...
is a plan to assist in understanding one's work, what is to be accomplished, how it will be accomplished, and whether or not performance is achieved. Its purpose is to create a dialogue which focuses on results. Thus, managers and volunteers, together, would decide what constitutes important job performance. Of significance in this process is the determination of performance criteria, expectations and standards. The system responds to job descriptions, performance expectations and performance standards of the organization. It also encourages open discussions between the manager/supervisor and the volunteer.

In this plan, job descriptions refer to the duties, responsibilities or objectives of the volunteer position. Performance expectations refer to the acceptable level of performance for each job description. Performance standards refer to overall performance level to be accomplished by the volunteer: exceeds expectations, meets expectations and does not meet expectations. Goals, objectives, and suggestions refer to specific ways in which performance can be refined. All aspects of the review need to be discussed at the evaluation interview, with the supervisor/manager and the volunteer present. The Review of Volunteer Performance is to be signed by those individuals,
indicating that job descriptions, expectations, standards, and goals and objectives have been reviewed.

The information discussed at the performance interview needs to include references to specific observations, attendance at in-service training seminars, and the review of overall conduct. It needs to focus on performance and on improvement. The discussions need to be honest, accurate, positive, and specific, focusing on self esteem while also making suggestions for improvement. It is a time for explaining and discussing plans for the museum and for the volunteer in the up-coming year.

Performance appraisal or the review of performance is a complex concept which can require large blocks of time. Since managers of volunteer services or coordinators of volunteer programs have so many responsibilities, it is the objective of the manual to provide them with a system that is effective and efficient. The information included in this booklet has been devised with careful consideration of the needs of the museum, the needs of the manager or volunteer services, and the needs of the volunteers.
REVIEW OF MUSEUM VOLUNTEER PERFORMANCE

A review of volunteer performance is an important step in linking job elements, acceptable levels of performance, an action plan for enhancing performance and communication between the administration and the volunteers. An essential part of the performance plan for managers of volunteer services is the development of performance expectations, so the volunteers understand and know what is expected of them.

According to the results of the research study, A Responsive Evaluation in Two Hampton Roads Museums, less than 50% of the respondents indicated they received feedback from supervisors or staff. This is a concern or issue of the volunteers, staff, and or administrators. Volunteers need feedback to know how well they are doing. A performance evaluation system, including periodic performance appraisal and a performance interview, would require on-going dialogue which would encourage and provide an important source of feedback.

The problems facing the managers of volunteer services are how to evaluate the performance of museum volunteers and how to implement an evaluation with sensitivity and effectiveness. The data from the research study referred to above, determined important volunteer traits, performance
expectations and performance standards were determined. The information was validated by methods of cross-checking the data through observations, interviews, and a questionnaire, also referred to as triangulation. Quantitative methods of descriptive data analysis were used to analyze the information gathered from the questionnaire. It may appear that many of the expectations, standards and traits are common knowledge; yet, they are often overlooked in training. They need to be attended to and included in a performance review. The study confirmed the reality of the resistance to evaluation. It confirmed the need to change the concept of evaluation from critical to a less threatening notion of performance review. It also confirmed the necessity to introduce the idea of evaluation in stages.

INTRODUCING AN EVALUATION SYSTEM INTO YOUR ORGANIZATION

Introducing an evaluation system into your organization requires several steps. It must be remembered that some people who volunteer will resent or resist the idea of being evaluated. With careful consideration and with sensitivity, such a system can be implemented. Therefore, it is important to involve the volunteer staff in the decision-making and implementation processes so the
acceptance of an evaluation system will be accomplished more smoothly and with less resistance.

The following steps need to be considered when implementing a performance appraisal system for museum volunteers:

1.) Begin the process by casually discussing the concept of assessing volunteer performance.

2.) Secondly, use the enclosed questionnaire or develop your own to survey the issues and concerns of volunteers, as well as to learn about their expectations of responsibilities, ideas concerning important traits needed to be a volunteer, and standards which are reasonable to be evaluated. Be clear that this data will help develop a system for the organization in order to review the performance of volunteers. The information collected will be the actual thoughts and feelings of the people for whom the evaluation is meant. Thus, acceptance will be accomplished with more ease.

3. After reviewing this data, compare your lists with the ones included in this booklet. Make whatever revisions are necessary.

4.) Establish an Evaluation Review Committee. The committee would consist of the manager of volunteer
services, an individual who has some expertise with evaluating museum volunteers, several (approximately six) volunteers who represent the museum volunteer staff, and, as necessary, other museum administrators. The committee would review all information included in the appraisal system and would have input into its implementation.

5.) Implement the plan to Review Volunteer Performance. It must be remembered that during the entire process the needs of the volunteers and their sensitivities must repeatedly be recognized. Thus, including the non-paid staff in the implementation process is essential to the success of the system.

JOB DESCRIPTIONS

Another important step in developing any performance plan is to define the critical job elements or to describe the major responsibilities and/or objectives of the position. Job elements are determined by reviewing the duties and objectives discussed in the written job descriptions. There needs to be at least two but no more than seven duties or objectives. One goal of the established Evaluation Review Committee could be to review
the job descriptions and to determine needed changes in the objectives, duties or expectations associated with the specific position.

The following is a list of job descriptions for various volunteer positions in the museum. There is a space titled Job Descriptions on the Volunteer Performance Review Form. Only key words are used to identify the elements. In addition, in order to understand the relative importance of each element of the job, the job descriptions are to be listed in priority order. Thus, the jobs listed for each volunteer position provides guidance for determining the expectations the museum has for the volunteer’s performance.

EXAMPLES OF JOB DESCRIPTIONS

DOCENTS/INTERPRETERS

Individually follows policies and procedures of the museum
   a. understands the mission of the museum
   b. is committed to the volunteer position
      1. works a 4 hour schedule per week
      2. attends at least 4 training sessions/seminars/classes per year
      3. cooperates with staff to reach museum goals
      4. monitors assigned exhibit area
      5. is knowledgeable about museum policies
      6. promotes positive image of the museum
      7. follows security and safety procedures of the museum
      8. promotes attitude of teamwork
   c. is reliable
1. reports promptly to assignment
2. calls supervisor if unable to report
3. maintains input into log (signs in and out as required)
4. changes work situation when the need arises

Interacts with visitors
- demonstrates friendliness to visitors
- demonstrates enthusiasm
- gives accurate information
- has eye contact with visitors
- shows sensitivity to needs of the visitors
- listens to the visitors
- presents short interpretive programs at pre-scheduled times in selected areas of the museum
- presents demonstrations using hands-on exhibit items
- explains the best way to view an exhibit
- directs visitors to other exhibits, staff members, volunteers or resources that can provide additional information

Has open communication with the staff
- requests assistance when necessary
- accepts supervision
- expresses opinions, disagreements, suggestions about volunteer position, volunteer program and museum concerns

ADMISSIONS DESK

Demonstrates knowledge of sales/operations department policies
- maintains accurate record keeping
- follows procedures for processing regular admission
- follows procedures for processing member admission
- follows procedures for processing school groups
- follows procedures for processing tour groups
- follows procedures for processing complimentary admissions
MUSEUM STORE SALESPERSON

Demonstrates knowledge of merchandise and procedures
a. conducts sales transactions, using the cash register
b. processes regular sale
c. adheres to museum discount policy
d. knows the different gift shop areas
e. processes various methods of payment (cash, check, credit card)
f. adds in Virginia tax
g. follows procedures for out-of-town checks
h. follows procedures for those with membership privileges
i. receives, stock and price merchandise
j. cleans, arranges and organizes sales floor and stockroom
k. plans and assists in merchandise display
l. is a source of museum related information for visitors
m. assists in training new volunteers
n. maintains appropriate records regarding inventory
o. maintains appropriate records regarding consignments

PLANETARIUM ASSISTANT

a. takes tickets
b. directs visitors into the planetarium
c. assists visitors in finding seats into the planetarium area
d. provides visitors with information about the theater (equipment, programs, rules of conduct)
e. performs shows which are developed and directed by staff
f. answers questions about astronomy
g. assists in production work
h. operates the telescope in the observatory
i. provides other support as directed by Director of Astronomy

LIBRARY ASSISTANT

Maintains the library
a. catalogs periodicals, books, and other publications which received
b. uses system developed by the staff
c. files periodicals, books and other publications in appropriate places
d. develops files of research materials at the direction of staff
e. sorts items as they are received in library
f. classifies slide and photograph collection
g. files slide and photograph collections
h. maintains records of items removed from the library
i. keeps library’s appearance neat and clean
j. keeps list of requested/needed items
k. gives list of requested/needed items to staff
l. maintains inventory of library’s contents

MEMBERSHIP DATA COORDINATOR

a. receives information from Developmental Assistant and Reservations Coordinator
b. enters (above) information on the museum’s database
c. enters membership name list on a desktop computer
d. maintains membership list
e. ensures that members are receiving communications and renewal notices
f. has good typing skills
g. attends to details
h. keeps up with changing information
AQUARIUM CARE ASSISTANT

Prepares and distributes food for the aquarium inhabitants
a. cleans tanks
b. maintains tanks
c. helps with exhibit maintenance
d. observes aquarium tank behavior
e. handles aquarium inhabitants when necessary
f. uses appropriate method of handling aquarium
inhabitant (as explained by staff)
g. maintains adequate food inventory
h. advises staff which food supplies are low
i. assists in local collecting of specimens

ANIMAL CARE ASSISTANT

Provides direct care and maintenance for the museum's
animals and birds
a. prepares food for the animals
b. distributes food for the animals
c. cleans and disinfects cages, crates, and animal areas
d. observes animal behavior
e. handles animals only when necessary, using
appropriate method as explained by staff
f. ensures adequate inventory of food and supplies
g. advises staff which food and supplies are low

COLLECTIONS MAINTENANCE ASSISTANT

Maintains and assists in developing collections
a. demonstrates organizational skills
b. has legible and neat penmanship (printing)
c. has good eye-hand coordination
d. demonstrates artistry-craft skills
e. pays attention to detail

Assists in the curation of natural history specimens for use in exhibits and programs
a. assists in organizing collections
b. provides regular maintenance checks of specimen collections
c. assists in basic identification of natural history specimens
d. catalogs individual items—(affixes numbers to specimens and records pertinent information on tags)
e. cleans/preserves/mounts non-live biological specimens (invertebrates, insects, birds, mammals)
f. cleans/preserves/restores geological specimens (rocks, minerals, fossils)

DEVELOPMENT OFFICE ASSISTANT

Supports the Director or Development and the Development Assistant

a. types correspondence, reports, grant application, etc.
b. is able to file material
c. is able to use word processor
d. follows office procedures
e. used office equipment properly
f. uses duplication machine
g. collates material
e. provides general clerical support

EXHIBITS ASSISTANTS

Provide direct assistance in maintaining the quality of the museum’s exhibits

a. Evaluator-creates visitor surveys to improve exhibits implements visitor surveys
b. Photographer-takes photographs used in publications and exhibits
c. Illustrator-creates illustrations used in exhibits and publications, experience necessary; resume and portfolio requested for review
d. General Exhibits Assistants-installs and maintains exhibits; no experience necessary
HERPETOLOGY ASSISTANT

Provides direct care and maintenance for amphibians and reptiles
a. prepares food for amphibians and reptiles
b. distributes food for amphibians and reptiles
c. maintains exhibits displaying reptiles and amphibians
d. cleans tanks
e. observes behavior
f. handles amphibians and reptiles when necessary
g. uses appropriate methods of handling as explained by staff
h. ensures that adequate inventory of food items is maintained
i. advises staff when supplies are low

HORTICULTURE ASSISTANT

Assists staff with propagating and growing of native plants for indoor exhibits and outdoor landscape
a. maintains outdoor landscape
   1. plants
   2. waters
   3. fertilizes
   4. weeds
   5. prunes
   6. cares for seedlings
   7. assists in pest control
   8. assists in planting inspection
b. helps maintain large aviary and other exhibit planting
c. assists staff in collecting and rescuing of wild native plants
d. maintains greenhouse in an attractive, functional manner
e. ensures that adequate inventory of plant needs is maintained
f. advises staff which supplies are low
PERFORMANCE EXPECTATIONS OF MUSEUM VOLUNTEERS

Performance expectations indicate the acceptable levels of performance for each job description. Expectations need to be expressed in terms of quality, quantity and timeliness whenever possible. However, some do not lend themselves to these measures. Some may be expressed in terms of goals or objectives based on the specific job position, but in some instances, job activities change within the designated time-frame for performance review. Thus, objectives can also be project-oriented.

Performance expectations need to be reasonable, attainable and specific, since they identify what the volunteer must do and how well it must be accomplished. The following expectations were developed from this study in which fifty participants (volunteers, administrators, educators, and managers of volunteers services) were asked to check and prioritize important traits of a volunteer. The list is intended to be used as a guideline for determining the important expectations of museum volunteers at the museum. The most important expectations are:

be reliable
interact with visitors
be committed to the volunteer position
follow policies and procedures of the museum
impart knowledge of exhibit, display and/or museum
be enthusiastic
understand the mission of the museum
demonstrate friendliness to the museum visitors
attend meetings/seminars/training sessions
cooperate with the staff
have a sense of humor

The following expectations are considered valid but are not as important as those mentioned above.
be flexible
receive recognition
take initiative
be neat and clean
practice safety skills
operate equipment properly
be eager to learn
practice teamwork
put forth effort
be tactful
demonstrate friendliness to staff
be prompt
apply skill and ability to volunteer position
demonstrate friendliness to visitors
demonstrate friendliness to volunteers

Note: When conducting the performance review, the evaluator needs to keep in mind that external factors can influence performance. Example of external influences are poorly operating equipment, decrease in budget, new required
training program, new policies requiring adaptation of new information. Thus, external factors need to be determined when considering expectations.

**PERFORMANCE STANDARDS FOR MUSEUM VOLUNTEERS**

The following standards were also determined from this study. The respondents agreed these standards were reasonable for evaluation purposes. Thus, they can be used to appraise performance of museum volunteers and can be referred to when completing the evaluation interview.

Follows policies and procedures of the museum
a. understands the mission of the museum
b. is committed to the volunteer position
   1. works a 4 hour schedule per week
   2. attends at least 4 training sessions/seminars/information classes per year
   3. cooperates with staff in reaching the museum goals
   4. is knowledgeable about the museum procedures and policies
   5. promotes a positive image of the museum
   6. follows safety and security procedures
   7. promotes and practices teamwork attitude (with staff, other volunteers and visitors)
   8. shows interest in increasing knowledge about the museum exhibits and programs

c. is reliable
   1. reports promptly to assignment
   2. calls supervisor if unable to report to work
   3. attempts to find a substitute
   4. maintains hours in log
   5. changes situation when the need arises (flexible)
Interacts with visitors
   a. demonstrates friendliness to visitors
   b. demonstrates enthusiasm
   c. imparts knowledge about exhibits, displays, and the museum
   d. gives accurate information
   e. has eye contact with visitors
   f. shows sensitivity to the needs of the visitors
   g. listens to the visitors
   h. has a sense of humor

Interacts with staff
   a. requests assistance when necessary
   b. accepts constructive supervision
   c. expresses opinions, disagreements and suggestions about volunteer position, volunteer program, museum concerns
   d. has open communication with staff
FORMS FOR THE

REVIEW OF VOLUNTEER PERFORMANCE
VOLUNTEER PERFORMANCE REVIEW

for

(Name of Institution) ____________________________

Personal Information:

NAME: ____________________________

VOLUNTEER POSITION: ____________________________

DATE OF REVIEW: ____________________________
PART I—PERFORMANCE EXPECTATIONS

The following are considered to be IMPORTANT PERFORMANCE EXPECTATIONS of a museum volunteer. Check the ones which describe you.

As a museum volunteer I:

_____ have a sense of humor
_____ am flexible
_____ interact with visitors
_____ politely greet visitors
_____ support staff and administrators
_____ follow policies and procedures of the museum
_____ attend meetings/seminars/training sessions
_____ demonstrate enthusiasm
_____ impart knowledge about the exhibit
_____ apply skill and ability to the volunteer position
_____ am reliable
_____ relate to staff
_____ relate to administrators
_____ relate to other volunteers
demonstrate friendliness to staff

demonstrate friendliness to museum visitors

am tactful

am committed to the volunteer position

understand the mission of the museum

take initiative

cope with various situations

cooperate with staff

am neat and clean

practice safety skills

operate equipment properly

am eager to learn

practice teamwork

other (please list these below)
PART II—VOLUNTEER FEEDBACK

The following information is requested to help you and the managers of volunteer services to improve the volunteer program and volunteer performance. Please circle the response which best describes your situation.

<table>
<thead>
<tr>
<th>AGREE</th>
<th>DISAGREE</th>
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<tbody>
<tr>
<td>1. I intend to remain at my current volunteer position.</td>
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<tr>
<td>2. I would like to change my current volunteer position.</td>
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<tr>
<td>3. I would like to work at more than one volunteer station.</td>
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<tr>
<td>4. I need assistance in developing new skills at the museum.</td>
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<tr>
<td>5. I understand the museum’s policy concerning the role of the museum volunteer.</td>
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<tr>
<td>6. The museum’s expectations of volunteer performance are clear to me.</td>
<td>2 3 4 5</td>
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<tr>
<td>7. My duties and responsibilities at the museum are clear to me.</td>
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<tr>
<td>8. The tasks I perform at the museum give me the opportunity to develop my abilities/skills.</td>
<td>2 3 4 5</td>
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<tr>
<td>9. As a volunteer I am informed about changes that take place at the museum.</td>
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<tr>
<td>10. As a result of volunteering I have the opportunity to develop new skills.</td>
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<tr>
<td>11. The tasks I perform are a challenge.</td>
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12. The training I received adequately prepared me to carry out the responsibilities of my volunteer position.  

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<th>AGREE</th>
<th>DISAGREE</th>
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13. As part of my training I would like to listen/watch presentations by staff.  

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<th>AGREE</th>
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14. I communicate openly with the staff.  

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15. I have the opportunity to assume as much responsibility as I want.  

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16. My working conditions as a volunteer are equal to those enjoyed by paid staff doing similar work.  

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<th>AGREE</th>
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17. As a museum volunteer I am a representative of the museum and a link to the public.  

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<th>AGREE</th>
<th>DISAGREE</th>
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18. It is my responsibility to provide a positive experience for the museum visitors.  

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<th>AGREE</th>
<th>DISAGREE</th>
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19. I make recommendations and suggestions for improvements for the museum.  

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<th>AGREE</th>
<th>DISAGREE</th>
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20. I know who my immediate supervisor is and to whom I am responsible.  

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<th>AGREE</th>
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<td>4 5</td>
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21. I receive feedback about my volunteer performance from supervisors and/or staff.  

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<tr>
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<th>AGREE</th>
<th>DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>3</td>
<td>4 5</td>
</tr>
</tbody>
</table>

22. The staff/administrators appreciate the services I provide.  

<table>
<thead>
<tr>
<th></th>
<th>AGREE</th>
<th>DISAGREE</th>
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</thead>
<tbody>
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<td>4 5</td>
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23. I have made the commitment to work the regular schedule of 4 hours/week.  

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<th>AGREE</th>
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</tr>
<tr>
<td>24. I follow the policies and procedures of the museum.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>25. I work with staff and administrators to reach the goals of the museum.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>26. I am able to change work situations when the need arises.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>27. I encourage questions from the museum’s visitors</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>28. I relate accurate information about the exhibit or display being discussed</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>29. I am sensitive to the needs of the visitor/group.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>30. I present myself is a friendly manner.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>31. I have eye contact with visitors.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>32. I listen to the museum visitors.</td>
<td>2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>
**PART III—EVALUATION OF VOLUNTEER PERFORMANCE**

The following information is requested in order to help improve the current volunteer performance assessment system. Please circle the response which best describes your feelings.

<table>
<thead>
<tr>
<th>AGREE</th>
<th>DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I prefer that an evaluation of volunteer performance be conducted as a self-evaluation.</td>
<td>2 3 4 5</td>
</tr>
</tbody>
</table>

| 2. I prefer that an evaluation of volunteer performance be conducted by my peers. | 2 3 4 5 |

| 3. I prefer that an evaluation of volunteer performance be conducted by my supervisor. | 2 3 4 5 |

| 4. I prefer that an evaluation of volunteer performance be conducted by the manager/coordinator of volunteer services. | 2 3 4 5 |

| 5. I prefer that an evaluation of volunteer performance be conducted by museum visitors. | 2 3 4 5 |
FEEDBACK FROM PEERS

The following are considered to be IMPORTANT EXPECTATIONS of a museum volunteer. Check those which describe the person you are observing.

The museum volunteer:

_______ is reliable
_______ interacts with visitors
_______ is committed to the volunteer position
_______ follows policies and procedures of the museum
_______ imparts knowledge about the exhibit
_______ is enthusiastic
_______ understands the mission of the museum
_______ demonstrates friendliness to the museum visitors
_______ cooperates with the staff
_______ has a sense of humor
_______ carries out the responsibilities of the position
_______ is a representative of the museum
_______ provides a positive experience for the museum visitor
_______ makes recommendations for improvements
works with staff and administrators to reach goals of the museum

is able to change work situation which the need arises

relates accurate information about the exhibit or display being discussed

is sensitive to the needs of the visitor/group

has eye contact with the visitors

listens to the museum visitor
PART I—PERFORMANCE EXPECTATIONS

The following are considered to be IMPORTANT EXPECTATIONS of a museum volunteer. Please check those which describe the person you are observing.

- [ ] is reliable
- [ ] interacts with visitors
- [ ] is committed to the volunteer position
- [ ] follows policies and procedures of the museum
- [ ] imparts knowledge about the exhibit
- [ ] is enthusiastic
- [ ] understands the mission of the museum
- [ ] demonstrates friendliness to the museum visitors
- [ ] attends meetings/seminars/training sessions
- [ ] cooperates with the staff
- [ ] has a sense of humor
- [ ] is flexible
- [ ] receives recognition
______ takes initiative
______ is neat and clean
______ practices safety skills
______ operates equipment properly
______ is eager to learn
______ practices teamwork
______ is tactful
______ demonstrates friendliness to staff, visitors and volunteers
______ is prompt
### PART II—PERFORMANCE STANDARDS

Circle the response that most accurately describes the volunteer you are observing.

<table>
<thead>
<tr>
<th></th>
<th>AGREE</th>
<th>DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Presents a friendly manner</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>2. Works with staff and administrators to reach museum’s goals</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>3. Follows policies and procedures of the museum</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>4. Shows sensitivity to the needs of the visitors/group</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>5. Has eye contact with visitors</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>6. Gives accurate information about the exhibit or display being discussed</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>7. Has open communication with the staff</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>8. Works with staff and administrators to reach museum goals</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>9. Has committed to working the regular schedule of 4 hours per week</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>10. Encourages visitor questions</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>11. Is able to change work situations which the need arises</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>12. Listens to the visitors</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td></td>
<td>AGREE</td>
<td>DISAGREE</td>
</tr>
<tr>
<td>---</td>
<td>-------</td>
<td>----------</td>
</tr>
<tr>
<td>13. Knows who immediate supervisor is</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>14. Receives feedback about volunteer performance</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>15. Made the commitment to work the regular schedule of 4 hours per week</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>16. Follows policies and procedures of the museum</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>17. Works with staff and administrators to reach the goals of the museum</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>18. Encourages questions from the museum's visitors</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>19. Is sensitive to the needs of the visitors/group</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>20. Has eye contact with visitors</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>21. Presents a friendly manner</td>
<td>2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>22. Listens to the museum visitors</td>
<td>2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>
FEEDBACK FROM MUSEUM VISITORS

The volunteers at this museum represent the museum and are the link with the public. Please take a few seconds to fill in this questionnaire. Circle yes or no. It is our goal to provide museum visitors with the best experience possible. Thank you for your input.

THE MUSEUM VOLUNTEERS:

WERE FRIENDLY

WERE ENTHUSIASTIC

WERE KNOWLEDGEABLE ABOUT EXHIBITS, DISPLAYS, AND PROGRAMS

WERE SENSITIVE TO MY (OUR) NEEDS

LISTENED TO MY (OUR) RESPONSES AND QUESTIONS

WERE ABLE TO ANSWER MY (OUR) QUESTIONS

HAD A SENSE OF HUMOR

WERE KNOWLEDGEABLE ABOUT THE POLICIES AND PROCEDURES OF THE MUSEUMS

ADDITIONAL COMMENTS:
PART IV—FEEDBACK FROM THE INTERVIEW REGARDING VOLUNTEER PERFORMANCE REVIEW

The following outline is presented for use when conducting an interview to review volunteer performance. Job descriptions, performance expectations, and performance standards can be determined from the information listed in this handbook.

<table>
<thead>
<tr>
<th>JOB DESCRIPTIONS</th>
<th>PERFORMANCE EXPECTATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duties, responsibilities, or objectives of the volunteer position.</td>
<td>Acceptable level of performance for each job description. Be specific.</td>
</tr>
<tr>
<td>1._________________________</td>
<td>1._________________________</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>2._________________________</td>
<td>2._________________________</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>3._________________________</td>
<td>3._________________________</td>
</tr>
</tbody>
</table>

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REVIEW OF VOLUNTEER PERFORMANCE  (continued)

<table>
<thead>
<tr>
<th>REVIEW OF EXPECTATIONS</th>
<th>PERFORMANCE LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>This section reviews planned expectations with work accomplished. It demonstrates how work performance was achieved. Use specific, accurate, objective examples.</td>
<td>Check the performance level which reflects actual performance.</td>
</tr>
</tbody>
</table>

1.  
   -  
     - **EXCEEDS EXPECTATIONS**
     - **MEETS EXPECTATIONS**
     - **DOES NOT MEET EXPECTATIONS**

2.  
   -  
     - **EXCEEDS EXPECTATIONS**
     - **MEETS EXPECTATIONS**
     - **DOES NOT MEET EXPECTATIONS**
<table>
<thead>
<tr>
<th></th>
<th>EXCEEDS EXPECTATIONS</th>
<th>MEETS EXPECTATIONS</th>
<th>DOES NOT MEET EXPECTATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FUTURE GOALS/OBJECTIVES/SUGGESTIONS/ and ADDITIONAL COMMENTS

This section describes how a volunteer can improve performance. It includes suggestions for meeting personal and institutional goals. It is to be completed and discussed with the volunteer at the beginning of the evaluation cycle.

REVIEW OF PERFORMANCE PLAN

The volunteer and the supervisor/manager are to sign below to indicate that the job descriptions, expectations, standards and suggestions have been reviewed.

Name of Volunteer: ______________________________
Signature: ______________________________ Date: ____________

Name of Supervisor: ______________________________
Signature: ______________________________ Date: ____________
REFERENCES


Hicks, E. C. *Museums and schools as partners*. (From ERIC Document Reproduction Service No. ED2278 380).


NICOV, *Basic feedback system.* Virginia Division of Volunteerism, (File # 105,B).


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