Don’t Guess, Assess!
How to Incorporate Evaluation Practices into Museum Programming

Erin Wederbrook Yuskaitis, Co-Director of Education, Old North Church & Historic Site (MA)
Phoebe Townsend, Staff Resource Manager, ECHO, Leahy Center (VT)
Nina Ridhibhinyo, Director of Programs & Strategy, ECHO, Leahy Center (VT)
Evaluation 101

Case Study: Old North Church & Historic Site Program Evaluation

Case Study: ECHO, Leahy Center for Lake Champlain Workplace Evaluation

Team-Based Inquiry: Resources from the NISE Network

Brainstorming Your First Step
Why evaluate?

To gauge project/program effectiveness

Identify a need

Inform project design

To identify lessons learned for dissemination

To better involve and listen to your audience
Types of Evaluation

Front-end

- We haven't defined the project yet. What is the audience’s initial condition (knowledge, interest). How do these conditions inform our project design.
- Audience is museum “deciders” and project team.
Types of Evaluation

Formative

- We’re still developing it. What’s working; what’s not? How should we change course?
- Audience is the project team.
Types of Evaluation

Summative

- It’s done. Did it achieve its intended impact?
- Audience is typically funders and the other museums.
Common Evaluation Methods

Surveys
Facilitate honesty, can't ask follow-up questions, more data points in shorter amount of time

Interviews
Can get in-depth information, great if only need small sample

Observation
Observe authentic experiences, good for understanding how a product is being used, time-consuming

Program Embedded
Unobtrusive, challenge to design
Outcomes: Know What You’re Evaluating

Identify an audience (visitors, students, etc.)

Articulate a change (increase, decrease, and other fancy synonyms for increase and decrease)

In skill, knowledge, interest, awareness, or behavior

Regarding a topic (Lake Champlain, historic New England churches, etc.)
Outcomes as Mad Libs

Visitors will increase their knowledge of a topic.
Develop Logical and Simple Measures

Audience will increase awareness of phosphorus pollution in Lake Champlain.

Visitors self-report increased awareness of phosphorus pollution in Lake Champlain.
Informed Consent

Research means a systematic investigation, including research development, testing and evaluation, designed to develop or contribute to generalizable knowledge. Research project must go through an Institutional Review Board to protect human subjects.

vs.

Evaluation assesses a specific program, only to provide information for and about that program. No IRB required, but you should ensure the protection of participant privacy and data and that you have informed consent.
How to Get Going

Identify outcomes

Pilot a simple study

Make sure the information gets back to those building and delivering the program

Use them to make sense of the results

Remember not all studies need to conclude in a formal report
Program Evaluation

Old North Church & Historic Site (Boston)

Dear Professor Longfellow
Case Study: Old North Program Evaluation

In this presentation, we’ll discuss:

1. The site
2. The situation
3. The program
4. The methodology
5. The results
Let’s create the scene ...

February 2018

10 weeks to launch of paid admission

The Printing Office of Edes & Gill cancels contract

Interpretive specialist on staff only 2 days a week
Solution: Dear Professor Longfellow (DPL)

Living history program focused around literary celebrity

Themes: Words that inspire change; active citizenship through literacy and community

Subthemes: Civil War-era abolitionism through written expression
DPL Learning Outcomes

After experiencing Dear Professor Longfellow, visitors will:

1. Identify and understand the original intent behind Longfellow’s poem “Paul Revere’s Ride,” placing it in context with the Civil War.
2. Contemplate and internalize the power of words through tactile and participatory activities.
3. Connect literacy and community to the role of active citizenship.
4. Be inspired to use their own creative voices to effect change.
DPL Programming Elements

1. First person interpretation
2. Participatory activities
3. Physical memento/takeaway
4. Themed retail offerings
Evaluation Approach

What did we want to find out?

Methods:
1. Behavior observations
2. Visitor interviews
Evaluation Parameters

2 waves of evaluation:

PRE and POST -

- Paid admission model
- Specific training for educators
- Revised scripts

May vs. August
# Behavior Observations

Conducted by: Erin Wiedenbrock Yuskaitis, Co-director of Education

Observation period:
Total number of visitors during time frame:
# of presentations:

<table>
<thead>
<tr>
<th>Observed Behaviors</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitor stayed to watch interpreter presentation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitor asked interpreter question(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitor looked at the participatory activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitor actually participated in 1 or more activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitor looked at retail selections</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitor actually purchased retail item(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interpreter mentions the Civil War</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interpreter mentions Old North</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interpreter mentions the &quot;power of language/words&quot; or &quot;words that inspire change&quot;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interpreter invites visitors to do an activity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interpreter invites visitors to look at retail items</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interpreter invites visitors to do other things on site</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Visitor Interviews

Questions we asked:

1. Based on what you just experienced, what would you say this space is about?
2. Were you aware that this space is part of Old North Church & Historic Site?
3. If you were in charge, how would you change this experience to make it more appealing to visitors?
4. What prevented you from doing any of the activities? If you had more time, would you do them?
5. What prevented you from looking at the retail items?
6. If visitors only have 5 minutes, what should we focus on in this space?
Evaluation Results

Over a 3 month period of time, we conducted:

- 9 observation periods
  - 36 presentations
  - 374 visitors
- 9 exit interviews
  - 24 visitors
38%
Percentage of visitors who remained in the space for the full living history presentation

4%
Percentage of visitors who physically engaged with participatory activities
50%
Percentage of visitors who remained in the space for the full living history presentation

7%
Percentage of visitors who physically engaged with participatory activities
47%
Percentage of time interpreters directly mention Civil War

0%
Percentage of time interpreters use phrases “power of words/language” or “words that inspire change”
POST

100%

Percentage of time interpreters directly mention Civil War

62%

Percentage of time interpreters use phrases “power of words/language” or “words that inspire change”
What might we glean from this information?
Program Conclusions

Biggest Surprises

- What visitors wanted more of
- Which activities visitors were most excited about
- Length of time to get the script right

Biggest Struggles

- TIME!
- Loss of 2 managers
- Lack of adequate training
- Effects of retail on visitor
Evaluation Lessons Learned

1. Evaluation is POWERFUL.
2. Behavior observation is a GAME CHANGER.
3. Evaluation produces DATA.
4. Simple evaluation does not require what you may think.
Case Study: ECHO Workplace Evaluation
Case Study: ECHO Workplace Evaluation
Case Study: ECHO Workplace Evaluation

“Yay, It's Time for My Performance Review! Said No One Ever”

“95 Percent of Managers Hate Performance Reviews”

“Performance Reviews are Pointless and Insulting, So Why Do They Still Exist?”

“Employee Satisfaction Surveys are Usually a Total Joke”

“Why Managers Hate Employee Surveys”

“Why Your Employee Survey is a Waste of Time”
Case Study: ECHO Workplace Evaluation

Why evaluate?

- Staff need feedback on their performance
- New staff need to know expectations of performance
- Audience and community seek consistency in their experience with ECHO
- Managers need tools to guide their performance discussions with staff
- We all want to be on the same page about how we collectively move our organization forward
Case Study: ECHO Workplace Evaluation

Audience: Staff (primary); ECHO’s community audience (secondary)

Change/Outcomes:
- Increase clarity of performance expectations for staff
- Increase staff engagement and job satisfaction
- Increase leadership’s understanding of staff needs
- Increase staff skills and knowledge/performance development
Case Study: ECHO Workplace Evaluation

Evaluators

Formal process:
● Staff self-evaluate
● Managers evaluate individual staff
● All staff evaluate organizational leadership
● All staff evaluate all staff

Informal: guests and other audience members evaluate staff
Case Study: ECHO Workplace Evaluation

Methods for Performance Development:

● Engage leadership to determine organization-wide core competencies
  ○ What skills, behaviors, competencies do all ECHO staff need in order to move the organization forward?

● Performance grids based on those 8 competencies by level
  ○ Director, senior manager, manager, coordinator, specialist
  ○ Developing, proficient, advanced, excellence

● Identify attainable framework for conducting evaluation
  ○ Check in every 4 months: professional development goals
  ○ Annual evaluation of all skills, behaviors, knowledge contained in Performance Grids
Case Study: ECHO Workplace Evaluation

Tools

- Performance Grids (40)
- Organization-wide competencies and definitions
- Position-specific competencies
- Staff Climate Survey
- Performance Development Program
- Professional Development Goals Check-in Framework
- Compensation Program
## Case Study: ECHO Workplace Evaluation

### Communication

<table>
<thead>
<tr>
<th>1st Quartile Developing</th>
<th>2nd Quartile Proficient</th>
<th>3rd Quartile Advanced</th>
<th>4th Quartile Excellence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Communicates respectfully at all times with ECHO staff, guests, members, donors, and the community.</td>
<td>7. Communicates in a calm, diplomatic, and respectful manner in difficult conversations or moments of conflict.</td>
<td>16. Proactively seeks input from appropriate stakeholders on relevant issues and decisions.</td>
<td>24. Communicates proactively.</td>
</tr>
<tr>
<td>3. Is open to learning from other points of view.</td>
<td>9. Acknowledges different perspectives.</td>
<td>18. Demonstrates a solution-oriented mindset through communication.</td>
<td>26. Actively invites others to share diverse viewpoints and is respectful, appreciative, and open to hearing them.</td>
</tr>
<tr>
<td>4. Gives and receives feedback in a timely, constructive, and growth-oriented manner.</td>
<td>10. Appreciates and willingly accepts constructive feedback.</td>
<td>19. Reflects on and modifies own communication practices as needed when miscommunications arise.</td>
<td>27. Deescalates conflict and helps resolve it.</td>
</tr>
<tr>
<td>5. Provides timely and helpful information to others within their department (without overloading communication channels).</td>
<td>11. Uses all communications tools (phone, e-mail, etc.) proficiently and at the appropriate times.</td>
<td>20. Has awareness of own communication style; can articulate it to others to communicate more effectively together.</td>
<td>28. Constructively engages in difficult conversations.</td>
</tr>
</tbody>
</table>
Case Study: ECHO Workplace Evaluation

Bonus:

Many of these tools can be used for volunteers, too.

- Climate surveys
- Performance Grids
- Development/enrichment planning
Case Study: ECHO Workplace Evaluation

Staff Climate Survey

- Once per year
- 70 + questions; 97% participation (with incentive)
- Categories:
  - Compensation & Benefits
  - Manager Relationship
  - Professional Development
  - Diversity, Inclusion and Culture
  - Communication
  - ECHO Leadership
  - Open ended questions
Case Study: ECHO Workplace Evaluation

Challenges:

- Survey follow up: initiatives vs. enrichment
- General fear of annual performance evaluation
- Creating trust to solicit valuable feedback
  - Anonymous surveys with a small staff
- Openness to difficult feedback: supporting leadership in receiving feedback without defensiveness
Case Study: ECHO Workplace Evaluation

Outcomes: ?

- Still in progress!
Case Study: ECHO Workplace Evaluation

Next steps: Measurement - Evaluate the Evaluations

- How did clearer expectations impact
  - The guest experience?
  - Staff retention?
- Measure staff satisfaction with the process (both Performance Development Plan and Climate Survey)
- Professional development and evaluation becoming part of our workplace brand/differentiate from other organizations
Team-Based Inquiry

National Informal STEM Education Network (www.nisenet.org)
Team-Based Inquiry

An approach to empowering professionals to get the data they need, when they need it, in order to improve their products and practices and create successful educational experiences.

- Systematic
- Led by non-evaluation professionals
- Collaborative and team based
- Small scale and focused
- Embedded in work
Team-Based Inquiry Guide

www.nisenet.org/catalog/tools_guides/team-based_inquiry_guide
Team-Based Inquiry

Brainstorm, prioritize, and implement solutions.

Question

How could this activity be improved?

Investigate

Improve

Reflect

Review interview responses to identify common patterns.

Collect feedback by interviewing visitors after activity.

Additional questions?

Contact: Ali Jackson, NE Regional Hub for the NISE Network

Email: ajackson@sciencenter.org
Asking Questions

What’s a question you care about that you think you could investigate with TBI or other evaluation methods?

- A question that you don’t know the answer to.
- A question that focuses on useful, actionable information.
- A question that can be realistically investigated with time and resources.
Resources

Practical Evaluation Guide by Diamond, Horn, and Uttal

The Collaboration for Ongoing Visitor Experience Studies (COVES)

Online transcription services

Stopwatches

Team Based Inquiry (NISE Net)
Thank you!

Erin Wederbrook Yuskaitis (education@oldnorth.com)
Nina Ridhibhinyo (nina@echovermont.org)
Phoebe Townsend (ptownsend@echovermont.org)
Ali Jackson (ajackson@sciencenter.org)