



Museums Empowered

Sample Application MA-40-18-0548-18
“Evaluation Capacity Building at HDM”

High Desert Museum

Amount awarded by IMLS:	\$73,534
Amount of cost share:	\$83,449

Attached are the following components excerpted from the original application.

- Abstract
- Narrative
- Schedule of Completion

Please note that the instructions for preparing applications for the FY2019 Museums for America grant program differ from those that guided the preparation of FY2018 applications. Be sure to use the instructions in the FY2019 Notice of Funding Opportunity for the grant program and project category to which you are applying.

Project Abstract

Through this professional development initiative, the High Desert Museum will build staff competencies in evaluation across the institution, embedding evaluative thinking into organizational practices, including exhibitions, public and school programs, marketing, visitor services, staff development, institutional planning, and decision making. The project includes multiple opportunities for knowledge building through workshops and hands-on implementation, insights from several evaluation experts that will shape a customized approach to evaluation, and structures that will support on-going evaluation capacity building within the institution. Through these activities, the Museum will establish a culture of learning that will advance our capacity to serve our 180,000 annual visitors and Central Oregon community.

There are three main reasons we need to build staff evaluation capacity at this time:

1. Our Central Oregon community is rapidly growing and changing. Through increased evaluative capacity, Museum staff will be better prepared to align our programs to the diverse needs and interests of our community members, ensuring we remain responsive and relevant to our changing community.
2. The Museum is experiencing substantial growth in visitors, programs and revenue. To help us accommodate this growth and plan for the future, we are currently developing a new Master Plan and Strategic Plan. Increased evaluative capacity will help us better gauge and respond to visitor experiences and invest resources into supporting sustainable institutional growth.
3. The Museum is in the initial stages of two IMLS-funded projects related to increasing cultural competency. Aligning with the beginning of these initiatives, increased evaluation capacity will help us be more inclusive of diverse needs, interests and expectations of our visitors and community and achieve our cultural competency goals.

The three-year work plan includes a mixture of skill building workshops and guided studies that gradually build staff skills and confidence in evaluation processes. Evaluation consultant, Jill Stein, will act as an evaluation mentor, offering expert advice and guiding the development of staff skills. A cross-departmental project team will work closely with the evaluation mentor to embed evaluative thinking into our institution through department teams. In addition, an advisory group of evaluation experts will help staff develop a toolkit of evaluation methods that can be adapted to fit their needs. A baseline visitor study and logic model conducted in the first phase of the project will help us identify evaluation priorities and inform focused evaluative studies in the second phase. As the project progresses, the leadership of the project will gradually shift from the evaluation mentor to the internal project team. The project will culminate in the development of an institutional evaluation plan that will provide a framework for continuing a culture of evaluation within the institution. This plan will be a dynamic process that will evolve as staff continue to develop as a community of learners beyond the project period.

Through these activities, this project will build staff knowledge of and skills in evaluative thinking, advancing staff capacity to serve our 180,000 annual visitors and our Central Oregon community.

Specifically, this project will: 1) build staff capacity to incorporate evaluation methods into their daily practices; 2) launch a culture of evaluative thinking across the Museum that will enhance our ability to articulate departmental and organizational goals, more efficiently invest resources and improve our programs and services; and 3) empower Museum leadership and staff to align institutional goals with the changing needs of our visitors and community. We will measure success in achieving intended outcomes through staff surveys and semi-annual reflections from the internal evaluation team.

Project Justification

Through this three-year professional development initiative, the High Desert Museum will build staff competencies in evaluation across the institution, embedding evaluative thinking into organizational practices, including exhibitions, public and school programs, marketing, visitor services, staff development, strategic planning, and decision making. The project includes multiple opportunities for knowledge building through workshops and hands-on implementation, insights from several evaluation experts that will shape a customized approach to evaluation, and structures that will support on-going evaluation capacity building within the institution. Through these activities, the Museum will establish a culture of learning that will advance our capacity to serve our audiences.

As an institution with 40 full time staff members, a \$4 million operating budget, and a broad range of programs from art and culture to a living wildlife collection and living history ranch, evaluative thinking is a way to serve the Museum's multidimensional evaluation needs within the scope of our resources. Evaluative thinking is "*critical thinking applied in the context of evaluation, motivated by an attitude of inquisitiveness and a belief in the value of evidence*" (Buckley et al, 2015). It promotes a learning culture within an organization by integrating evaluation processes, including questioning, collecting data and making informed decisions, into organizational culture and practice. It helps leadership and staff collectively articulate goals, effectively invest resources—both financial and staff time, enhance internal communication, respond to community needs and interests, and spark institutional growth (Baker & Bruner, 2012; Stein et al, 2007).

Evaluation consultant Jill Stein (the evaluation mentor) in conjunction with an evaluation advisory group will guide staff in building the skills and confidence to apply evaluative thinking to their roles at the Museum, cultivating a culture of learning across the institution. A cross-departmental project team will work closely with the evaluation mentor to embed evaluative thinking into our institution and to design and implement a baseline visitor study to answer important questions about who our audiences are, what motivates their visits, and what they take away from their experiences at the Museum. The three-year project will culminate in the development of an actionable evaluation plan for the Museum that will support on-going staff professional development around evaluation and the continuation of evaluative thinking at our institution.

Why Now? There are three main reasons the Museum needs to integrate evaluative thinking into our practices at this time. First, our Central Oregon community is rapidly changing. Between 2015 and 2016, the population of Bend grew by 4.9%—reaching a population of 91,122 and making it one of the fastest growing cities in the country (U.S. Census Bureau). At the same time, this region remains primarily rural with limited cultural and educational resources. Although central and eastern Oregon account for two-thirds of the state's size, only 10% of the population lives in this region, and large metropolitan areas, such as Portland, are three hours away. This urban-rural composition creates a unique mixture of diverse perspectives and experiences. As our region continues to grow and diversify, the Museum has an opportunity to bridge differences and highlight the diversity found throughout our region, acting as a site of community dialogue about relevant topics. Through increased evaluative capacity, Museum staff will be better prepared to align our programs to the diverse needs and interests of our community members, ensuring we remain responsive and relevant to our changing community.

Secondly, in the last ten years, the Museum has experienced substantial growth in the number of our visitors, programs and revenue. In 2008, we launched a Changing Exhibits Initiative, which established hosting at least nine new exhibitions each year along with numerous associated programs. The purpose of this initiative is to offer a variety of experiences that engage broad audiences and encourage repeat

visits to the Museum. Since launching the initiative, attendance has increased by 39%, reaching 181,778 last year. Corresponding to this growth, we have experienced an increase in both earned and contributed revenue. We are also advancing our capacity to integrate art with cultural and natural history in the stories we tell, increasing the depth of our unique, interdisciplinary mission. In July 2017, we hired our first Curator of Art and Community Engagement, and we are starting a capital campaign to construct a new Art of the American West gallery, which will increase our temporary exhibition space by 60%. To anticipate and respond to facilities, classroom, and gallery needs arising from this growth, the Museum is in the process of creating a new master plan. This process will inform the development of a new strategic plan later this year. In planning for the future, increased evaluation capacity will help us better gauge and respond to visitor perspectives on our interdisciplinary approach and help us invest resources (both financial and staff time) into effective programs that create meaningful visitor experiences and support sustainable institutional growth.

Lastly, the Museum is involved in two IMLS-funded projects related to increasing cultural competency. Through the IMLS-funded *Weaving Stories* project, we are partnering with the Museum At Warm Springs to enhance staff capacity at both museums to respectfully convey Indigenous worldviews to broad audiences. We are also participating in the IMLS funded Cultural Competence Learning Institute, which along with a three-year grant from Meyer Memorial Trust will enable us to increase staff awareness of diverse cultures and perspectives and prepare us to better serve our community. Evaluation is a key way to be inclusive of visitor voices and responsive to diverse needs, interests and expectations. Aligning with the beginning of these initiatives, this evaluation project will be vital to helping us achieve our cultural competency goals.

Who will benefit? This initiative will build staff knowledge of and skills in evaluative thinking, advancing staff capacity to serve our 180,000 annual visitors and our Central Oregon community. Initial interviews conducted in preparation for this proposal demonstrated widespread staff enthusiasm for using evaluation to help articulate project goals, align programs with the Museum's mission, and ensure efficient investment of resources. Many staff members, however, expressed a need for instruments that would help them better understand our visitors and their experiences. By empowering Museum staff to think evaluatively—develop measurable questions, select the best evaluation methods for their goals, effectively collect information, analyze the data, and make informed decisions—we will expand staff capacity to create meaningful visitor experiences. Ultimately, establishing a culture of evaluation will make the Museum more sustainable by using data to demonstrate the impact of our programs to various stakeholders and ensuring our programs are relevant to our visitors and community members.

Strategic Plan. As a visitor-centered institution, evaluation is imperative to achieving and holding the Museum accountable to all five goals in our strategic plan: *amaze visitors with meaningful experiences, inspire stewardship and sense of place, engage new audiences, ensure future financial stability and build leadership for the 21st century*. A strategy for Goal 1—amaze visitors with meaningful experiences—includes developing and incorporating ongoing evaluation of public and educational programs. In addition, we are in the process of developing a new strategic plan. The evaluation plan developed during this project will reflect priorities from our new plan and enable Museum leadership and staff to use evaluative thinking to articulate institutional goals, ensure programs align with our new strategic plan, and track progress toward achieving goals outlined in the strategic plan.

Museums Empowered Goals. Multilayered professional development opportunities will empower Museum staff to institute a culture of learning that uses evaluative thinking to strengthen the Museum's ability to serve our public. This project aligns with the Evaluation category of the Museums Empowered

initiative by developing and strengthening staff competencies in evaluation tools and strategies, including formative and summative evaluation techniques, audience research, needs assessments, and logic models in an institution-wide evaluation framework. In conjunction with the evaluation consultant and using a baseline needs assessment, we will establish institutional and departmental evaluation priorities and create a flexible evaluation plan that will reflect the specific strengthens and needs of the Museum and our staff and the needs and interests of our visitors and community.

Project Work Plan

Through a combination of staff workshops, intensive small group trainings, and hands-on practice, this three-year project will: 1) build staff capacity to incorporate evaluation methods into their daily practices; 2) launch a culture of evaluative thinking across the Museum that will enhance our ability to articulate departmental and organizational goals, more efficiently invest resources and improve our programs and services; and 3) empower Museum leadership and staff to align institutional goals with the changing needs of our visitors and community.

This project is based on several assumptions, including that staff will remain interested in evaluation and motivated to incorporate evaluative thinking into their practices and that leadership will continue to invest resources in evaluation training and support the implementation of evaluation results. To help mitigate risks and ensure project success, the work plan for this project is based on established best practices and lessons learned, including:

- 1) Generate participant interest and investment in evaluation by tangibly demonstrating the value of evaluation early in the process and by building from organizational strengths and practices (Preskill & Boyle, 2008; Buckley et al, 2015). We will generate support for evaluation by empowering staff to collectively identify evaluation priorities and demonstrating a meaningful connection between evaluative thinking and their work.
- 2) Involve staff from different departments and at multiple levels of the organization to support systematic change in the organization culture (Buckley et al, 2015; Stein et al, 2007). The evaluation team includes leadership and staff from multiple departments across the Museum, and they will use regular department meetings to integrate evaluative thinking into Museum practices.
- 3) Provide time for staff members' skills and attitudes around evaluation to evolve and opportunities to apply evaluation skills in multiple contexts (Preskill & Boyle, 2008; Buckley et al, 2015). Project activities are intentionally spaced out over a three-year period, providing time for staff members to reflect on and practice competencies developed during intensive training workshops.

Modeled on the work plan for the Charles H. Wright Museum of African American History IMLS Museums Empowered funded evaluation project, our plan includes three main phases that gradually build staff skills and evaluative processes within the institution and shifts project leadership from the evaluation mentor to an internal evaluation team. Jill Stein will act as an evaluation mentor, offering expert advice and guiding the development of staff skills and the establishment of an institutional evaluation plan. Stein has over ten years of experience in evaluation, including five years with the Lifelong Learning Group at COSI and seven years with the Institute for Learning Innovation. She has taught evaluation to emerging professionals in graduate programs and through conference workshops. Stein is currently the external evaluator for the Museum's IMLS funded *Weaving Stories* project. Through this established relationship, she is aware of the Museum's goals, mission and programs, and we are confident she will be a good fit for the Museum.

Stein will work closely with a cross-departmental project team at the Museum. This team includes: Executive Director Dana Whitelaw, Director of Programs Christina Cid, Visitor Services Manager

Nicole Swarts (Operations), Exhibit Designer Robert Flood (Exhibits), Curator of Wildlife Jon Nelson (Wildlife), Curator of Living History Linda Evans (Living History), Curator of Education Carolyn Nesbitt (Education), Program Development Manager Michelle Seiler-Godfrey (Development), and Director of Communications TBD (Communications).

To ensure evaluation becomes part of the Museum's practices, these team members will use regular department and staff meetings to embed evaluative thinking into the Museum's practices. See Supporting Document #4 for a diagram of this relationship between project team members and their departments. Having a broad base of evaluation champions will ensure the continuation of evaluative thinking practices even when staff turnover occurs. In addition, the Program Development Manager will help coordinate evaluation goals between departments and assist with institution-wide evaluative practices. The project team and evaluation mentor will meet at least once a month via Zoom and in-person at least three times a year.

The evaluation mentor and evaluation team will have access to broad evaluation expertise through an advisory group that will include Kate Livingston (Expose Your Museum) and Scott Pattison (Institute for Learning Innovation). This team will help staff develop a toolkit of evaluation methods that can be adapted to fit their needs. Livingston has over 15 years of evaluation experience with art, science, and history museums, and she is the evaluation consultant on the IMLS funded Wright Museum project. Livingston will increase staff understanding of cross-discipline evaluation methods and incorporate lessons learned from the Wright Museum project. Pattison is a researcher and evaluator for the Institute for Learning Innovation. As part of the NSF funded Nanoscale Informal Science Education Network project team, Pattison helped develop Team-Based Inquiry—a practical approach to empowering non-evaluators to incorporate a cycle of inquiry within a team-based setting (Pattison et al, 2014). This approach will help department teams apply evaluative thinking to their practices. Members of the advisory group will participate in 2-3 virtual meetings a year and at least one in-person meeting during the project.

The *Foundational Phase* (November 2018-November 2019) will establish the Museum's current evaluation needs and priorities (what we know and what we want to know) and introduce staff to evaluative thinking using both a foundational workshop and a guided application of evaluation methods. We will accomplish these goals through the following key activities:

1. Conduct a staff survey and logic model to identify key evaluation goals. Based on the initial staff interviews, the evaluation mentor will facilitate a staff survey to assess the current perceptions, understandings and culture of evaluation at the institution. The results of this survey will provide input into the logic model process and highlight areas of need for future trainings. Through three two-hour, in-person meetings, the evaluation mentor and evaluation team will develop a logic model to identify key evaluation goals, including what needs to be known, for what purpose, from whom and from what methods. The logic model will be used as a guide for developing an institution wide evaluation plan. Through this process, the internal evaluation team will gain increased knowledge of developing logic models and articulating project outcomes that they will share within their department team meetings.
2. Facilitate a full-day workshop focused on introducing staff to evaluative thinking, including evaluation design, methods and data collection, and building staff investment in evaluation. In addition to the internal evaluation team, this workshop will include 8-10 staff members from across the Museum. The evaluation mentor and members of the advisory group will introduce staff to a variety of evaluation tools and frameworks, such as key principles of Team-Based Inquiry. Throughout the three-year project

period, monthly meetings and skill building workshops will build on this foundational workshop to increase staff ability to adapt and implement these frameworks.

3. Implement a baseline visitor survey. From initial interviews with staff, there is a clear need to develop a better understanding of Museum visitors—what motivates them to visit, how they experience the site and what they take away from their visit. The evaluation mentor will work with the evaluation team to design and implement a baseline study to develop an initial understanding of the visitor experience and use a series of meetings with key departments to discuss the survey results and their implications. Through this process, Museum staff will participate in a focused evaluation study from start to finish under the guidance of an evaluation expert. This process will help staff develop a greater understanding of the evaluation process and how it can be used in connection to their work.

4. Connect with other institutions. Because the Museum is in a primarily rural region, we have limited opportunities to learn from or share knowledge with similar organizations. During this first phase, the Museum's evaluation team will initiate conversations with museums similar to ours in their interdisciplinary approach or emphasis on cultural competency to learn about their evaluation methods. For example, the Denver Museum of Nature and Science has expressed interest in having several evaluation team members visit them to learn how they embed evaluation into their work. By developing relationships with other institutions, we aim to develop a larger learning community of practice that will facilitate on-going dialogue about common issues.

The goal of the *Skill Building Phase* (December 2019-December 2020) is to provide staff with an understanding of the necessary evaluation methods to implement a series of sub-studies. Using the logic model and needs assessment from year one, the evaluation team will establish several short, focused studies that will answer real questions developed by staff within their departments and as an institution. The evaluation mentor and members of the advisory group will conduct a series of four workshops on common evaluation methods, such as surveys, interviews, focus groups and timing and tracking. The focus and order of these workshops will be determined by staff priorities established during year one. Museum staff will apply these methods to their focused studies, gaining practical, hands-on experiences. While the evaluation mentor and advisory group will provide guidance on the studies, they will be led by Museum staff. A half-day workshop will help staff analyze and make meaning of the data they collected. Participating staff will develop written reports of the studies' results and present them to the rest of the staff or specific departments, with a focus on building skills around the use of evaluation data to improve outcomes.

The *Sustainability Phase* (January 2021-October 2021) will focus on developing organizational structures that will sustain a culture of evaluation at the Museum. During this final phase, Museum staff will continue to implement evaluative thinking skills within their department teams and as an organization. This work will be independent of the evaluation mentor with an emphasis on continuing these practices after the project period. To ensure sustainability, the evaluation team in consultation with the evaluation mentor will create an institutional evaluation plan. Responding to the priorities established during the first phase and the results of the focused studies conducted during the second phase, this plan will provide a framework for continuing a culture of evaluation within the institution, including on-going staff professional development. Instead of a static document, this plan will be a dynamic, living process that will evolve as staff continue to develop as a community of learners. In addition, a final half-day workshop will focus on questions of sustainability, such as: What is needed for the Museum to continue to develop its evaluation practice? What does it take to leverage our community of learners and become evaluative thinkers? How can we ensure the evaluation plan is a dynamic

process rather than a static document? By exploring these questions, the Museum will discover how we can continue to support the advancement of staff's evaluation capacity and the evolution of a culture of evaluation beyond the project period.

Project Management. The Museum's Executive Director will serve as project lead, providing the necessary resources and support to ensure the project's success. The internal evaluation team will be responsible for the planning and implementation of the project, and the Museum's Program Development Manager will serve as project manager, helping to ensure progress toward intended results and coordinating evaluation activities across departments. Monthly virtual meetings and periodic in person meetings will facilitate on-going communication between the evaluation team and evaluation mentor.

Resources. Embedding a culture of evaluation at the Museum requires time to develop staff awareness and understanding of evaluation methods and how to use evaluative thinking to better serve our audiences. Therefore, this is a three-year project with the recognition that we will continue to grow as a community of learners after the project period. Museum leadership and staff are committed to providing the necessary time and resources to generate systematic change within our institution. Therefore, the majority of the budget is staff time (\$67,562). In addition, we recognize the need for expert advice to guide us through the skill building process, meaning the other significant portion of the budget is evaluation consultants (\$65,225).

Tracking Progress. At the beginning of the project, the evaluation mentor will conduct a baseline survey to assess staff attitudes toward and understandings of evaluation. This survey in conjunction with the logic model will inform the direction of the project, including specific skill building workshops and focused studies. Periodic all staff surveys at key project junctures will track progress toward goals and be used to inform next steps. At the end of the project, the evaluation mentor will conduct a survey to assess changes in staff attitudes toward and understandings of evaluation. In addition, the evaluation mentor will collect semi-annual responses from the internal evaluation team to adjust the project as necessary to ensure it remains on track to achieve project goals.

Share Results. We will share the results of this project with other museum professionals through regional museum conferences and state-wide institutions in Oregon. We plan to submit a paper proposal on the lessons learned from this project to the 2021 Western Museum Association (WMA) conference. We will also submit posts about our project to their WestMuse blog. By using an established platform to blog project results, we will reach a larger museum-field audience than if we used the Museum's website. In addition, the Museum will work with state-wide organizations that have expressed interest in the project, such as the Oregon Heritage Commission, Oregon Arts Commission and Oregon Cultural Trust, to share results from the project with other institutions.

Project Results

The project's IMLS performance goal is Learning: train and develop museum and library professionals. The evaluation mentor will use a staff survey at the end of the project to collect data corresponding to performance objectives. In addition, this project will: 1) build staff capacity to incorporate evaluation methods into their daily practices; 2) launch a culture of evaluative thinking across the Museum that will enhance our ability to articulate departmental and organizational goals, more efficiently invest resources and improve our programs and services; and 3) empower Museum leadership and staff to align institutional goals with the changing needs of our visitors and community.

As a result of this capacity-building project, *all Museum staff* will develop:

- Knowledge—increased understanding of evaluative thinking; increased awareness of a variety of evaluation methods; increased understanding of how evaluation can be used to support institutional and departmental goals.
- Skills—increased ability to ask evaluative questions, collect data using the appropriate tools, and apply evaluation results.
- Behaviors—increased support for including evaluative thinking in Museum practices and increased support for the development and implementation of evaluation studies.
- Attitudes—increased recognition of the role and value of evaluation.

The *nine member, cross-departmental evaluation team* will develop:

- Knowledge—increased understanding of evaluative thinking; increased knowledge of evaluation methods, data collection techniques, analysis and reporting; increased knowledge of how evaluation can be used to support institutional and departmental goals.
- Skills—increased skills in developing focused evaluation studies; increased skills in data collection and analysis; and increased skills in presenting and implementing evaluation results.
- Behaviors—increased participation in the development and implementation of evaluation studies and increased support for incorporating evaluative thinking at the Museum.
- Attitudes—increased recognition of the role and value of evaluation.

These changes in staff knowledge, skills, behaviors and attitudes around evaluative thinking will equip Museum staff to better understand our visitors' experiences, expanding our capacity to serve our visitors and community. Museum staff will have increased capacity to conduct audience research and gain visitor insights into how we can better serve our expanding and changing Central Oregon community, invest resources into developing meaningful visitor experiences and creating sustainable growth, and be more inclusive of diverse cultures and perspectives. As we implement new cultural competency initiatives and plan for the future, these insights will ensure we align the Museum's goals with our visitor's needs. (See attached logic model Supporting Document #5).

Tangible Products. Tangible products include evaluation instruments and reports developed during the project period (such as staff and visitor surveys, the logic model, and materials from the focused studies), blog posts about lessons learned and project results, and the institutional evaluation plan.

Sustainability. Embedding an on-going culture of evaluation at the Museum is the primary goal of this project, and we intentionally focused the final project phase on establishing structures to sustain the advancement of evaluative practices within the institution. The institutional evaluation plan and continued meetings of the cross-departmental evaluation team will support on-going evaluative initiatives and staff development around evaluation. For example, in year four—following the completion of the IMLS grant funded project—the HDM evaluation team will continue to hold meetings to execute the evaluation plan, conduct on-going assessment of evaluation needs, use established evaluative practices within their departments, and sustain a culture of evaluation at the Museum. By making evaluation a priority in our next strategic plan, we will put in place accountability structures and board reporting. Through these activities, we will enhance the Museum's capacity to serve our community.

