NOAA Education Council Meeting

Date/Time: October 12, 2011 (1:00–4:00 pm)
Location: SSMC3, Room 14836
Dial-in: 866.901.0711
Passcode: 8134683
Contact: Luis Leandro - work: (202) 482-3139

Adobe Connects Link to Meeting: http://connectpro46305642.adobeconnect.com/edcouncil/
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AGENDA

1:00 Welcome/Opening Remarks

1:10 Smithsonian National Museum of Natural History Evaluation Framework – Bill Watson *(informational)*
(*15 min presentation/15 min discussion*)

1:40 FY13 Blue Book Education Chapter – Luis Leandro (*input request*)
(*15 min presentation/15 min discussion)*

2:10 Break

2:25 M&E Framework Implementation Update – John Baek (*input request)*
(*20 min presentation/30 min discussion)*

3:15 Leadership WG Report Out – Marlene Kaplan (*informational)*
(5 min presentation/10 min discussion)

3:30 Updates & Announcements

Next Council Meetings:
November 16, 2011
December 14, 2011

Attendance

In person: Louisa Koch (LK), Marlene Kaplan (MK), John Baek (JB), Jennifer Hammond (JH), Luis Leandro (LL), Paulo Maurin (PM), Christos Michalopoulos (CM), Rochelle Plutchak (RP), Shannon Ricles (SR), Sarah Yue (SY), Michelle Arsenault (MA), Bill Watson (BW), Maggie Benson (MB), Ron Gird (RG)

On the phone: Atziri Ibanez (AI), Nina Jackson (NJ), LuAnn Dahlman (LD), Eric Hackathorn (EH), Paula Keener-Chavis (PKC), Carrie McDougall (CMc), Maria Murray (MMu), Amy Clark (AC), Lisa Iwahara (LI), Leon Geschwind (LG), John McLaughlin (JM), Audrey Trotman (AT), Frank Niepold (FN)

Announcements (LK)

- Draft program criteria document authored by OSTP. (Document displayed during meeting). Lays out beginning of program expectations for education programs. Every program should have logic model, submit management plan to Co-STEM, have evaluation plan. Still in early stages, but it's important to know that this document is coming.
- While this is still an early draft, the expectation will be that NOAA will submit information about how all programs are meeting these criteria, and will then receive a score. Co-STEM will expect progress over time. All Ed Council members will be affected.
- Connects to primary objectives in OSTP survey from last spring; we will be expected to meet program criteria in these particular categories in addition to general program management criteria.
- Would appreciate reflections on this document from Ed Council members with respect to their programs; if there are any criteria that you feel you cannot support or that your program does not meet, it would be very helpful to let us know. Luis will send out draft via email; feedback is not mandatory but would be much appreciated.
- CM: Can we develop a spreadsheet with a color code indicating feedback (positive, negative, concerns)?
    - LK: For now, just identify any criteria that you feel you cannot meet. Can also provide feedback on additional criteria you would like to see (probably will not be many)
- AI: Deadline? Also, should every individual program comply with these requirements, or the program as a whole?
    - LK: All programs listed individually in OSTP survey should comply with program criteria. Co-STEM has done a good job coming up with criteria that address programs broadly.
- FN: I'm gathering that the primary focus area will be the only focus; what should we do about secondary focus areas?

    - LK: Not on the table at this point; already difficult enough to address primary focus, especially for complex/multifaceted programs. Co-STEM would like OMB to be assessor, so adjudication process is not yet clear either. Michael Feder has agreed to come and talk to us in November. This program criteria process is in early stages but is serious, so I want us to be prepared for it
- NJ: Not sure yet what direction our program will focus on; how should we handle this?
    - LK: Focus on what you are currently spending your money on. As guidance is provided to change your current investment, you can respond accordingly; but for now, focus on your current investment
- JH: Timeframe for response?
    - LK: Not yet defined, but an early look is better than later. We will give you a week to get comments back to us.
- JH: Timeframe for actual formal process?
    - LK: Probably implemented in 2012, but not full implementation. Are looking for pieces that they can implement
- JH: Can you add context to the header of the document: who created this, and date?
    - LK: Yes – good idea

Smithsonian National Museum of Natural History Evaluation Framework – Bill Watson *(informational)*

See PowerPoint.

- JH: Timeline for process, from the time you got the group together until started testing it out on exhibits?
    - BW: About two years, not counting time to develop RFP
- JH: Do you feel this RFP got you the group you really needed to make this process happen? Can you share the RFP with us?
    - BW: Yes, I will send it to Marlene. We received 4 really good proposals.
- JH: How do the four framework items you described demonstrate public value?
    - BW; Public value is a term like engagement: it is used in different ways. We needed to define it in a way that was useful to us and did not stray too far from generally accepted parameters. For us, it was about what we contribute as a museum: trust, large scale of influence, and many ways to engage the public. Our statement is that these things are unique to us; may be different for other institutions.
- PM: Sounds like you charted your own course to come up with metrics that are useful to your institution specifically. Does this allow you to compare yourself with other institutions in addition to looking inward?
    - BW: Before this process, we had evaluations that were not under a framework, so we were not able to compare effectively across institutions. We are no worse off now than we were before, and we have the opportunity to be better off than we were before by collectively describing impact. There are many museums that are using common metrics like the data we are collecting; we are deliberately using nationally normed instruments. Have had interest from other Smithsonian units in using aspects of this framework, and also interest in the process we followed. Would love to see other museums adopt part or all of our framework. In museums generally, there is split opinion; is it better to aggregate measures broadly, or is it dangerous to overgeneralize and/or compare? I can see it both ways. I'm interested in seeing the results of comparisons.
- AI: On slide 10, outcome C: can you describe how this is measured?
    - BW: Still trying to figure out how to measure this. Meaning maps (free-association word "nets") may be a useful tool in conjunction with a measure of engagement: what do the visitors do next to act on what they learned or what they now know? We have not yet done the kind of follow-up survey that this measure requires.
- JB: Now that system is pretty much in place, is it informing strategic planning?
    - BW: Yes. Two examples: building of education center (programming development tied to framework) and re-doing museum interpretive plan, now called public engagement plan (framework is built into the new plan). Also, the evaluation framework is informed by our strategic plan
- FN: What about partnership opportunities? Are they part of your model?
    - BW: Yes. Other organizations can use the framework. Also, the framework helps us to uncover gaps (e.g., what we are not doing well) and allows us to map out a strategic plan for what's next. Finding the right partners to help us fill these gaps and/or achieve common goals is very important. One of the goals of the framework is to help us identify what's working and what we can improve. Improvement hinges on the quality, depth, type of partnerships. As we pursue measures of influence (what did visitors do next?), it is very satisfying to see visitors pursuing further knowledge through another source or institution. We already see this; the challenge is to identify/measure it.
    - FN: This presents a challenge and good opportunity to facilitate visitors' next step. Are there ways that we can help do this?
    - MK: Ocean portal in Ocean Hall has lots of NOAA information and information from other agencies. Captures resources of many partners who helped develop Ocean Hall.
- MA: What were the changes to the Human Origins Hall?
    - BW: They focused on the Neanderthal skeleton (Hope Diamond of hall). Few visitors were actually seeing this part of the exhibit because of positioning and programming constraints. We are re-orienting volunteers to this area to give an in-person introduction of the skeleton. This draws attention to the exhibit. We are also looking for better signage solutions, but these will take longer; at the moment, we are using a programming solution to solve an exhibit problem. We have also found that people stay longer when the volunteer engages visitors in conversation, not a lecture; this draws people in and gives richer experience
- LK: On the engagement attribute, you said that you have been collecting data for quite a while, but are now better at interpreting numbers. Can you explain what this means?
    - BW: Take for example the length of stay at a particular exhibit. Before, this was isolated information without context. If you compare/benchmark these numbers with similar exhibits or other visitor experiences (visits to website, for example), you can draw conclusions about the effectiveness of the exhibit. Length of stay provides a measure of how well the experience holds people's attention, which in turn creates opportunities to initiate dialogue and spark interest.
- LK Where are you getting benchmarks from?

- BW: for the website, we are looking at “competitor” information. For exhibits, we use data from other Smithsonian exhibits, as well as the literature on exhibits of different sizes
  - LK: How do you get dwell time for other websites?
  - BW: These numbers are often published. We also use industry averages.
- NJ: Have you studied how people use Ocean Today kiosks and how beneficial they are?
  - BW: We have not applied this framework to that particular exhibit. We did take a couple of steps in kiosk design that increased visitation to the kiosk. To have an impact, you have to attract and retain visitors. However, we can’t comment on engagement or influence because we haven’t studied them.
  - LK: Smithsonian Castle looked at the Ocean Today kiosk and found that ability to hear the audio was an issue. They tried to adjust the volume to compensate for ambient noise at different times of day. There is also a whole evaluation of the kiosk that rates it in comparison to multiple exhibits. It rates very highly.
- BW: Will send MK the RFP and the executive summary of the framework
- MK: Excellent framework and good example to put on the table as we explore NOAA education evaluation
- LK: The strong connection between the position statement and the metrics is great to see.

FY13 Blue Book Education Chapter – Luis Leandro (*input request*)

See PowerPoint.

- JH: When this request goes to the budget formulation group, please emphasize that you are asking for FY11 numbers and not what they think we should get for FY13. It gets a little confusing for them.
    - LL: Thanks for bringing that up. It was confusing last year, because we were asked to include a projection for the first time. It's unclear whether that will happen this year or not.
- JH: Less text and more delineation of what we need from the budget group would be helpful
    - CM: We will include clear guidance
- FN: Last year there was a lot of confusion/lack of communication between the program and budget sides. Can Ed Council members' names be provided to budget offices?
    - LL: The names were actually provided last year as part of the data call.
    - FN: May need to highlight them more
- PM; Have we receive feedback from the intended audience regarding earlier submissions? How did the audience react to them?
    - LK: LL and I briefed 25 Congressional audiences. Many Congressional staff members studied the different programs listed on the pie chart and turned to the relevant pages in the Blue Book for more information. Pictures were really important. We did not have time to talk about every page, but the staff would often go picture by picture (without necessarily looking at the text). I don't remember much feedback about text. It's important to make a visual impact on someone who is scanning the document.
    - PM: The guidance provided last year was helpful.
    - LK: This year's format will have to be filtered through the new budget director; not sure what format will look like yet.
    - LL: Hill works reactively. The advantage of the Blue Book chapter is to have something Congressional staff can access as a reference, and something to which we can link in order to answer questions. It's important to give an impression of how large the education programs are at NOAA – the audience is often pleasantly surprised.
- PM: Will there be any correlation with the GAO survey?
    - LL: Let's keep that separate. GAO survey was not a very good survey
    - PM: Could we use the Blue Book to counter assumptions in the GAO survey? Should we be highlighting what is unique (not duplicative) about our programs to help us make our case?
    - LK: I asked a couple of days ago about the OSTP survey status. I heard that the report is almost ready, but have not actually seen it yet. I heard that the GAO survey report will be out in early 2012. We need to think through how we can use the Blue Book to address GAO findings and help us tell our story. Making the case that your program is unique and makes an important contribution would be very helpful.
    - PM: Please provide this information in the guidance you send to us.
    - LK: We will.
- FN: Should there be an Ed Council page in the Blue Book? Ed Council is the vehicle by which we avoid duplication, so it may be important to highlight.
    - LK: We do have introductory and next-steps section. The connection you are pointing out is helpful.
    - LL: We try to address some of this in the sections LK mentioned. The budget component has a section on the education mission and strategic plan. I'm not sure that a page on the specific Ed Council process would be that useful.
    - FN: If you highlight the things that LL mentioned, that will be sufficient.
    - LK: We will include overarching Ed Council accomplishments and next steps. LL would appreciate help.
- PM: Corals recently developed interactive (clickable) map that could be used as a model.
- LK: Regional collaborative teams put together a version of "NOAA in your state." May want to put one of those together for education assets. Should we convene a working group or put out a data call to construct a Google map?
    - JH: Who is the audience for the map?
    - LK: Congress. They are very focused on regional priorities.
    - JH: Then we should think about state- rather than national-level maps; a national level map would be too cluttered/have too many layers
    - LK: That could be an issue, particularly if the audience wants more detail in a particular state. However, the geographic reach of NOAA education is incredible, and being able to show that large-scale geographic reach makes an impact.
    - AI: We are asking for information from our programs at the congressional district level. We are nowhere close to having all the information collected, but this would be very useful way to map it.
    - MK: Simple approach: put up a map and click on a particular state to generate a list of education programs in that state, including location. This should be sufficient for congressional audiences.
    - FN: If we're going to build out proper metrics, geographic information is crucial. We need to find a solution for how to represent programs with national focus.
    - JB: We need to be careful in defining and measuring reach. Measuring by Congressional district doesn't always work over time because of re-districting. Zip codes don't always work either. The data must align with the argument we want to make about the scope of audience reached.
    - LK: It's unlikely that we will include this in the 2013 Blue Book. Let's let this percolate and consider ideas about a working group, etc.

M&E Framework Implementation Update – John Baek (*input request)*

See PowerPoint.

- CM: The expectation is that all programs will have their own logic model. It is essential to be able to describe and present what we do. A subset of our activities will be offered up for common metrics. This will not replace individual logic models, but will simply roll up some activities into Ed Council-wide metrics.
- JH: This framework allows us to make a connection to the Strategic Plan, which is very beneficial
- AI: This makes a lot of sense and is very clear. I hope we can better identify how we map to the rest of NOAA and how we support NOAA-wide goals. The danger is that we are stovepiping ourselves and making education separate from the rest of NOAA.
    - JB: This logic model is retrospective – it measures across what we have already committed to. Suggestion: maybe we can develop an alternative version that isn't so stovepiped or locked into the language developed in 2009. This could re-shape how we look at things going forward.
- PK: We have a fully developed logic model and evaluation plan, plus metrics that we have developed evaluation instruments for. I'm happy to share that with anyone; it is not very restrictive, so it could be easily tailored. I'm confident that it meets the requirements of the OSTP checklist.
- PK: For folks that are just starting out, a logic model doesn't need to be extremely detailed at first. You can pick a few key points.
- CM: I'm concerned about the characterization of stovepiping. The majority of what we do is captured under the engagement enterprise objective. It's important that we have a clear place in NOAA strategic plan, so this is not a bad thing. However, there are education programs whose ultimate outcome and objectives do not match Goal 1 or 2, but are aligned with other programmatic goals of the NOAA strategic plan. One possible solution is to add another column to John's model that links to a different goal. It's fine to expand this to be more inclusive.
- FN: The climate goal does not effectively include the role of education as an integral piece. Many people do not understand what we're trying to do. To me, this is the "stovepiping" aspect.
    - AI: Yes, I agree. We're on the same page.
    - LK: So you are trying to make yourselves relevant and significant within your mission goal, and connection to the enterprise objective does not give you the ammunition to make yourself relevant to the mission goal
    - FN: Yes. We need to be relevant to both objectives.
    - AI: CM's solution regarding adding another column could be an effective way to handle this. We may need to bring this up in the leadership discussion.
- JB: A logic model is a tool to help you reflect and clarify things. Ultimately, doing this well is not an end goal in itself. If it sparks conversations and decisions about strategy, that is important. The M&E process also integrates with the SEE process.
- LL: From the planning/SEE process perspective, I like this format. It is evergreen in the sense that the top three rows are replaceable as needed. This is what SEE is asking us to do right now; we can copy and paste the whole thing and submit it for planning purposes. For the first time, we will have this all lined up.
- FN: The difference between the SEE process and this logic model is that this one weaves all the disparate pieces together into a whole, while the SEE process fractures pieces by outcome. We need to do both; there is value in both, but there are key differences
    - JB: This is an easier entryway, because you all think of your programs as programs, not as fractured pieces. The logic model allows you to keep some coherence.
- LK: Is there a timeframe for this process?
    - JB: No, because the group has not made final decisions about how this works. Want to hold off for now.
    - CM: John has a detailed implementation plan over a 5-yr timeframe
    - LK: No, I mean for the data request, not for the full process. Ed Council members, are you comfortable with the data call? It seems broad. Many people are not present at this meeting; I would like to hear if they are OK with this
    - JB: The group hasn't finalized the timing yet. Let's say 2-4 weeks as a time period to get initial feedback in order to finalize the logic model
    - LK: Let's put time on December Ed Council meeting to discuss how well this logic model maps to Ed Council programs
- LK: Request to Ed Council: be prepared to provide feedback in December
    - Candidates for common metrics
    - How well the logic model fits your program
    - Concerns/problems/issues
- LK: Should we start with the M&E working group and work outwards? Individuals who are not on the working group could contact JB with problems/concerns/issues before November meeting
- LK: LL and JB, please send email out to Ed Council detailing this request and expectations
    - JB: The intent is not to make this a data call. Feedback would be helpful
    - LK: So this is an opportunity for input, not a request?
    - JB: Yes
    - JH: If you want your voice or opinion heard, please take this opportunity now.
    - JB: An actual data call is coming in January, so please do the homework now
    - CM: This IS a data call, actually. We really need the feedback to come up with a valid framework
    - LK: Okay, we want feedback from every program
- CM: We need to do a better job connecting the common logic model to the goals of the NGSP. Feedback now will help us do this. Eventually, we want a logic model that connects to all aspects of the NGSP.
    - AI: I would like to leave this on the back burner and let JB think about it. We will need to have indicators for the new columns that connect to broader NOAA goals, which may be tricky.
    - LK: It is useful to communicate that this is a future priority and begin thinking about it. There is a lot of potential to expand outside of the enterprise objective.

Leadership WG Report Out – Marlene Kaplan (*informational)*

See PowerPoint.

- Postponed for future meeting

Updates and Announcements

- None were submitted for the record.