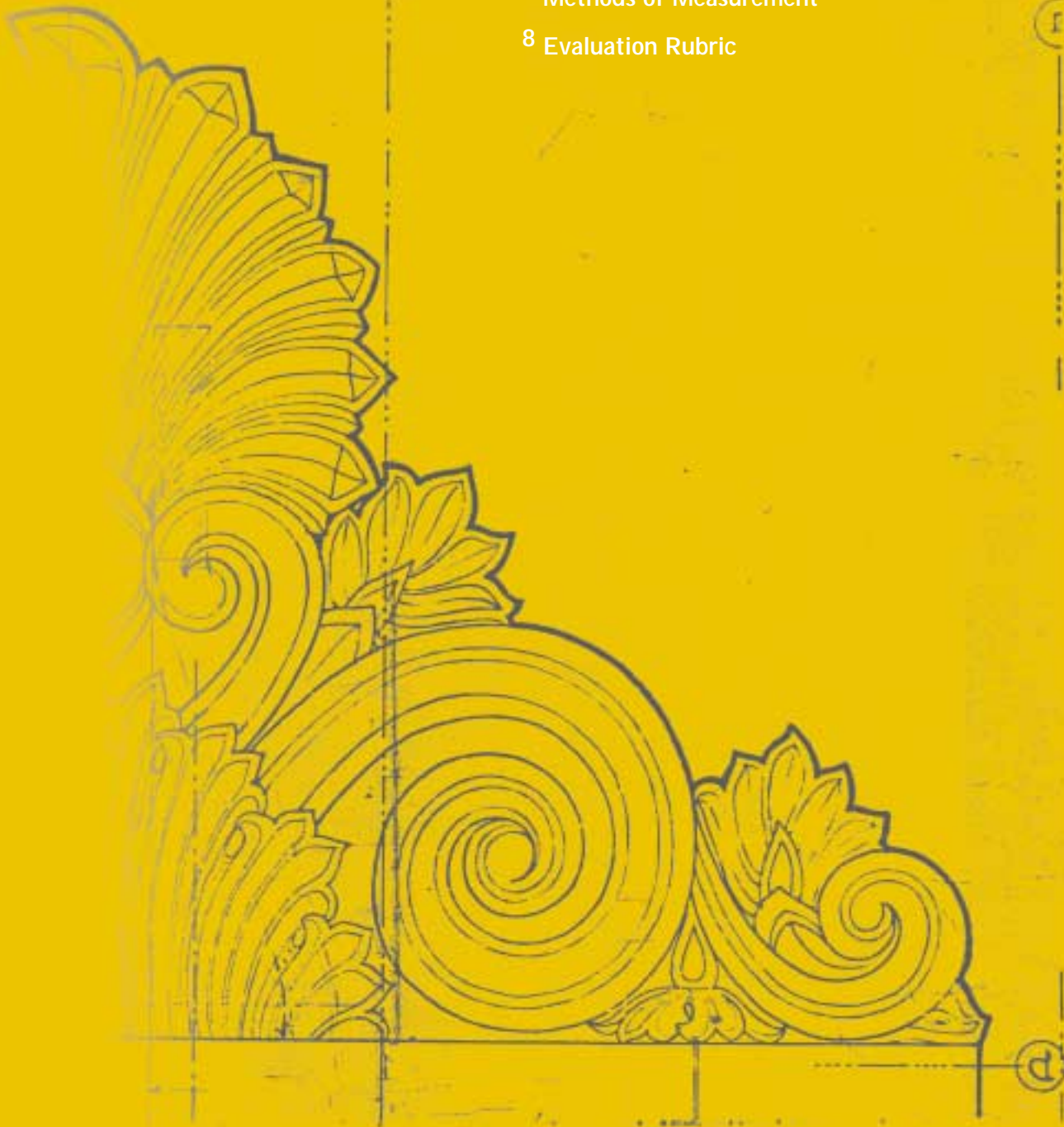


## Section 4 Evaluation

- 1 Advancing Mission, Meeting Needs
- 2 Relationship Changes
- 3 What Is the Evaluation Rubric?
- 4 Using the Rubric
- 5 Lessons Learned
- 6 Communication of Results
- 7 Methods of Measurement
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## Evaluation

The idea to build an evaluation rubric evolved from several discussions within Urban Network about “best practices” relative to audience engagement and a desire to work toward being able to define them. Before developing a new initiative, we all scan the field to glean ideas and lessons learned from others who went before us. As a consortium, we are rich because nearly all of us bring to Urban Network experiences from one or more of the other national audience diversity initiatives in the arts, sciences, or humanities. We know that none of us is inventing the wheel, but what more can we learn from one another and how can we frame our discussion in a way that brings us the most clarity about our practice?

The following evaluation rubric is the result of our attempt to set a framework for examining and discussing diverse audience engagement initiatives, especially those developed in community partnerships of all kinds. We designed this rubric to outline the types of questions we need to ask ourselves about the process as well as the products of audience engagement initiatives and to pinpoint the intersections where we are seeking change. We design and implement programs to engage diverse audiences upon a logic model that says if we affect (*a*), then (*b*) is going to change and (*c*) will be different because of it. The questions in this rubric are designed to help evaluate if this logic is true and understand why or why not.

### Advancing Mission, Meeting Needs

Successful community engagement programs are win-win in nature. They further the museum’s mission while addressing community needs. Evaluating a program’s alignment with mission and needs gets to the heart of a program’s rationale, goals, and objectives. It encourages questions essential to a healthy relationship: Are all parties involved both giving to and receiving from the program in ways that are rewarding to them? Are the basic premises of the program well founded?

### Relationship Changes

Most evaluations focus on assessing the relationship between the program and the participant, from either quantitative or qualitative perspectives. For example, who participated in the program and what did they derive from it? When Urban Network members began to consider the various elements of successful programming for community engagement, we agreed that two additional constituencies needed to be added to the evaluation mix—namely the institution (museum) sponsoring the program and any external stakeholders involved in it. Clearly, sustainable, community-based programs require both institutional and external stakeholder endorsement. As the dialogue proceeded, Urban Network participants concluded that the various constituencies should not only be measured for their relationships to the program, but also for their relationships to one another. Thus

the group came up with the following evaluation rubric that identifies six sets of relationships associated with community engagement programs. Three relationships may be considered primary—they involve the program directly and are the ones that programming professionals are most likely to assess:

- Program participants to the program
- Institution (museum) to the program
- External stakeholders (including collaborators, cooperators, partners, funders, government) to the program

Three additional relationships may be considered secondary to the program—they are relationships that exist independently of the program but may be affected positively or negatively by the program. These relationships are often longer term and more mission-driven than those associated with individual programs. Though often neglected in evaluations, they are essential to programmatic success:

- Institution to external stakeholders
- Institution to program participants
- Program participants to external stakeholders

It is important to examine how relationships between groups or perceptions of one group by another have changed as a result of a program. The relationship between an institution and a community change according to the types of programs and level and frequency of interactions over time.

### What Is the Evaluation Rubric?

Urban Network members created the evaluation rubric as a tool for museums to use to assess the efficacy of their community engagement programs in meeting program goals. It is also designed to help gauge the broader impact these programs have on the institutions and communities that support them. Although the rubric is comprehensive, it is also a work in progress. We offer it as a generic template that can be applied, tested, and refined to fit each program's unique circumstances.

### Using the Rubric

The rubric is a complex and potentially daunting tool for programmers with limited time to evaluate their work. At the least, Urban Network participants hoped that by specifying the various relationships essential to successful community engagement, the rubric would spur other professionals to acknowledge the presence and evolution of these relationships in the course of program implementation. While we encourage those applying the rubric to give careful consideration to each of the questions posed, we recognize that different institutions and programs will benefit from placing greater emphasis on selected relationships and areas within them. In this respect, we hope that the rubric will be viewed as a flexible resource rather than a prescriptive form. In

addition to using the rubric for formally evaluating a program, one can also use it informally as a reflective tool. During the process of developing the rubric, Urban Network members used the relationship-based questions to interview one another about their respective programs, and we found in these approximately half-hour conversations that both interviewers and interviewees gained insight into the mechanisms behind community engagement.

### Lessons Learned

The lessons learned—by participants, community partners, museum staff, etc.—as a result of a program are valuable resources if they are “mined.” Good evaluations strive to discover how to do it better the next time. It is important to remember to gather this information from all perspectives, document it, and apply it when planning the next program or the next cycle of the same program. Some programs conduct formative evaluations throughout their implementation and make adjustments accordingly. It is always good practice to keep notes on lessons learned in a central file so that they can inform future program development strategies.

### Communication of Results

Sometimes a program has remarkable results, but few beyond the program know of them. Evaluations can provide programmers with substantial and compelling documentation that can help leverage additional support for the program and make a compelling case for new programs like it. Two things need to be considered along with the evaluation: a strategy for disseminating the results to each of the stakeholders, and a set of tools to communicate the results to them. Tools might include a written report, video, interactive media such as a CD-ROM or Web site, or oral presentations at board or community meetings.

### Methods for Measurement

As explained above, the evaluation rubric focuses on exploring the different relationships associated with community-based programming. Although it is comprehensive with regard to specifying the relationships evaluated, the rubric does not provide comprehensive or scientific guidelines for measuring change in these relationships. The evaluation rubric suggests some methods for measurement that can be used for each type of questioning, such as surveys, focus groups, and interviews. We recognize that measurement will vary tremendously from institution to institution and from program to program, based on human and financial resources and other considerations. We simply hope the suggestions for measuring relationships prompt ideas about the means for doing so.

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By *Jennifer Amdur Spitz* and *Margaret Thom*, Consultants to Urban Network, and *Joel Hoffman*, Vice Director for Education and Program Development, Brooklyn Museum of Art.

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## Evaluation Rubric

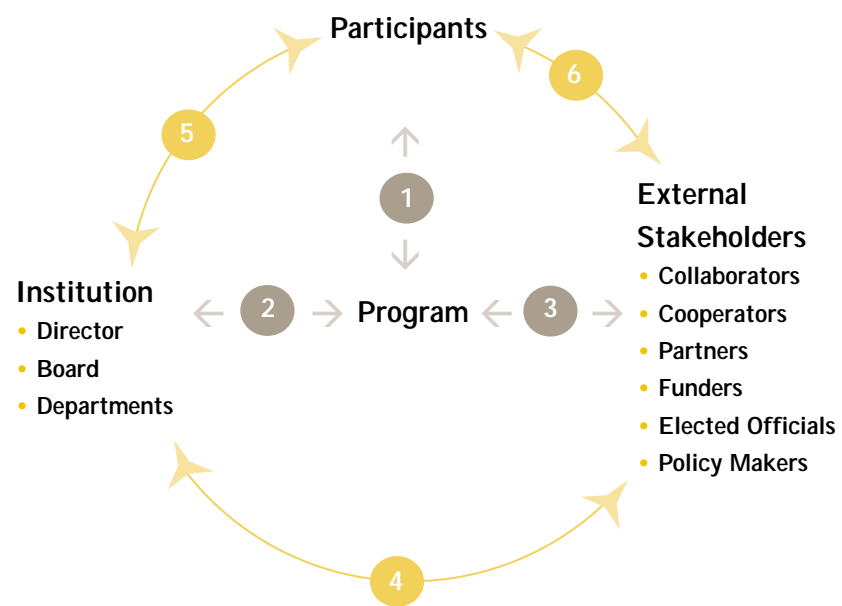
Urban Network members collaboratively created this evaluation rubric as a tool for museums to assess the efficacy of community engagement programs in meeting program goals, and to gauge the broader impact these programs have on the institutions and communities that support them.

### Key Relationships

In this rubric, six relationships are considered:

1. Program participants to the program
2. Institution to the program
3. External stakeholders to the program (external stakeholders include collaborators, cooperators, partners, funders, government, etc.)
4. Institution to external stakeholders
5. Institution to program participants
6. Program participants to external stakeholders

The first three relationships directly involve the program. The second three may be affected by the program.



- Arrows indicate relationships
- ↔ being evaluated
- Primary Relationship
- Secondary Relationship

## Key Questions

The rubric asks six questions as applied to these six relationships. The first three questions apply only to the primary three relationships. The second three questions apply to all six relationships.

Primary Relationships			Secondary Relationships		
1	2	3	4	5	6
Program Participants to Program	Institution to Program	External Stakeholders to Program	Institution to External Stakeholders	Institution to Program Participants	Participants to External Stakeholders

?	A	Who was served or engaged?			
			N/A	N/A	N/A
B		Did the program fulfill the mission, values, or needs (as applicable)?			
			N/A	N/A	N/A
C		Who was involved in program development and implementation and how?			
			N/A	N/A	N/A
D		How did the program change relationships and perceptions?			
E		What lessons were learned and what was/will be their impact?			
F		How were program components/results communicated?			

### Getting Started

To use this evaluation rubric, we suggest beginning with the following two items:

- Provide the name and a brief description of the program.
- Identify the program goals relative to community engagement.

### Primary Relationships

#### Evaluating a Community Engagement Program's Effect on Its Primary Relationships

Below are suggested evaluation questions for the program's three primary relationships.

Relationship 1: Program Participants to Program	Relationship 2: Institution to Program	Relationship 3: External Stakeholders* to Program
<p><b>A Who was served or engaged?</b></p> <ul style="list-style-type: none"> <li>Who composed the audience served? (Document quantity, age, gender, race, educational background, geography, etc.)</li> <li>Were primary and secondary targets identified and assessed?</li> </ul>		
<ul style="list-style-type: none"> <li>Who was involved within your institution, including program staff and others?</li> </ul>	<ul style="list-style-type: none"> <li>Who was involved within your institution, including program staff and others?</li> </ul>	<ul style="list-style-type: none"> <li>What external stakeholders were involved and at what level?</li> <li>*External stakeholders include collaborators, cooperators, partners, funders, government, etc.</li> </ul>
<p><b>B Did the program fulfill the mission, values, or needs?</b></p> <ul style="list-style-type: none"> <li>Were the program's cognitive and/or affective goals met?</li> <li>Did the program meet participants' needs?</li> <li>Were there audience goals? If so, how did the audiences served compare to the program's targeted audience goals?</li> <li>Were the needs of different ethnic/racial communities met?</li> <li>For what reasons did the participants visit the institution?</li> </ul>		
<ul style="list-style-type: none"> <li>Did the program advance or impact the vision, mission, values, needs of your institution (relative to audience served, cognitive or affective behaviors, etc.)? If so, how?</li> </ul>	<ul style="list-style-type: none"> <li>Did the program advance or impact the vision, mission, values, needs of your institution (relative to audience served, cognitive or affective behaviors, etc.)? If so, how?</li> </ul>	<ul style="list-style-type: none"> <li>Did the program advance the vision, mission, values, needs of the external stakeholders (relative to audience served, cognitive or affective behaviors, etc.)? If so, how?</li> </ul>
<p><b>C Who was involved in program development and implementation and how?</b></p> <ul style="list-style-type: none"> <li>Were program participants involved in the development of the program? If so, how did you select and involve them?</li> <li>Did you shape the program based on participants' input? If so how? Was it ongoing?</li> </ul>		
<ul style="list-style-type: none"> <li>Outside of the program staff, were other colleagues at your institution involved in the development of the program?</li> <li>If so, how did you select and involve them (supervisors, peers, board, etc.)?</li> <li>Did you shape the program based on the input of other colleagues at your institution? If so, how? Was their input ongoing?</li> </ul>	<ul style="list-style-type: none"> <li>Outside of the program staff, were other colleagues at your institution involved in the development of the program?</li> <li>If so, how did you select and involve them (supervisors, peers, board, etc.)?</li> <li>Did you shape the program based on the input of other colleagues at your institution? If so, how? Was their input ongoing?</li> </ul>	<ul style="list-style-type: none"> <li>Were external stakeholders involved in the development of the program? If so, how did you select and involve them?</li> <li>Did you shape the program based on the input of external stakeholders? If so, how? Was their input ongoing?</li> </ul>

Relationship 1: Program Participants to Program	Relationship 2: Institution to Program	Relationship 3: External Stakeholders* to Program
<p><b>D How did the program change relationships and perceptions?</b></p> <ul style="list-style-type: none"> <li>What were program participants' positive and negative perceptions of the program (include all program participants, primary and secondary)?</li> <li>Outside of the program staff, what were the positive and negative perceptions of the program among your institutional colleagues?</li> <li>What were external stakeholders' positive and negative perceptions of the program (include collaborators, cooperators, partners, funders, etc.)?</li> </ul>		
<p><b>E What lessons were learned and what was/will be their impact?</b></p> <ul style="list-style-type: none"> <li>What lessons were learned about participants' needs during program implementation?</li> <li>How will these lessons inform future practice relative to this program (include marketing, cognitive or affective goals)?</li> <li>What did you learn about the institution's relationship to the program during program implementation?</li> <li>Did your institution commit sufficient resources to achieve program goals? If not, please explain.</li> <li>Based on lessons learned, have insights been incorporated into your institution's standard planning and operating procedures (e.g., fundraising)?</li> <li>What did you learn about stakeholder needs during program implementation?</li> <li>How will lessons learned about stakeholder needs inform future practices related to this program?</li> </ul>		
<ul style="list-style-type: none"> <li>What lessons were learned about participants' needs during program implementation?</li> <li>How will these lessons inform future practice relative to this program (include marketing, cognitive or affective goals)?</li> </ul>	<ul style="list-style-type: none"> <li>What did you learn about the institution's relationship to the program during program implementation?</li> <li>Did your institution commit sufficient resources to achieve program goals? If not, please explain.</li> <li>Based on lessons learned, have insights been incorporated into your institution's standard planning and operating procedures (e.g., fundraising)?</li> </ul>	<ul style="list-style-type: none"> <li>What did you learn about stakeholder needs during program implementation?</li> <li>How will lessons learned about stakeholder needs inform future practices related to this program?</li> </ul>
<p><b>F How were program components/results communicated?</b></p> <ul style="list-style-type: none"> <li>Was your marketing plan effective in attracting the desired participants (consider primary and secondary program participants)? What was most and least effective?</li> <li>Did you share with your constituents your intent to evaluate the program and your willingness to modify the program based on their input?</li> <li>Did you invite appropriate parties within the museum (e.g., board, director, curators, etc.) to attend the program? If so, whom and how?</li> <li>Did you effectively inform appropriate parties within the museum of program successes and challenges based on evaluation (this may include board reports, etc.)? If so, whom and how?</li> <li>Did you invite/inform appropriate external stakeholders to the program (including collaborators, cooperators, partners, funders, etc.)? If so, whom and how?</li> <li>Did you apprise appropriate external stakeholders of program successes and challenges? If so, whom and how?</li> </ul>		
<ul style="list-style-type: none"> <li>Was your marketing plan effective in attracting the desired participants (consider primary and secondary program participants)? What was most and least effective?</li> <li>Did you share with your constituents your intent to evaluate the program and your willingness to modify the program based on their input?</li> </ul>	<ul style="list-style-type: none"> <li>Did you invite appropriate parties within the museum (e.g., board, director, curators, etc.) to attend the program? If so, whom and how?</li> <li>Did you effectively inform appropriate parties within the museum of program successes and challenges based on evaluation (this may include board reports, etc.)? If so, whom and how?</li> </ul>	<ul style="list-style-type: none"> <li>Did you invite/inform appropriate external stakeholders to the program (including collaborators, cooperators, partners, funders, etc.)? If so, whom and how?</li> <li>Did you apprise appropriate external stakeholders of program successes and challenges? If so, whom and how?</li> </ul>

## Methods for Measurement

### Program Participants to Program

- Measure content and attitude change among program participants (using tests, surveys, and focus groups; document program participant baseline on content and attitude).
- Measure responsiveness of program to participants' performance/input (through evaluation of tests and surveys, evaluations as functions of sex, age, and ethnicity as appropriate).

### Institution to Program

- Measure institutional change through awareness and support surveys (through focus groups).
- Measure institutional support of program (through anecdotal reports and questionnaires; document institutional baseline of performance expectations).

### External Stakeholders to Program

- Measure stakeholders' expectations (through questionnaires, interviews).
- Measure stakeholders' impact on the program (anecdotal reports; document stakeholders' baseline for attitudes and expectations).

## Secondary Relationships

### Evaluating a Community Engagement Program's Effect on Its Secondary Relationships

Many program evaluations omit consideration of a program's secondary relationships, i.e., how it influences the relationships between the institution and external stakeholders, the institution and program participants, and program participants and external stakeholders. However, consideration of secondary relationships can yield important information and better assess the real impact and value of a community engagement program. Some suggested evaluation questions for these relationships follow.

Relationship 4: Institution to External Stakeholders	Relationship 5: Institution to Program Participants	Relationship 6: Program Participants to External Stakeholders
<p><b>D How did the program change relationships and perceptions?</b></p>		
<ul style="list-style-type: none"> <li>• Did stakeholders' perceptions of the institution change as a result of the program? If so, how?</li> <li>• Did the institution's perception of the stakeholders change as a result of the program? If so, how?</li> <li>• Did the program cause increased communication between external stakeholders and the institution? If so, how?</li> </ul>	<ul style="list-style-type: none"> <li>• Did the program participants' perceptions of the institution change as a result of the program? If so, how?</li> <li>• Did the institution's perception of the program participants change as a result of the program? If so, how?</li> <li>• Did the program cause increased communication between program participants and the institution? If so, how?</li> </ul>	<ul style="list-style-type: none"> <li>• Did the program participants' perceptions of the stakeholders change as a result of the program? If so, how?</li> <li>• Did the stakeholders' perception of the program participants change as a result of the program? If so, how?</li> <li>• Did the program cause increased communication between external stakeholders and program participants? If so, how?</li> </ul>
<p><b>E What lessons were learned and what was/will be their impact?</b></p>		
<ul style="list-style-type: none"> <li>• What did you learn about the relationship between the museum and stakeholders during program implementation?</li> <li>• How will lessons learned from the program impact future relationships between the museum and stakeholders?</li> </ul>	<ul style="list-style-type: none"> <li>• What did you learn about the relationship between your institution and program participants during program implementation?</li> <li>• How will lessons learned from the program impact future relationships between your institution and program participants?</li> </ul>	<ul style="list-style-type: none"> <li>• What did you learn about the relationship between stakeholders and program participants during program implementation?</li> <li>• How will lessons learned from the program impact future relationships between stakeholders and program participants?</li> </ul>
<p><b>F How were program components/results communicated?</b></p>		
<ul style="list-style-type: none"> <li>• Did members of your institution outside of program staff communicate appropriate invitations to external stakeholders to participate in the program? If so, who invited whom and how?</li> <li>• Did external stakeholders communicate their enthusiasm or concerns for the program to members of your institution outside of program staff? If so, who communicated what to whom and how?</li> </ul>	<ul style="list-style-type: none"> <li>• Did members of the institution outside of program staff communicate appropriate invitations to participate in the program? If so, who invited whom and how?</li> <li>• Did program participants have opportunities to communicate their enthusiasm or concerns for the program to members of the institution outside of the program staff? If so, who communicated what to whom and how?</li> </ul>	<ul style="list-style-type: none"> <li>• Did external stakeholders use the program to reach their prospective program participants (e.g., constituents, readers, product purchasers). If so, who reached whom and how?</li> <li>• Did program participants share their enthusiasm or concerns about the program with external stakeholders or others (e.g., elected officials, newspapers, etc.). If so, who communicated what to whom and how?</li> </ul>

## Methods for Measurement

### Institution to External Stakeholders

- Measure change in relationship between institution and stakeholders (identify number of board members, contributions; document baseline of the relationship).

### Institution to Program Participants

- Measure institutional awareness of program participants (number of new and modified programs/venues).
- Measure change in program participants' utilization of institution (document baseline participation levels).

### Program Participants to External Stakeholders

- Measure change in stakeholder relationship with program participant (better products, more programs).
- Measure change in attitude/behavior of program participant toward stakeholder (determined by nature of stakeholder).

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### Participants

Evaluation Rubric developed by Joel Hoffman, Paul Mohrbacher, Karen Nelson, Carolyn Sumners

Evaluation Rubric Discussion Group: Joel Hoffman, Mark Larson, Alisa Martin, Paul Mohrbacher, Karen Nelson, Paul Richard, Carolee Smith Rogers, Sarah Schultz, Sophia Siskel, Mary Ann Steiner, Carolyn Sumners, Margaret Thom

Additional Collaborators: Barbara Henry, Beth B. Schneider

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