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Visitor Studies Association

Evaluator Competencies for Professional Development

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Letter from the Project Directors

The Visitor Studies Association (VSA) received a planning grant from the Informal Science Education Program of the National Science Foundation to plan a Continuing Education Program for Mid-Career (Practicing) Professionals in informal learning research and evaluation. That VSA should pioneer in the development of guidelines and aids for those wanting to plan their own professional development is an appropriate step in the evolution of visitor studies as a profession.

VSA was founded in 1988 by a small group of research and evaluation practitioners interested in creating a forum for the exchange of information in the field of visitor studies and evaluation. And from the start, the founders recognized the need and opportunity for continuing professional education by offering a menu of workshops in association with the 1989 annual meeting. Professional development workshops have been offered ever since.

The NSF planning grant gave us resources to take these efforts to a new level. Both of us had served terms as chair of the VSA professional development committee. In that capacity we were able to see the potential for strengthening the VSA continuing education offerings but we could also see there was not a coherent structure to guide development.

The evaluator competencies for professional development are the result of a good many people thinking about the essence of visitor studies. We probed the definitions of visitor studies and have made an attempt to distill the diversity and breadth of the field to an elemental core. Many people have contributed to this project and we owe them considerable gratitude. Much of this work has been carried out on a volunteer basis and we are grateful to have such generous colleagues that are interested in the continuing professionalization of the field of visitor studies. Rebecca Reynolds got us off to a good start as facilitator of the first planning meeting held in August, 2005. Catherine Eberbach, John Fraser, Lisa Hubbell, Kathy McLean, Kris Morrissey, and Marcella Wells joined the two of us to form the first working committee to refine all the information that came from the larger planning meeting and turn it into a working idea. Support was also received from various officers of VSA including Kirsten Ellenbogen, Alan Friedman, Julie Johnson, Judy Koke, Mary Ellen Munley, Deborah Perry, and Beverly Serrell. Toward the end of the planning phase, the registration program concept was separated from the professional development planning and it moved forward on its own. We thank those who helped specifically with this part of the project including Sue Allen, Jessica Brainard, Lynn Dierking, David Ellis, Ellen Giusti, Cheryl Kessler, Elizabeth Kollman, Ross Loomis, Wendy Meluch, Amy Grack Nelson, Randi Korn, Kris Morrissey, Christine Reich, Matthew Sikora, Steve Yalowitz, and members of the VSA Board of Directors.

This has been a labor of love on the part of all who have contributed to this project for the field of visitor studies and we hope our efforts will prove beneficial. In spite of all the assistance with this project, there may still be errors and omissions. We accept the responsibility for these. We hope that the competencies will evolve as the field does.

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Larry Bell, Senior Vice President for Research, Development, & Production, Museum of Science, Boston
Barbara Butler, Retired, formerly Program Director, Informal Science Education, National Science Foundation

Visitor Studies Professional Competencies

Competency A. Principles and Practices of Visitor Studies
All professionals involved in the practice of visitor research and evaluation should be familiar with the history, terminology, past and current developments, key current and historic publications, and major contributions of the field. Visitor studies professionals should also be familiar with major areas that have relevance to visitor studies, including evaluation, educational theory, environmental design, developmental psychology, communication theory, leisure studies, and marketing research.

Competency B. Principles and Practices of Informal Learning Environments
All individuals who engage in visitor research and evaluation must understand the principles and practices of learning in informal environments, the characteristics that define informal learning settings, and an understanding of how learning occurs in informal settings. An understanding of the principles, practices, and processes by which these experiences are designed or created is required in order to make intelligent study interpretations and recommendations.

Competency C: Knowledge of and Practices with Social Science Research and Evaluation Methods and Analysis
Visitor studies professionals must not only understand but also demonstrate the appropriate practice of social science research and evaluation methods and analysis. These include:

- Research design
- Instrument/protocol design
- Measurement techniques
- Sampling
- Data analysis
- Data interpretation
- Report writing and oral communication
- Human subjects research ethics
- Research design, measurement, and analysis that shows sensitivity to diversity and diversity issues

Competency D: Business Practices, Project Planning, and Resource Management
Visitor studies professionals must possess appropriate skills for designing, conducting, and reporting visitor studies and evaluation research. Professionals should demonstrate their ability to conceptualize a visitor studies or evaluation research project in a context of informal learning institution management and administration (i.e., scheduling, budgeting, personnel, contracting).

Competency E: Professional Commitment
Visitor studies professionals should commit to the pursuit, dissemination, and critical assessment of theories, studies, activities, and approaches utilized in and relevant to visitor studies. Through conference attendance and presentations, board service, journals and publications, and other

formal and informal forums of communication, visitor studies professionals should support the continued development of visitor research and evaluation.

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Introduction to the Visitor Studies Professional Self Assessment

This document was created to help you plan your continuing professional development in visitor studies. It was designed to facilitate life-long learning for all visitor studies professionals by providing suggestions for learning activities in five competencies.

Competency A. Principles and Practices of Visitor Studies
Competency B. Principles and Practices of Informal Learning Environments
Competency C: Knowledge of and Practices with Social Science Research and Evaluation Methods and Analysis
Competency D: Business Practices, Project Planning, and Resource Management
Competency E: Professional Commitment

In addition to the competencies, there is a self-assessment rubric, as well as a list or resources and a glossary. Recognizing that visitor studies is a diverse field and that much of continuing professional development is meshed with demanding professional and personal schedules, the suggestions incorporate a broad range of learning activities. Since individuals are attracted to the field of visitor studies from a variety of backgrounds, these guidelines are to aid in the identification of transferable skills and knowledge from previous experiences as well are areas that are considered specific to the field of visitor studies.

The Visitor Studies Association (VSA) currently offers resources, training, etc. designed to help professionals build skills. From the very outset, VSA has had professional development as a core value. And over the years VSA has observed interest in its programs increase; most specifically in the various professional development components (workshops and other forms of training) of the VSA annual meetings. With the support of a planning grant from the Informal Science Education Program of the National Science Foundation, VSA developed these guidelines for a self-study and professional development in visitor studies.

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Visitor Studies Professional Self Assessment

If you are unsure about where to start in determining your plans for professional development as a visitor studies professional it will be helpful to understand your strengths, weaknesses, and interests at this point in your career. Fill in the following table to get a sense of your current professional strengths and those areas that you would like to strengthen. Use the rubric below to assess your competencies.

Once you have an idea of your current professional profile, identify ways you would like to strengthen your knowledge, skills, and abilities in the various visitor studies competencies. Establish a professional development plan:

Step 1: Determine your learning goals. What do you want to learn in each of the competencies?

Step 2: Establish a time frame to accomplish your goals.

Step 3: Identify learning opportunities for each competency. Consider readings, courses, workshops, internships, work experience, and volunteer work. Rate yourself in terms of high, medium, or low for your knowledge of each of the competencies, professional commitment, and ethics.

Competency	**Excellent** I feel extremely knowledgeable about this.	**Competent** I have some knowledge but would like more.	**Need Strengthening** I know very little about this.	**Not Applicable**
A. Principles and practices of visitor studies.				
B. Principles and practices of informal learning.				
C. Research and evaluation methods and practices in the Social Sciences.				
D. Project planning and resource management.				
E. Professional commitment.				

Rubrics for Assessing Competency Proficiency

Competency A: Principles and Practices of Visitor Studies

All professionals involved in the practice of visitor research and evaluation should be familiar with the history, terminology, past and current developments, key current and historic publications, and major contributions of the field. Visitor studies professionals should also be familiar with major areas that have relevance to visitor studies, including educational theory, environmental design, developmental psychology, communication theory, leisure studies, and marketing research.

General Guiding Question:
Does the learner understand visitor studies in the broadest sense both currently and historically?

Criteria	Excellent	Competent	Needs Strengthening
A.1 The learner demonstrates knowledge of the purpose of visitor studies.	Demonstrates considerable knowledge of the history and purpose of visitor studies by citing relevant, broadly based literature.	Demonstrates basic knowledge of the history and purpose of visitor studies by citing relevant, but not broadly-based literature.	Demonstrates no knowledge of the history or purpose of visitor studies.
A.2 The learner demonstrates familiarity with the terminology of visitor studies.	Demonstrates considerable knowledge of the terminology of visitor studies by using terms specific to visitor studies such as visitor centered; front-end, formative, summative, remedial evaluations; visitor experience, informal learning, etc.	Demonstrates basic knowledge of the terminology of visitor studies by using only few terms specific to visitor studies.	Demonstrates no knowledge of the special visitor studies terminology.
A.3 The learner demonstrates knowledge of major research, evaluation, and/or marketing research specializations in visitor studies and critical issues associated with that specialization.	Identifies more that one of the specializations of visitor studies and explains some critical issues in that specialization.	Identifies at least one of the specializations of visitor studies and identifies one critical issue in that specialization.	Cannot identify any of the specializations of visitor studies and knows none of the critical issues of importance to visitor studies.

A.4 The learner can describe major trends in the history of visitor studies field over the last century.	Presents considerable detail in describing major trends in the Visitor studies field. Identifies at least three historically important trends, contributions, or leaders in the field.	Presents basic understanding of the history of visitor studies. Identifies less than three historically important trends, contributions or leaders in the field.	Has no knowledge of the history of visitor studies and is unaware of any of the field's leaders.
A.5 The learner shows evidence of basic understanding of other disciplines/ fields that may inform visitor studies.	Has evidence that information from at least three related disciplines is applied in their approach to visitor studies.	Has evidence that information from at lease one other disciplines is applied in their approach to visitor studies.	No evidence that the learner has awareness of the relevance of other disciplines to visitor studies.
A.6 The learner demonstrates knowledge of historical and current visitor studies literature.	Identifies more than 15 published reports, books, journals, etc. that relate to visitor studies.	Identifies 10-15 published reports, books, journals, etc. that relate to visitor studies.	Identifies less that 10 published reports, books, journals, etc. that relate to visitor studies.

Competency B: Principles and Practices of Informal Learning

All individuals who engage in visitor research and evaluation must understand the principles and practices of informal learning, the characteristics that define informal learning settings, and an understanding of how learning occurs in informal settings. An understanding of the principles, practices, and processes by which these experiences are designed or created is required in order to make intelligent study interpretations and recommendations.

General Guiding Question:
Does the learner understand informal learning and the contexts within which visitors studies takes place?

Review Panel's Criteria	Excellent	Competent	Needs Strengthening
B.1 The learner can define informal learning, distinguish between formal and informal learning, and provide examples of informal learning settings.	Can distinguish between formal and informal learning and apply the concepts to their work. And can identify as many as five different informal learning settings.	Can define formal and informal learning in a manner that aides their understanding of visitor studies in an informal learning setting. And can identify as many as three different informal learning settings.	Cannot identify or distinguish between formal and informal learning and can identify no more than one informal learning setting.
B.2 The learner can clearly describe what is meant by the visitor experience.	Presents a clear definition and explains its importance.	Presents a clear definition.	Doesn't know what is meant by the visitor experience.
B.3 The learner demonstrates use of major social science and informal learning education conceptual frameworks and models in their work.	Identifies more than three theories or frameworks identifies their sources, and describes how they have been applied to informal learning activities.	Identified less than three theories, their sources or frameworks, and describes how they have been applied to informal learning activities.	Cannot identify any theories or frameworks.
B.4 The learner can define outcomes and can demonstrate the distinction of cognitive, affective, and psychomotor outcomes through their work.	Illustrates with examples from the learner's own work of proposed outcomes in terms of cognitive, affective, and psychomotor domains.	Illustrates with examples from the learner's own work proposed outcomes in at least one of the learning domains.	Cannot illustrate proposed outcomes using the learner's own work.
B. 5 The learner is knowledgeable about issues surrounding diversity and universal access in the museum field (and/or with other informal learning settings).	Is very knowledgeable about and highly committed to promoting universal access and diversity.	Knows what ADA is and has demonstrated a basic commitment to serving diverse and underserved audiences.	Has limited knowledge about and/or is unaware of the need for universal design and the importance of serving diverse audiences in the informal learning field.

Competency C: Knowledge of and Practices with Visitor Studies Research

Visitor studies professionals must not only understand but also demonstrate the appropriate practice of social science research, methods, and analysis and communication. These include:

- Research design
- Instrument/protocol design
- Measurement techniques
- Sampling
- Data analysis
- Data interpretation
- Report writing and oral communication
- Human subjects research ethics
- Research design, measurement, and analysis that shows sensitivity to diversity and diversity issues

General Guiding Question:
Can the learner demonstrate that he/she can effectively conduct and communicate visitor studies research and evaluation?

Review Panel's Criteria	Excellent	Competent	Needs Strengthening
C.1 The learner understands the need for and can develop a detailed evaluation plan.	The learner has developed more than 10 evaluation plans that include all the important categories of information.	The learner has developed 3-10 evaluation plans that include at least the following categories: background/situation, research question(s), methods and methodologies, data analysis, sampling and selection of respondents, reporting and dissemination, ethical treatment of respondents, timeline, and budget.	The learner has developed less than 3 evaluation plans for research projects and/or has developed plans that are missing certain essential categories.
C.2 The learner is familiar with, understands, and can select and apply appropriate research methodologies and methods.	Has developed innovative, practical, and theoretically sound visitor research techniques that have been used appropriately on a number of research and evaluation projects.	Is knowledgeable about and understands the appropriateness of a variety of different research methods, and is skilled at applying them in the appropriate situation.	Has a very limited and/or superficial understanding of research methods and methodologies. Tends to revert to a limited set of tools regardless of their appropriate-ness for the task.
C.3 The learner is skilled at collecting and analyzing data.	Has collected and analyzed data in a manner that adhere to industry standards for more that 12 research/evaluation studies.	Has collected and analyzed data in a manner that adhere to industry standards for 2 – 12 research/evaluation studies.	Either has collected and analyzed data on less than 3 studies, or does so in a manner that consistently violated one or more tenets of high quality research and evaluation.

C.4 The learner is skilled at reporting and presenting the results of research and evaluation studies.	Consistently writes reports/presents findings for all the studies conducted and writes/present them in a manner to ensure the greatest utility by clients.	Has written report/presented findings for the majority of studies conducted.	The learner collects data but does not report or present it, or reports/presents it in a manner which is of limited usefulness.
C.5 The learner understands important issues surrounding the ethical treatment of respondents including IRBs, and demonstrates a history of ethical practices.	Has developed a special interest in and a sophisticated understanding of the complexities of treating respondents ethically.	The learner understands the importance of and has implemented strategies to ensure the ethical treatment of respondents. S/he is familiar with the role of an IRB.	Is unfamiliar with the concept of the ethical treatment of respondents, and/or has a limited history of implementing strategies to ensure the ethical treatment of respondents.

Competency D: Business Practices, Project Planning, and Resource Management

Visitor studies professionals must possess reasonable and appropriate business skills for proposing, conducting, and reporting visitor studies and evaluation research. Professionals should demonstrate their ability to conceptualize a visitor studies or evaluation research project in a context of informal learning institution management and administration (i.e., scheduling, budgeting, personnel, contracting).

Does the learner demonstrate that he/she can manage a visitor studies or evaluation research project?

Review Panel's Criteria	Excellent	Competent	Needs Strengthening
D.1 Can the learner efficiently plan and schedule his/her project work?	Clearly organized and complete project plan with all the requested details (tasks, schedule, budget).	Project plan that lacks clear organization and/or is incomplete.	Demonstrates no understanding of business practices appropriate for project planning and resource management.
D.2 Has the learner participated as part of a team (lead or sole PI as well as team member acceptable) on a visitor studies project?	Is active in the field and provides a list of at least five recent projects where the role was as a lead or sole PI for 3-4 projects and/or team member for at least 4 recent projects.	Is active in the field and provides a list of less than five recent projects where the role was lead or sole PI for 1-2 projects and/or team member of at least 2 recent projects.	Has little evidence of experience as a lead or sole PI in a project. Has only been a member of a team.
D.3 The learner can demonstrate professional administrative and business writing skills.	Demonstrates significant business writing skills that clearly demonstrate clarity, organization, and purpose.	Demonstrates modest business writing skills that intermittently demonstrate clarity, organization, and purpose.	Demonstrates weak or no significant business writing skills.
D.4 Can the learner work with a "client" in an appropriate manner taking into account resource availability, unique needs and constraints of the client institution.	Demonstrates consistently professional and thorough communication with clients that show flexibility to change.	Demonstrates professional and thorough communication with clients.	Has little evidence of client communication or evidence of poor client communication.

Competency E. Professional Commitment

Visitor studies professionals should commit to the pursuit, dissemination, and critical assessment of theories, studies, activities, and approaches utilized in and relevant to visitor studies. Through conference attendance and presentations, board service, journals and publications, and other formal and informal forums of communication, visitor studies professionals should support the continued development of visitor research and evaluation.

General Guiding Question:
Is the learner committed to the advancement the field of visitor studies?

Review Panel's Criteria	Excellent	Competent	Needs Strengthening
E.1 Has the learner demonstrated fairly consistent membership and participation in VSA and/or aligned organizations over the last 5 years?	Yes. There is evidence of consistent VSA membership and/or membership in several related organizations.	Yes. There is evidence of intermittent or short-term VSA membership and/or membership in one or two related organizations.	No. There is no evidence of VSA membership or membership in other related organizations.
E.2 Has the learner been a recent lead or sole preparer and/or presenter for VSA and/or aligned organization workshop(s) and/or session (last 5 years)?	Evidence of ten or more workshop and/or session presentations. Has been the lead or sole presenter for at least half of these sessions.	Evidence of participation in 3 to 10 workshop and/or session presentations.	No evidence of any presentations.
E.3 Has the learner made professional contribution to the scholarly literature in journal writing, model development, literature synthesis, etc?	Yes. There are more than five examples of such contributions.	Yes. But there are fewer than 5 examples of such contributions.	No, there are no examples of any contributions.
E.4 Has the learner contributed service in VSA or comparable informal learning organizations (e.g. CARE, AEA, etc.) in recent years (past 5 years)?	Yes, There is evidence of serving both as elected officers, board members and other volunteer activities including grant reviewing; editorial boards, etc.	Yes, There is some evidence of volunteer activities including service on a board.	No, there is no evidence.

E.5 Has the learner served as teacher, trainer and/or mentor in a professional capacity to train others to be visitor studies professionals (e.g., University or higher education settings)?	Yes, the learner has been quite active in this regard.	Yes, but the learner activity has been modest.	There is no evidence of any activity in this area.

Bibliography of Competency Readings

See these websites for other bibliographies related to visitor studies.

- http://www.visitorstudiesarchives.org/index.php
- http://www.informalscience.org/
- http://oerl.sri.com/
- http://www.eval.org/Resources/bibliography.asp
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Protection of Human Subjects

A short computer-based training, from the National Institutes of Health, on protecting human subjects, one for people who are doing research and/or evaluation and one for people who are members of institutional review boards can be accessed at http://ohsr.od.nih.gov/cbt/index.html.

The NSF web site is regularly updated with rules and references and can be accessed at http://www.nsf.gov/bfa/dias/policy/human.jsp.

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Glossary of Visitor Studies Terms

These are common terms in the visitor studies profession. These definitions came from The Definitions Project. See http://www.definitionsproject.com/definitions/index.cfm for additional terms.

Affective: An attribute of the human experience that describes feelings or emotions and sometimes attitudes or values; often used to describe learning objectives or outcomes.

Assessment: The process of documenting, usually in measurable terms, knowledge, skills, attitudes, and beliefs.

Audience Research: The systematic gathering of information (descriptive, psychological, contextual) about visitors or audiences.

Benefit: Lasting, meaningful change over time that results from multiple and diverse learning experiences; refers to collective sociological, psychological, economic, and/or environmental outcomes of education and learning.

Capacity Building: Activities that improve an organization's ability to achieve its mission or a person's ability to define and realize his or her goals or do his or her job more.

Critical Appraisal: The overall observations and expert judgment of an exhibition, program or interpretive product by a professional evaluator (or panel of professional evaluators) to identify obvious or suspected problems which can be immediately corrected or studied later with visitor input.

Demand Analysis: The deliberate and systematic process of gathering information and data about current and potential visitors for program and administrative decision-making; audience inventory and analysis that considers current, hindsight, and future perspectives and employs a thoughtful and deliberate process for understanding and describing patterns in the data for making planning recommendations.

Effectiveness: The degree to which the project achieves its stated objectives with its intended audience.

Ethics: The rules or standards governing the conduct of a person or the members of a profession.

Evaluation: A judgment of worth or merit; an appraisal of value; the careful appraisal and study of something to determine its feasibility or effectiveness.

Evaluation Planning: The decision making process for evaluation that often includes at minimum, sections that address, (a) purpose of and audience for the evaluation, (b) information needed and type of evaluation, (c) who has the information – visitors, stakeholders, audiences, etc), (d) how should the information be collected – methodologies but also ethical treatment of respondents, (e) what resources are available.

Formative Evaluation: Provides information about how a program or exhibit can be improved and occurs while a project is under development. It is a process of systematically checking assumptions and products in order to make changes that improve design or implementation.

Front-end Evaluation: Provides background information for future project planning and development. It is typically designed to determine an audience's general knowledge, questions, expectations, experiences, learning styles, and concerns regarding a topic or theme.

Goal: A statement about intended outcome of an interpretive or educational program.

Human Dimensions: The recognition and acceptance of human dimension factors in resource management; the interface of social science and natural resource management.

Impacts: The collective effects, achievements, benefits, or changes brought about by a program or exhibit on its intended audiences or on the environment. Impacts often embody lasting changes, such as improved environmental conditions and changes in the way people think and live.

Indicator: A benchmark or specific performance target used to determine success of an outcome.

Informal Learning: The truly lifelong process whereby every individual acquires attitudes, values, skills, and knowledge from daily experience and the educative influences and resources in his or her environment -- from family and neighbors, from work and play, from the market place, the library, and the mass media. Related words or phrases include free-choice learning and self-directed learning.

Informal Learning Environments: The places, venues, and settings where informal learning opportunities are intentionally made available to visitors, such as in parks or museums.

Institutional Review Board (IRB): Also known as an independent ethics committee (IEC) or ethical review board (ERB) is a committee that has been formally designated to approve, monitor, and review research involving humans with the aim to protect the rights and welfare of research subjects.

Interpretive Planning: The decision making process that blends management needs and resource considerations with visitor desire and ability to pay to determine the most appropriate interpretive (educational) prescriptions for their site and situation. Interpretive Plans often include at minimum, sections that address, (a) the context and situation - history, background, rationale for the plan, (b) purpose for the plan, (c) inventory and analysis of facilities, resources, programs, issues, audiences, (d) media alternatives and decision criteria; media recommendations, and (e) actions needed – timeline, budget, resources.

Logic Model: An organizing tool or picture of how an interpretive or educational organization or program works. A logic model links outcomes (short- and long-term) with program activities and processes and the theoretical assumptions of the program through tiered objectives: outputs, outcomes, and impacts.

Measurement: The assignment of numerals to objects or events according to rules; an operation resulting in standardized classifications of outcomes; in visitor studies or evaluation research, measurement often refers to the tools used to capture data about audiences or visitors and may include such things as observations, interviews, focus groups, surveys and so forth.

Needs Assessment: A systematic process for determining the needs of a defined population; the process of researching need, available services, and service gaps by population and geographic area.

Objective: A statement of a specific, measurable, and observable result desired from an educational or interpretive activity or experience; a stated expectation about audience, behavior, condition, and degree that will result from a learning experience.

Outcomes: The achievements or changes brought about by a program, project, exhibit, or activity that helps lay the foundation for longer-term impacts or benefits. Outcomes can involve changes in behavior, skills, knowledge, attitudes, values, or condition after participating in a learning activity or experience.

Outcome-Based Evaluation (OBE): Evaluation that focuses on measurable visitor outcomes rather than outputs.

Output: The material products, programs, or other media of a program, exhibit, or project. Measurable, observable results that can be counted as numbers or dollars; direct products of activities measured in units.

Performance Measure: A benchmark or specific performance target used to determine the degree to which an outcome is successful. (See Indicator.)

Remedial Evaluation: The assessment of how all individual parts of an exhibition or interpretive project work together as a whole in order to improve the impact on visitors.

Rubric: Specific criteria or guideline used to evaluate learner outcomes.

Summative Evaluation: Conducted after an interpretative media, program, or exhibition is completed and provides information about the impact of that project. It can be as simple as a head count of program attendance or as complex as a study of what individuals learned; what is assessed should be tied to project goals and objectives.

Visitor Studies: The interdisciplinary study of human experiences within informal learning environments. The systematic collection and analysis of information or data to inform decisions about interpretive exhibits and programs.

- Visitor studies follow rigorous research methods that adhere to the standards of the social sciences.
- Visitor studies draw from and contribute to the theory and practice of social science.
- Visitor studies are designed to improve the practices of learning in informal environments.