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Interpretive Skills
Training Product

AIMING FOR EXCELLENCE

An Evaluation Handbook for
Interpretive Services in
California State Parks



Aiming for Excellence

An Evaluation Handbook for Interpretive Services in California State Parks

Prepared by
Linda L. McDonald

Illustrated by
James A. Maddox

Revised and designed by
Jenan Saunders

Cover designed by
Gail Dudding



California State Parks
Interpretation and Education Division
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For more information or additional copies contact:

California State Parks
Interpretation and Education Division
PO Box 942896
Sacramento CA 94296-0001
Phone: (916) 654-2249, Calnet 454-2249
Fax: (916) 654-9048, Calnet 454-9048
TTY relay service: 711
interp@parks.ca.gov

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Foreword

Our Mission

To provide for the health, inspiration and education of the people of California by helping to preserve the state's extraordinary biological diversity, protecting its most valued natural and cultural resources, and creating opportunities for high-quality outdoor recreation.

Certain memories are lifetime treasures—a compelling story told at a campfire program; the discovery of nature's secrets during a guided walk; the time travel of participating in a living history program. These and other interpretive services bring parks to life in the hearts and minds of our visitors. Our department's interpretive offerings can mean the difference between a superficial visit and an inspirational, perhaps unforgettable experience.

Our department serves approximately 85 million visitors each year. In fiscal year 02/03, these visitors participated in 11.5 million hours of interpretive programming, including over 830,000 hours of programs especially for school-age children. Some of our over 10,000 volunteers conducted close to 125,000 hours of these interpretive programs.

This level of interaction with the people of California deserves careful attention. We must hire qualified interpretive staff, offer top-notch training, and provide consistent coaching and evaluation.

I congratulate the staff of the Interpretation and Education Division for completing the award-winning *Aiming for Excellence: A Handbook for Evaluating Interpretive Services in California State Parks*. This handbook is filled with good suggestions for effectively evaluating interpretive services. I support the policies and concepts presented here and encourage each district to move ahead with implementation.

As we move further into the 21st Century, we can be proud to know that in serving the public through our interpretive services, we truly are *Aiming for Excellence*.



Ruth Coleman
Director, California State Parks

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Karen Barrett	State Park Interpreter II, Interpretation Section
Karen Beery	Guide Supervisor, Hearst San Simeon State Historical Monument
Wes Chapin	District Interpretive Specialist, Channel Coast District
Jeanne Ekstrom	Guide Supervisor, California State Capitol Museum
Steve Feazel	State Park Superintendent II, Northern Buttes District
Dave Gould	State Park Superintendent II, Four Rivers District
Elizabeth Hammack	State Park Interpreter I, Santa Cruz District
Bruce Kennedy	Senior Park and Recreation Specialist, Park Services Division
Tom Lindberg	District Interpretive Specialist, Marin District
Pat Morris	Editorial Assistant, Museum Services Section
John Mott	Regional Interpretive Specialist, Interpretation Section
Scott Nakaji	Training Specialist, Learning and Performance Support
Carol Nelson	State Park Superintendent III, Office of Community Involvement
Donna Pozzi	Chief of Interpretation, Park Services Division
Broc Stenman	Training Officer III, Learning and Performance Support
Mary Veliquette	Associate Government Program Analyst, Strategic Planning and Performance Analysis Section
Tom Ward	Staff Services Manager II, Strategic Planning and Performance Analysis Section
John Werminski	State Park Interpreter II, Interpretation Section
Dan Westfall	Associate Government Program Analyst, Strategic Planning and Performance Analysis Section
Pete Williams	Assistant Director for Total Quality Management

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* *Classifications and divisions are not current, but rather reflect the positions these individuals held at the time they made their contributions to this handbook.*

Introduction

Interpretation is a voyage of discovery in the field of human emotions and intellectual growth, and it is hard to foresee that time when the interpreter can confidently say, "Now we are wholly adequate to our task."

—Freeman Tilden



This handbook is an outgrowth of the department's core program of education and interpretation. It provides statewide measures and measurement tools that allow our department to assess the quality of our educational and interpretive services. The handbook provides evaluation tools for District Interpretive Specialists, Chief Rangers, interpretive improvement team members, Volunteer Program Coordinators and other leads and supervisors. Ideally, this handbook will facilitate qualitative improvements in interpretive services for the benefit of all visitors.

Interpretive services in California State Parks play a key role in the organization's mission—inspiring and educating the people of California and creating opportunities for high-quality outdoor recreation. Measurement of the success of that mission is critical to maintaining support for interpretive services. It is imperative, therefore, that evaluations take place in a systematic and consistent way.

This handbook consists of four main parts:

- **District Guidelines** gives specific guidelines for district evaluation planning and improvement, including Departmental policies and requirements.
- **Evaluation Methods** explains several current evaluation methods, offering advantages and disadvantages, samples and references.
- **Appendices** supply background material on data gathering principles, performance appraisals, and resource people.
- **Bibliography** lists references used in preparing *Aiming for Excellence*.

Measuring the quality of interpretive services raises many questions, among them:

- Is it possible to measure quality objectively?
- Whose perspective on the quality of a program is most important—the supervisor’s, the visitor’s or an “expert’s”?
- How do you account for visitors’ individual opinions, tastes and special needs?

In theory, a combination of perspectives and a variety of evaluation methods are more likely to provide balanced, reliable data about the quality of interpretive programs. A supervisor may not see a program from the point of view of a visitor and a visitor may not understand the Department’s mission and how interpretive programs support that mission.

Interpretation is an art form. At its best it is inspirational, transformational communication. We cannot measure the quality of a visitor’s inspirational experience, but we can evaluate the elements of good interpretive programs. As a public agency we must make the effort to find meaningful measures of quality. Finding the measures is only the first step to gathering information and in turn using it to develop, test and implement improvements.

The goal of evaluation is to facilitate continuous improvement. Each evaluation method presented in this handbook results in a type of data with its own unique application. Data may show an individual interpreter that improvement is needed in subject research, visitor involvement or speech techniques, for example. Other methods provide data that can be used to identify needs within the entire park such as further training, new exhibits or revised interpretive themes. Thus, evaluation data can be used to address an element of a park’s interpretive services or an entire district’s interpretation program.

***Aiming for Excellence* uses the following definitions:**

Interpretive services encompass the complete interpretive offerings that a visitor might encounter in relation to an individual park. They include live interpretive programs and interpretive facilities, as well as interpretive signs, publications, Web sites, orientation information, audio-visual programs and more.

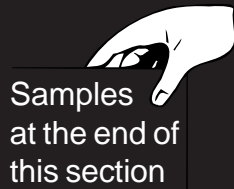
Live interpretive activities provide direct interaction between an interpreter or other staff and the park visitor. Interpreter-led activities can include walks, tours, talks, demonstrations, campfire programs, dramatic presentations, Junior Ranger programs, puppet shows, living history programs, environmental living programs, touch tables, outreach programs and other activities. These personal services are effective interpretive media because they allow visitors to participate and interact, permitting immediate responses to what is actually occurring at a given moment and place.

Interpretive facilities include indoor or outdoor/wayside exhibits, visitor/interpretive centers, museums, house museums, self-

guided trails, audio-visual facilities, amphitheaters/campfire areas and historic structures.

Interpretive staff includes, but is not limited to, any full-time permanent, seasonal or volunteer staff member who conducts interpretive programs as part of their regular job duties.

What does this mean?



The “Samples at the end of this section” icon indicates that printed examples of material related to that section are included at the end of the section. For those with the binder version of this publication (available only to California State Parks personnel), original samples are provided in sheet protectors after the Bibliography.

Our Evaluation Policy

Evaluation is creation: hear it, you creators! Evaluating is itself the most valuable treasure of all that we value. It is only through evaluation that value exists: and without evaluation the nut of existence would be hollow. Hear it, you creators!

—Friedrich Nietzsche



Evaluation of interpretive services provides immediate and long-term benefits for visitors, employees and ultimately for the preservation of park resources. To that end, districts must plan their evaluation strategy to produce and maintain high quality programs.

The implementation of the policy below (which was made official policy through Departmental Notice 2003-10) should be viewed as a step-by-step, phased-in process. Each district is responsible for moving in the direction of policy compliance.

Policy On Interpretive Evaluations

Interpretive services shall be monitored and evaluated on a regular basis to maintain high quality and to gather data for continuous improvement. Interpretive services encompass the complete interpretive offerings that a visitor might encounter in an individual park. They include live interpretive programs and interpretive facilities, as

well as interpretive signs, publications, orientation information, audio-visual programs and more.

Specifically, these requirements are as follows:

- I. Each district will develop a consistent plan for evaluating its interpretive staff, programs and facilities.
- II. Data on the number of interpretive staff evaluated will be included in the District Performance Contract.
- III. All interpretive staff who present interpretive programs will have their program(s) evaluated a minimum of twice per year, including a minimum of one evaluation by an interpretive coordinator, lead person or supervisor using the Standard Evaluation DPR 461 form. Additional evaluations may be conducted using a variety of appropriate techniques.

- A. Interpretive staff includes, but is not limited to, any full-time permanent, seasonal or volunteer staff member who conducts interpretive programs as part of his or her regular duties. Districts should allocate evaluation time in proportion to the categories of interpretive staff who are actually conducting live programs. For example, if a district's programs are conducted by 5 percent permanent, 25 percent seasonal and 70 percent volunteers, evaluation time should be guided by the same general percentages. In this example, volunteer interpreters would receive a majority of the evaluations. This guideline is not meant to require detailed calculations in order to determine percentages. The raw data to guide these allocations of evaluation time is readily available in the DPR 918, Semi-annual Interpretive Summary.

State of California - The Resources Agency DEPARTMENT OF PARKS AND RECREATION		MANUAL
DEPARTMENTAL NOTICE		Operations
SUBJECT		CHAPTER
Evaluating Interpretive Programs		0900 Park Interpretation
ISSUED	EXPIRES	REFERENCE
July 17, 2003	When Incorporated	DOM 0900

DPR 375 (Rev. 10/2001)(Word 6/4/2002)

WHEN APPLICABLE, ENTER THE NUMBER AND DATE OF THIS DEPARTMENTAL NOTICE IN THE MARGIN OF THE MANUAL PAGE, ADJACENT TO THE SECTION(S) AFFECTED BY IT.

This Departmental Notice has been re-created for transmittal in electronic format. The original notice was signed by William Berry, Deputy Director, Park Operations.

This notice establishes policies governing the evaluation of interpretive services provided by the Department.

The Department has produced, and incorporates herein by reference, a manual on effectively evaluating interpretive programs, entitled *Aiming for Excellence: An Evaluation Handbook for Interpretive Services in California State Parks*. This manual, which underwent extensive review and policy approval when it was created in 2000, presents information on a wide variety of evaluation methods for interpretive services and programs.

The following are statements of departmental policy with regard to the evaluation of interpretive services, as put forth in *Aiming for Excellence*. Interpretive services shall be monitored and evaluated on a regular basis to maintain high quality and to gather data for continuous improvement. Specifically:

- I. Each district will develop a consistent plan for evaluating its interpretive staff, programs and facilities.
- II. Data on the number of interpretive staff evaluated will be included in the District Performance Contract.
- III. All interpretive staff who present interpretive programs will have their program(s) evaluated a minimum of twice per year, including a minimum of one evaluation by an interpretive coordinator, lead person or supervisor using the Standard RAPPORT Evaluation (DPR 461) form. Additional evaluations may be conducted using a variety of appropriate techniques.
 - A. Interpretive staff includes, but is not limited to, any full-time permanent, seasonal or volunteer staff member who conducts interpretive programs as part of his or her regular duties.
 - B. Districts should allocate evaluation time in proportion to the categories of interpretive staff who are actually conducting live programs. For example, if a district's programs are conducted by 5% permanent, 25% seasonal and 70% volunteer, evaluation time should be guided by the same general percentages. In this example, volunteer interpreters would receive a majority of the

evaluations. This guideline is not meant to require detailed calculations in order to determine percentages. The raw data to guide these allocations of evaluation time is readily available in the DPR 918, Semi-Annual Interpretive Summary.

To assist in meeting these evaluation requirements, three versions of an evaluation form for interpretive services have been developed and are incorporated into this notice as Exhibit A:

1. Standard RAPPORT Evaluation (DPR 461)
2. Visitor RAPPORT Survey (DPR 461A)
3. Self-Evaluation of Interpretive Program (DPR 461D)

All of these forms utilize the acronym RAPPORT to delineate the pertinent issues to be evaluated in any interpretive program. The acronym stands for:

Relevant
Accurate
Provocative/Enjoyable
Programmatically Accessible
Organized
Retained
Theme

A process for district reporting of evaluations conducted each year (in addition to the requirement that such information be included in the District Performance Contract as referenced above) will be outlined in a future notice.

The warehouse maintains copies of each of the DPR 461 forms. The DPR 461A form must be ordered from the warehouse because it is distributed on card stock for ease of visitor completion. Electronic versions of the DPR 461 and DPR 461D forms are available on the departmental intranet and on the LAN/WAN or can be requested from the Interpretation and Education Division, (916) 654-2249. *Aiming for Excellence* can be found on the state parks website, through the Adventures in Learning link from the home page; or, to receive a copy of *Aiming for Excellence*, contact the Interpretation and Education Division, (916) 654-2249.

Bill Berry
Chief
Park Operations Division

Attachments

District Interpretive Improvement Team

Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed it is the only thing that ever has.
—Margaret Mead



It is recommended that each district form a District Interpretive Improvement Team (DIIT). A DIIT is a standing team whose primary role is to facilitate the ongoing improvement of the district's entire interpretive program. The interpretive program includes not only guided and self-guided programs but also exhibits, publications, facilities, special events and training.

Team Makeup

The DIIT functions under the direction of the district superintendent and typically consists of the District Interpretive Coordinator, supervisors of the visitor services program and representatives from other district services. The superintendent should approve membership on the DIIT. Normally the District Interpretive Coordinator serves as the team's chair. Docents and seasonal interpreters may also participate, offering their experience in day-to-day operation of the interpretive programs. To best benefit the function of the DIIT, inclusion of persons who represent user groups should be considered, i.e., inclusion of person with a disability would tend to benefit programmatic accessibility. If appropriate, a DIIT may have temporary members or create a task team to accomplish specific objectives.

Broad-based representation on the DIIT is essential for a number of reasons. It recognizes the unique perspectives and skills that each participant brings to the team's effort. It promotes teamwork and communication among the various programs in the district. It fosters the use of interpretation and interpretive tools to help achieve the outcomes of all the district's core programs. Finally, it facilitates and encourages the team members to view the goals of interpretation, maintenance, public safety, administration and resource protection in their larger context of accomplishing the department's mission.

A DIIT may choose an alternate name that is more specific to the programs of the district or that better serves to express the purpose of the team.

Number of DIITs

A district may have one or more DIITs depending on the size of the district, the proximity of the units within the district and the scope and complexity of the district's interpretive services. In those cases where more than one DIIT is created, attention should be paid to ensure that the work of each DIIT folds into and moves the overall district interpretive services improvement effort forward in a coordinated way.

Role of DIIT

Communication between the DIIT and the District Management Team and between the DIIT and the field is essential. The DIIT's role is not to accomplish specific improvements in the interpretive program. Rather it is to assist program supervisors who have the primary responsibility for accomplishing improvements. It does this by analyzing the

current status of the interpretive program, developing recommendations for improvement, coordinating measurement of the effectiveness of improvement actions, facilitating the standardization of successful improvements, and coordinating the development of future improvement plans in a cycle of continuous improvement.

Assessment

One of the DIIT's first tasks is to formulate a plan to assess the current level of success in achieving the interpretive outcome. Once this plan is approved, the DIIT works with field supervisors to accomplish the evaluation. Because a district's interpretive programs may be seasonal in nature, it will likely require at least a year to evaluate all of the district's interpretive services. However, in these cases, it should be possible for the DIIT to prepare an evaluation of the on-season program or the off-season program within six months of its creation. Based on this assessment, the team develops an improvement plan. The approved plan is then implemented by the field. The DIIT monitors the effect of the changes and prepares a report summarizing the results. This report forms the basis for the next round of improvements.

Frequency of Meetings

How often a DIIT should meet is best left to individual districts and local circumstances to determine. Meeting times could vary from once a month to every six months, depending on the current state of interpretive services within the district.

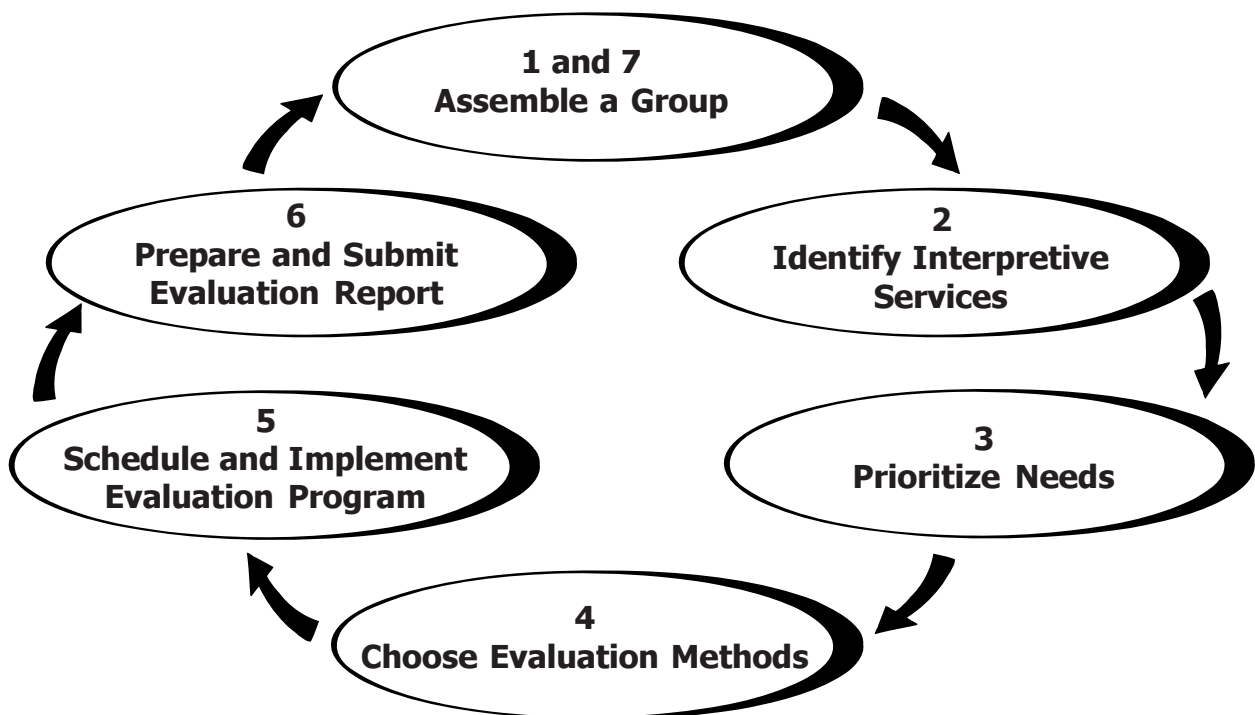
See Team Evaluation section for more information about improvement teams.

Evaluation Planning

It is the greatest of mistakes to do nothing because you can only do a little. Do what you can.

–Sydney Smith

The following is a model for a cycle of continuous improvement. This model is designed for use by a District Interpretive Improvement Team (DIIT) or a group of evaluation planners.



Step 1. Assemble a group of people to develop the evaluation plan. If the district has a District Interpretive Improvement Team (DIIT), that team would most likely include evaluation planning as a part of its process. Staff from a variety of program areas, such as maintenance, public safety, administration, interpretation and the volunteer program should be included to provide a broad perspective. Leads and supervisors of interpretive programs should play a major role in the group process. It may be helpful to become familiar with the Team Evaluation section of this handbook early in the planning process.

Step 2. Identify interpretive services offered to visitors at each park within the district. This information is available from the DPR 918 Semi-annual Interpretive Summary. More in-depth information may be gathered using the National Park Service's Self-

Critique method identified in the Team Evaluation section. Include the following, if applicable: campfire programs; guided tours and hikes; talks and demonstrations; audio-visual programs; Junior Rangers; Junior Lifeguards; school programs; environmental living/studies; living history programs; visitor centers/museums; information stations; self-guided tours/trails; interpretive special events; exhibits; house museums; historic structures; publications; Web sites.

Step 3. Prioritize need for improvement.

The evaluation methods presented in this handbook can be used to prioritize improvement needs. The Statewide Visitor Satisfaction Survey (see page 37) is a valuable data source to assess visitors' perceptions of park interpretive programs. Each district has the ability to use the survey to gather specific data and assess priorities based upon their own customers' needs. Additionally, a simple response card survey may help to identify priorities by focusing on the visitor's needs (see sample in Learning and Behavior section).

Legal considerations, such as compliance with the Americans with Disabilities Act, and other district priorities, such as critical resource protection, must also be incorporated in the planning process.

Step 4. Choose the appropriate evaluation method(s). The methods should be appropriate for the type of interpretive service, the outcomes the group is interested in measuring, the resources available, and the usefulness and acceptability of the data for field staff. After identifying the interpretive programs to be evaluated, the evaluation planner(s) should become familiar with each method presented in *Aiming for Excellence*

and choose the appropriate option. The methods are:

- Visitor Evaluation
- Supervisor Evaluation
- Expert Evaluation
- Peer Evaluation
- Self-Evaluation
- Team Evaluation

A familiarity with data gathering principles is very beneficial in planning certain evaluations. See Appendix A for more information about how to achieve reliable data using sampling, random selection and other methods.

Step 5. Schedule and implement the evaluation program. Once a plan is developed, each person who will be participating in the evaluations should be informed. This includes leads and supervisors, interpretive staff (full-time permanent, seasonal and volunteer) and other participants who might be involved in various evaluation projects. Advanced scheduling demonstrates good planning and preparation. It also helps staff make evaluation a priority.

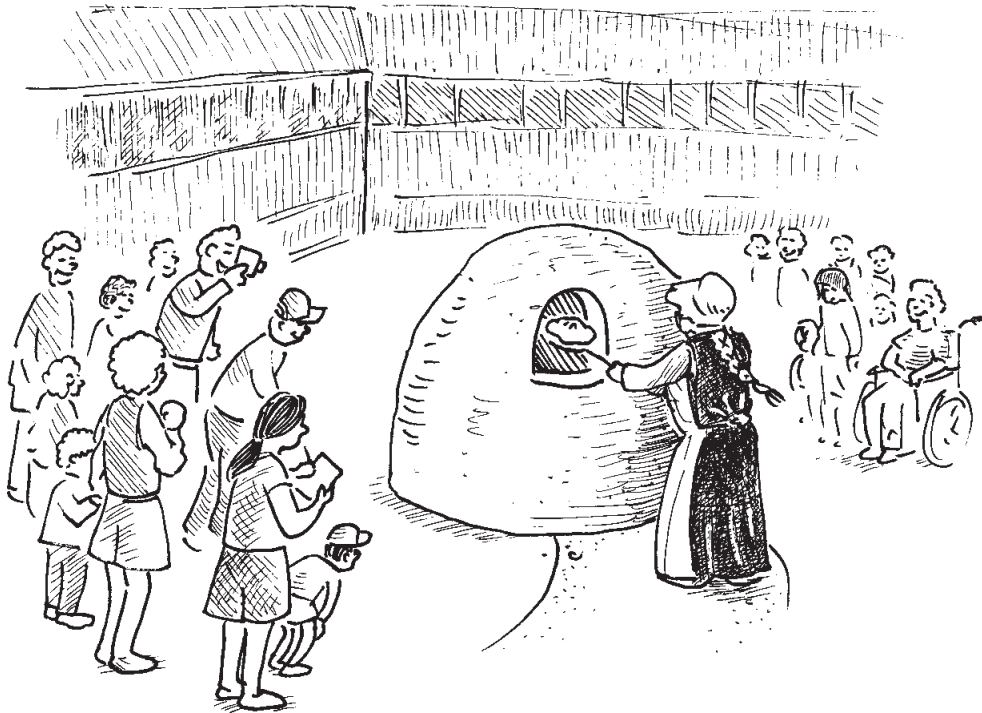
Step 6. Prepare and submit an evaluation report. This report briefly summarizes the recommendations of the evaluation team, highlighting significant data, analysis and improvements that were implemented. An improvement team report may be in a format similar to the outline in the Team Evaluation section.

Step 7. Assemble group every year to assess and revise the evaluation plan for the district. If a District Interpretive Improvement Team chooses to measure performance twice annually, it may be appropriate to address the evaluation program at each interval.

Docent Evaluation

If you want to move people, it has to be toward a vision that is positive for them, that taps important values, that gets them something they desire, and it has to be presented in a compelling way that they feel inspired to follow.

—Dr. Martin Luther King, Jr.



Docents are highly trained volunteers who interpret for park visitors. One of the most rewarding and challenging aspects of being a docent is the opportunity for ongoing education. People enrolling in docent programs embark upon a rigorous course of study and training that provides a strong foundation of expertise for interpreting the varied resources of a particular park unit.

Periodic assessments and reviews of performance provide vital two-way communication between docents and their program leaders and supervisors. Frequent, informal evaluations furnish docents with feedback on their work. Program leaders should conduct informal interviews with new docents after the first four to six weeks. These interviews can identify strengths and weaknesses of the volunteer training program. Copies of any written evaluations should be given to the docent, as well as kept on file.

Many of the evaluation methods in this handbook are appropriate for use in evaluating a docent's interpretive presentations. These evaluations may be performed by peers, experts, and/or lead persons. There is an important distinction between evaluations of

a docent's presentations and their formal performance appraisal, which must be conducted by a supervisor.

POLICY NOTE
Designated Supervisor Role

While nonsupervisory staff may provide most of the actual day-to-day oversight of a volunteer program, a few supervisory-specific jobs, such as hiring, firing, and providing **formal** performance appraisals, must be accomplished by a designated supervisor.¹

It is also important for docents and other volunteers to evaluate the Volunteers in Parks Program and aspects of the park's interpretive programs. They have unique insights and can often provide important input into improvement efforts. These evaluations can occur informally (for example, a suggestion box) or formally (such as an exit interview, improvement team involvement or survey).

References

1. *Volunteers in Parks: Program Guidelines* (Sacramento: California State Parks).

Accessibility

*Accessibility pertains not only to buildings and programs but also to **attitudes** of tolerance and sensitivity as well.*

–Anonymous



The policy of California State Parks is to meet the recreational needs of all visitors and to provide an accessible environment within state parks. In addition to having good physical access, parks should offer information and interpretive programs using a variety of sensory and communications media.

In 1990 the Americans with Disabilities Act (ADA) became law. It requires that people with disabilities be allowed to participate in regular programs and that they cannot be discriminated against or treated separately because of their disability. In compliance with this law, parks may not refuse to allow a person to participate in a service, program or activity simply because the individual has a disability. Programs and services must be in an integrated setting, unless separate or different measures are necessary to ensure equal opportunity. If a separate program is offered, individuals may still choose to participate in the standard program.

Parks must furnish auxiliary aids and services, when necessary, to ensure effective communication, unless it would result in an undue burden or a fundamental alteration of the facility or program. Compliance with ADA can benefit California State Parks by encouraging exciting new programs that will increase visitor attendance, satisfaction and participation for all. Throughout this handbook, accessibility issues have been addressed in the methods for evaluating interpretive services.

California State Parks' publications *All Visitors Welcome* and *Access to Parks Guidelines* contain recommendations for accessibility in interpretive programs. *All Visitors Welcome*, reprinted in 2003, provides detailed background information on disabilities, including hidden disabilities and the needs of older adults and visitors with limited English proficiency. It also gives specific recommendations for a variety of interpretive services and how to make them accessible. In addition, the book provides resources for products, services and organizations that are available to assist with ADA compliance.

References

Access to Parks Guidelines (Sacramento: California State Parks, 2001).

All Visitors Welcome: Accessibility in State Park Interpretive Programs and Facilities, second edition (Sacramento: California State Parks, 1998).

John P. S. Salmen, *Everyone's Welcome: The Americans with Disabilities Act and Museums* (Washington, D.C.: American Association for Museums, 1998).

Keep in Mind . . .

Many of the features that make a space accessible for people with disabilities also make it easier and more convenient for everyone else. A person does not have to be disabled to benefit from access.

District Performance Contract

It is an immutable law in business that words are words, explanations are explanations, promises are promises –but only performance is reality.
–Harold S. Geneen

Although under California State Parks' current performance management system districts are no longer required to submit an annual performance contract, the information in this section may still be valuable to districts in setting goals and assessing achievement.

It is important that district interpretive staff provide leadership in the development of the educational and interpretive goals and objectives. Staff can assist in developing activities for the upcoming year, which will result in improvement or maintenance of performance.

With established goals and objectives, districts can measure basic outputs and processes that will lead to results. For example, many of the evaluation techniques covered in this publication can be monitored over time. When improvements are made at this level, there will ultimately be positive change to the outcomes. The examples that follow demonstrate how the format of the district contract might be used for this purpose.

Core Program Area 2

Outcome 2.1

Education/Interpretation

Public understands the significance and value of the state's natural and cultural resources through education, interpretation and leadership.

Supporting Education/Interpretation Activities

List planned activities that will affect the district's contribution to the outcome of Education/Interpretation.

Supporting Education/Interpretation Activities	Responsible Person
<i>(Examples)</i> 1. Redesign exhibit at _____ SHP to reflect current theme. 2. Conduct ADA training for all interpretive staff by _____. 3. Update and reprint Teachers Guide at _____ SP. 4. Evaluate 100% of new docents in 2000.	

Statewide Measures

These are statewide outcome measures for education/interpretation. Each district calculates its target performance for each measure.

Measure		Past Performance Level	District Target	Actual Performance
2.1A	Customer’s perception of the quality of interpretive programs			
	Public’s perception of the opportunities offered to help learn about the area’s history and natural environment			
2.1B	Participant hours of presented interpretive programs			
	Participant hours of self-guided interpretive programs			
2.1C	Congruity level of education curricula for K-12 students			
2.1D	Participant hours of educational programs for K-12 students			

Sample District Measures

List any additional measures that link to the outcome of education/interpretation. Each district may draft their own measures. The following are suggestions based on *The Measurement Chain* section.

Measure		Past Performance Level	District Target	Actual Performance
2.1F	Percentage of full-time interpretive staff evaluated			
	Percentage of seasonal interpretive staff evaluated			
	Percentage of docents evaluated			
	Percentage of full-time interpretive staff who received training			
	Percentage of seasonal interpretive staff who received training			
	Percentage of docents who received training			

The Measurement Chain

All successful men have agreed in one thing—they were causationists. They believed that things went not by luck, but by law; that there was not a weak or a cracked link in the chain that joins the first and last of things.
—Ralph Waldo Emerson

The measurement chain illustrates how outcomes relate to an interconnected series of resources and processes and the amount of work accomplished. The outcomes for Education/Interpretation measurement are identified in the right-hand column of the model below, along with the applicable data sources, which are underlined in parentheses.

The measurement chain is especially useful when it is difficult to understand the connection between the things we do and the ultimate results. Inputs, processes and outputs can often be measured in more tangible terms. By focusing improvement efforts on the inputs, processes and outputs, it is logical that those improvements will ultimately improve the outcomes.

Inputs Resources consumed by the system	Processes Steps to produce output	Outputs Amount of work done	Outcomes Results
Staff (number of interpreters)	Training of full-time, seasonal and volunteer interpreters	Number of programs presented (CAMP)	Visitor satisfaction (Statewide Visitor Satisfaction Survey)
Staff time for interpretive activities	Evaluation of interpreters, facilities and services	Presenter hours (CAMP)	Participant hours (CAMP)
Hours of training	Strategic planning	Training by state parks staff	Congruity with curricula (School Group Program Evaluation)
Equipment and materials	Improvement teams	Publications	Transfer of training (post-training evaluation)
Budget (dollars)	Program planning and development		

References

James E. Swiss, *Public Management Systems, Monitoring and Managing Government Performance* (Upper Saddle River, NJ: Prentiss-Hall, Inc., 1991).

District Reporting

*Report me and my cause aright.
–Hamlet in William Shakespeare's "Hamlet"*



Interpretive Activity Summary (previously DPR 918 – Semi-annual interpretive Summary)

The Interpretive Activity Summary is a web-based application tool for measurement of the quantity and type of participation in various interpretive programs being conducted in each park unit.

District Interpretive Coordinators ensure that the information from each unit within their district has been entered into CAMP. This information will help with their own planning needs and to supply information for district management.

The department has developed this web-based application, utilizing the MAXIMO database, to capture participation data that allows for real time entry of interpretive activity information and access to generated reports. For more information about this new system, contact the Interpretation and Education Division at (916) 654-2249.

Interpretive Staff Portfolios

*People are entitled to joy in their work and a sense of ownership.
–Dr. W. Edwards Demming*

A “portfolio” is a compilation of materials about or by an individual relating to all aspects of his/her growth as an interpreter. Each park interpreter, whether permanent, seasonal or volunteer, will have a variety of opportunities for training, evaluation and improvements. Records of each experience may be collected in a portfolio.

A supervisor or lead person may introduce the concept of portfolios during training and encourage new interpreters or docents to begin using them. The interpreter should be responsible for maintaining his/her own portfolio. Folders and other supplies that will enhance a portfolio should be provided by the park staff.

An interpreter’s portfolio or file might include preparatory work such as outlines or note cards, records of training sessions, observations by the interpretive coordinator, duty statements, notes from meetings, an interpreter’s “journal,” self-evaluations, peer evaluations, tests, videos of the interpreter “in action,” written evaluations from the supervisor or from tour groups, thank you notes from visitors and more.

For paid employees of California State Parks, a copy of an Annual Development Plan should also be included in the interpreter’s portfolio (see Appendix B: Performance Appraisals). An interpreter may find a portfolio useful in working with his/her supervisor to identify training and development needs and to set goals on an annual basis.

References

Betsy Gough-DiJulio, “Portfolios Offer a Better Perspective,” *The Docent Educator* (Summer 1997).

Visitor Evaluation

*Customers are treasure; goods are but straw.
–Chinese proverb*



Visitors are the principal customers of interpretive programs. While there are other customers, park visitors' opinions provide important information on program effectiveness. Visitor evaluations help park managers and interpretive program leaders answer the following questions:

- Do visitors enjoy our programs?
- Do our programs contribute to the formal education of school children?
- Are the primary interpretive themes of the park being addressed through our programs?
- Do our programs effectively inspire attitudes and behaviors that help preserve park resources, promote safety and increase appreciation for the park?
- Does the visitor receive information and orientation needed to fully appreciate the park?

- Do visitors with disabilities receive equal access to our programs, facilities and communications?
- Are there sufficient programs available for park visitors?
- What types of programs would be best received by visitors?

- How can we change our current offerings to better meet visitor needs?

Certain methods of visitor evaluation are designed to obtain certain types of data that answers questions like those above. To choose the most appropriate method, evaluators should first list the questions they have and find a method that matches their needs.

Simple Techniques

Simplicity is an acquired taste. Mankind, left free, instinctively complicates life.

–Katharine Fullerton Gerould

The following matrix gives suggestions for a variety of techniques that may require less planning time than the more formal methods presented in other sections of this handbook. The data you gather using most of these techniques will only reflect the opinions of visitors who are willing to participate. (See Appendix A: Data-Gathering Principles for recommendations on sampling.)

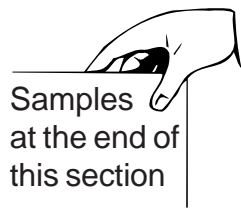
Evaluation Technique	Description	Pros	Cons	Comments
Direct Audience Feedback	Interpreter analyzes visitors' responses in face-to-face settings during the presentation.	Allows for immediate analysis of visitors' reactions. The interpreter can change his/her approach on the spot to elicit a better response.	Technique is subjective since the interpreter must "interpret" the visitors' reactions.	The number of questions asked, facial expressions, restlessness, etc., are often good indicators of enjoyment, boredom, etc.
Auditing by an Expert	Have an experienced interpreter watch and critique an interpretive presentation.	Allows for the input of an experienced professional.	The expert judges how he/she thinks a presentation will affect a visitor. (This is subjective.)	Where live presentations cannot be evaluated on site, video tapes can be used.
Direct Measures of Behavior	Determine what interpretive service options visitors take when given a choice (e.g., hike vs. movie).	Allows for determination of which services are most preferred.	Can determine <u>what</u> services visitors prefer but not <u>why</u> .	Usually determined by head counts, ticket stubs, etc. Additional techniques could be used to determine why visitors had certain preferences.

Evaluation Technique	Description	Pros	Cons	Comments
Observation of Audience Attention	Plant scanners in the audience to watch and document how many people are focusing their eyes on the interpreter.	Allows for the determination of visitor responses during a presentation.	Assumes that watching the interpreter is synonymous with interest, understanding, enjoyment, etc.	Scanners should be trained in what to look for and how to be inconspicuous.
Length of Viewing or Listening Time	Compare the amount of time people look at or listen to a presentation with the amount of time it would take to completely read or hear it.	Allows for the determination of whether or not people are spending enough time with an exhibit, sign, etc. to absorb the entire message.	Cannot determine visitor enjoyment, understanding, or interest. Thus, no judgment can be made as to whether or not the message is too long.	Studies show visitors look at displays only 15 to 64 percent of the time required to read or listen to the total message. The longer the printed message, the shorter the viewing time.
Self-Testing Devices	Mechanical devices are operated by visitors to answer questions or uncover more interpretive information.	Allows for active participation. A “fun” evaluation technique from the visitors’ point of view.	Subject to mechanical breakdowns and vandalism. Often monopolized by children.	May be adapted for use on a web site.

Evaluation Technique	Description	Pros	Cons	Comments
Interviews and Informal Groups	An orally administered survey of visitors to determine demographic and experiential data.	A great deal of visitor information can be obtained using well-designed questions. Many people are more willing to communicate orally than in writing.	Questions must be designed objectively to avoid bias. They can be time consuming to design, administer and evaluate.	Interviewers should be sensitive to how they may impact the visitor's experience.
Suggestion Box	A locked box where visitors can drop any comments or suggestions.	Anonymity and very simple implementation.	Usually comments are biased towards a positive or negative extreme.	Boxes can be decorated to reflect the site's resources.

References

John A. Veverka, *Interpretive Master Planning* (Helena, MT: Falcon Press, 1994).



Samples
at the end of
this section

Learning and Behavior

Do not try to satisfy your vanity by teaching a great many things. Awaken people's curiosity. It is enough to open minds; do not overload them. Put there just a spark. If there is some good inflammable stuff, it will catch fire.

—Anatole France



Evaluation tools serve a variety of purposes. Some measure visitor satisfaction and enjoyment. Others measure an interpreter's presentation skills and interpretive techniques. Measuring learning and behavior ensures that programs are effective in meeting their performance objectives.

Performance Objectives

Performance objectives are the foundation of interpretive planning. Interpreters must ask themselves, "What should visitors know and understand after they have participated in this program?" and "How will visitors' attitudes and behavior change as a result of this interpretive experience?" Once performance objectives are identified and used to prepare an interpretive program, the evaluation of learning and behavior helps determine if they were actually achieved.

A performance objective states what visitors should be able to do as a result of the interpretive service and what percentage of them should be able to do it. Clearly stated objectives guide and direct the preparation of an interpretive activity, the design of an exhibit or the production of a brochure. They guide the preparation of evaluation questions. Performance objectives should be identified in quantifiable terms. The following are examples of performance objectives for learning and behavior:

Learning

At least ___% of the participants will be able to identify specified facts or ideas that were presented by the interpretive service.

Behavior

At least ___% of participants will engage in (or not engage in) specific behavior(s) after experiencing the interpretive service.

Response Cards

Response cards are a simple method for evaluating the effectiveness of interpretive programs. They are designed to measure how well the program meets performance objectives.

Response cards are commonly printed on cardstock to allow for easy writing in case there is no convenient writing surface available. They are usually 5½" x 8½" (half of a letter-sized sheet). This size provides space for brief, concise questions that visitors feel comfortable completing.

Some visitors may feel intimidated if questions are too detailed or complex. It may also be helpful to offer low-cost, park-related giveaways such as postcards, posters or rulers as a thank you to visitors for filling out

the response card. Such giveaways may be supplied by a contribution from the park's cooperating association or another donor.

The questions on a response card should address the themes and interrelationships that were presented in the program. Questions may also focus on the department's mission or on such "big picture" topics as biodiversity or the significance of park resources.

The following is a list of various question types with corresponding examples:

Matching

Match each animal below with its primary food source.

pelican	shellfish
otter	microscopic organisms
sea anemone	fish

Best Answer

Choose the best answer to the following question:

How does fire benefit the forest?
A. It allows new seeds to sprout.
B. It destroys old trees.
C. It clears undergrowth.
D. Both A and C.

Greater-Less-Same

For each pair, write in the correct symbol: > (greater than), < (less than), = (equal).

Height of the tallest living redwood ___ 369 feet
Lifespan of a redwood tree ___ 500 years
Size of a redwood cone ___ size of a baseball

Scale of Understanding

Rate your understanding of the following (circle number): 1 = none, 2 = very little, 3 = some, 4 = good, 5 = expert

The weather pattern of the Mojave Desert

1 2 3 4 5

Threats to the desert tortoise

1 2 3 4 5

Geological history of Red Rock Canyon

1 2 3 4 5

Native Americans in the Mojave Desert

1 2 3 4 5

Question and Short Answer

Please give a short answer to the following questions:

What is the term for animals that are most active at night?

Raptors, such as the red-tailed hawk, most commonly prey on what animals?

At what time(s) of day are mountain lions most likely to hunt?

Statement and Comment

Please comment on the following statement:

Some people believe that mountain lions pose a threat to human safety in rural areas. Based on what you learned in today's program, what is your opinion?

Rank Order

Number the following events in order of their occurrence in California history:

_____ John Sutter built his fort

_____ Monterey was established as the capital of Spanish California

_____ John Bidwell came to California on a wagon train

_____ James Marshall discovered gold in the American River

_____ California was admitted to the United States

Sentence Completion

Please complete the following sentence:

Chaparral is often referred to as a "miniature forest" because . . .

After developing appropriate questions, a response card can be prepared for distribu-

tion. The response card should be simple, clear and uncluttered. The more appealing it is, the more likely useful information will be collected. Cards should be passed out in an area where writing is facilitated and where it will be easy for the visitor to return their response to a staff member. It is important to keep in mind that completion of a survey form may be difficult for some visitors, such as those with visual or mobility impairments. It may be appropriate to ask a visitor if they would like to have the survey read aloud and have the staff member record the responses. It should be made clear that the purpose is not to judge their skills, but to measure the effectiveness of the interpretive programs.

Pre- and Post-Program Checking

The most meaningful information can be obtained by checking for knowledge before and after the program and then comparing the results. This comparison shows what learning took place during the program. A response card given before and after a program should be short and direct, focusing only on primary objectives.

More complex, in-depth testing can be utilized if an evaluation team places a high priority on test results and measuring performance objectives. This may be appropriate for programs that are designed for high school or college students, where participation in testing may assist in meeting specific educational goals or serving a specialized clientele.

Other Ways to Check for Learning

In addition to response cards or test sheets, quizboards, computers or other interactive technology can make measuring effectiveness a recreational element of the overall

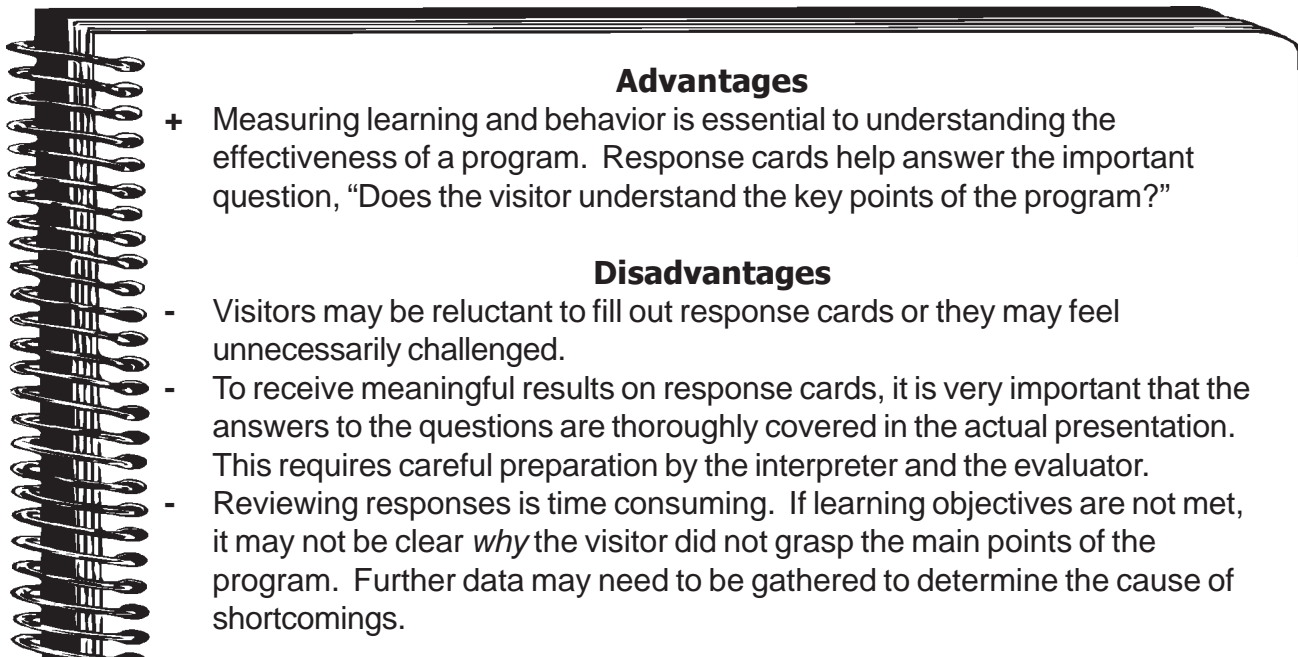
interpretive experience. During live presentations, interpreters are encouraged to use questioning strategies to check for learning and get instant feedback about the effectiveness of their programs.

It is important to get a meaningful sample of visitors in order to draw reasonable conclusions from any data-gathering process (see Appendix A: Data-Gathering Principles).

References

Nancy C. Medlin and Sam H. Ham, *A Handbook for Evaluating Interpretive Services* (Moscow, ID: University of Idaho, prepared for the USDA Forest Service Intermountain Region, 1992).

Brett Wright and Marcella Wells, *A Field Guide for Evaluating National Park Service Interpretation* (Washington, DC: National Park Service, 1990).



Advantages

- + Measuring learning and behavior is essential to understanding the effectiveness of a program. Response cards help answer the important question, “Does the visitor understand the key points of the program?”

Disadvantages

- Visitors may be reluctant to fill out response cards or they may feel unnecessarily challenged.
- To receive meaningful results on response cards, it is very important that the answers to the questions are thoroughly covered in the actual presentation. This requires careful preparation by the interpreter and the evaluator.
- Reviewing responses is time consuming. If learning objectives are not met, it may not be clear *why* the visitor did not grasp the main points of the program. Further data may need to be gathered to determine the cause of shortcomings.

Sample Generic Response Card

We are measuring the success of this program. Your help is appreciated.

Title of service: (staff member completes this in advance)

Date: (staff member completes this in advance)

What was the main point or theme of the program?

Based on your previous knowledge, did this program improve your understanding and appreciation for this park?

Did this program improve your understanding or appreciation for California's State Park System?

Please return this card to (staff member completes this in advance; examples: ranger office, entrance station, information desk, etc.)

Sample Customized Response Card

We are measuring the success of this program. Your help is appreciated.

Title of service: (staff member completes this in advance)

Date: (staff member completes this in advance)

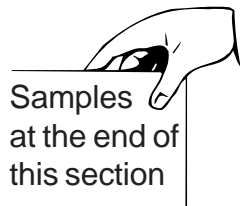
Please complete this sentence: The Pacific Flyway is vital for migratory birds because. . .

Choose the best answer to the following: Insects benefit man and the environment by:

- A. Providing food for birds and small animals
- B. Aiding in decomposition
- C. Increasing water supply
- D. Both A and B

Based on your previous knowledge, did this program improve your understanding and appreciation for this park?

Please return this card to (staff member completes this in advance; examples: ranger office, entrance station, information desk, etc.)



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Visitor RAPPOR**T** Form DPR 461A

*Nothing great was ever achieved without enthusiasm.
—Ralph Waldo Emerson*



The Visitor RAPPOR**T** form DPR 461A is California State Parks' standardized form for surveying the perceptions of visitors about individual interpretive programs. This form may be customized to gather more program-specific information.

Interpreters strive to establish a good rapport with visitors. That is why the items on the Standard RAPPOR**T** form DPR 461 are organized into the essential elements of a quality interpretive program, represented by the acronym RAPPOR**T**. This acronym is used in the organization of each form in the DPR 461 series.

RAPPOR**T** stands for:

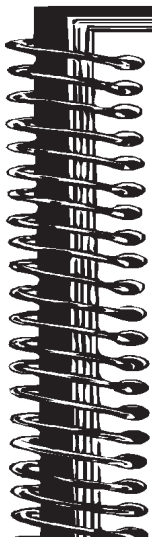
- Relevant
- Accurate
- Provocative/Enjoyable
- Programmatically Accessible
- Organized
- Retained
- Thematic

Questions on the Visitor RAPPORT form DPR 461A are designed to give feedback to the individual interpreter on his/her program and its delivery. This form differs from the Statewide Visitor Satisfaction Survey in that it focuses on individual programs rather than on the overall interpretive experience of a park.

The upper portion of the Visitor RAPPORT form should be completed in advance by park staff. The forms should be distributed systematically over the course of a pre-determined evaluation period. See Appendix

A: Data Gathering Principles for more information on how to obtain reliable data through sampling, random distribution and other techniques.

When possible, a park staff person other than the interpreter being evaluated should briefly explain the purpose of the survey and request the group members' assistance. That person should be available to collect the completed forms after the program. The results of the evaluation should be discussed by the supervisor or coach and the interpreter.



Advantages

- + The Visitor RAPPORT form DPR 461A gives visitor feedback to the interpreter. It is a tool to measure customer satisfaction. It is simple and inexpensive to implement. Data is readily available to use for improvements in a format that is easy to analyze.

Disadvantages

- This form is simplified and does not provide information on performance objectives for learning and behavior. The information applies only to the individual presentations and would not serve well as a tool for evaluating a program that is offered by several presenters.

Visitor RAPPORT Survey

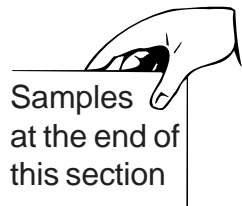
Thank you for providing feedback on this interpretive program. We value your honest assessment, and offer this evaluation so that California State Parks may provide the highest level of public service. Please turn in this form to the park office or return it to a park employee.

PARK		DATE				
PRESENTER		PROGRAM TITLE				
ITEM	DEFINITELY NO	PROBABLY NOT	MAYBE	PROBABLY YES	DEFINITELY YES	NOT APPLICABLE
RELEVANT: Did the program give you a better appreciation of this park?	1	2	3	4	5	N/A
Was the length of the program suitable?	1	2	3	4	5	N/A
ACCURATE: Was the presenter knowledgeable?	1	2	3	4	5	N/A
PROVOCATIVE/ENJOYABLE: Was the program interesting?	1	2	3	4	5	N/A
Did you feel involved in the program?	1	2	3	4	5	N/A
Did you enjoy the program?	1	2	3	4	5	N/A
PROGRAMMATICALLY ACCESSIBLE: If you have visual, hearing, or mobility impairment or any disability, were you accommodated appropriately?	1	2	3	4	5	N/A
ORGANIZED: Was the material presented in a logical order?	1	2	3	4	5	N/A
RETAINED/THEME: In your own words, what was the main point of the program?						
How could this program be improved?						
How did you find out about this program or activity?						

Visitor RAPPORT Survey

Thank you for providing feedback on this interpretive program. We value your honest assessment, and offer this evaluation so that California State Parks may provide the highest level of public service. Please turn in this form to the park office or return it to a park employee.

PARK		DATE				
PRESENTER		PROGRAM TITLE				
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RELEVANT: Did the program give you a better appreciation of this park?	1	2	3	4	5	N/A
Was the length of the program suitable?	1	2	3	4	5	N/A
ACCURATE: Was the presenter knowledgeable?	1	2	3	4	5	N/A
PROVOCATIVE/ENJOYABLE: Was the program interesting?	1	2	3	4	5	N/A
Did you feel involved in the program?	1	2	3	4	5	N/A
Did you enjoy the program?	1	2	3	4	5	N/A
PROGRAMMATICALLY ACCESSIBLE: If you have visual, hearing, or mobility impairment or any disability, were you accommodated appropriately?	1	2	3	4	5	N/A
ORGANIZED: Was the material presented in a logical order?	1	2	3	4	5	N/A
RETAINED/THEME: In your own words, what was the main point of the program?						
How could this program be improved?						
How did you find out about this program or activity?						



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School Group Program Evaluation

We should expand our emphasis on education. Our parks are the greatest natural classrooms available. We must use them to teach people the basics of ecology. We've been doing this for a long time but we've got to do it on a better and bigger scale.

—Freeman Tilden



Every year, hundreds of thousands of school children enjoy educational programs in California's state parks. Park interpreters strive to provide meaningful programs that fit within the framework of California's K-12 curriculum. The department is committed to making visits to state parks both fun and educational. The primary goal is to provoke young people to care about their natural and cultural heritage.

The department recognizes the role of education in its performance-based management system, which calls for measurement of the *degree of congruity with curricula for educational experiences for K-12 students*. A statewide School Group Program Evaluation (SGPE) is conducted each year to measure congruity with education curricula. The SGPE samples statewide data and can be adapted to produce measures at the district level as well.

A park-specific SGPE can be designed to supplement the annual evaluation and gather data that is more unique to the park unit. If teachers consistently bring their students to participate in park interpretive programs, those teachers may have valuable ideas for program improvements. Here are a few tips for administering a park-specific SGPE:

- Send a survey to teachers at their schools either before or shortly after the field trip. This could be included in the reservation confirmation packet.
- Include a self-addressed, stamped envelope to facilitate response to the survey.
- Make questions focused and brief.
- Always include a question that welcomes “other comments.”
- Include a deadline for return of the survey.
- Offer a nominal “thank-you” gift. Gifts improve the rate of response.

Surveys are only helpful if they are administered properly and actions are taken based on the results. To be most useful, an SGPE should focus on one subject that can be fully addressed through a few questions. If a survey contains too many subjects or questions, it is less likely to be completed. Possible subjects that a given park may want to address include:

- Scheduling and availability of school programs
- Teacher’s Guide – quality, usefulness, importance, etc.

- Congruity with curriculum and teaching frameworks
- Satisfaction with interpretive presentation and/or special programs
- Satisfaction with facilities (restrooms, AV program, parking, etc.)

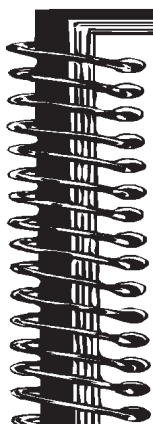
Survey questions should be developed with primary objectives in mind. Questions should be clear and lead to meaningful answers. The District Interpretive Improvement Team (DIIT) and possibly a sampling of visitors should be used to test the questions for their clarity and quality. Once questions are developed, the SGPE should be implemented consistently and scientifically.

A park may distribute surveys randomly over an entire season or choose a short term, such as a two-week period, to survey a sampling of teachers. It is important to track the return rate (number of surveys returned compared to the number distributed) in order to analyze the SGPE process.

It is important to get a meaningful sample of visitors in order to draw reasonable conclusions from any data-gathering process (see Appendix A: Data-Gathering Principles).

References

Randi Korn, and Laurie Sowd, *Visitor Surveys: A User’s Manual* (Washington, DC: American Association of Museums, 1990).



Advantages

- + School Group Program Evaluations can help bridge the gap between what the educational community wants and needs and what is being offered in park programming. Skilled interpreters can use the data to make programs more meaningful in the context of an educational curriculum.

Disadvantages

- Teachers are extremely busy and, like many people these days, may feel over-surveyed.



District #: _____
Unit(s) #: _____
Code: _____
Staff, please circle below:
Permanent Seasonal Volunteer

School Group Program Evaluation

Date(s) of Visit: _____ Name of Park Program: _____
Teacher: _____ Grade(s)(circle): K 1 2 3 4 5 6 7 8 9 10 11 12
Primary Subject for the trip: _____ Number of students: _____
School: _____ Phone #: _____
School Address: _____ City: _____ Zip: _____
Email Address: _____

***For each section, please circle an appropriate letter grade,
A, B, C, D, or F, like a report card***

Educational Content of Program

Grade: A B C D F

Issues to consider: Did the program present unifying theme(s) and big ideas rather than just facts? Were ideas presented logically and connected to curriculum? Was the program connected to the students' lives and society?

Presentation to the Student

Grade: A B C D F

Issues to consider: Were the roles of environmental ethics or responsible citizenship explored? Did the program promote respect and caring for society or the environment, without being dogmatic? Were personal and societal values and conflicting points of view explored in a context that students could understand?

Usefulness to Students

Grade: A B C D F

Issues to consider: Were instructional materials easy for students to use and understand? Was the program accessible for all students regardless of special needs such as those with limited English proficiency or learning disabilities? Was the layout of instructional materials for students interesting and appealing?

Using Current Educational Pedagogy

Grade: A B C D F

Issues to consider: Did the program have the students engaged in active learning? Did the program base the students' learning on their constructing knowledge through research, discussion, and application of their findings? Were the instructional materials and presentations sensitive to social, economic, and cultural diversity? Were group or cooperative learning strategies used?

Teacher Usability of Materials and Presentations

Grade: A B C D F

Issues to consider: Were the learning objectives or outcomes clear and appropriate? How well did the materials integrate with educational content standards? Were the background materials and/or additional resources useful to you?

Reservations

1. Did you make a reservation? (check one) Yes No
2. How did you make your reservation? (check one)
- ReserveAmerica Commercial tour group Contacted park directly
- Other: _____ N/A
3. How satisfied are you with the service you received when making your reservation? (check one)
- Very satisfied Somewhat satisfied Not satisfied N/A

Comments on reservations? _____

Pre-Trip Information

1. What information did you receive from California State Parks prior to your trip? (check all that apply)
- Reservation confirmation Map/directions/parking information
- Pre- and post-trip activity sheets Suggested readings/discussion topics
- Glossaries/definitions lists Video
- Other: _____ None
2. What types of information would be most useful to you? (indicate by numbering the items below, with 1 being the item of greatest usefulness and 7 being the least)
- ___ Reservation confirmation ___ Map/directions/parking information
- ___ Pre- and post-trip activity sheets ___ Suggested reading/discussion topics
- ___ Glossaries/definitions lists ___ Video
- ___ Other: _____
3. Would you utilize the internet to obtain such information? Yes No

Comments on pre-trip information? _____

Additional comments? _____

THANK YOU! We appreciate you taking the time to give us feedback on your experience.
Please return this form to:

Focus Groups

We can't solve problems by using the same kind of thinking we used when we created them.

–Albert Einstein

The focus group is an evaluation technique that provides customer feedback in the form of a group discussion focused on a specific topic. The focus group technique has been used extensively in market research to gauge consumer responses to particular products, advertising campaigns, services and more. For interpretive programs, participants are asked to discuss important questions about the quality of the program they experienced. The focus group method is also useful in assessing the effectiveness of interpretive services.

A typical focus group at a state park unit would take place at the end of an interpretive program such as a tour, nature walk, AV program, self-guided walk, exhibit, demonstration or living history event. It is important that all focus group participants experience the same program. Live programs such as tours or demonstrations should have little variance between presentations if the focus group technique is to be used effectively.

Visitors are recruited for participation in a focus group after the conclusion of the program or after visiting an exhibit area. Visitors are asked by a moderator (not the program presenter) to participate in a short 15-20-minute group discussion. The moderator explains the purpose of the focus group and offers a small thank-you gift and refreshments to volunteer participants.

Focus group participants can also be recruited outside the park. Depending on the improvement goals, a park may choose to invite teachers, park volunteers or randomly chosen individuals to visit the park and participate in a focus group.

To effectively recruit a specialized group, such as school teachers, it is a common practice to offer a stipend, or payment, as an incentive to participate. Participants that receive a stipend can be expected to spend more time in a focus group session or series of sessions. Funding for stipends may be available through grants from cooperating associations or other organizations.

Typically, the group would meet in a nearby room where the nonuniformed moderator asks specific questions about the interpretive program that was just experienced. Group discussion is encouraged and the entire session is recorded on audio tape. The results of the focus group are compiled into a written report for use in the improvement process.

The focus group technique is best used when a park is preparing to update interpretive services. It is an important source of candid comments from a random sampling of visitors. The information gathered can be directly used in renovating exhibits, identifying training needs, changing a tour route, or any number of other improvement efforts.

It is suggested that three to five focus groups be conducted for each interpretive program to give a wide variety of feedback. As a general rule, these focus groups should be conducted over a period of approximately one to six weeks.

It is important to get a meaningful sample of visitors in order to draw reasonable conclusions from any data-gathering process (see Appendix A: Data-Gathering Principles).

Steps in Conducting a Focus Group

1. Obtain approval of the District Superintendent or appropriate supervisor and the District Interpretive Coordinator.
2. Choose the interpretive program to be evaluated and later improved.
3. Establish the number of focus groups and estimate the number of participants for each. (For large audiences, prepare a method for limiting the number to 12 or less, depending on the meeting room size.)
4. Gather gift items, refreshments, recording tapes and questions.
5. Recruit participants and conduct the sessions.
6. Meet with appropriate staff to analyze and discuss the results.

7. Write a report summarizing the results of the focus group.
8. Implement the improvement process.

Basic Tips for Focus Groups

1. Select a comfortable meeting place that is relatively close to where participants have experienced the interpretive program.
2. Everyone should be able to see one another. Keep the size of the group manageable so that everyone can fit around a large table where the tape recorder is located and refreshments can be served.
3. If you choose to meet outdoors, make sure the area is free of distractions.
4. You will need:
 - questions to guide the discussion
 - a tape recorder and cassette tape (check power or batteries)
 - gifts ready to be distributed
 - refreshments

Developing Questions

For a focus group lasting 15-20 minutes (most visitors won't want to stay any longer) use five or six questions. Begin with an ice-breaker to allow everyone to get comfortable. Questions should be open-ended, without an implied answer. Performance objectives should be addressed through questions about what the visitors learned or how the program may affect their behavior. Avoid questions that can be answered yes or no. Be prepared to probe for details and elaboration.

Example of questions and probes from the National Park Service's *Focus Groups: A Tool for Evaluating Interpretive Services*:

1. Where are you from? (Ice breaker)
2. Think about the program you've just experienced. What did you like most about it?
 - Probe: What in particular did you like?
3. What did you learn from this program?
 - Probe: What do you mean?
4. Now think about what you learned. How is this significant to you?
 - Probe: What did it mean to you personally?
5. How could this program be improved?
 - Probe: How could it be better for you?
6. Is there anything else you'd like to say about this program?

Completing the Process

The moderator(s) makes a summarized transcription of the focus group tapes. The

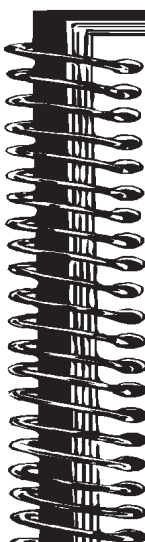
summary should include the number of participants, the nature of the group (gender, family roles, occupations, etc., as appropriate), main points of discussion, and any problems that were encountered. Every word need not be transcribed.

The results of the focus groups should be presented to interpretive staff and others. After that, a report summarizing the entire process, its purpose, which programs were evaluated and the number of focus groups and participants is prepared. This final report should not name individuals or presenters from the focus groups. The results can be organized according to the questions that were asked (strengths, weaknesses and recommendations). The final report becomes a tool for implementing improvements in future interpretive programs.

References

D.K. Fischer, "Connecting with Visitor Panels," *Museum News*, vol. 76, no. 3 (May/June 1997).

Nancy C. Medlin, and Gary E. Machlis, *Focus Groups: A Tool for Evaluating Interpretive*



Advantages

- + Focus groups have the advantage of providing candid, in-depth impressions of interpretive programs. They give evaluators insight into visitors' perceptions and often result in creative solutions and new ideas. A focus group addresses both the quality of the program and whether or not it met performance objectives in learning and behavior outcomes.

Disadvantages

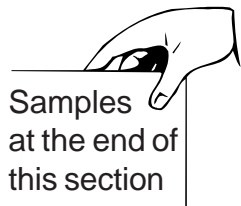
- Preparation for focus groups is time consuming. Focus group evaluation takes commitment and follow-through to produce meaningful results. Funding for thank-you gifts, refreshments and stipends must be secured from other than State sources.

Services; A Training Package for the National Park Service (Moscow, ID: University of Idaho, prepared for the USDA Forest Service Intermountain Region).

Nancy C. Medlin and Sam H. Ham, *A Handbook for Evaluating Interpretive Services* (Moscow, ID: University of Idaho,

prepared for the USDA Forest Service Intermountain Region, 1992).

Rosalyn Rubenstein, "Focus on Focus Groups," *What Research Says about Learning in Science Museums*, vol. II (Washington, DC: Association of Science-Technology Centers, 1994).



Statewide Visitor Satisfaction Survey

*Man is the measure of all things.
—Protagoras*

The department’s Statewide Visitor Satisfaction Survey (SVSS) is a key data source for measuring visitors’ perceptions of quality in state parks. This information helps the department understand how the public feels about us and how those feelings change over time.

This handbook is intended to facilitate quality improvements in interpretive services for the benefit of all state park visitors. As improvements are made, future results of the statewide visitor survey should reflect the public’s positive response to a variety of improvements.

California State Parks first implemented the SVSS in the spring of 1994. It was designed in response to the growing need to provide data that reflect the results of our core programs and to respond to our visitors’ needs. The SVSS is under constant revision, the latest offering the following improvements:

- A “real time access” database designed to provide quick feedback to all levels of the organization
- Data presented in a meaningful, easy-to-analyze format, with a wide variety of optional search parameters (e.g., results by season, by park unit, by question or subject)
- Data available to headquarters, district and park personnel
- Survey collection and data entry work done by contractor, minimizing workload at the point of service
- Districts can suggest new questions be added in order to customize surveys and “drill down” deeper to identify problems and solutions

The survey requires a dual response, asking visitors about their *satisfaction* with programs and services and the *importance* that they place on them. The services are divided into the following categories: resource management, public safety, facilities, interpretation and education, recreation and other park services. The diagram on the right is a guide on how to interpret SVSS responses.



District managers design a survey to meet their needs using a menu of five required questions and over 100 optional questions. Surveys are collected throughout the year and summarized by season. Seasons correspond with Winter (December-February), Spring (March-May), Summer (June-August), and Fall (September-November).

See Appendix A: Data-Gathering Principles for more information on how to obtain reliable data through sampling, random distribution and other techniques.

Required Questions Regarding Interpretation *

How important is it to you and how satisfied are you with the:

- Opportunities offered to help you learn about the area's history and natural environment? [402]

Optional Questions Regarding Interpretation *

How important is it to you and how satisfied are you with the:

- Quality of services to help you understand and appreciate the park? [403]
- Quality of Junior Ranger programs? [404]
- Quality of campfire programs? [406]
- Quality of tours and other guided activities? [408]
- Quality of information on history? [410]
- Quality of information on natural features? [412]
- Quality of information on recreational opportunities? [414]

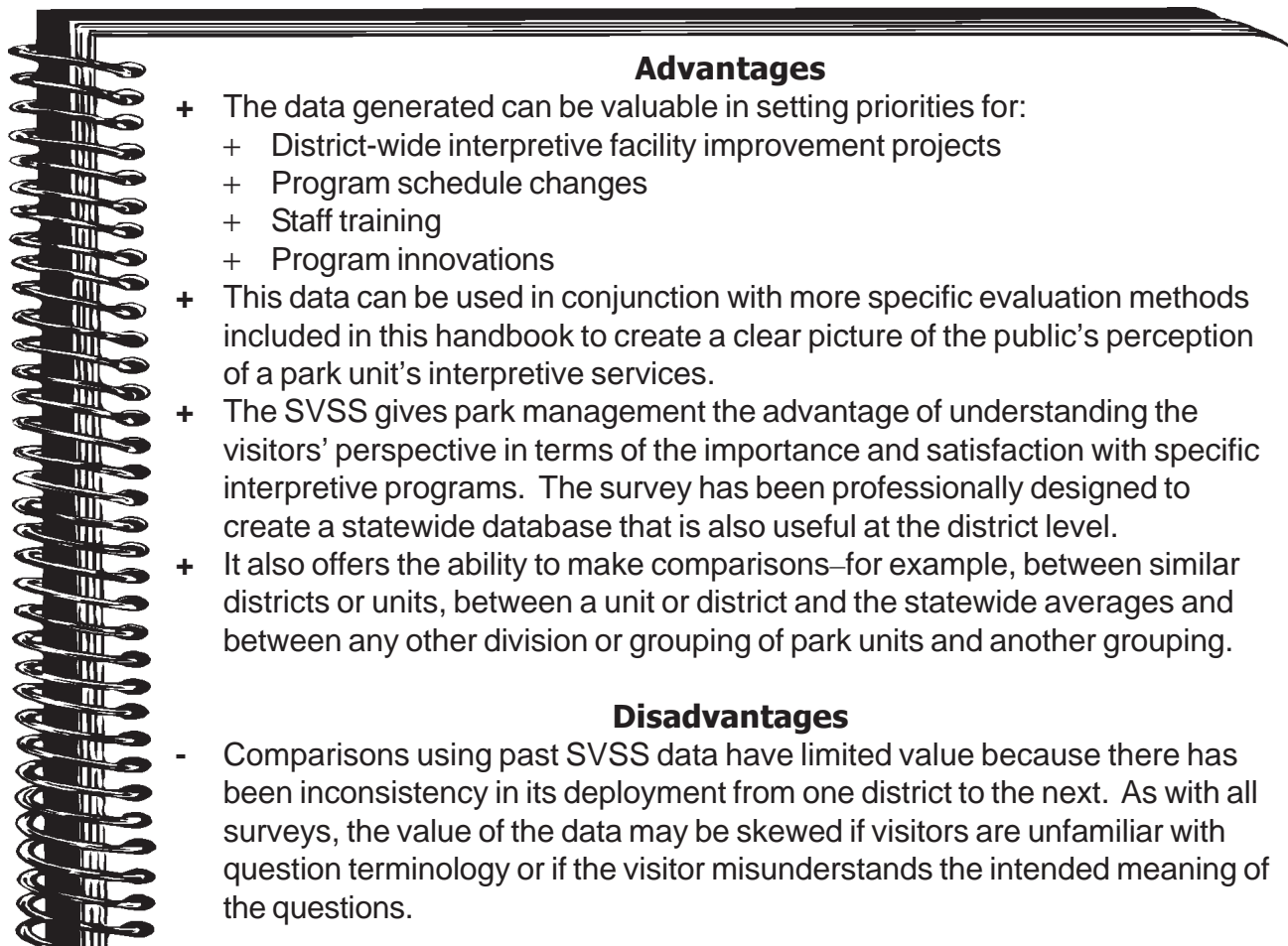
- Quality of information on park facilities? [416]
- Quality of information on park activities? [418]
- Quality of publications? [420]
- Quality of audio-visual media? [422]
- Quality of outdoor exhibits or displays? [424]
- Quality of recorded audio tours? [426]
- Quality of park educational activities for children? [428]
- Quality of living history programs? [430]
- Quality of other special events? [432]
- Quality of visitor centers or museums? [434]
- Quality of information on cultures and traditions of the area? [436]
- Quality of museum objects on exhibit? [439]
- Availability of Junior Ranger programs? [405]
- Availability of campfire programs? [407]
- Availability of tours and other guided activities? [409]
- Availability of information on history? [411]
- Availability of information on natural features (plants, animals, geology, etc.)? [413]
- Availability of information on recreational opportunities? [415]
- Availability of information on park facilities (trails, restrooms, roads)? [417]
- Availability of information on park activities? [419]
- Availability of publications? [421]
- Availability of audio-visual media? [423]
- Availability of outdoor exhibits or displays? [425]
- Availability of recorded audio tours? [427]
- Availability of park educational activities for children? [429]
- Availability of living history programs? [431]

* As of early 2004, these questions are current. However, California State Parks does periodically update these questions.

- Availability of other special events? [433]
- Availability of visitor centers or museums? [435]
- Availability of information on cultures and traditions of the area? [437]
- Opportunity to learn more, on your own, through exhibits, publications, or other methods? [438]

References

Brett Wright and Marcella Wells, *A Field Guide for Evaluating National Park Service Interpretation* (Washington, DC: National Park Service, 1990).



HOW ARE WE DOING?



[Park #]

[Park Name]

Date of Visit _____

Is your stay: Day Use Overnight ⁽⁰⁰²⁾

Please respond to each question by circling one of the numbers under "Importance" and one under "Satisfaction." For example:

⑤ 4 3 2 1 N/A 5 ④ 3 2 1 N/A

We are listening. Please take a moment to tell us . . .

How *important* is it to you and how *satisfied* are you with the:

- Efforts to preserve the natural or historic resources here? ⁽¹⁰¹⁾
- Role which the park's natural resources played in the quality of your experience? ⁽¹⁰²⁾
- Role which the park's cultural setting played in the quality of your experience? ⁽¹⁰³⁾
- Role which the park's historic setting played in the quality of your experience? ⁽¹⁰⁴⁾
- Level of protection of historic areas from inappropriate use? ⁽¹⁰⁵⁾
- Level of protection of natural areas from inappropriate use? ⁽¹⁰⁶⁾
- Level of protection of cultural areas from inappropriate use? ⁽¹⁰⁷⁾
- Level to which historic buildings are protected from deterioration? ⁽¹⁰⁸⁾
- Level to which cultural sites are protected from deterioration? ⁽¹⁰⁹⁾
- Condition of museum objects on exhibit? ⁽¹¹⁰⁾

	Importance						Satisfaction					
	Most Important	Very Important	Important	Fairly Important	Unimportant	Do Not Know or Not Applicable	Totally Satisfied	Very Satisfied	Satisfied	Barely Satisfied	Not Satisfied	Do Not Use or Do Not Know
• Efforts to preserve the natural or historic resources here? ⁽¹⁰¹⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Role which the park's natural resources played in the quality of your experience? ⁽¹⁰²⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Role which the park's cultural setting played in the quality of your experience? ⁽¹⁰³⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Role which the park's historic setting played in the quality of your experience? ⁽¹⁰⁴⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Level of protection of historic areas from inappropriate use? ⁽¹⁰⁵⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Level of protection of natural areas from inappropriate use? ⁽¹⁰⁶⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Level of protection of cultural areas from inappropriate use? ⁽¹⁰⁷⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Level to which historic buildings are protected from deterioration? ⁽¹⁰⁸⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Level to which cultural sites are protected from deterioration? ⁽¹⁰⁹⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Condition of museum objects on exhibit? ⁽¹¹⁰⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A

Comments on Park Resources: ⁽¹⁹⁹⁾ _____

- Feeling of safety and security during this visit? ⁽²⁰²⁾
- Fairness of rules and regulations? ⁽²⁰³⁾
- Enforcement of rules and regulations? ⁽²⁰⁴⁾
- Availability of Lifeguards? ⁽²⁰⁵⁾
- Availability of State Park Rangers? ⁽²⁰⁶⁾
- Availability of staff to address safety problems? ⁽²⁰⁷⁾
- Feeling of safety and security from wildlife? ⁽²⁰⁸⁾
- Feeling of safety and security from uncontrolled domestic animals? ⁽²⁰⁹⁾
- Feeling of safety and security from natural hazards (poison oak, cliffs, rip currents, etc.)? ⁽²¹⁰⁾
- Feeling of safety and security from criminal activity? ⁽²¹¹⁾
- Availability of information on hazards? ⁽²¹²⁾
- Posting of prohibited areas? ⁽²¹³⁾
- Availability of law enforcement services? ⁽²¹⁴⁾

• Feeling of safety and security during this visit? ⁽²⁰²⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Fairness of rules and regulations? ⁽²⁰³⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Enforcement of rules and regulations? ⁽²⁰⁴⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of Lifeguards? ⁽²⁰⁵⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of State Park Rangers? ⁽²⁰⁶⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of staff to address safety problems? ⁽²⁰⁷⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Feeling of safety and security from wildlife? ⁽²⁰⁸⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Feeling of safety and security from uncontrolled domestic animals? ⁽²⁰⁹⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Feeling of safety and security from natural hazards (poison oak, cliffs, rip currents, etc.)? ⁽²¹⁰⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Feeling of safety and security from criminal activity? ⁽²¹¹⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of information on hazards? ⁽²¹²⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Posting of prohibited areas? ⁽²¹³⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of law enforcement services? ⁽²¹⁴⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A



HOW ARE WE DOING?

How important is it to you and how satisfied are you with the:

Please respond to each question by circling one of the numbers under "Importance" and one under "Satisfaction." For example:

⑤ 4 3 2 1 N/A 5 ④ 3 2 1 N/A

	Importance						Satisfaction					
	Most Important	Very Important	Important	Fairly Important	Unimportant	Do Not Know or Not Applicable	Totally Satisfied	Very Satisfied	Satisfied	Barely Satisfied	Not Satisfied	Do Not Use or Do Not Know
• Quality of tours and other guided activities? (408)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of tours and other guided activities? (409)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of information on history? (410)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of information on history? (411)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of information on natural features? (412)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of information on natural features (plants, animals, geology, etc.)? (413)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of information on recreational opportunities? (414)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of information on recreational opportunities? (415)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of information on park facilities? (416)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of information on park facilities (trails, restrooms, roads)? (417)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of information on park activities? (418)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of information on park activities? (419)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of publications? (420)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of publications? (421)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of audio-visual media? (422)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of audio-visual media? (423)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of outdoor exhibits or displays? (424)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of outdoor exhibits or displays? (425)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of recorded audio tours? (426)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of recorded audio tours? (427)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of park educational activities for children? (428)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of park educational activities for children? (429)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of "living history" programs? (430)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of "living history" programs? (431)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of other special events? (432)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of other special events? (433)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of visitor centers or museums? (434)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of visitor centers or museums? (435)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of information on cultures and traditions of the area? (436)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of information on cultures and traditions of the area? (437)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Opportunity to learn more, on your own, through exhibits, publications, or other methods? (438)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of museum objects on exhibit? (439)	5	4	3	2	1	N/A	5	4	3	2	1	N/A

Comments on Education Programs: (499) _____



HOW ARE WE DOING?

How *important* is it to you and how *satisfied* are you with the:

Please respond to each question by circling one of the numbers under "Importance" and one under "Satisfaction." For example:

⑤ 4 3 2 1 N/A 5 ④ 3 2 1 N/A

	Importance						Satisfaction					
	Most Important	Very Important	Important	Fairly Important	Unimportant	Do Not Know or Not Applicable	Totally Satisfied	Very Satisfied	Satisfied	Barely Satisfied	Not Satisfied	Do Not Use or Do Not Know
• Quality of recreational opportunities available here? ⁽⁵⁰¹⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Fees you paid compared to the value of your park experience? ⁽⁵⁰²⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Courtesy and helpfulness of park staff? ⁽⁵⁰³⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Accessibility for visitors with disabilities? ⁽⁵⁰⁴⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Courtesy of concession staff (park store, boat rental, restaurant/snack bar, etc.)? ⁽⁵⁰⁵⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Quality of your concession purchase (park store, boat rental, restaurant/snack bar, etc.)? ⁽⁵⁰⁶⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Prices at concessions (park store, boat rental, restaurant/snack bar, etc.)? ⁽⁵⁰⁷⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Time it took to get through to the telephone reservation service? ⁽⁵⁰⁸⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Accuracy of information received from the telephone reservation service? ⁽⁵⁰⁹⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Telephone courtesy you received from the reservation service employees? ⁽⁵¹⁰⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Fairness of the reservation fee? ⁽⁵¹¹⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Fairness of the cancellation fee? ⁽⁵¹²⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Hours of operation of entrance station? ⁽⁵¹³⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Time it took to check-in and register for overnight camping? ⁽⁵¹⁴⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Time it took to get through entrance station? ⁽⁵¹⁵⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Enforcement of quiet hours? ⁽⁵¹⁶⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Availability of staff to assist you? ⁽⁵¹⁷⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Hours of permitted operation of recreational vehicle generators? ⁽⁵¹⁸⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Variety of recreational opportunities? ⁽⁵¹⁹⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Adequacy of signs? ⁽⁵²⁰⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Grooming and appearance of uniformed employees? ⁽⁵²¹⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Condition and appearance of park vehicles and equipment? ⁽⁵²²⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• Clarity of instruction for self-registration and payment of fees? ⁽⁵²³⁾	5	4	3	2	1	N/A	5	4	3	2	1	N/A

Comments: ⁽⁵⁹⁹⁾ _____

Additional Questions.

How *important* is it to you and how *satisfied* are you with the:

- [Type question here -- do not delete the # to the right of the question mark]? ⁽⁶⁰¹⁾
- [Type question here -- do not delete the # to the right of the question mark]? ⁽⁶⁰²⁾

5	4	3	2	1	N/A	5	4	3	2	1	N/A
5	4	3	2	1	N/A	5	4	3	2	1	N/A



How important is it to you and how satisfied are you with the:

Please respond to each question by circling one of the numbers under "Importance" and one under "Satisfaction." For example:

⑤ 4 3 2 1 N/A 5 ④ 3 2 1 N/A

HOW ARE WE DOING?

	Importance						Satisfaction					
	Most Important	Very Important	Important	Fairly Important	Unimportant	Do Not Know or Not Applicable	Totally Satisfied	Very Satisfied	Satisfied	Barely Satisfied	Not Satisfied	Do Not Use or Do Not Know
• [Type question here -- do not delete the # to the right of the question mark]? (603)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (604)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (605)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (606)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (607)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (608)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (609)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (610)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (611)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (612)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (613)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (614)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (615)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (616)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (617)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (618)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (619)	5	4	3	2	1	N/A	5	4	3	2	1	N/A
• [Type question here -- do not delete the # to the right of the question mark]? (620)	5	4	3	2	1	N/A	5	4	3	2	1	N/A

What one improvement will make your next visit more enjoyable? (698)

Optional: California State Parks are for *everyone*. Please tell us about yourself



How important is it to you and how satisfied are you with the:

Please respond to each question by circling one of the numbers under "Importance" and one under "Satisfaction." For example:

⑤ 4 3 2 1 N/A 5 ④ 3 2 1 N/A

Importance					Satisfaction					
Most Important	Very Important	Important	Fairly Important	Unimportant	Totally Satisfied	Very Satisfied	Satisfied	Barely Satisfied	Not Satisfied	Do Not Use or Do Not Know

Your ZIP code (or country if outside USA) (001) _____

PLEASE CHECK ONE IN EACH CATEGORY

Your Education: Some High School H.S./Grad/GED Some College College Grad (003)

Are You: Male Female (004)

Your Age: Under 18 18-24 25-34 35-44 45-54 55-64 64+ (005)

Your Annual Household Income: Under \$15,000 \$15,000-\$29,999 \$30,000-\$44,999
 \$45,000-\$59,999 \$60,000-\$75,000 Over \$75,000 (006)

Your Ethnicity: Asian American Indian Black Filipino Hispanic Pacific Islander White Other (007)

If you would like free California State Parks information, please provide your name and address below. (699)

Thank you for visiting your California State Parks

Please return this survey to a park employee, or mail to: California Department of Parks and Recreation
Attn: Mary Veliquette
Field Services Division
Visitor Services Section
P.O. Box 942896
Sacramento, CA 94296-0001

Supervisor and Lead Evaluation

One measure of leadership is the caliber of people who choose to follow you.

–Dennis A. Peer

Interpretive programs can flourish under good leadership and supervision. Most interpreters appreciate the opportunity to discuss their programs with someone who is supportive and has valuable experience and ideas to share. Evaluation conducted by a supervisor or lead is a vital link in the success of interpretive programs.

It is the policy of the Department that all members of the interpretive staff will have their interpretive program(s) evaluated a minimum of twice per year, including a minimum of one evaluation by an interpretive coordinator, lead person or supervisor using the Standard RAPPORT form DPR 461.

The relationship between interpreter and evaluator benefits when coaching techniques are incorporated into the completion of the Standard RAPPORT form. This section, Supervisor and Lead Evaluation, includes coaching techniques and recommendations for using the DPR 461. A supervisor or lead should become familiar with both this section and the Standard RAPPORT Form DPR 461 section.

See Appendix B: Performance Appraisals for basic policy statements and form samples of the performance appraisal process for permanent and seasonal employees and volunteers.

Coaching Techniques

*Excellence can be attained if you:
Care more than others think is wise,
Risk more than others think is safe,
Dream more than others think is practical,
Expect more than others think is possible.
—Anonymous*



Coaching is more than just an evaluation technique. It is an attitude and a partnership between the supervisor or lead and the interpreter. A coach provides nonthreatening support by exchanging thoughts, ideas and factual information while encouraging interpreters to present excellent interpretive programs. Evaluation is an important component of coaching, which includes training, constructive feedback, consultation and validation.

To be effective, a coach must be familiar with interpretive concepts, techniques and principles. Only then can the coach serve as a catalyst for improvement in the programs he/she supervises. Communication skills are at the heart of effective coaching and effective interpretive programs.

Coaching is a holistic approach, a system of participating in the development of both individual interpreters and the interpretive program as a whole. The benefits of this approach extend not only to the person being evaluated but to the coach, the visitor, and ultimately to the park resource.

Before the Evaluation

A good starting point for initiating a coaching system is to orient employees to the program. It may be beneficial to present the idea in a workshop atmosphere, including an explanation of expectations and a thorough question and answer session. Coaching includes the following elements:

- A thorough training program
- Clear criteria for a good interpretive presentation
- Opportunities to develop rapport and trust between the interpreter and coach
- Understanding of the evaluation criteria and process that will be used
- The schedule of evaluations planned per season/per year for each interpretive employee
- Several opportunities for informal consultations with the coach regarding presentations

The most important factors for successful coaching are the coach's attitude and communication skills. A good coach is supportive, a good listener, open to discussing new ideas and sensitive to the uniqueness of each individual interpreter. At one time, for example, the department benefited from the skills of a tour guide who is blind and who had a unique ability to lead and inspire visitors. While eye contact is normally an essential part of conducting an effective tour, this guide overcame a disability and demonstrated expertise in presenting quality interpretive programs. The coach must foster mutual respect and trust within the coach-interpreter relationship.

All coaches must be thoroughly familiar with the established evaluation criteria, which appears on the Standard Rapport form DPR 461 (see next section). These criteria are intended to offer helpful suggestions for new

interpreters as well as to provide a challenge for those with years of experience.

A sufficient amount of time should be planned to complete the evaluation process. Allow at least one hour of uninterrupted time for the coach and interpreter to discuss the evaluated program. This should be conducted within a 24-hour period, while it is still fresh in memory. A timely discussion also relieves the interpreter's possible anxiety about the evaluation outcome. If schedules do not allow for a discussion in a timely manner, the coach should be sure to offer positive comments and acknowledge the interpreter immediately following the presentation; then schedule a time for detailed discussion as soon as possible.

Observing the Presentation

The coach should demonstrate interest and respect by showing up on time and participating in the entire program. The coach should inform the interpreter in advance that he/she will be evaluated. The coach should not wear a uniform nor draw focus away from the interpreter in any way during the presentation. The coach should be as inconspicuous as possible and respond as one of the audience. His/her role is to listen, mingle, be aware of the visitors' responses and, above all, pay close attention to the presentation. A coach may take brief notes but should not be distracting or conspicuous in doing so. If a visitor asks why the coach is taking notes, the response should be courteous and brief such as, "I always take notes" or "I want to remember what he/she said."

The Evaluation Discussion

The setting for the evaluation discussion should be comfortable for both the coach and

the interpreter. A picnic area, library or conference room may serve as an appropriate site. It should not be conducted in the supervisor's office seated on opposite sides of a desk or in an area where the conversation can be easily overheard or interrupted. Coaches should do what they can to put the interpreter at ease.

The coach should begin the evaluation with a sincere positive comment, most likely highlighting what he/she liked best about the presentation. Positive feedback should be spread throughout the evaluation rather than only at the beginning. If all the positive feedback comes at the beginning, the interpreter may come to fear the more critical portion of the evaluation. This fear can be a distraction from hearing the intent of the coach's comments. Positive feedback that is insincere and unwarranted will be recognized as a manipulative technique and will work against the establishment of trust.

The next step is to ask the interpreter what he/she thought of the presentation. The coach should listen and possibly jot notes on the interpreter's comments. Self-evaluation allows the interpreter to demonstrate his/her knowledge of what can be improved. This listening technique builds self-esteem in the interpreter, whereas the same comment made by the coach could produce feelings of inferiority. Negative comments from the interpreter should be followed by constructive suggestions from the coach. Above all, the coach should listen carefully and be responsive. A coach can probe for better understanding by asking, "What do you mean when you say . . . ?" or "Tell me more about that."

The focus of the evaluation should not be a detailed dissection of what occurred, but an exploration of the potential opportunities for future success. If there were several

problems with the presentation, the coach should focus on three to five priorities. Later evaluations can address the next level of improvement. Throughout the session, the coach and interpreter work together, with the coach serving as a catalyst for developing new ideas. Together they examine different portions or subject areas of the presentation and discuss alternative approaches to the subject. Problems are solved through collaboration. Possible questions include:

- Was that the best place to begin talking about . . . ?
- How could this portion be better tied to your theme?
- Do you think you built up your conclusion effectively? What could you do to improve it?
- What activity could you have the visitor do to illustrate that concept?

The coach should strive to inspire the interpreter. Evaluations are a prime opportunity for coaches to validate the important role of interpreters in park operations, including resource protection. It may be appropriate to emphasize that each individual makes a significant contribution to the department's mission. A coach should avoid any negative, unrelated discussion such as office politics, lack of funding, etc.

Be specific instead of general. A coach may need to be persistent if he/she feels that the interpreter isn't hearing or understanding the suggestion. Coaches should realize that perceptions vary from one person to the next; be sure that important points have been understood.

A coach should not impose his/her opinion, but keep the discussion open, allowing for a variety of opinions and perceptions. Being open-minded increases the likelihood of effective interchange. Unbending opinions have a way of shutting down the other

person's willingness to share. Interpretation is an art, and each interpreter is an artist deserving of respect. A coach should adapt the evaluation in response to the unique personality of each interpreter.

At the conclusion of the discussion, the coach may want to ask the interpreter, "What did we leave out?" and "Do you have any questions?" After addressing any further issues, the coach should summarize the main points of the evaluation and explain that the written version will be completed shortly.

The Written Evaluation and Follow-up

After discussing the evaluation with the interpreter, steps outlined in this handbook should be followed for filling out and distributing copies of the DPR 461. The

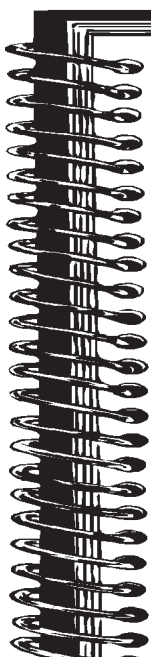
written evaluation should be completed soon after the discussion with the interpreter. Positive comments *and* suggestions for improvement are included. This will be a valuable tool for coaches to use in subsequent evaluations.

References

Caroline Wakeman Evans, "Coaching - A System of Evaluating Interpretive Presentations," *The Interpreter* (Fall 1984).

Nancy Hadlock, *Maintaining the Magic: A Manual for Coaching Interpretation* (Sacramento, CA: Recreation Administration Masters Thesis for CSU Sacramento, 1993).

William J. Lewis, *The Process of Interpretive Critiquing*, handbook and video (Washington, DC: National Park Service, 1994).



Advantages

- + Coaching is beneficial because it:
 - + Sets a timetable for regularly evaluating programs
 - + Encourages frequent communication between coach and interpreter regarding interpretive programs
 - + Creates a positive atmosphere for program evaluations
 - + Provides guidelines for evaluating a presentation and conducting an evaluation discussion
 - + Encourages self-evaluation for creative self-improvement
 - + Can be used as a means of continuous training for the interpreter

Disadvantages

- Coaching methods require good communication skills, experience with interpretive programs and a time commitment for staff development. Not everyone has the experience and temperament to be a coach.

Coach Checklist: Before the Presentation

- ___ Know your own interpretive assets, biases and attitudes.
- ___ Become acquainted with your staff.
- ___ Be available as a source of information.
- ___ Maintain an open door policy.
- ___ Explain your personal approach as an interpreter and coach.
- ___ Define which programs will be watched and how coaching works.
- ___ Maintain an open mind.
- ___ If you have a bias toward any interpreter, select someone else to coach.
- ___ Review the previous written evaluation (if available) to jog your memory about what improvements were suggested.
- ___ Let the person know that your purpose is to improve the park program, not find fault.
- ___ Familiarize yourself with the criteria in the DPR 461.
- ___ Schedule discussion time within 24 hours of the presentation being evaluated.

Coach Checklist: During the Presentation

- ___ Be inconspicuous.
- ___ Fit in with the crowd.
- ___ Try to mingle and hear the reactions of the group.
- ___ Take brief notes.
- ___ Support and show interest in the program.
- ___ Pay attention to the audience reaction.
- ___ Do not answer questions or draw attention from the interpreter.
- ___ Have fun.

Coach Checklist: After the Presentation

- ___ Organize your thoughts.
- ___ Discuss the program as soon as possible.
- ___ Begin the session with sincere positive feedback.
- ___ Ask the interpreter what he/she thought.
- ___ State problems clearly and directly as an opportunity for future success.
- ___ Include a constructive suggestion for each area needing improvement.
- ___ Be sensitive, responsive and attentive.
- ___ Criticize the interpretation, not the interpreter.
- ___ Focus only on behavior that can be changed.
- ___ Limit the discussion to primary areas for improvement.
- ___ Don't feel that you have to give criticism.
- ___ Ask the interpreter for a source if you question the accuracy of information.
- ___ Conclude the session with sincere positive feedback and encouragement.
- ___ Prepare the written evaluation after you discuss it with the interpreter.

Coach Checklist: Follow-Up

- ___ Complete the DPR 461 written evaluation and give one copy to the interpreter and one to the employee's file at the unit.
- ___ Ask yourself, as a coach, "How did I do?" "What would I have done differently?" "How can I improve my coaching ability?"
- ___ Follow up on comments and suggestions.
- ___ Attend at least one more program by the interpreter.
- ___ Continue to do interpretation yourself.
- ___ Keep abreast of what is new in the field of interpretation.
- ___ Encourage interpreters to try new things.
- ___ Give credit and rewards for successes.



Standard RAPPORT Form DPR 461

*Principle-centered leaders:
Are continually learning
Are service oriented
Radiate positive energy
Believe in others
Lead balanced lives
Serve others
See life as an adventure
Regularly renew themselves
—Steven Covey*

California State Parks' Standard RAPPORT form DPR 461 is designed as the primary tool for evaluating interpretive programs from a variety of perspectives. It is intended for use by supervisors, leads, peers and experts. It is formatted to highlight key elements of a quality interpretive program.

The *DPR 461 RAPPORT Guidelines* below should be reviewed before the interpretive program is observed. The evaluator may use the numeric system opposite each question and/or the comment section of the form. Including narrative comments and recommendations will produce a more thorough evaluation. Copies should be filed at the park unit, with an additional copy given to the interpreter.

DPR 461 RAPPORT Guidelines

Interpreters strive to establish a good rapport with visitors. That is why the items on the Standard RAPPORT form DPR 461 are organized into the essential elements of a quality interpretive program, represented by the acronym RAPPORT. This acronym is used in the organization of each form in the DPR 461 series.

RAPPORT stands for:

Relevant
Accurate
Provocative/Enjoyable
Programmatically Accessible
Organized
Retained
Thematic

The following are explanations of each element, followed by the items on the Standard RAPPORT form DPR 461.

Relevant

A high-quality interpretive program must be appropriate to the audience, using examples, analogies, comparisons and other techniques to make the presentation personally meaningful to the visitor. It must relate to the visitors' lives and experiences.

- Use of comparisons to relate new ideas to familiar concepts
- Appropriate to age and ability level of group
- Appropriate program length
- Relates the DPR message/mission and park objectives to the visitors' lives

Accurate

A high-quality program must present well-researched information that is factual, current, complete and appropriately credited. Controversy and theory regarding the facts must be presented with a balanced perspective. Historic costumes must be accurate and well researched.

- Well-prepared, well-researched (costume if applicable)
- Correct facts
- Balanced presentation of theories

Provocative/Enjoyable

A high-quality program inspires the audience. The program holds visitors' attention, provokes thought and participation and brings about a new perspective and/or sense of meaning and connection to the resource. It is presented with good speaking and communication skills. The program also conveys the self-confidence and enthusiasm of the interpreter, contributing to the visitors' enjoyment.

- Program is thought-provoking and engaging
- Leads the group in active participation
- Encourages visitor feedback

- Appropriate appearance, mannerisms, gestures and body language
- Positive attitude, enthusiasm, appropriate humor

Programmatically Accessible

A high-quality program uses a wide variety of techniques to involve the senses and accommodate a variety of people with disabilities. All visitors may benefit from the use of accessible communication techniques such as handheld objects, descriptive language, large-print brochures, program outlines, tape recordings, assistive listening devices and written transcripts of programs.

- Thorough orientation—restrooms, exits, length of program, rest stops, availability of services for people with disabilities or limited English
- Uses a variety of senses to communicate concepts
- Faces audience, speaks with mouth visible for possible lip-reading
- Considers and responds to visitors' needs
- Good volume, pronunciation and enunciation
- Comfortable and appropriate pace

Organized

A high-quality program includes an introduction, body and conclusion. It is outlined sequentially and logically with meaningful transitions that link main ideas.

- Introduction, body and conclusion
- Effective transitions
- Good sequence and progression of ideas

Retained

A successful program makes a lasting impression on visitors, enabling them to retain key points that were made. Ideally, visitors will be inspired in a way that leads to a change in their attitudes and/or their behavior. To check for understanding, an interpreter includes questions for the audience that will indicate that key points have been retained.

- Uses questions to check for understanding
- Conclusion includes a review or summary to make sure visitors understood the major points

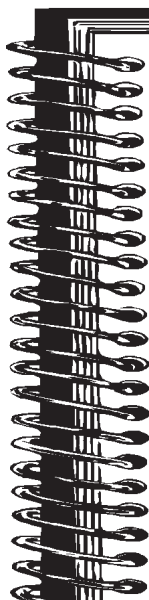
Recommendations

Be constructive when completing this section. Offer suggestions for improvement, alternative approaches, helpful hints, sources of information, ideas, etc. This is the evaluator’s opportunity to provide additional feedback to the interpreter(s) that may not fit in the preceding categories. If the evaluator needs more space, additional recommendations may be attached.

Thematic

A high-quality program presents a clear theme that is developed and supported throughout the presentation. The theme is vital to the success of the program because it focuses and reinforces the key message being conveyed.

- Program has a discernible theme statement
- Theme addresses the significance of the park and helps bring the park to life
- Key points develop the theme



Advantages

- + Many districts use the DPR 461 forms in conjunction with other evaluation methods. Supervisor evaluation using earlier versions of the DPR 461 form has been standard procedure within the department for decades. The Standard RAPPORT form DPR 461 provides a consistent record of the evaluation process.

Disadvantages

- The Standard RAPPORT form DPR 461 is designed to provide feedback for individual interpreters. The use of these forms does not address issues of visitor response, program effectiveness, or the quantity and availability of interpretive services at a given park. Therefore, it is best used in conjunction with other evaluation techniques.

Standard RAPPORT Evaluation

INTERPRETER		PROGRAM TITLE				SITE		DATE PROGRAM PRESENTED	
PROGRAM THEME			START TIME	FINISH TIME	ATTENDANCE	EVALUATOR NAME			
ITEM		POOR	NEEDS IMPROVEMENT	STANDARD	GOOD	EXCELLENT	COMMENTS <i>(Enter comments for each element.)</i>		
RELEVANT	Use of comparisons to relate new ideas to familiar concepts.	1	2	3	4	5			
	Appropriate to age and ability level of group.	1	2	3	4	5			
	Appropriate program length.	1	2	3	4	5			
	Relates DPR message/mission and park objectives to visitors' lives.	1	2	3	4	5			
ACCURATE	Well-prepared, well-researched (costume if applicable).	1	2	3	4	5			
	Correct facts.	1	2	3	4	5			
	Balanced presentation of theories.	1	2	3	4	5			
PROVOCATIVE/ENJOYABLE	Program is thought-provoking and engaging.	1	2	3	4	5			
	Leads the group in active participation.	1	2	3	4	5			
	Encourages visitor feedback.	1	2	3	4	5			
	Appropriate appearance, mannerisms, gestures and body language.	1	2	3	4	5			
	Positive attitude, enthusiasm, and appropriate humor.	1	2	3	4	5			

ITEM		POOR	NEEDS IMPROVEMENT	STANDARD	GOOD	EXCELLENT	COMMENTS <i>(Enter comments for each element.)</i>	
PROGRAMMATICALLY ACCESSIBLE	Thorough orientation — restrooms, exits, length of program, rest stops, availability of services for people with disabilities or limited English. etc.	1	2	3	4	5		
	Uses a variety of senses to communicate concepts.	1	2	3	4	5		
	Faces audience, speaks with mouth visible for possible lip reading.	1	2	3	4	5		
	Considers and responds to visitors' needs.	1	2	3	4	5		
	Good volume, pronunciation and enunciation.	1	2	3	4	5		
	Comfortable and appropriate pace.	1	2	3	4	5		
ORGANIZED	Introduction, body, conclusion.	1	2	3	4	5		
	Effective transitions.	1	2	3	4	5		
	Good sequence and progression of ideas.	1	2	3	4	5		
RETAINED	Uses questions to check for understanding.	1	2	3	4	5		
	Conclusion includes a review or summary to make sure visitors understood major points.	1	2	3	4	5		
THEMATIC	Has a discernable theme statement.	1	2	3	4	5		
	Theme addresses the significance of the park and helps bring the park to life.	1	2	3	4	5		
	Key points develop the theme.	1	2	3	4	5		
RECOMMENDATIONS								
COMMENTS DISCUSSED WITH <i>(check all that apply)</i>					EVALUATOR SIGNATURE		DATE	PHONE NO. <input type="checkbox"/> CALNET
<input type="checkbox"/> Interpreter(s) <input type="checkbox"/> Unit Supervisor <input type="checkbox"/> District Superintendent					▶		()	

Expert Evaluation

*Art communicates what cannot be said in mere words.
It brings us to a point beyond the complacent and the
mundane, where our minds and spirits soar.*
—Larry Beck and Ted Cable

Expert evaluation is a method that harnesses the knowledge of skilled interpreters. Experts have experience, education and training that allows them to efficiently assess a program's strengths and weaknesses, including aspects that might otherwise go unnoticed. Many experts are interpretive professionals with a deep awareness of the subtleties of the art of interpretation. They are versed in its vocabulary and can articulate the qualities of a program. They have developed skills to analyze and describe the many levels of communication within a program.

Interpretive experts may have a specialty such as accessibility, environmental education, exhibit design, etc. By making use of expert evaluation, a park can make significant improvements in areas where staff may have little training or experience. In some cases an expert may be a university student with a specialized field of study. It may be appropriate for a graduate student to perform an evaluation as part of a thesis project.

Experts can be utilized not only in the evaluation process, but also in training or workshops that inspire and motivate interpretive staff and docents. The involvement of experts can be viewed as an opportunity to network with professionals in the field. Many workshops offered by organizations such as the National Association for Interpretation are structured to allow the participants to bring examples of problems and successes to share in a workshop setting. Thus, with the assistance of a group or network of experts, program elements can be improved.

Expert evaluation can be applied not only to live interpretive programs, but also to facilities such as exhibits, visitor centers and audio-visual programs. Expert evaluation is also highly recommended for accessibility evaluation, which requires familiarity with related laws and their application.

Ideally, interpretive program evaluation is an element of a well-coordinated improvement plan. If the plan identifies the need for expert evaluation, the following steps are recommended in order to reap the greatest benefit:

1. Identify the goals and objectives of the expert evaluation.
2. Research the availability of an expert who would be appropriate to evaluate the park's interpretive program(s), goals and objectives.
3. Follow contract procedures for a consultant (for a volunteer, follow normal documentation procedures).
4. Meet with the expert to plan the evaluation. If the expert will view live interpretive programs, there should be meetings with the interpreters to allow the participants to

- become familiar with each other and to know what is expected through the evaluation process.
5. The expert conducts the evaluation(s). This may or may not include the use of a specific form or questionnaire that is applicable to the program.
 6. Results of the evaluation(s) are discussed with staff or individual park interpreters.
 7. A written narrative of the evaluation findings and recommendations is submitted by the expert.
 8. The park implements improvements based on the expert's recommendations.
 9. Follow-up evaluations may be conducted.

- Local museums, zoos, parks or tourist attractions that offer high-quality interpretive programs
- Educators who specialize in environmental education, communications, interpretation or a related topic (university contacts may assist with finding a graduate student)
- Professional associations such as the National Association of Interpretation (NAI), American Association of Museums (AAM) or the American Association for State and Local History (AASLH)
- Exhibit designers—see magazines of NAI, AAM, etc., and Interpretive Service Vendors/Contractors Database, maintained by the Interpretation and Education Division

Sources for Expert Interpreters

- District Interpretive Coordinators or other interpretive staff from California State Parks
- Staff from California State Parks' Park Operations Division, Interpretation and Education Division and Service Centers
- Accessibility consultants

References

Brett Wright and Marcella Wells, *A Field Guide for Evaluating National Park Service Interpretation* (Washington, DC: National Park Service, 1990).



Advantages

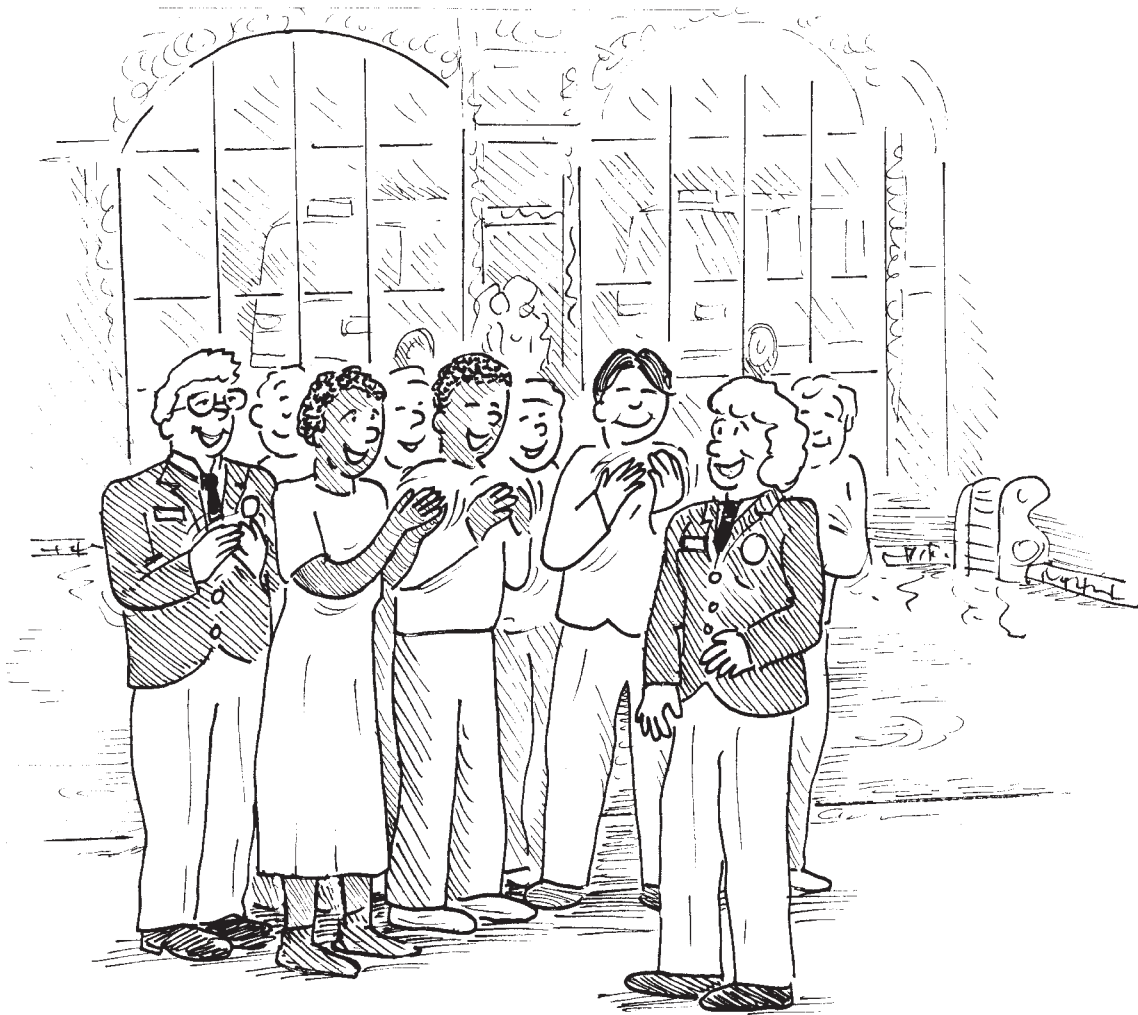
- + Expert evaluation can be used to assess the subtleties of an interpretive program in a manner similar to the way in which art, literature or theater performance is critiqued. This serves to:
 - + improve the appreciation of interpretation
 - + improve the standards by which interpretation is judged
 - + acknowledge the complexities of an interpretive program and to make the appreciation of those complexities possible
 - + raise the caliber of interpretive programs by benefiting from the expertise of others
 - + build relationships and network within the professional field of interpretation

Disadvantages

- Interpretive staff may feel intimidated by the caliber of the expert, depending on their own level of training, preparation and resources available. An expert may be available on a volunteer basis, but most require a contract and payment.

Peer Evaluation

*A few strong instincts and a few plain rules suffice us.
–Ralph Waldo Emerson*



Peer evaluation is a dynamic evaluation method that allows an entire group of interpreters to build upon each other's skills. When leads and supervisors have limited time, peer evaluation provides interpreters with the feedback and interaction they need to keep their programs current and of high quality.

At Hearst San Simeon State Historic Monument, experienced peers who evaluate new interpreters are referred to as "angels." At some parks, volunteers participate in docent peer groups to help build team spirit and improve the quality of interpretive programs. Perhaps most commonly, members of a training session informally practice their presentations and then comment on each other's work in the development phase.

The success of peer evaluation depends heavily on the chemistry and communication skills of each peer within a given group. Some interpreters may find it difficult to critique their co-workers, teammates and/or social friends.

Peer “observation” is another term for peer evaluation that in some cases is less threatening. Peers are asked to observe specific techniques—how often they are used and when they are used in a program. Thus the peer’s comments take the form of an objective assessment rather than subjective comments. The process can be structured to provide positive feedback and allow the observers to show a great deal of support.

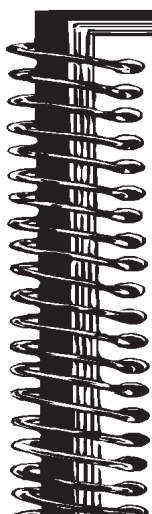
A peer evaluation program is most successful if carefully planned and structured. For best results, the concept of peer evaluation should be introduced and practiced in training. There should be a strong emphasis on communication skills and each interpreter

should be prepared to give and receive appropriate comments from peers. Participation in peer evaluations should be voluntary. The supervisor should also monitor the success and general acceptance of the technique, due to its potential sensitivity.

The Standard RAPPORT form DPR 461 may be used in the process of peer evaluation. This form focuses on the major elements that contribute to successful, quality interpretive programs. Although included in this handbook under Supervisor Evaluation, the DPR 461 can be used by anyone who is conducting an evaluation of live interpretive programs. See the Supervisor Evaluation section for instructions and a sample form.

References

Alan Gartenhaus, “Why, How, and When to Evaluate,” *The Docent Educator* (Summer 1997).

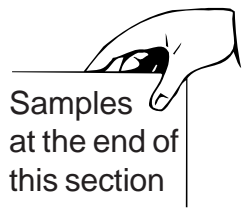


Advantages

- + Successful peer evaluation can build professionalism and group support. It is an inexpensive evaluation technique utilizing knowledgeable staff members. A successful peer evaluation program is an indicator that a park unit has cohesive staff, consistent training and good communication skills.

Disadvantages

- Evaluation can be threatening to interpreters. A successful peer evaluation program relies on strong, trusting relationships and good communication skills. With many park workplace demands, it can be a challenge to create and maintain a supportive atmosphere.



Samples
at the end of
this section

Self-Evaluation

The author himself is the best judge of his own performance; none has so deeply meditated on the subject; none is so sincerely interested in the event.
—Edward Gibbon



Self-evaluation allows an individual interpreter to reflect on his/her skills and knowledge. A professional interpreter should constantly strive to improve communication skills and to use new techniques to reach a variety of audiences. To formalize this process, a district may schedule self-evaluation in its array of evaluation techniques.

For new interpreters or seasonal staff, self-evaluation is very helpful after the conclusion of a training program and a few initial presentations. This is an ideal time to reflect on what is working and what needs to be improved. For experienced interpreters, a self-evaluation may be appropriate on an annual basis in conjunction with an employee's Appraisal and Development Plan (DPR 911) review.

The most common method of self-evaluation is to fill out a questionnaire such as the DPR 461D. Park unit staff can customize a questionnaire to address the park's unique objectives. Staff may choose to address important preservation themes or other current issues.

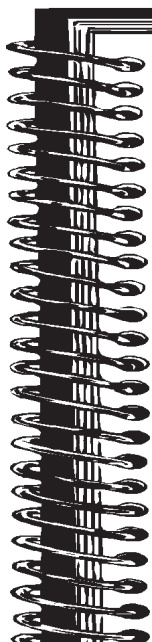
Another very effective method for self-evaluation is to videotape or audiotape an interpreter's presentation and allow him/her to play it back. This allows interpreters to see how they look and/or sound to visitors. After reviewing the tape, the interpreter should write a brief summary or discuss what he/she felt worked well and what should be improved about the presentation.

Self-evaluation can also be applied to the department's performance measures. For example, the department's performance-based management plan has adopted the following performance measure: the *degree of congruity with curricula for educational experiences for K-12 students*. While the

School Group Program Evaluation provides important data for this measure from a teacher's perspective, a park's interpretive staff can also use self-evaluation to assess their own programs for congruity with K-12 curricula. Curricula information on California teaching frameworks is available from the California Department of Education (Web site address: www.cde.ca.gov).

References

William T. Alderson, and Shirley Payne Low, revised second edition, *Interpretation of Historic Sites* (Walnut Creek, CA: AltaMira Press, 1996).



Advantages

- + A self-evaluation is nonthreatening to the interpreter while providing an opportunity to identify improvements. Given the opportunity and encouragement to evaluate their own abilities, interpreters will find creative ways to improve programs.

Disadvantages

- Self-evaluations sometimes require interaction or guidance from another person. A review or discussion with a coach or supervisor is helpful. Success with this method requires the interpreter to approach it with a mature and responsible attitude.
- Some interpreters suffer from "stage fright" when faced with videotaping or audiotaping. However, it is inadvisable to record an interpreter without his/her knowledge.

SELF-EVALUATION OF INTERPRETIVE PROGRAM

INTERPRETER	DATE PROGRAM PRESENTED	SITE	
THEME STATEMENT			
ITEM	YES	NO	IDEAS TO TRY NEXT TIME
<p>RELEVANT:</p> <p>Did I use the pre-program time for assessing my group's interests, capabilities and prior knowledge of the park?</p> <p>Was my introduction meaningful to the group?</p> <p>Was the presentation appropriate to the age and ability of the group?</p> <p>Did I hold the interest of the group members?</p> <p>Was the program length appropriate?</p> <p>Did I use comparisons to relate new ideas to familiar concepts?</p> <p>Did I relate the DPR mission and park significance to the visitors' lives?</p>			
<p>ACCURATE:</p> <p>Did I show a good knowledge of the subject matter?</p> <p>Was I fully prepared to answer a variety of questions?</p> <p>Do I have any doubts about any statements I made?</p> <p>Did I give a balanced presentation of conflicting theories?</p>			
<p>PROVOCATIVE/ENJOYABLE:</p> <p>Did I get my group involved?</p> <p>Did I provoke them to care about the park?</p> <p>Speech:</p> <p>Was my volume appropriate?</p> <p>Did I vary tones for emphasis?</p> <p>Were my words clearly pronounced?</p> <p>Was my speaking rate varied for emphasis and feeling?</p> <p>Gestures:</p> <p>Did I use body motions such as pointing for direction and gesturing for emphasis?</p> <p>Did I avoid distracting postures such as folded arms, hands in pockets, rocking, leaning or slouching?</p>			

ITEM	YES	NO	IDEAS TO TRY NEXT TIME
<p>Was I using facial gestures as positive responses to my group, such as nodding and smiling?</p> <p>Was I facing my group when listening?</p> <p>Poise:</p> <p>Was I available for conversation before and after the presentation?</p> <p>Was I supportive when my group responded to my presentation?</p> <p>Did I handle strange questions gracefully?</p> <p>Did I answer the most frequently asked questions as if it were the first time the questions were asked?</p> <p>Did I keep my group under control?</p> <p>Was I positive toward my group at all times, expressing warmth, interest and enthusiasm?</p> <p>Did I use humor appropriately?</p> <p>Was I attentive to visitor comments, questions and replies by acknowledging the speaker?</p>			
<p>PROGRAMMATICALLY ACCESSIBLE</p> <p>Did I provide a thorough orientation with ground rules and safety tips clearly and graciously explained?</p> <p>Did I offer services that are available for people with disabilities or limited English?</p> <p>Did I explain the length of the program, rest stops, and exit options?</p> <p>Were key concepts illustrated through the use of objects, media and/or site features?</p> <p>Was my mouth clearly visible to assist possible lip reading?</p> <p>Did I speak slowly enough to be understood by everyone in the group, including people with hidden disabilities?</p> <p>Did I wait for chatter and distracting noises (such as from an electric wheelchair) to subside before beginning?</p>			
<p>ORGANIZED</p> <p>Did my presentation have an introduction, body and conclusion?</p> <p>Did I introduce myself and California State Parks?</p> <p>Did I organize what I said so that the visitor could understand the major points I was making?</p> <p>Did I manage the time well?</p> <p>Did I use good transitions?</p> <p>Was the progression of ideas smooth and logical?</p>			

ITEM	YES	NO	IDEAS TO TRY NEXT TIME
<p>RETAINED</p> <p>Were my questioning strategies successful in encouraging participation and leading visitors to learn?</p> <p>Did the visitors' questions reflect an understanding of the subject?</p> <p>Did I use questions to check for understanding?</p> <p>Did I summarize?</p> <p>Did I review my theme for visitors?</p> <p>Did I leave them wanting more?</p>			
<p>THEMATIC</p> <p>Did I use a clearly stated theme?</p> <p>Did I select appropriate facts to accomplish the objectives and illustrate the theme of my program?</p> <p>Did my theme address the significance of the park and help bring the park to life?</p>			
<p>How can I improve my presentation?</p>			
<p>How can my supervisor or other staff assist me with improving my presentation?</p>			

Team Evaluation

The salvation of this human world lies nowhere else than in the human heart, in the human power to reflect, in human meekness and human responsibility.

–Václav Havel

California State Parks is committed to using quality management methods and tools to evaluate and improve its programs. Team evaluations take an in-depth approach to improvement: identifying needs for improvement, analyzing the cause of problems and strategically planning effective solutions.

The department strongly encourages the formation of a District Interpretive Improvement Team (DIIT) (see section under District Guidelines). The efforts of the DIIT should focus broadly to include improvement of all interpretive services. Additional improvement teams may also be formed to address individual programs or facilities as appropriate. For example, if the DIIT's analysis recommends that funds be directed to refurbish a visitor center, the DIIT may choose to form a special team to make specific recommendations for that project's completion.

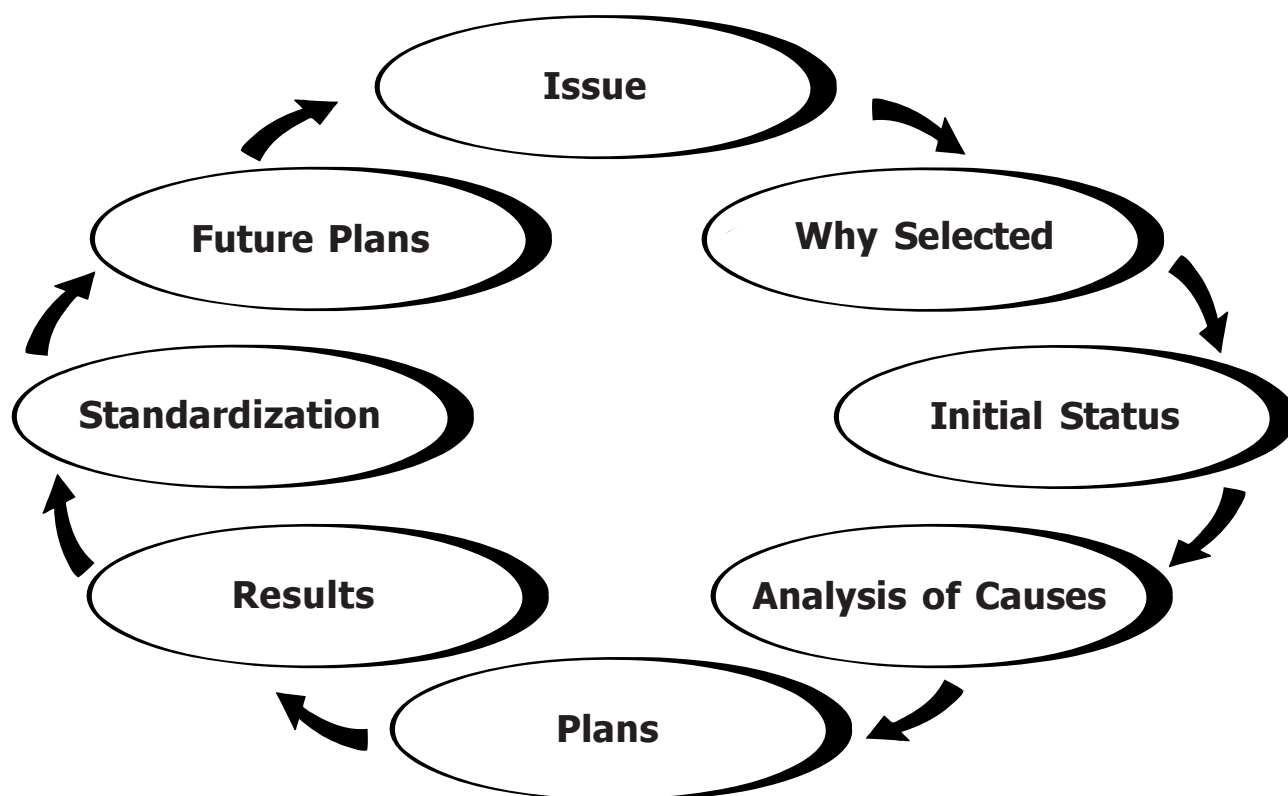
The improvement team model was used in a training package entitled *Self-Critique: A Tool for Evaluating Interpretive Services* produced for the National Park Service. Its simple step-by-step approach could also be applied to a state park. This self-critique evaluates the availability and quantity of interpretive services within a park. It calls for an evaluation coordinator to conduct a one-day workshop with staff from each area of park operations. The group comes up with a priority list of improvements. The evaluation coordinator then prepares a report on the group's recommendations and submits it to the superintendent. This improvement team model only addresses the quantity and availability, not the quality, of interpretive services.

The current improvement team method preferred by the Department consists of eight steps (diagram on next page) to guide the team and document the team's progress.

Step 1: Issue—The issue statement is a simple phrase that contains a **direction**, a **measure** and a **reference** to a process, product or service. In some cases an issue will be defined by the superintendent. In other cases, the team may be charged with identifying the most important issue to address first in the course of improvement efforts.

Examples

- Increase visitor satisfaction with interpretive services at [this state park].
(direction) (measure) (reference)
- Increase visitor understanding of resource preservation.
(direction) (measure) (reference)
- Decrease the number of incidents of visitors feeding wildlife.
(direction) (measure) (reference)



Step 2: Why Selected—This section explains how and why the issue was selected, why it is the most important issue, and how it relates to the customer.

Examples

- This issue was selected to address the department’s desired outcome in the Education/Interpretation Core Program Area, which states: “The public understands the significance and value of the state’s natural and cultural resources through education, interpretation and leadership.”
- This issue was selected based on data showing that visitor impact on the resource is increasing, while the public’s understanding of resource preservation issues is minimal. Interpretive services offer visitors resource preservation information that is intended to increase their understanding and improve their behavior with regard to park resources.

Step 3: Initial Status—The initial status is the starting point necessary to measure the

success of the improvement effort. It provides data giving the status of the **measure** that was identified in the Issue Statement before the process was improved. The initial status statement lists the main facts that were known at the beginning of the project.

Example

- If the measure in the issue statement is “visitor satisfaction,” as it is in the first example on page 64, the initial status would be the current data regarding visitor satisfaction with interpretive services. Initial Status: A survey of 100 visitors in 1998 gave an average 3.2 rating (from a scale of 1-5, 1 being “very low” and 5 being “very high”) in visitor satisfaction with interpretive services at (this state park).

Step 4: Analysis of Causes—This portion of the improvement process can utilize a variety of analytical tools to identify the main causes of the issue. It provides the data and analytic information to show how the causes were

found. It also explains the theory of the causes and how the theory was verified. Improvement team members should refer to manuals from the department's Park Quality Management training course, for examples of tools for analyzing causes.

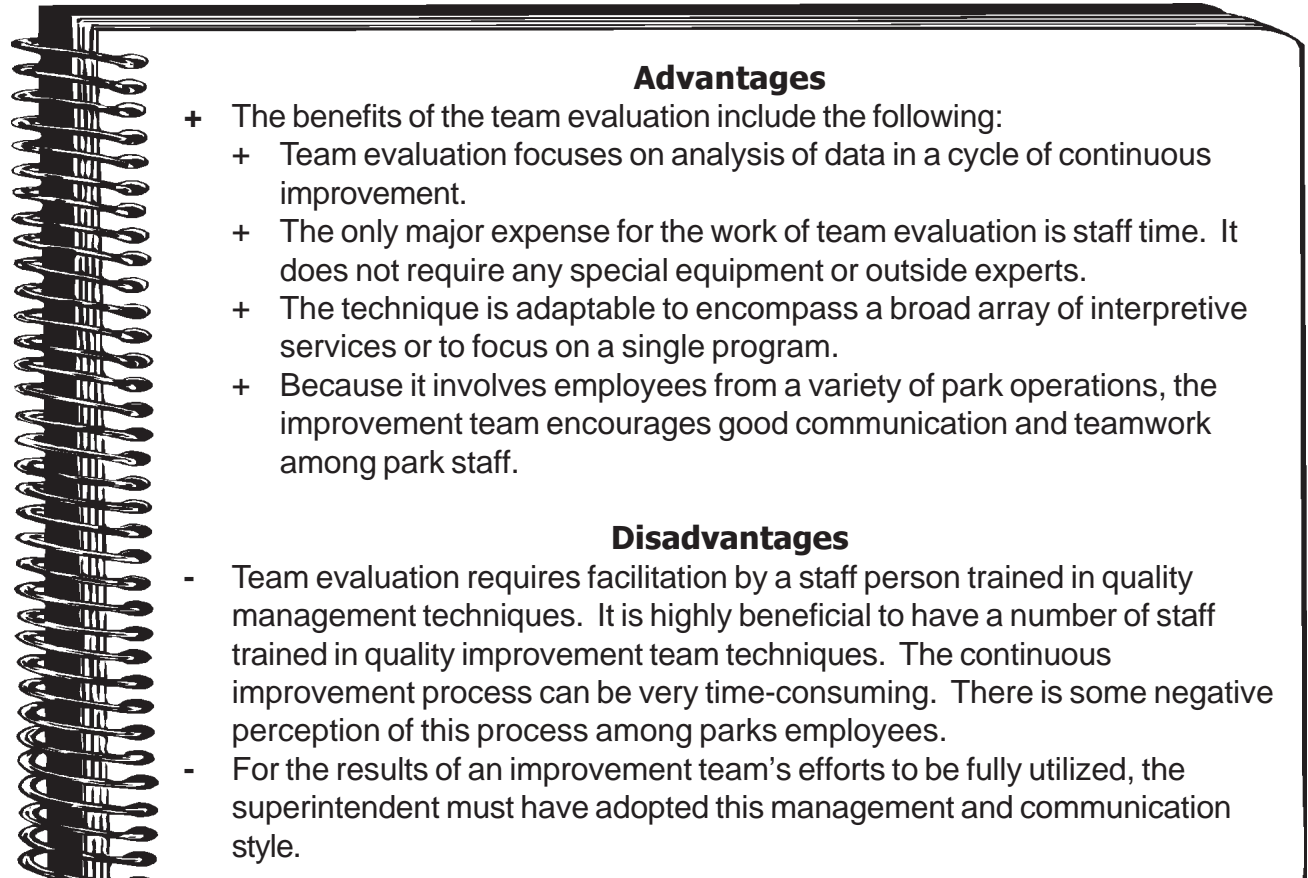
Step 5: Plans—This section begins with an objective statement, which is a goal derived from the process of analysis. Plans show how the best solution was selected and give the steps for implementation including tables and timelines. Plans should clearly show how implementing the plan will eradicate the cause and achieve the goal.

Step 6: Results—This section compares the actual results with the objectives. It is important to use the same measure used in the initial status. If there is an unexpected gap between the objective and the actual result, an analysis is included.

Step 7: Standardization—These are the steps taken to assure that the implemented solution will remain in effect. The steps include documentation, training on the new process, training on the skill needed, physical reorganization, sharing, and monitoring.

Step 8: Future Plans—Listed here are the remaining problems that might be targeted for the next improvement project. Problems may or may not be related to the previous issue. Future plans should identify the next issue selected as a priority for improvement.

An improvement team is generally formed to facilitate continuous improvement as a cycle. If future plans identify remaining problems to be solved, the group returns to Step 1—The Issue.



Advantages

- + The benefits of the team evaluation include the following:
 - + Team evaluation focuses on analysis of data in a cycle of continuous improvement.
 - + The only major expense for the work of team evaluation is staff time. It does not require any special equipment or outside experts.
 - + The technique is adaptable to encompass a broad array of interpretive services or to focus on a single program.
 - + Because it involves employees from a variety of park operations, the improvement team encourages good communication and teamwork among park staff.

Disadvantages

- Team evaluation requires facilitation by a staff person trained in quality management techniques. It is highly beneficial to have a number of staff trained in quality improvement team techniques. The continuous improvement process can be very time-consuming. There is some negative perception of this process among parks employees.
- For the results of an improvement team's efforts to be fully utilized, the superintendent must have adopted this management and communication style.

References

Ron Black, *Total Quality Management Basics* (Sacramento, CA: Meta Dynamics, 1994).

Interpretive Improvement Team Interim Report (Santa Barbara, CA: Channel Coast District, California State Parks, 1997).

Nancy C. Medlin, Gary E. Machlis, and Jean E. McKendry, *Self-Critique: A Tool for Evaluating Interpretive Services: A Training Package Prepared for the National Park Service*, handbook and video (Moscow, ID: University of Idaho, prepared for National Park Foundation).

Appendix A: Data-Gathering Principles

*It is a capital mistake to theorize before one has data.
–Sherlock Holmes in Sir Arthur Conan Doyle's "Scandal in Bohemia"*

Reprinted from *A Handbook for Evaluating Interpretive Services*, by Nancy Medlin and Sam Ham (Moscow, ID: University of Idaho, prepared for the USDA Forest Service Intermountain Region, 1992), with permission of the authors.

Section 3: A Few Important Issues

Before discussing specific evaluation techniques, there are a few important points concerning the way the evaluation is conducted which will determine how meaningful and useful the results will be, especially when a quantitative technique is used. These are 1) precision, 2) consistency, 3) sampling, 4) generalizing, and 5) assumptions about evaluative criteria.

Precision

Precision is an issue that all evaluators face. A precise yardstick, for example, is exactly three feet long, and each division mark is exactly in the right place, down to fractions of an inch. So if a tree is 2 feet, 3½ inches tall, and we measure it with the yardstick, our measurement should read 2 feet, 3½ inches.

Similarly, when evaluating an interpretive service, our evaluation technique (the yardstick) must be precise in order to produce valid results. How precise must it be? In the case of the tree measurement, knowing its height to the nearest one-half inch was precise enough for our purposes. More precision might require a different, more expensive measuring technique and perhaps more time and effort, but would not produce more useful information. Our goal is to obtain results that are precise enough to yield usable information in a timely, practical manner. In our case, “usable” means that the information an evaluation produces gives us some indication of how to improve our service to visitors.

Consistency

Consistency is also an important issue. Returning to our tree measurement analogy, if two or more different people each use the same yardstick to measure the tree, both should come up with the same height of 2 feet, 3 ½ inches. If the yardstick is consistent,

it shouldn't shrink or stretch between readings. So if the different evaluators independently use the same technique to evaluate the same interpretive service, and their results are the same, that technique is consistent and the results are reliable.

Sampling

Sampling is a third evaluation issue to consider. If we had ten acres of young trees and wanted to know their average height, rather than measure hundreds of trees we could measure a sample of trees and compute the average. In selecting our sample it would be important to choose trees *randomly* and to measure the same number of trees from each acre. This is because some acres might have different growing conditions and therefore taller or shorter trees than others, thus raising or lowering the average. If each acre were *equally represented* in our sample, the average height of the sampled trees would be

representative of the average height of all the trees within the ten acres.

Evaluators must be careful samplers. For example, when observing visitor behavior, such as the number of people who stop to look at an exhibit, it is very important to select a sample that is representative of most visitors. Quantitative evaluation techniques require systematic sampling procedures. First, one must decide how many visitors to sample. If you are evaluating a personal interpretive activity such as a walk or talk, refer to Table 1 which suggest sample sizes for different audience sizes. These sample sizes will produce results that are representative of the entire audience, with an error margin of plus or minus 1 percent.

If you are evaluating an exhibit or other non-personal interpretive service, you could select a sample of time periods and apply your evaluation technique to every visitor within those time periods, or sample visitors within time periods. Sampling procedures are

Table 1
Sample Size Guide for Evaluating Personal Interpretive Services

<u>Audience Size</u>	<u>Sample Size (individual adults)</u>
1-40	entire audience
41-50	28-33
51-60	33-37
61-70	37-40
71-80	40-44
81-90	44-47
91-100	47-50
101-150	50-60
151-200	60-67
201-250	67-75
251-300	75-80

Source: R. Schaeffer, W. Mendenhall, and L. Ott, *Elementary Survey Sampling* (Boston: PWS-Kent Publishing Co., 1986)

clearly described for each evaluation technique in Section 4.

Generalizing

Evaluators must consider the extent to which their findings can be applied to other situations, that is, generalizability of their results. Sampling and generalizability are closely related. Using our tree example again, if our sample is representative, we can say that the average height of the trees within the ten acres is 2 feet, 3½ inches; that is, we can generalize our results to those ten acres. However, we cannot generalize to the surrounding 100 acres, because they were not sampled.

Similarly, if we want to know how many visitors are reading the exhibit, but we only make observations on Sunday mornings, our results only apply to Sunday morning visitors (unless we have reason to believe that visitors who come on Sundays are no different from visitors who come on other days). In any event, our observations will only tell us about the exhibit in question, not about other exhibits.

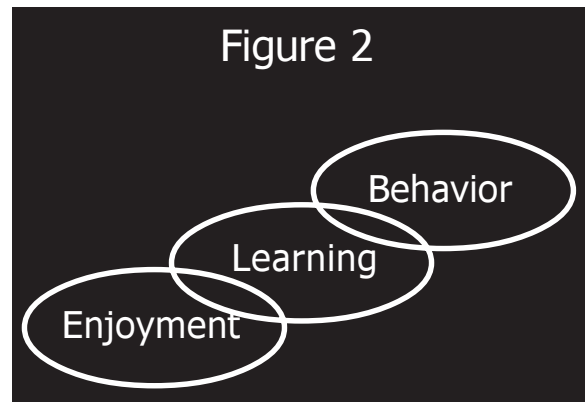
Some evaluations are based on feedback from visitors who *volunteer* to give it to us, rather than those who are selected at random. Because volunteers may have extreme opinions (both positive and negative), they may paint a different picture of an interpretive service than visitors who are selected randomly to participate in an evaluation. Keep this in mind, and always be conservative in making generalizations from evaluation results.

Making Assumptions

Any evaluation may require us to make assumptions related either to the criteria we

are using, our procedures, or both. In this handbook, at least four sets of assumptions apply.

1. To assess enjoyment, we make the assumption that if visitors tell us they enjoyed something, then they did.
2. Learning is defined here as short-term recall. In other words, if asked immediately after experiencing a program, what will visitors say they learned from it?
3. We make assumptions about visitor behavior: 1) that we can interpret observed behavior, and 2) that behaviors that interest us can be attributed, at least in part, to interpretive messages received. Although it is true that many visitors would engage in desired behaviors whether or not they received the message, trying to determine which visitors are which would require evaluation methods that are more complex and more costly.



4. We assume that our three interpretive outcomes build on each other in a sort of hierarchy (Figure 2). If visitors enjoy a particular interpretive service, such as a guided walk, it is more likely that they will pay attention to the interpreter and learn something. Continuing up the hierarchy, learning important information may lead to desired behavior (unless visitors are not already engaged in desired behavior).
5. We assume that unless an interpretive service is specifically designed for children, then it is aimed at adults. For our purposes an adult is anyone who appears to be in their teens or older.

The information below was distributed by California State Parks in 1996. While it is intended to give guidelines for the Statewide Visitor Satisfaction Survey, this information on data gathering may be applied to many evaluation methods.

User's Guide - Chapter 3 Data Gathering

The "Random" Component of the Survey Process

One of the key survey components to assure statistical reliability is that of being random. The word random, as used here, means that all visitors have an equal chance of being selected for survey without *bias or prejudice*. It does not mean "haphazard, aimless, confused or unplanned."

The survey process you develop for your specific park unit must eliminate surveyor bias as much as possible. If you are successful, you will have a system that is independent of who is administering the survey, and it will be reliable regardless of the person doing it.

The ideal survey would cover 100 percent of park users, but that is not practical. So, the problem then becomes, "if you can't survey everyone, who do you survey?" It is in the selection of who gets surveyed that randomness becomes important.

Reliability of the Survey Process

The task at your park is to survey enough visitors to have reliable data.

Statisticians have found that survey reliability (that is the chance that your survey of a percentage of visitors will approximate the

results of surveying all of the visitors) increases in direct proportion to an increasing number of surveys. However, they also found that at some point the results approach a stable limit and won't change significantly, no matter how many additional people you survey.

Polls, for example, predict nationwide voting outcomes, with potentially millions of voters. They do this at a 95 percent reliability level with a relatively small telephone poll of about 500 people. The key to such reliable statistical prediction is that the polling company's small sample represents the total population very closely.

If you have multiple uses at your park unit, you may have to adjust your survey process to accommodate most all user groups. For example, if all your surveys are handed out at an entrance station, but 80 percent of your use is walk-in or free day use, you will miss a major component of your visitor base. In this example one would want to be sure those walk-in access points were also surveyed.

In another situation, if your park unit has a substantial day-use visitor component, but you are only handing out surveys during camp-ground patrol, you will bias the survey toward campers opinions on the questions asked. The survey will not reflect a measure of satisfaction by all your visitors for all services and facilities. Survey bias may give you unreliable data and misdirect valuable resources toward solving the wrong problems.

Several typical park unit scenarios are provided at the end of this chapter as a guide for what you might want to consider in assuring a *random and reliable* survey process.

Who Gets the Survey?

Setting up a random survey distribution will, in itself, determine who does or does not get a survey. It must not be dependent on any personal or subjective bias. The person is picked at random. Remember, “random” does not mean “haphazard, aimless, confused or unplanned,” it means free from bias or prejudice.

We do want a random cross section of our visiting public. We do not want specific types of visitors surveyed. If one gives surveys only to those who seem “friendly” or those who are “using the park correctly,” we will not get a true picture (statistically) of the services with which our visitors feel satisfied or those that need improvement.

The distribution system you devise for your unit should take as much of the subjectivity out of the process as possible. That is why the examples at the end of this chapter use factors that can’t be affected by the surveyor. One has no way of knowing or affecting who will be the first person to drive up to the entrance station at noon or who will be sitting on the beach when the truck odometer hits a specific number; it is random.

Who Distributes the Survey?

The person distributing surveys should be identifiable as being associated with California State Parks. This recognizable identity will reduce the time necessary to explain who you are and why you are contacting a visitor. Identifiable does not necessarily mean “uniformed.” A campground host, for example, wearing a volunteer vest and ball cap, would meet this requirement.

Some introduction to TQM and customer satisfaction, the unit’s survey process, why it

is being done and what you will do with the information from the survey, should be understood before contacting visitors with survey requests.

Selection of Surveyors

Each survey location will have its own peculiar staffing constraints and opportunities. In some cases permanent full-time employees will be the most appropriate to assign survey responsibilities. In others either seasonal or volunteer help would be more appropriate, efficient, or cost effective. In assigning survey responsibility, however, there are some basic tenets that should be considered.

Bias

The individuals responsible for collecting survey data must be as free of bias as possible. We all have biases that are the product of our life experiences. These biases, in a survey situation, can unconsciously creep into the results of the survey. Although we have attempted to remedy this potential problem by establishing methodologies, surveyors should be introspective enough to be aware of the potential for the influence of personal biases on the survey outcomes. Your surveyors must guard against introducing factors which will bias the outcome of the survey.

Some of the ways in which personal bias has been observed to potentially influence outcomes include:

- *Look-alikes*: Most people have an affinity for others that seem to be “birds of the same feather.” Older people may enjoy talking to more mature park visitors while younger employees may focus more on youthful visitors. Cultural and ethnic differences can produce a similar influence.

- *Good Attitudes:* A friendly and appreciative park visitor often appears to be a good subject for the survey effort. While such a contact is certainly conducive to cooperation in completing a survey form, the “happy camper” may not tell us what we need to know. An inaccurate result can keep us from addressing much needed customer improvement efforts.
- *Location, Location, Location:* Like our visitors, there are some locations in our park units that are more appealing to us than others. Consequently, a surveyor may spend an inordinate amount of time conducting surveys in a favorite location to the virtual exclusion of other areas in the park. Consequently, a whole segment of our customer base will be ignored. There is more to a survey than just the number of forms completed.

Attitude

While any supervisor can tell you that it is not always possible to find employees who want to do every assignment, it is always best to assign people to jobs that they enjoy. The attitude someone brings to an assignment, especially one that involves public contact, will often dictate the degree of success that can be achieved. The Statewide Visitor Satisfaction Survey is a critical component of our effort to improve public service and public image with it. A positive attitude toward the survey process will produce more and better raw data.

Understanding

In order to achieve the best possible results from the survey effort, it is important that those directly contacting the public understand the survey process and its importance to the department. The public frequently wants to know what will be done with their opinions. An answer that comes from an understanding of

the program is always much more satisfying than one that comes from ignorance.

The Statewide Visitor Satisfaction Survey effort is one of the most important programs of the department. Our performance-based budget efforts, our image with the public (and therefore with their elected representatives), and our ability to fulfill our mission are largely dependent on acquiring the right information from the public we serve. It is an effort deserving of our best employees.

Training Surveyors

Why train surveyors?

Understanding the process assures that we will get consistent and reliable survey results. It is important that the individuals conducting the Visitor Survey have appropriate training in order to achieve reliable results. While this training need not be costly or extremely time-consuming, it is nonetheless essential to achieving a valid product.

How do we train surveyors?

Explain the purpose of the customer survey. For example, “We use this data to sort out the significant problems so we can focus our improvement efforts,” or “We use this data to determine true causes of problems so we can eliminate them and have lasting improvement.”

Explain the survey process you have developed for your unit to the surveyor. Model the visitor contact process for the prospective surveyor, including suggested phrases to use when speaking to the visitor. For example, “Would you please help us improve service at this park by taking a few moments to complete and return this survey?”

Follow-up training

Periodically, a brief follow-up should be scheduled with surveyors. These sessions will advise surveyors of any changes in the program, seek input as to what is working well and what is problematic, and advise the surveyors of improvement efforts that are underway as a result of the information gathered.

Criteria for Consistent Results

1. Stick to the survey pattern
 2. Train surveyors
 3. Encourage visitor participation
 4. Monitor the process
 5. Train data entry person
 6. Enter data regularly
 7. Send data to HQ quarterly
- (When new system is implemented, data entry will be done by a contractor and reports accessible on the Wide Area Network [WAN].)

Five Unit-Specific Examples

Here are several hypothetical park unit situations to use as guides in determining what you might consider in developing a survey process for your unit. The basic methodology in each example relies on consistent, random and reliable survey procedures.

Example 1

Camping, Day Use, No Entrance Station

This park unit has no entrance contact station, a 30 unit campground, a 75-person group camp, four separate day-use parking areas (which primarily use self-registration) and 25 miles of hiking/horse trail. The day use areas account for 75 percent of attendance.

The campground and day-use areas are occupied daily and will be surveyed on a regular basis by the patrol staff. The group camp will be surveyed by staff when occupied. Surveys designed for "Satisfaction" will be alternated with surveys for "Importance." (The new survey forms combine satisfaction and importance in one form.)

To achieve random distribution, a preset time period is selected and a way to identify who gets the survey. The methodology could look like this:

- Campground: Every Sunday, Tuesday, Thursday and Saturday, staff will distribute surveys in the campground to the first person they contact at the occupied campsite number which corresponds to the date (if today is Saturday the 24th, you give a survey to campsite #24 or the next nearest occupied site, if vacant).
- Day Use: Every Monday, Wednesday, Saturday and Sunday, on the first patrol between 1200 hrs. and 1400 hrs., staff will give a survey to the first person observed upon entering each of the four day-use parking lots.
- Group Camp: When occupied, the first staff person in the group camp provides a survey to the first person they contact.
- For the park unit in this example, the weekly maximum number of surveys handed out would be, 4 in campground, 16 in the day use area and from 0 to 7 in the group camp, totaling between 20-27 surveys weekly. Instructions are given on how to return the completed survey.

Example 2

Camping, Day Use, Staffed Entrance Station

This park unit has a staffed entrance contact station, a 30 unit campground, a 75-person group camp, four separate day-use parking areas (which primarily use self-registration) and 25 miles of hiking/horse trail.

Assume same profile as in Example 1, except that all visitors pass the entrance station. The methodology could look like this: On a daily basis, give a survey to the next vehicle that enters the park immediately after 1000 hours and after 1500 hours. Because of increased weekend use, an additional survey will be distributed on Saturday and Sunday immediately after 1200 hrs. This method would distribute 16 surveys per week.

Example 3

Day Use, No Entrance Station

This park is day use only (picnic areas, beach, trails) and has no entrance station or administrative building. Visitors may park in parking lots with self-service registration or park outside and walk in. Unscheduled patrols go through the unit only twice per day; usually mid-morning and late-afternoon. The restroom is cleaned daily, usually early morning. Trails are foot patrolled on an irregular basis for fallen trees, hazards and general safety, but usually twice per week.

The methodology could look like this: On a daily basis give a survey to the first person encountered on the morning and afternoon patrol. Maintenance will give a survey to the first person they encounter while cleaning the restroom. Trail patrol will take the surveys and give to the first person encountered after passing some predetermined point on the trail.

For the park unit in this example, the weekly maximum number of surveys handed out would be, 14 in day-use parking, seven near the restroom and from two to seven on trails, totaling between 23 and 28 surveys weekly. Instructions are given to return the completed survey to a specified location (a box at the entrance, mail slot at park office, etc.) for collection.

Example 4

Free Day-Use Beach, No Facilities, Patrol Contacts Only

The walk-in visitors to this two-mile-long beach unit are only contacted in person by lifeguards on vehicle patrol. Between patrols here they have other beaches to check. The round-trip length of this beach is covered about five times per day under normal patrol conditions. There is no entrance or primary contact point.

The methodology could look like this: On a daily basis, patrol staff will give a survey to the person on the beach who is closest to them when their odometer turns over a “3” and a “6” on the indicator (miles not tenths). During a typical week, a minimum of 28 surveys should be distributed.

Other possibilities for this unit include: When the vehicle hour meter hits an even hour (referring to odometer) or; Precisely every two hours from the time going “in service,” etc.

Example 5

Gambler’s Delight - Random Number Generation

Here’s the ultimate random survey generator idea. One determines the location and time in advance. The next survey is given out to the first person seen at the random location and time.

First, take a map of your park unit and divide it into six sectors, so that each sector has some portion of the visitor use. Next, determine how many hours the park unit is staffed (from earliest to latest hour) and divide that by six. Last, get a pair of dice and mark one die.

Roll the dice once to determine which sector (marked die–1 to 6) will be surveyed and the hour multiplier (unmarked die–1 to 6) to

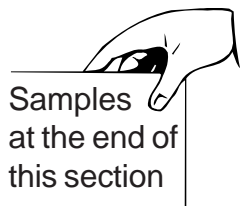
determine the time(s) you will survey. You may want to prepare these numbers in advance, such as a week or a month, and write them directly on your unit schedule.

For this example, assume the roll is a 3 (marked die) and a 4 (unmarked die). That sets three as the sector and four as the time multiplier.

This hypothetical unit has maintenance staff on at 0700 hours and ranger off at 1900

hours, giving 12 hours of staff coverage. Dividing 6 (the number of sides on a die) into the total coverage of 12 hours yields 2 hours. Your marked die was a 4, so multiply 4 times 2 hours and add that to the 0700 start time ($4 \times 2 = 8$, + 0700 hours = 1500 hours) to get the survey time.

In this example, you get a random survey delivery time for a day's patrol shift of 1500 hours in sector #3.



Samples
at the end of
this section

Appendix B

Performance Appraisals

True balance requires assigning realistic performance expectations to each of our roles. True balance requires us to acknowledge that our performance in some areas is more important than in others. True balance demands that we determine what accomplishments give us honest satisfaction as well as what failures cause us intolerable grief.
—Melinda M. Marshall

Permanent Employees

For information on performance appraisals for permanent employees, see the next ten pages.

Seasonal Employees

A Departmental Notice regarding Performance Appraisals for seasonal employees is pending.

Volunteers In Parks Program

For information on performance appraisals for volunteers, refer to the Volunteers in Parks Program manual.

State of California - The Resources Agency CALIFORNIA STATE PARKS		MANUAL
DEPARTMENTAL NOTICE No. 2000-03		Administration
SUBJECT		CHAPTER
EMPLOYEE APPRAISAL AND DEVELOPMENT		0200 Personnel
ISSUED	EXPIRES	REFERENCE
March 10, 2000	When Incorporated	DAM 0240.2, 0240.21, 0309.1

DPR 375 (Rev. 11/97)(Word, 12/30/97)

WHEN APPLICABLE, ENTER THE NUMBER AND DATE OF THIS DEPARTMENTAL NOTICE IN THE MARGIN OF THE MANUAL PAGE, ADJACENT TO THE SECTION(S) AFFECTED BY IT.

This Departmental Notice has been re-created for transmittal in electronic format. The original notice was signed by Denzil Verardo, Chief Deputy Director Administrative Services.

This notice supersedes Departmental Notices 95-17 and 97-31.

The Department has revised the DPR 911, Appraisal and Development Plan (copy attached). Correspondingly, the procedures for completing the Appraisal and Development plan have been revised to reflect the new format. Supervisors shall use the new DPR 911 for all future employee appraisals and career development plans.

The following sections from DAM 0200, Personnel, have been revised to incorporate the new procedures and Departmental Notice 97-31 regarding standards of performance for designated managers and supervisors.

Performance Appraisals for Permanent Employees

0240.2

G.C. 19992-19992.4; DPA Rule 599.798

This is a negotiable issue and may be addressed in bargaining unit contracts. If the issue is not negotiable, Department policy applies as follows:

Annual performance appraisals are required by DPA Rule 599.798 for all permanent full-time, part-time and intermittent employees. These appraisals affirm the Department's commitment to employee development, and allow the supervisor an opportunity to provide recognition to the employee for effective performance or to identify aspects of performance which should be improved.

Performance appraisal is a continuing responsibility of all supervisors who shall discuss performance informally with each employee as often as necessary to ensure effective performance throughout the year. Once a year, each supervisor shall provide an appraisal of each employee's performance using a DPR 911, Appraisal and Development Plan. Such annual appraisals may occur at any time during a twelve month period. Below is one manner in which the annual appraisals may occur.

Last Digit of Social Security Number

Month Plan To Be Completed

- | | |
|---|----------|
| 1 | January |
| 2 | February |
| 3 | March |
| 4 | April |

Last Digit of Social Security Number

5
6
7
8
9
0

Month Plan To Be Completed

May
June
September
October
November
December

Completion of the DPR 911, Appraisal and Development Plan

0240.21

(See flowchart attached to hard copy.)

Responsibility

Action

Supervisor

1. Upon receipt from District/Personnel Section, provides DPR 911 form to employee according to annual plan for completing employee performance appraisals. Instructs employee to complete Parts I-A and II-A & B, and determines a due date for return of the form by the employee.
2. Reviews duty statement with employee to determine if it accurately reflects the employee's current duties and, if not, ensures that a current duty statement is prepared and signed and dated by both the employee and the supervisor.

Employee

3. Completes Parts I-A and II-A & B in draft form and returns the form to the supervisor by the agreed upon date. District Superintendents fill out Part III only. The District Performance Contract is used in lieu of Part I-A and Parts II-A & B.

Supervisor

4. Completes the supervisory appraisal portion of the form (Part I-B & C) including comments on the supervisor's assessment of performance outcomes and the supervisor's assessment of the employee's personal performance. For designated managerial or supervisory employees, completes Part I-B, but not I-C. Also completes DPR 911A or 911B in lieu of Part I-C (*see DAM 0240.22 below*). Reviews and provides comments in Part II-C on Parts II-A & B regarding the employee's performance objectives and performance plan for the coming year. Schedules a performance appraisal session with the employee.
5. Discusses with the employee the duty statement, the employee's past year performance outcomes, and the employee's personal performance by recognizing the employee's achievements and areas of effective performance as well as areas of performance where improvement may be needed (Part I-A through C). Discusses the employee's performance objectives for the coming year and the employee's plan for accomplishing his/her objectives (Part II-A through C). Suggests various means and methods by which the employee's coming year performance objectives may be achieved. Also discusses ratings provided on DPR 911A/B if applicable.

Responsibility

Action

<u>Responsibility</u>	<u>Action</u>
	6. Serving as a coach, encourages employee to participate in the optional Career Development Program and assists the employee in completing Part III. Discusses ways in which the employee might pursue and achieve his/her career objectives, including the employee's interest and participation in the Department's Leadership Development Program.
Employee	7. When meeting with supervisor, reviews comments objectively. Uses the form information and the supervisor's discussion to determine how the supervisor views his/her work. 8. Prepares the DPR 911 in final based on discussions with the supervisor and signs and dates the form. Signs and dates DPR 911A/B if applicable.
Supervisor	9. Signs and dates DPR 911. Informs employee that he/she may request a meeting with the District Superintendent or Division Chief if he/she wishes to further discuss the appraisal (see bargaining unit contracts for any appeal provisions). Attaches copy of the current duty statement and DPR 911A/B for managerial or supervisory employees, submits the originals for the employee's personnel file maintained at the District (for field employees) or the Personnel Section (for headquarters employees), provides one copy to employee, and retains one copy.
District/Personnel Section	10. Files completed forms in employee's personnel file. 11. Maintains records of when to provide supervisors with employee DPR 911s for update based on the District Superintendent's/Division Chief's annual plan for completing employee appraisals. Annually audits District/Headquarters files to determine if appraisals are being completed on a timely basis. Reports discrepancies to District Superintendent/Division Chief.
District Superintendent/ Division Chief	12. Ensures that appraisals are completed and filed on a timely basis. 13. On July 1 st of each year, reports to the Learning and Performance Support Section the number and classifications of employees with Career Development Plans on file (Part III).

Standards of Performance for Designated Managers and Supervisors

0240.22

The Standards of Performance for Managers (DPR 911A) and Standards of Performance for Designated Supervisors (DPR 911B) are used for the annual evaluation of managers and designated supervisors required under the State's pay-for-performance process (copies of forms attached).

Salary adjustments for managers and designated supervisors who are not at the top step of their salary ranges are now provided on a pay-for-performance basis rather than as Merit Salary Adjustments (MSAs). It is necessary, therefore, that managers and designated supervisors be evaluated at least once every 12 months to determine if they will receive a step salary adjustment on the anniversary of their appointment. The DPR 911A/B (which becomes Part IV of the DPR 911, Appraisal and Development Plan) is the evaluation mechanism. The evaluations may be prepared more than once a year for performance evaluation purposes; however, salary adjustments will be given, where appropriate, only once a year. The evaluations may be completed at any time during the 12-month period, not necessarily on the employee's appointment anniversary date. The Personnel Section maintains a tickler file to distribute to appropriate managers and supervisors for evaluations that are to occur for their subordinate staff.

Once a manager or designated supervisor has reached the top step of his/her current salary range, the DPR 911A/B should be completed annually in concert with the Appraisal and Development Plan process. Additionally, general salary increases authorized for managers and supervisors require that a current (within 12 months) pay-for-performance evaluation be completed for each manager and designated supervisor approved to receive the salary increase. Here again, the DPR 911A/B serves as the evaluation mechanism.

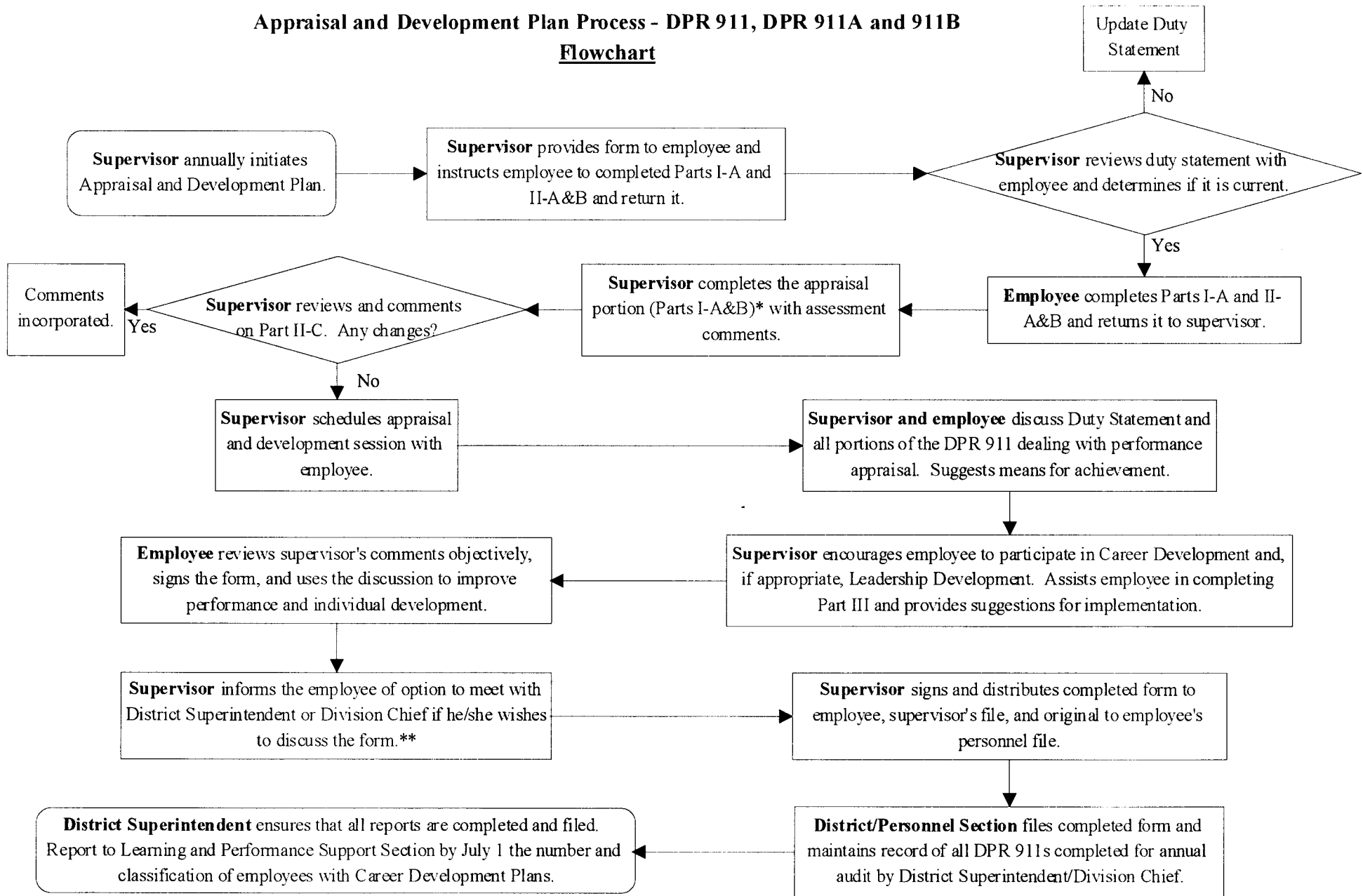
In accordance with DPA Rules 599.799.1 and 599.799.2, a manager or supervisor may appeal his/her performance appraisal using the excluded employee grievance procedure.

Once completed, the rater provides a copy of the DPR 911 and 911A/B to the employee, retains a copy, and sends the originals to the District Office (for field employees) or to the Personnel Section (for Headquarters employees) for retention in the employee's personnel file.

The new DPR 911 (Rev. 5/99) is available on the WAN, and from the DPR Warehouse. Prior revisions of the form should be deleted or recycled. The DPR 911A and B have not been revised; therefore, units can continue to use existing supplies.

If you have any questions regarding this notice, contact Personnel Section Manager Shirley Moody at (916) 653-6089/CALNET 453-6089, or Learning and Performance Support Section Manager Broc Stenman at (831) 649-2954.

Appraisal and Development Plan Process - DPR 911, DPR 911A and 911B
Flowchart



*DPR 911A and 911B completion required in addition for supervisors and managers.

**See bargaining unit contracts for any appeal provisions.

1. For Managers and Supervisors, Part I-A and B will be completed, but not I-C, and all of Parts II and III. The DPR 911 A/B will be completed in lieu of Part I-C.
2. For District Superintendents, only Part III will be filled out. The District Performance Contract will be used in place of Part I-A and B and Part II-A, B, and C.

APPRAISAL AND DEVELOPMENT PLAN

For form completion instructions and procedures, refer to the Personnel Chapter in DAM. If more space is needed, attach additional sheets.

EMPLOYEE	DIVISION/DISTRICT	SECTION/SECTOR	CLASSIFICATION	DATE OF LAST APPRAISAL
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I. PAST YEAR PERFORMANCE

A. PERFORMANCE OUTCOMES: *What goals did you achieve over the past year?*

B. SUPERVISOR'S COMMENTS ON PERFORMANCE OUTCOMES

DUTY STATEMENT CURRENT? Yes (*attached*) No. To be revised by: _____

C. SUPERVISOR'S ASSESSMENT OF PERSONAL PERFORMANCE

	Improvement Needed	Successful	Outstanding
MEETING WORK COMMITMENTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INITIATIVE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PROBLEM SOLVING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMUNICATIONS SKILLS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RELATIONS WITH OTHERS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OTHER (<i>specify</i>):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OVERALL ASSESSMENT OF PERSONAL PERFORMANCE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SUBSTANTIATING COMMENTS:			

II. UPCOMING YEAR PERFORMANCE: OBJECTIVES AND ANNUAL DEVELOPMENT

A. PERFORMANCE OBJECTIVE: <i>What are your performance goals?</i>	B. PERFORMANCE PLAN <i>What actions will you take to accomplish your objectives?</i>	C. SUPERVISOR'S COMMENTS
		PERFORMANCE OBJECTIVES: PERFORMANCE PLAN:

III. CAREER DEVELOPMENT
(Optional)

GOAL STATEMENT <i>Between now and the next 2-5 years, I . . .</i>	DEVELOPMENT OBJECTIVES <i>List in priority order specific steps and methods to reach your goal.</i>
PARTICIPATION IN LEADERSHIP DEVELOPMENT IS INDICATED IN THE EMPLOYEE'S GOALS AND OBJECTIVES? <input type="checkbox"/> Yes <input type="checkbox"/> No	

I accept the Rater's assessment.

I disagree with the Rater's assessment/I wish to discuss this with a Reviewing Officer. ▶

SUPERVISOR SIGNATURE

DATE

EMPLOYEE SIGNATURE

DATE

I concur with the Rater's assessment.

REVIEWING OFFICER SIGNATURE

I have modified the assessment
as shown on the attached.

TITLE

DATE

STANDARDS OF PERFORMANCE FOR MANAGERS

The Standards of Performance provide a basis for assessing managerial performance and for determining whether a salary increase is justified. This form serves as Part IV of the Appraisal and Development Plan/Career Development Plan process (DPR 911) for Managers.

DEFINITIONS OF ASSESSMENTS:

- Improvement Needed** Employee should seek opportunities to acquire skills and abilities characteristic of top performing managers.
- Meets Expectations** Employee is an accomplished and productive member of the management team.
- Exceeds Expectations** Employee's accomplishments have resulted in savings, benefits or program improvements that are clearly beyond those normally expected.
- Outstanding** Employee is at the highest end of the managerial performance spectrum. Employee has achieved results that have demonstrable benefits. Employee serves as a role model for others.

A. MANAGERIAL BEHAVIORS	IMPROVEMENT NEEDED	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	OUTSTANDING
RESULTS ORIENTED: Understands what organizational results are required; defines a clear link between short-term actions and long-term goals; drives for meaningful and measurable results; encourages continuous improvement in work processes.				
ACTION ORIENTED: Establishes an environment where an appropriate response and a sense of mission characterize all interactions; takes appropriate action when tough decisions are required; ensures that decisions are implemented in a timely manner; allocates resources to respond to changing needs.				
TEAM ORIENTED: Recognizes the importance of teams in realizing the department's objectives; understands the appropriate circumstances for the use of teams in contrast to individual work; is able to use teams to increase productivity, quality, employee involvement and customer satisfaction; demonstrates the ability to build and mold teams, foster openness and two-way communication, and increase overall team effectiveness.				
EMPOWERS PEOPLE: Assigns decisions which are best handled at a lower level; creates self managed work teams as the way to work; motivates and supports people through effective coaching and mentoring; sets goals and monitors results rather than getting too involved in telling people how to do things; gives credit where credit is due; delegates not only the work but also the authority and resources to achieve organizational results, is a positive role model of self-management and empowerment.				
OPEN AND HONEST COMMUNICATION: Is sensitive to the concerns and feelings of others; does not treat disagreement as disloyal; encourages constructive and dialogue; creates a climate of openness and trust through his/her behavior; feedback actively solicits information and views from others; deals with conflict appropriately.				
B. LEADERSHIP STRATEGIES	IMPROVEMENT NEEDED	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	OUTSTANDING
USE OF QUALITY MANAGEMENT: Is committed to Quality Management as a basic management principle; personally uses and promotes Quality Management tools to solve organizational problems and identify opportunities; manages by fact and conducts root cause analyses that examine all relevant data to ensure accurate and comprehensive problem diagnosis; serves as a role model for continuous improvement throughout the organization.				
STRATEGIC IMPLEMENTATION: Able to translate broad strategic intent into concrete strategic plans and directions; defines operating objectives and makes specific relevant resource allocation decisions; creates appropriate processes for strategy formulation, implementation, and assessment, including designing and staffing the organization on the basis of strategic requirements.				
CUSTOMER FOCUS: Keeps staff focused on understanding and responding to the needs of customers; sees customer satisfaction as the number one priority throughout the department and the ultimate benchmark guiding decision-making; utilizes customer satisfaction/feed back mechanisms.				

B. LEADERSHIP STRATEGIES (Continued)	IMPROVEMENT NEEDED	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	OUTSTANDING
EMPLOYEE DEVELOPMENT: Recognizes that developing work force competencies is key to gaining competitive advantages-, provides a challenging climate to encourage staff development by rewarding excellence, and encouraging growth, ensures ADP/CDP completed for all employees.				
DELEGATION AND EMPOWERMENT: Directs decision making to the appropriate level and develops subordinates' confidence in their ability to lead and manage; instills in subordinates a sense of partnership in the organization, allocating sufficient authority and resources to subordinates to enable them to make significant decisions and act independently within their area of responsibility.				
C. MANAGING SELF AND OTHERS	IMPROVEMENT NEEDED	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	OUTSTANDING
OPENNESS TO CHANGE: Is open to new ideas and willing to experiment; has a tolerance for change, ambiguity and paradox; demonstrates a willingness to learn and seek feedback; solicits information and views from others, and uses this input to make appropriate change; is willing to continually modify existing processes in order to improve effectiveness.				
PERSONAL CONSISTENCY: Evokes trust in others by being appropriately open and by behaving in predictable ways; is consistent in his/her behavior toward others in the organization, as well as maintains consistency between his/her words and actions; is clear and consistent in his/her values and acts accordingly.				
D. KNOWLEDGE BASE	IMPROVEMENT NEEDED	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	OUTSTANDING
ENVIRONMENTAL PERSPECTIVE: Is aware of developments in the larger business, political, and social arenas which will affect Parks in a significant manner; is knowledgeable about trends in government; demonstrates awareness and deep insight concerning resource stewardship and protection, and the emerging roles and opportunities of information technology.				
E. MANAGERIAL RESULTS	IMPROVEMENT NEEDED	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	OUTSTANDING
MEETS PERFORMANCE OBJECTIVES: Focuses on accomplishing relevant objectives; achieves goals through effective use of resources; attains greater efficiency through continuous improvement projects; significantly attains performance objectives identified in an Appraisal and Development Plan or Performance Contract.				
COMMENTS				
SIGNATURE AND TITLE OF RATER			DATE	
<input type="checkbox"/> I accept the Rater's assessment.	<input type="checkbox"/> I disagree with the Rater's assessment/I wish to discuss this with a Reviewing Officer.			DATE
<input type="checkbox"/> I concur with the Rater's assessment.	<input type="checkbox"/> I have modified the assessment as shown on the attached.			DATE
EMPLOYEE'S SIGNATURE	TITLE			DATE
REVIEWING OFFICER'S SIGNATURE				

STANDARDS OF PERFORMANCE FOR DESIGNATED SUPERVISORS

The Standards of Performance provide a basis for assessing supervisory competency and for determining whether a salary increase is justified. This form serves as Part IV of the Appraisal and Development Plan/Career Development Plan process (DPR 911) for Supervisors.

DEFINITIONS OF ASSESSMENTS:

- Improvement Needed** Employee needs improvement to reach successful level, but is performing above the level at which corrective action would be warranted.
- Meets Expectations** Employee is an accomplished and productive member of the Department's team.
- Exceeds Expectations** Employee's accomplishments have resulted in savings, benefits or program improvements that are clearly beyond those normally expected.
- Outstanding** Employee is at the highest end of the supervisory performance spectrum. Employee has achieved results that have demonstrable benefits. Employee serves as a role model for others.

ITEM	IMPROVEMENT NEEDED	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	OUTSTANDING
SUPERVISION: Creates a work environment in which employees are treated with respect. Provides employees with a sense of ownership and satisfaction in unit accomplishments, influence over how things are done, and an understanding of their personal importance to the organization. Provides appropriate control over staff activities. Provides timely performance appraisal of subordinate staff. Inspires continuous learning and development of staff. Recognizes and values the contributions of all members of a diverse work force.				
MEETING WORK COMMITMENTS: Appropriately plans work activities and timetables to meet program deadlines. Keeps supervisor/manager appropriately informed of progress and problems. Effectively delegates work and responsibility. Maximizes use of staff and other resources. Produces high quality, comprehensive work products. Establishes work completion deadline commitments and meets them. (Rating in this category should include review of work plans of specific assignments.)				
PROBLEM SOLVING: Accepts work assignments and views problem solving as a challenge. Approaches work with a high level of initiative, creativity and flexibility. Focuses program activities and problem solving on customer satisfaction.				
COMMUNICATON: Keeps interested parties fully informed of issues which impact their work assignments and responsibilities. Provides oral and written communications that are well organized, comprehensive, to the point, appropriate for the intended audience, and reflect the tact necessary to reflect sensitivity to the needs of others. Produces final written products in an appropriate format and free from grammatical and typing errors.				
FISCAL ACCOUNTABILITY: Exercises appropriate and accurate fiscal and equipment accountability. Completes accounting practices and reports in a timely manner and without error.				
QUALITY MANAGEMENT: Demonstrates the application of Quality Management principles and methods. Maintains focus on the requirements of customers through personal involvement, modeling and rewarding continuous improvement efforts.				
LEADERSHIP: Cooperates, inspires, motivates, persuades and guides others toward goal accomplishment. Adapts leadership style to a variety of situations. Models high standards of honesty, integrity, trust, openness and flexibility. Makes sound decisions consistent with departmental objectives.				

COMMENTS

SIGNATURE AND TITLE OF RATER

DATE

I accept the Rater's assessment.

EMPLOYEE'S SIGNATURE

I disagree with the Rater's assessment/I wish to discuss this with a Reviewing Officer.

DATE

I concur with the Rater's assessment.

REVIEWING OFFICER'S SIGNATURE

I have modified the assessment as shown on the attached.

TITLE

DATE

Appendix C

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Books are the bees which carry the quickening
pollen from one to another mind.

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