

Historic House Museum Resource Kit

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Cover Photos:

top left: Weaving and Spinning Shop, George Washington Birthplace National Monument.

top right: Philip Schuyler House, Saratoga National Historical Park.

bottom: Glenmont, Home of Thomas and Mina Edison, Thomas Edison National Historical Park.

Photos courtesy Department of the Interior, National Park Service.

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Executive Summary

Inspired by movement in the museum field towards re-thinking historic house museum visitor experiences, feedback from park staff and personal experience, the National Park Service's Northeast Regional Office¹ conceived of a pilot project between fall 2017 and summer 2019 to experiment with creating innovative new approaches to installation and interpretation at parks in the Northeast Region. This report is a summary of the evaluation of this pilot project and includes a Resource Kit to be used as a model for Historic House and Site Museums to create their own visitor-centered re-interpretation projects.

The Project

This pilot project was conceived by interdisciplinary subject matter experts in the Northeast Regional Office of the National Park Service to address the overall concern in the field of a lack of connection and vitality in the visitor experience. Anecdotal National Park Service (NPS) sites' visitor and staff feedback has indicated that increasingly the variety of experiences offered to visitors aren't of interest, feel static and don't relate to current issues, so the question of how might the NPS create better visitor experiences in historic house settings drove the creation of this pilot project. The pilot project was developed to accomplish six Regionally established goals:

- 1.** Identify target audiences at each participating site and create experiences which engage those audiences
- 2.** Co-create meaningful experiences related to historic house museums with visitors
- 3.** Share stories including different points of view
- 4.** Collaborate across organization, division, and park borders

¹ The Northeast Regional Office (NERO) oversees operations for national parks, national heritage areas, national historic and natural landmarks and other associated sites within Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Virginia, and West Virginia. Post project, region renaming occurred and the NERO is now named Region 1.

- 5.** Steward a community of learning, inquiry, and practice to foster conversation and collaboration beyond facilitated project activities
- 6.** Reflect on success and identify room for growth, individually and collectively

Delivery Structure and Approach

To facilitate innovation and collaboration within NPS house museums, and convene professionals across divisions and across parks, the core team created an agenda of professional development workshops. To best address the practicalities of time away from work, geographical locations and fiscal responsibility, the final structure of the project consisted of online webinars and opportunities for interaction along with two full-participant, in-person workshops. Active participation by the parks was approximately 16 months from the first webinar to the final one (February 2018 to June 2019) which didn't include the application and selection process or the evaluation of the project.

Individual Park Goals

Individual meetings were coordinated at each site to share content about goal setting and allow park cohorts the opportunity to co-create specific goals with support from core team members. The SMART goal format² was used as a basic outline for goal creation during these meetings.

Resources

The resources allocated for the pilot project from the regional office included approximately \$55,000 that covered supplies, external content experts, a part time intern and an independent museum consultant and related travel expenses. This did not include time devoted by three full-time NPS staff as core team members and their related travel expenses. Additional costs that were borne or absorbed by the individual parks included approximately 60

² Specific, Measurable, Attainable, Relevant and Timely

hours of professional development time from each park team member and funding for their travel to in-person workshops.

Evaluation Methodology

Evaluation methodology was designed to gather the perspectives and perceptions of participants, including other leaders at participating sites, as well as the core team. A twenty-five-question survey (See appendix C) was created by the evaluator with input from the core team members and distributed via email to all park team participants who were active³ as of March 2019. The evaluator provided a promise of confidentiality and the survey consisted primarily of open-ended questions to elicit responses that were candid and introspective. This feedback was followed up by a site visit and researcher-conducted in-person interviews. To guarantee anonymity, minor edits have been made to quoted respondent answers to ensure this level of privacy.

An additional written questionnaire (See appendix D) was created for core team feedback by the evaluator with core team input. This survey was completed by the core team members who were active as of March 2019 and was followed up with a conference call for further discussion and clarification.

Evaluation Results

Analysis was undertaken by quantifying and summarizing questionnaire answers, reviewing all meeting notes, recordings and observations during webinars, phone meetings and in-person workshops, feedback solicited during webinars and workshops, site visits and consultation with the core team for additional perspectives on the results and conclusions.

Of the original six pilot project goals three were met, two were partially successful and one was not. (See figure 3).

³ Team make-up changed during the course of the project due to retirements and new positions. Given the timing of these changes, no new personnel were added to teams.

While the majority of the parks struggled to both set and meet their individual park goals, much of this was based on the fact that initial assumptions by both the core team and participants were that the project's results would be a physical change or product related to interpretation. During the course of the pilot, the core team learned that the true need was related to professional development amongst staff including coaching and mentoring, introducing new information and approaches, facilitating and modeling through goal setting and implementation plans. Once teams had a better grasp of the possible approaches and techniques, their progress improved. While only one site met their goals during the project timeline, it is anticipated that provided the project is given priority, the remaining three will do so within the next year.

What are key success factors?

Several factors appear to have led to a greater level of success as self-reported by participants and observed by core team members with this project; prior work and discussion surrounding the visitor experience, alignment with ongoing park priorities, focused time to conceptualize and work on the project, and outside perspectives from content experts. Additionally, flexibility was repeatedly noted as an important characteristic for success by both the park and core teams in areas of working together, project ideation and thinking about new approaches.

Do those who participated in this pilot project feel that this effort provided a good return on investment?

The participants' and core team's perceptions of the value of effort, time and money spent on the project were very positive. When asked what level of return on investment they felt the outcomes the project provided, participants rated it an average of 4.69 (on a scale of 1 to 5) with two of the parks rating it a 5. (See figure 3). The perception of value for time, expertise and money expended by the core team members averaged a 4.5.

Findings Summary

Key findings include that there is a great deal of value in interdisciplinary collaboration, collaboration among parks and regional office staff who typically don't work closely together, and perspectives from outside of your own site and/or organization. The most successful projects are those that are connected to current site and/or organizational priorities and where teams have a good working relationship and have already begun to think about, discuss, plan and research the visitor experience. Systems of accountability, particularly those that arise from shared outcomes in a team setting were found to be important. Support from organizational and/or site leadership is also key to conferring legitimacy to a project as well as reinforcing the necessity to prioritize and make time for the project. And finally, undertaking these types of projects not only jump starts visitor engagement efforts at a site, it also serves as both a foundation for and impetus to continue this type of work.

Key Recommendations

These recommendations are in addition to the success factors from above and are based on analysis of survey results and observations by the core team.

Balance of in person and online content and structure: Participants feel strongly about the value of field trips, site visits and in-person workshops. In-person workshops were the highest rated overall components of the project. (See figure 3).

Online sharing of content is a valuable and necessary tool for a project that seeks to include participants from a larger geographical area. However, there are drawbacks, as reflected by the participants' ratings of the overall value of the online components, which were the lowest of any rated project component. In analyzing the narrative answers and accompanying comments, this seemed to be more a result of frustration with inadequate technologies, the likelihood of being more easily distracted during a webinar and the ease of

non-participation rather than a reflection of the online content. As this project took place prior to the COVID-19 pandemic that necessitated remote work, it will be interesting to see if opinions of the efficacy of online meetings and learning will change.

Leadership: "Sites where a leader was in place, or emerged, allowed for the program to remain a priority, move forward, *actually* try something and generate feelings of self-esteem/team efficacy that something new is possible and build trust across the interdisciplinary team."

For teams where a "shared leadership" was assumed, or purposely adhered to, they were less successful in moving the project forward. While the project leader does not have to be formally designated, nor does it need to be the formal leader of a site, a leadership role in the team is necessary for effective communications and project success.

Readiness Factors: While questions asked during the initial application process appeared effective, it later emerged that there were more subtle factors that needed to be ascertained. Enhancing and modifying of the application questions to better get at issues of team dynamics, previous thinking or work together on the given topic, a shared general direction of the outcome of this experience, how the initiative fit in with current site priorities and motivations for participating will be necessary.

Accountability: Given the sheer amount of work for staff involved in these types of projects, hard and fast deadlines with specific tasks is preferable to "optional" items. Participants expressed a desire for more oversight or prodding from the core team and others expressed concern that unless there was deadline looming, this project fell to the back burner.

Enhanced Content: To support accountability and enhance the overall experience, it is recommended that additional tasks be incorporated to serve as opportunities to reinforce concepts introduced during webinars and workshops.

Additional Coaching and Support: Because much of this work and methodology is nuanced and a new way of working for project participants,

additional mentoring, facilitation, and modeling will be necessary for full successful implementation of a physical project and to move parks into full integration of the techniques and methodologies into regular work patterns and plans.

Conclusion

Regardless of whether or not this pilot program continues, many lessons learned are applicable across the NPS as effective means of improving all work products. Professional development that focuses on collaboration and communication, exploring new ideas and taking risks, creates effective opportunities for parks to collaborate not only internally across park divisions but also with other parks, exploration of non-NPS sites as models and incorporates outside points of view and experts can allow for better outcomes in all areas of work.

Creation of Historic House Museum Resource

Background

Inspired by movement in the museum field towards re-thinking historic house museum visitor experiences, feedback from park staff and personal experience, the National Park Service's Northeast Regional Office⁴ conceived of a pilot project between fall 2017 and summer 2019 to experiment with creating innovative new approaches to installation and interpretation at parks in the Northeast Region.

Key Trends in Historic House Museums

Interpretation in historic house museums, just like interpretation in other types of museums, is benefitting from re-examination stemming from a desire to improve how the field connects with its visitors. Broader trends reveal a shift toward visitor-centered interpretation. "The transformation of art museums from intimidating repositories of collections and curator-driven exhibitions into welcoming and socially relevant centers of visitor input and engagement has been a leading trend within the museum field for several decades."⁵ This approach to interpretation may manifest in various ways such as replacing lecture-based tours with dialog-based experiences and other interactive methods, utilizing traditional period-based historic spaces in new ways and even framing the content choice for exhibitions specifically to be relevant from a visitors' perspective rather than that of a museum professional.

⁴ The Northeast Regional Office (NERO) oversees operations for national parks, national heritage areas, national historic and natural landmarks and other associated sites within Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Virginia, and West Virginia. Post project, region renaming occurred and the NERO is now named Region 1.

⁵ Mager 2017

Folded into some of these trends are techniques that may eventually show themselves to be fads—items that generate initial excitement, but likely aren’t successful long-term.⁶ For instance, there is a great deal of interest in how technology may be best suited to create personalized experiences for museum goers. While QR codes, virtual and augmented reality, traditional audio tours available on cell phones and specialized apps are seen regularly as a part of many institution’s public interpretive offerings, research is showing that these may not be as effective as these sites assumed.⁷

Many historic homes utilize several of the above stated visitor-, rather than museum professional-focused techniques to create effective and relevant experiences. Examples of successful use of dialog-based tours to better engage visitors can be seen at Vizcaya Museum & Gardens in Miami, Florida, the Tenement Museum in New York, New York and the Harriet Beecher Stowe Center in Hartford, Connecticut. Descriptions on the websites of these museums set expectations for visitors’ experiences; “Guided tours are interactive, discussion based, and last 45 minutes.”⁸ and “Expect a conversational, interactive tour where you can participate along with your guide.”⁹ The Director of the Tenement Museum has described the focus of their museum’s experience of brick-and-mortar programming, “not so much on the content but on the evocative storytelling, immersive framing, and seamless links made between experiences past and present.”¹⁰

Boscobel House and Gardens in Garrison, New York, the Newport Mansions in Newport, Rhode Island, Vizcaya and many others are re-thinking the use of conventional exhibition techniques in historic homes and incorporating temporary installations of contemporary art or other thematic exhibitions into traditional period rooms. In places like President Lincoln’s Cottage in Washington, D.C. or the Woodrow Wilson Family Home in Columbia, South

⁶ Dilenschneider, Fads vs. Trends How Organizations Can Tell the Difference and Why it Matters 2014

⁷ (Dilenschneider, Musing on a Mobile Application for your Cultural Organization? 2019)

⁸ Vizcaya Museum & Gardens 2019

⁹ Harriet Beecher Stowe Center 2019

¹⁰ Jennings, Why the Tenement Museum Launched a Podcast 2019

Carolina the usual period room construction has been abandoned all together in favor of utilizing the spaces for thematic exhibitions and discussions.

Another broad trend is the shift from focusing on the shrine of the so-called famous or genius historic figure to the lives of ordinary people such as the Tenement Museum's focus on every day immigrants or specialized tours that focus on servants or enslaved peoples such as Monticello or Mount Vernon. Part of this re-shifting of perspective has also led many sites to focus on a broader theme, many related to issues of social justice, rather than a heroic figure. For instance, during the 2016 presidential election the Jane Addams Hull-House Museum in Chicago, Illinois in support of its work of the continuation of the historic settlement house vision, collaborated with artists, radical thinkers, and organizations to create the *Official Unofficial Voting Station: Voting for all who legally can't* which allowed discontented and disenfranchised voters to cast unsanctioned ballots.

The American Association for State and Local History has been diligent in ensuring publications related to historic house museums and sites are available with its *Interpreting Historic House Museums*, 2002 and *Reimagining Historic House Museums: New Approaches and Proven Solutions*, October 2019. Frank Vagone and Deborah Ryan's *The Anarchist Guide to Historic House Museums*, 2016 strongly advocates for a radical re-thinking of the visitor experience in these spaces.

Despite these success stories, experimentation, discussions and publications, more visitor centered approaches are not yet standard in historic house museums and the stereotype of the dusty, musty, boring experience is indeed based on many real-life encounters.

The Project

This pilot project was conceived by interdisciplinary subject matter experts in the Northeast Regional Office of the National Park Service to address the overall concern in the field of a lack of connection and vitality in the visitor experience. Anecdotal National Park Service (NPS) sites' visitor and staff

feedback has indicated that increasingly the variety of experiences offered to visitors aren't of interest, feel static and don't relate to current issues, so the question of how might the NPS create better visitor experiences in historic house settings drove the creation of this pilot project. With this project, the team hoped to answer the question "How might we instruct, inspire, and empower parks across the Northeast Region to create more engaging visitor experiences within historic house settings?" Part of the problem the project sought to address is what the 2011 Organization of American Historians report *Imperiled Promise* describes as "the History-Interp divide" — a lack of connection and collaboration between the visitor services and cultural resources management programs in the National Park Service. In addition, perceived barriers and demarcations between divisions of park staff, similar to perceived barriers between museum departments, also informed this project and its goals.

The pilot project was developed to accomplish six Regionally established goals:

- 1.** Identify target audiences at each participating site and create experiences which engage those audiences
- 2.** Co-create meaningful experiences related to historic house museums with visitors
- 3.** Share stories including different points of view
- 4.** Collaborate across organization, division, and park borders
- 5.** Steward a community of learning, inquiry, and practice to foster conversation and collaboration beyond facilitated project activities
- 6.** Reflect on success and identify room for growth, individually and collectively

The interdisciplinary working group shaped the original project concept into an initial processes and outlines for participant selection, project structure and logistics, curriculum delivery and timeline. The project's core facilitation team consisted of an Education Specialist in the Cultural Resources Division/History Program as the project manager, an Education Program Manager from the Division of Visitor Experience and Community Engagement, a Museum Specialist from the Cultural Resources Directorate/ Curatorial Program, a

National Council for Preservation Education intern who was an historic house subject matter expert, and an independent museum consultant to provide additional support and outside perspective. The final structure and execution of the project were created jointly by regional specialists in the museum, history, and interpretation fields, with input from park-based staff and regional leadership, and was an ongoing effort that consistently responded and reacted to the needs of the participants by design.

A participant selection process and rubric were created to choose sites best suited for this experience with a goal of identifying three teams from different historic homes within the northeast region. The opportunity was advertised to potential candidates through internal NPS communication networks such as the weekly regional newsletter and targeted listserv/email lists. A review panel of four NPS subject matter experts and two external public history specialists convened in October 2017 to review applications and make a selection of participating sites. Based on an unexpected large response of 14 sites, and to ensure the participating sites reflected geographic, contextual, and resource diversity, eventually four, rather than three sites were chosen to be a part of this pilot.

Site readiness was judged based on applicant answers to questions that were designed to indicate readiness such as the quality of interest, the park's expectations for participation, the awareness of issues facing their historic house, the quality of the identified cohort and superintendent support and the willingness to support travel and 60 hours of professional development. (See appendix A) The four parks, selected by an interdisciplinary panel in fall 2017 for their commitment to participation and readiness factors, were: Thomas Edison National Historical Park (EDIS), George Washington Birthplace National Monument (GEWA), Saugus Ironworks National Historic Site (SAIR) and Saratoga National Historical Park (SARA).

Each site initially had a minimum of four team members which included representation from interpretation as well as curatorial resources. One site, SAIR, also had a member from maintenance. Two of the four sites, SARA and GEWA,

included the park superintendent as a part of their team. In addition, SARA initially worked with the manager of a partner site. During the course of the project, two parks lost one team member each to retirement and moving on to another position. (See figure 1).



Figure 1: Organizational Chart Showing Individual Team Member Make up
 *Asterisks indicate team members who rotated off due to new positions or retirement.

Delivery Structure and Approach

To facilitate innovation and collaboration within NPS house museums, and convene professionals across divisions and across parks, the core team created an agenda of professional development workshops. To best address the practicalities of time away from work, geographical locations and fiscal

responsibility, the final structure of the project consisted primarily of online webinars and opportunities for interaction along with two full-participant, in-person workshops supported by individual and conference phone call meetings and email communications. This pilot was designed to form a Community of Learning, Inquiry, and Practice (CLIP) to foster continued conversation and collaboration beyond facilitated project activities. Active participation by the parks was approximately 16 months from the first webinar to the final one (February 2018 to June 2019) which didn't include the application and selection process or the evaluation of the project.

To achieve the six project goals stated above¹¹, project content consisted of creative problem solving, team-building, creativity incubation, park team goal setting, project ideation, planning and refinement, audience research studies, giving and receiving peer feedback, and interactions with historic house museum staff from other sites to gain insight into new and successful approaches to visitor engagement. Pacing revolved around the complexities of participant availability combined with best practices for learning and utilizing new information and techniques. (See appendix B for detailed schedule and agendas).

Methodologies of instruction included core team modeling facilitation, dialogue and interdisciplinary team behaviors and techniques, co-creation and utilization of the pecha kucha format¹² for some of the webinars to further engage participants in what can easily be a passive process. In person workshops utilized facilitated dialogues and activities, site visits and lecture-based formats to model a variety of delivery techniques appropriate for a variety of learning styles to encourage active participation and learning from all participants. (See appendix B for webinar and workshop agendas) Each instructional encounter between the core team and park team participants was analyzed shortly following the session to debrief on effectiveness for

¹¹ 1. Identify target audiences at each participating site and create experiences which engage those audiences
2. Co-create meaningful experiences related to historic house museums with visitors
3. Share stories including different points of view
4. Collaborate across organization, division, and park borders
5. Steward a community of learning, inquiry, and practice to foster conversation and collaboration beyond facilitated project activities.
6. Reflect on success and identify room for growth, individually and collectively

¹² See <https://www.pechakucha.com/categories/business> for more information.

participants based on their responses, achievement and engagement.

Subsequently, agendas and content were restructured continuously to best meet participants' capabilities and needs.

By participating in this project, a series of two in-person, multiple day workshops, five webinars, two office hours/informal check-in opportunities and work conducted individually at the park level, participating parks experienced and accomplished the following:

- Active engagement with webinars via the creation of pecha kucha presentations about themselves, their sites, and their work.
- Experienced regular opportunities to increase skill sets in the areas of providing feedback to fellow parks and the core team related to fellow park projects as well as the pilot project overall.
- Access to an online folder of resources related to the project
- Variety of activities and discussions to work through planning, creativity, idea iteration, and problem solving.
- Explored a non-participating historic home/site to have it serve as a model for thinking about interpretation in new ways and to generate dialogue amongst participants and between participants and non-participating site staff.
- Re-installed four historically furnished interiors to highlight the "constructed" nature of the historic house, giving a focal point to guide visitor inquiry about the role of the NPS in creating and preserving these stories.
- Incorporated audience-centered and participatory methods into house tour programming, including highlighting more diverse stories of house occupants.
- Explored expanding programming to include tours on the grounds of the house, both to increase visitor access as well as to tell more diverse stories.
- Ideated plans to transform exhibit spaces to be more accessible to visitors with different abilities.

Individual Park Goals

Individual meetings were coordinated at each site to share content about goal setting and allow park cohorts the opportunity to co-create specific goals with support from core team members. The SMART goal format¹³ was used as a basic outline for goal creation during these meetings. Initially these activities were scheduled to take place at the end of the first in-person workshop but were reconfigured due to inclement weather. Because the goal setting took place with only the specific park and core team members, it is unclear how this activity may have benefited (or have been less effective) if it had been done utilizing feedback from other parks as part of its format. Below are each of the participating parks' goals along with related key activities:

EDIS

- 1.** Develop an inclusive program on an Edison theme which doesn't include entering the home by next Glenmont Season in 2019.
- 2.** Explore 3 different ways to provide access to Glenmont House and grounds, over three different seasons.
- 3.** Open 3rd floor to tell more stories while potentially upgrading storage either on or off site by 2022.
- 4.** Expand programming content and options for a target audience by summer 2019.

EDIS Activities

- Staff spent time on the grounds observing guests and asking them questions about their interests.
- Team members utilized a standing meeting format to introduce the project, new ideas and approached and to gather input from fellow staff and volunteers.
- Planned for new signage.

¹³ Specific, Measurable, Attainable, Relevant and Time-based

- Worked with museum consultant to physically walk through potential grounds tour stops utilizing tour theme and lens of how the staff at Glenmont might have crossed paths with those of the Edison's.

GEWA

1. Participate in a community of learning, inquiry and practice. We will have 75% team participation for every call, event and meeting. 90% of the time our team will: Do all homework and be prepared, be present; engage in a thoughtful, constructive way; share information and ideas, be courageous and take risks.
2. Reflect on success and identify room for growth by identifying benchmark goals, celebrating reaching benchmarks, establishing cycles of thoughtful reevaluation of progress and revising goals as appropriate.
3. Engage specific audiences. Due to lack of specific data on specific audiences to serve as a benchmark for growth it was decided that the new interpretation would work for general visitors to the Memorial House Museum.
4. Create meaningful experiences with visitors by aligning the space with current and emerging information (e.g., memorialization) most relevant to the resource and park goals for interpretation.
5. Share stories, including different points of view surrounding memorialization efforts including Federal, Wakefield National Memorial Association, Washington Family descendants, Descendants of the enslaved, the 1930s and/or Colonial Revivalism, Bicentenary Committee, Cult of Washington.
6. Collaborate across organizational boundaries.

GEWA Activities

- Renamed the George Washington Memorial House to the George Washington Memorial House Museum to help clarify to visitors that this was not the actual home in which George Washington was born.

- Reinstalled the entire first floor of the Memorial House to emphasize its Colonial Revival origins and not inadvertently reinforce that this was the actual birth home.
- Utilized the outdoor kitchen for a temporary, 30s style Christmas display to emphasize the 1930s timeframe of the buildings as well as an experimental visitor feedback activity asking visitors to answer the question, "Who inspires you?" to gather ideas for future interpretation surrounding George Washington.

SAIR

1. Create an exhibit plan for the 1st floor that highlights Colonial Revival history and facilitates self-guided experiences of the first floor by April 2019.
2. Develop a variety of stories that tell the fuller SAIR story to our many audiences by the 2019 season.
3. Create and enhance engaging audience-centered experiences around the Ironworks House by April 2019.
4. Work with Essex NHA and other local partners to inspire local HHMs through a collaboration during 2018/2019 off-season.

SAIR Activities

- Began to utilize the results of an accessibility study to re-frame how they approached the visitor experience in the Iron Work's House, particularly in regards to accessibility.
- Used the accessibility lens to help inform the layout and methods of interpretation for a traveling exhibition that was already scheduled to be at their site.
- Worked on plans to include a space for visitors to sit and read site-related reference materials into a current exhibit space.

SARA

- 1.** Over the period of one month increase visitor engagement by restructuring one experience.
- 2.** Develop a junior patriot program to encourage intergenerational discussion and creative thinking.
- 3.** Offer a tour that places visitors in the site and explores the experiences of diverse people who lived and worked here.
- 4.** Use collections to create a temporary exhibit for 2019 summer season.
- 5.** Attract 5% more African American and Hispanic visitors.

SARA Activities

- Worked to develop annual themes five years out that focus on seeing the house through the eyes of those other than the Schuylers'.
- Experimented with drop-in, area guided tours for guests in response to frustration regarding limits of tour times and capacities.
- Created a community forum to share the new directions for interpretation and visitor experience.

Resources

The resources allocated for the pilot project from the regional office included approximately \$55,000 that covered supplies, external content experts, a part time intern and an independent museum consultant and related travel expenses. This did not include approximately 20% of 3 full-time NPS staff for core team members' time and their related travel expenses, which was covered by regular travel and salary budgets. Additional costs that were borne or absorbed by the individual parks included approximately 60 hours of professional development time from each park team member and funding for their travel to in-person workshops.

Evaluation Methodology

Evaluation methodology was designed to gather the perspectives and perceptions of participants, including other leaders at participating sites, as well as the core team. A twenty-five-question survey (See appendix C) was created by the evaluator with input from the core team members and distributed via email to all park team participants who were active¹⁴ as of March 2019. The evaluator provided a promise of confidentiality and the survey consisted primarily of open-ended questions to elicit responses that were candid and introspective. Of the 25, eight questions utilized a rating system from 1 to 5 to provide data that was more easily quantifiable. This feedback was followed up by a site visit and researcher-conducted in-person (or phone if logistics dictated) interviews with both the team as a whole and individual interviews if the questionnaire answers indicated. To guarantee anonymity, some minor edits have been made to quoted respondent answers to ensure this level of privacy.

An additional written questionnaire (See appendix D) was created for core team feedback by the evaluator with core team input. This survey was completed by the core team members who were active as of March 2019 and was followed up with a conference call for further discussion and clarification. In addition, a separate questionnaire was created and distributed to the two superintendents who were not a part of their site's team to gather their perspectives and assess if there were any differences in perceptions or outcomes based on superintendent direct involvement. Because only one of the two sites who did not have the superintendent on the team responded to the survey, data gathered was not sufficient to include in this report.

Evaluation Results

Analysis was undertaken by quantifying and summarizing questionnaire answers, reviewing all meeting notes, recordings and observations during webinars, phone meetings and in-person workshops, feedback solicited during

¹⁴ Team make-up changed during the course of the project due to retirements and new positions. Given the timing of these changes, no new personnel were added to teams.

webinars and workshops, site visits and consultation with the core team for additional perspectives on the results and conclusions. Some of the key questions this evaluation explores include:

- Was the NPS successful at meeting the established project goals?
- Were the parks successful in setting and meeting their individual park goals?
- What are key success factors?
- How did this project fit into ongoing work and work priorities?
- Do those who participated in this pilot project feel that this effort provided a good return on investment?
- Should this project be continued or repeated?

Was the NPS successful at meeting the established project goals?

The successful attainment of the NPS pilot project goals was determined based on questionnaire answers (including self-reporting of success with meeting goals) observations by the core team and subsequent interviews. The project goals were conceived before the pilot was fully formed. As the project necessarily evolved given the realities of the project and participants, it was found that all were not achievable. Initial assumptions made by the core team as to where the “starting line” was for individual parks and/or their level of readiness to embark on radical change in interpretation ascertained from the application process did not align with where parks actually were. It was determined from observation and feedback as the project unfolded that professional development in acquiring deeper skills in process, teamwork, audience research, communication, implementing change and goal setting were the appropriate next steps along a continuum rather than a concrete physical outcome as originally envisioned. The content, skills, and behaviors necessary to move forward with significant physical changes to exhibits and programs needed to be more fully grounded and refined, experienced, learned, and coached.

NPS Goal 1: Identify target audiences at each participating site and create experiences which engage those audiences.

The first goal was not able to be met given structural issues within the NPS. While identification of a target audience is best practice, it was found that this goal would have been impossible to set for individual parks as the park service does not currently have visitation numbers broken down by potential target audiences therefore making any sort of measure (other than an anecdotal one) of an increase or change in attendance by a particular audience unachievable. In addition to unavailable baseline data, the Paperwork Reduction Act of 1995 prohibits NPS from surveying visitors without going through an elaborate and prohibitively complicated approvals process first, which also blocked the gathering of new data.

To assist the participants in better understanding audiences, potential audiences, and their motivations for attending a cultural organization, the core team utilized the expertise of Colleen Dilenschneider, Chief Market Engagement Officer for IMPACTS, a global leader in predictive market intelligence and related technologies and her partner, Jim Hekkers, who specializes in leveraging his extensive experience in visitor-serving organizations as a consultant with leadership at nonprofit organizations as a formal part of the second in-person workshop.

These sessions provided project participants with data informed trends and influences specifically related to audiences for cultural organizations and began to lay groundwork for how to think about audiences, their needs and expectations, in new ways. Much of the information was revelatory for participants.

- “Collen Dilenschneider....was a game changer...”
- “Seeing the Impact slides really opened my eyes as to what people in this region are looking to get out of their park experience and I hope as a site, we move toward meeting those expectations.”
- “...the presentation about audience was also a revelation.”

- While the letter of this goal was not met, the resulting learning for parks staff was meaningful and specifically cited as useful for their work moving forward.
- “Who our audience is or possibly could be in the future has made me stop and think about what the experience should or should not be.”
- “The IMPACTS presentation really opened my eyes. I will definitely be using that information when thinking about future projects and initiatives.”
- “We hope to get IMPACTS to come to our site to talk with all staff about our surrounding population and potential visitors. That was fascinating.”

This response somewhat contradicts the survey results regarding to what extent participants felt their perception of audience experiences at their sites changed, which averaged 3.47 on a scale of 5 overall. (See figure 2). Only one site rated their change as significantly high at a 4.67. For those sites rating their change in perception lower this may be a result of interpreting the question differently than intended by the evaluator.

Average Rating Results

#	Question Content	
2	How ready were you and your site?	3.47
6	How much have your perceptions changed about audiences?	3.47
8	How confident are you in your team's ability to move forward?	3.875
9	How much will you utilize these skills in future work?	4.63
10	What return on investment do you feel this project provided?	4.69
20	Value of in-person workshops?	4.88
21	Value of on-line components?	3.33
22	Value of outside consultants?	4.625

Figure 2: Average Results for Rated Items in Survey

NPS Goal 2: Co-create meaningful experiences related to historic house museums with visitors
and 3: Share stories including different points of view.

Parks reporting out during webinars and the second in-person workshop along with site visits and self-reported progress showed varying degrees of success in the second and third goals. At the formal conclusion of the project GEWA had reinstalled the interior of the Memorial House Museum that shifted the story from that of George Washington to that of Colonial Revival to better interpret the site as the structure was actually erected as a memorial during the 1930s rather than an historic replica of the actual birthplace. This has allowed the park to talk about other local figures important to historic preservation and provide visitors with the facts of the site rather than the previous myths. Visitors were not a formal part of the creation of the new installations and approaches. EDIS, while not fully completed, was in the process of creating a new tour experience that focused on the grounds of Glenmont and how servants would have interacted with the Edisons. Staff spent time on the grounds and utilized interns as well to observe and interact with visitors to better understand their current experience on Glenmont's grounds. "Through the process, we have brought in staff and volunteers to help us shape the story. It was great to see how many people wanted to be involved. We plan to continue the engagement going forward through the pilot of the program and beyond." After re-imagining the experience from the visitor's logistical point of view, SARA has experimented with self-guided, drop-in tours and are including more information about the women, children, and enslaved persons at the Schuyler Estate. However, these experiments have been staff-initiated and at the close of the project did not formally include visitors as a part of their creation. As of June 2019, SAIR had not yet made any formal decisions to move forward with new approaches for visitor experiences although they did begin to think about and incorporate a recent accessibility study as a filter for re-creating visitor experiences at their site.

While these two goals weren't fully met, all of the sites have begun to think about how to re-invigorate their visitor experiences and three of the four

have made specific progress towards their related individual park goals. As for the goal that included co-creation, upon reflection, the core team did not provide specific guidance or reminders that this was expected of the parks, nor did they provide resources or skill training to achieve visitor integration into the planning process. In addition, this is also a next-level skill that isn't easily accomplished as a team is learning to think about their programming in new ways. The only team that did incorporate the visitor most closely in the creation of a new experience, EDIS, did so at the specific suggestion from a core team member during a check-in phone call. This approach would be expected as a next stage as the teams become more comfortable and skilled at their new approaches to the visitor experience.

NPS Goal 4: Collaborate across organization, division, and park borders.

Initial collaboration across organization, division, and park borders was achieved at a fundamental level with each park cohort made up of interdisciplinary and/or cross divisional staff. Survey respondents specifically called out this type of collaboration across divisions, as well as teamwork, as a key success factor for their teams.

- "...particularly having Interpretation and Cultural Resource Management working on this together."
- "I think it worked well for us to...have both Interpretation and Cultural Resources divisions in our team."
- "The building blocks of the trainings were great to get people comfortable with brainstorming, doing some head stretching to think outside the box, collaboration exercises, and learning how to collaborate together."
- "Our team were (sic) unsure how to work together at the beginning, and I think the first trainings were key to early successes in collaboration."
- "Having the framework to brainstorm, prototype, experiment, and collaborate with each other. With that framework, I have been so appreciative to have a project that focuses on collaboration and inter-

disciplinary work at our park. This has brought divisions so much closer and collaboration is now an integrated piece in the work they do – this is huge! They have a shared language and shared goals for tackling interpretation and preservation.”

- “We also had to recognize that when interpretation makes a suggestion for change, it is important to include our resources team – they might see something we don’t, or vice versa.”

The value of collaboration in general was also clearly demonstrated to parks through this project as collaboration was a key theme for responses to the lessons learned related question.

- “Everything is a better product when more than one Division is involved.”
- “Deeper appreciation for the value of experimentation, feedback and peer support.”
- “Going through the process together helped our team get on the same page.”
- “We were able to get to know each other better and understand what each person’s goals were for entering the program.”

When asked if they worked differently with their team or park after this experience, many responded in the affirmative.

- “I am more inclusive of the team, park staff, and partners.”
- “Yes – I work much more closely with resources and I believe other team members are working better together as well.”

However, many also indicated that they felt they have always worked collaboratively within their parks and didn’t see much of a change. Core team observations about how team dynamics and interactions changed from the first in-person workshop to the second also reflected greater collaboration and willingness to work together by the later. “It has been so very cool to watch some participants emerge as leaders as well as others become more confident and connected.”

NPS Goal 5: Steward a community of learning, inquiry, and practice (CLIP) to foster conversation and collaboration beyond facilitated project activities.

The success of the fifth goal was visible in the responses to the question, "What do you feel has been most valuable for you during this pilot project? Your site?" Nine out of sixteen park respondents specifically called out interacting with the staffs at other sites as what was most valuable for them as a part of this pilot project.

- "I personally place a high value on sitting in a room with a large group of NPS staff members from many other historic houses across the region and discussing these issues face to face. This is the first time this has happened in my career with the NPS."
- "To be able to talk with other sites that are going through "issues" about interpreting an historic house. There is not enough face to face networking between parks and this time was very meaningful and insightful."
- "I find the ability to meet and work with staff from other parks, dealing with similar resources very valuable. Good to know we're all dealing with similar issues. Makes me feel more connected to NPS."
- "...working with Regional staff and consultants, and teams from other parks was a gift!"
- "Working with other park staffs and seeing the challenges they also have with their programming has been valuable."
- "I feel that the interaction with other members of the park staff was extremely valuable. Getting together to discuss new ideas."
- "Meeting the cohort of other parks. Finding our content-related compatriots has been amazing."
- "Getting to work with other sites within our region to brainstorm creative ideas to tell the same story."

Additional resoundingly positive responses were received for the question, "Was connecting with your counterparts and other NPS staff at other

sites useful for you? Also, in response to the value of the in-person workshops, meeting other park staff in person was listed as a valuable highlight. The only negative responses from participants related to connecting with colleagues from across the park service indicated a desire for more in-person opportunities, specifically an opportunity to visit each park that was involved in the project to better understand each site and its challenges. (A compilation of questionnaire responses from parks and the core team are available as research files.)

NPS Goal 6: Reflect on success and identify room for growth, individually and collectively.

The final goal was accomplished by a steadfast commitment to reflective practice methods by the core team. Opportunities to reflect and provide feedback were incorporated into and utilized during webinars and in-person workshops to provide immediate evaluation and suggestions regarding content and methodology in group settings. The core team met either in person or virtually after each webinar, workshop, and site visit to de-brief, generate ideas for future encounters, and evaluate effectiveness. In addition, this formal evaluation process allowed for specific individuals to provide confidential feedback regarding the project.

In summary, of the original six pilot project goals three were met, two were partially successful and one was not. (See figure 3).

Successful Completion of NPS Project Goals

NPS Project Goal	Not Met	Partially Met	Met
Identify target audiences and create experiences which engage those audiences			
Co-create meaningful experiences related to historic house museums with visitors			
Share stories including different points of view			
Collaborate across organization, division, and park borders			
Steward a CLIP to foster conversation and collaboration beyond facilitated project activities			
Reflect on success and identify room for growth, individually and collectively			

Figure 3: Project Goal Completion

Were the parks successful in setting and meeting their individual park goals?

The majority of the parks struggled to both set and meet their individual park goals as indicated by self-reporting on the surveys and observations and surveys of the core team. There are a variety of reasons for this. Initial assumptions by both the core team and participants were that this project would result in a physical change or product related to interpretation at these historic homes and the park goals set reflected this. During the course of the pilot, the core team learned that the true need was related to professional development amongst staff including coaching and mentoring, introducing new information and approaches, facilitating and modeling through goal setting and implementation plans. Each of these areas takes a substantial amount of time to be processed and become implemented. In addition, the

unexpected shut down of the government for 35 days¹⁵ adversely impacted the momentum and energy resulting from the second in-person workshop as it occurred immediately after, not to mention the time lost. Once teams had a better grasp of the possible approaches and techniques, their progress improved. While only one site met their goals during the project timeline, it is anticipated that provided the project is given priority, the remaining three will do so within the next year.

What are key success factors?

Several factors appear to have led to a greater level of success as self-reported by participants and observed by core team members with this project; prior work and discussion surrounding the visitor experience, alignment with ongoing park priorities, focused time to conceptualize and work on the project, and outside perspectives from content experts. Additionally, flexibility was repeatedly noted as an important characteristic for success by both the park and core teams in areas of working together, project ideation and thinking about new approaches.

From both the park and core team perspectives, questionnaire feedback and observation showed that teams who had done work around thinking about the visitor experience and had planning discussions prior to this project felt they were better prepared to take full advantage of what this experience offered. Some of this planning work could also be tied into a site having recently updated foundational documents and long-range interpretive plans to ensure they were all on the same page regarding the messages the park wished to share with visitors.

Surveys showed mixed responses regarding how well the project fit into current park priorities. When the project coincided with these objectives and leadership saw and reinforced this, park efforts were more successful.

¹⁵ To date, the longest United States federal government shutdown occurred from midnight EST on December 22, 2018, until January 25, 2019 (35 days).

- “This project was a priority from the start, and when we made the commitment to this program, we did all we could to re-schedule other things to accommodate the needs of this program. ...it was good to know this project was a priority and we had the backing and support of the Superintendent.”
- “Some ongoing work had to be pushed back a bit to meet the self-imposed timelines of the project. Since this project supported our LRIP and new foundation documents, this project really helped to get us moving toward the changes those documents outline at the site.”
- “The park has been investing project funding and time into research and new exhibits for our house. It was perfect timing for the park because we have finished a couple of historic resource studies and an architectural study but didn’t know what to do with all the info.”

When the pilot was perceived as “extra” (not unimportant, but not a fully integrated part of current priorities and goals for a park) it was much more difficult to gain traction.

- “It seldom aligned with our regular park priorities, except on days closely surrounding a meeting relating to this project. I feel very much that the idea of this project was shelved until we needed to discuss it. I cannot speak for anyone else, but while it remained in my mind quite a lot, doing anything towards its ultimate creation was tough, everyday upkeep takes over.”
- “It didn’t very well, which is one of the reasons we didn’t move further on it.”
- “It was a priority, but I still feel like we tried to squeeze it in along with everything else we need to get done.”

Having essentially mandated time to devote to solving issues surrounding historic house interpretation was also a success factor noted during site visit interviews and in survey responses. This was highlighted as an important aspect of the two in-person workshops. The overall average rating from participants on a scale of 1 to 5 regarding the value of the in-person

workshops was 4.88, the highest average of all rated items. (See figure 2). With the exception of one participant who rated the value at a 4, all rated this aspect of the program a 5 or 5+.

- “Being able to get away from the home park to think and discuss our own house museum was key.”
- “Time focused on the pilot program was valuable in forcing us to put aside time to think about issues specific to our Historic House Museum. I always say it’s a luxury to have time to think about issues at work.”
- “We had ideas, but this pilot gave us the time and focus to develop and implement, at least the first stage, of these ideas. It also gave us street cred when we were rolling these new ideas out.”
- ‘I think in-person workshops are the key to success here – it gives people a chance to focus on the project and move things along.’
- “The skills, discussions, and experiences we had were immense. I don’t think we would be able to learn as much as we had (sic), or have so much team building, if those topics were tried via webinar.”
- “Being able to get away from our park for a week allows us to focus on the task at hand and not get distracted by our regular work responsibilities.”
- “There’s more focus because you’re in the same room engaged with everyone. It’s too easy get distracted during distance training.”

The perceived value of outside consultants also rated very high (third highest of all rated items) with a 4.63 average out of 5. (See figure 2). The levels of appreciation for the knowledge and perspectives brought to the pilot project were immense as can be seen in the following survey responses:

- “The consultants were well prepared, experts in their field, and able to field a multitude of questions. They added a great deal to the program.”
- “We need outside voices, particularly in NPS museums and history, and in other areas, to keep us current and thinking outside our boxes!”
- “Consultants added a new non-NPS voice to the discussions that helped open up new ideas for ways to look at and present ideas.”

- “Incredibly valuable to have non-NPS observations and feedback.”
- “Excellent range of expertise and so important NPS does not do this in a vacuum.”
- “I LOVED having the outside consultants as part of the project. I appreciate being able to pick their brains, getting new contacts and resources, and getting their help exploring our particular park project. Love them!! ☺”
- “I personally feel we consistently need fresh eyes on what the NPS is doing, we’re not the only people with historical sites.”

Based on narrative survey question answers, a working relationship with team members that felt respectful of their abilities, supportive, inclusive and trustworthy was an additional factor that seemed to correlate with goal achievement. Sites that were less successful in full goal attainment had individual team members mention feeling that their opinions were ignored, voices not heard, that they were out of the loop or that there were issues amongst certain team members.

Do those who participated in this pilot project feel that this effort provided a good return on investment?

The participants' and core team's perceptions of the value of effort, time and money spent on the project were also very positive. When asked what level of return on investment (on a scale of 1 to 5) they felt the outcomes the project provided, participants rated it an average of 4.69 with two of the parks rating it a 5. (See figure 2). The perception of value for time, expertise and money expended by the core team members averaged a 4.5. The additional comments that were added along with these ratings also prove insightful:

- “Park management has been grappling with the issues we brought to the study for more than 80 years. As a result of the study, we've taken solid steps toward addressing significant issues, more fully aligning our interpretive program with our resources, being more inclusive and expanding our stories. That's invaluable.”

- “It was one of the best, most helpful, optimistic experiences I’ve had in the NPS.”
- “Worth every penny and time spent. It was an invaluable experience for me, our team, and I think for our park.”
- “It was time and money well spent as it will ‘revolutionize’ the way in which we engage visitors at the site, telling the untold stories, and varying our theme from year to year to provide unique experiences that make visitors want to return.”
- “Overall, the project gave our park the ability to re-think and move out of the 1990s (or earlier); to create a viable park team, and it gave us all a good focus on the house which prior park administrations had regarded as a liability. We could never have done this on our own. NEVER.”

Should this project be continued or repeated?

While all of the project’s initial goals were not met, five out of the six were either fully or partially met and evaluation results indicate that from the participant’s point of view, there is value in continuing this project or repeating it for other users. The goals that were not met, or fully met appear to be those that were either unattainable (focusing on a target audience and increasing it) or too advanced for where parks were in their trajectories into reimagining interpretation at their sites.

Additionally, the significant response from the call for participation from 14 sites, highlights the high level of interest in this area from parks across the Region, and demonstrates a need to continue and expand the pilot. Participants said that they see themselves using the skills learned during this experience in their future work. With 5 being “a great deal,” the average rating was 4.63. (See figure 2). All participants with the exception of one rated this a 4 or a 5. During follow-up interviews every participant with one exception said they would be willing to do this project again and that they would recommend it to their colleagues. The lone dissenter qualified the response in that they did not feel their park had appropriate foundational work in place to be successful.

Narrative answers to various survey questions showed additional important impacts for ongoing work in interpretation of historic house museums.

- “Once our pilot project is completed, it will make a huge impact on the park and the visitor experience.”
- “I feel like we have a great new support network to lean on if we have any questions or want to pose a query to the group. I hope we can continue having discussions and learning from each other!”
- “I have almost daily been preaching how we need to tell the complete story. So I will most definitely be using info I picked up in these sessions going well forward into my career.”
- “It was all great stuff which was practical and usable.”
- “The Impacts presentation really opened my eyes. I will definitely be using that information when thinking about future projects and initiatives.”
- “The field trip, and sessions we experienced during the Virginia trip have stayed with me.”
- “It was one of the best, most helpful, optimistic experiences I’ve had in the NPS.”
- “As our LRIP requires us to expand our interpretation and update interpretation throughout the park, I will be utilizing these skills in each new area we tackle.”
- “I look forward to implementing knowledge gained by the statistics folks.”
- “The brainstorming, design thinking process, looking to other sites for ideas, and a collaborative approach will all be used!!”
- “We are already implementing changes for this summer.”
- “I have saved the Sites of Conscience powerpoint to my computer to continually reference any time I think of a new idea.”

Unintended Benefits

While better connections amongst parks was a hoped-for outcome, deeper connections between the regional office and the parks were also created. Participants specifically noted in evaluations that the project created new or better relationships with representatives from the regional office. Those that didn't have a prior relationship with regional office staff really appreciated making the connections and feeling like it was now a resource open to them in a way it wasn't before and core team NPS staff reflected that this project provided important insight into day-to day park operations.

- "Having regional involved gave the project more legitimacy, as though we had permission to make the changes."
- "It's nice to have the region's backing when trying new things as it is inevitable there will be some visitors and employees who don't think anything should be changed."
- "I really feel I got to know the regional staff involved in this project and they were all stupendous. They put a lot of time and effort into the project, making sure that people built relationships. I see them as more approachable now."
- "This really strengthened my comfort level is reaching out to Regional not only on this project but other issues that arose in the park."
- "I feel like I understand some of what the parks need broadly better now than I did before, and that helps me give them better support as a regional subject matter expert."

While the project hoped for change in interpretation at participating sites, an additional unintended benefit overall was that it provided an important impetus for parks to move forward with their approach to historic house interpretation and would serve as a catalyst for future progress at any site with an historic home. This additional impetus allowed for the change to actually begin rather than be merely talked about or wished for.

- "We would not have gotten the changes implemented this quickly or thoroughly without the project."

- “I think the most valuable thing for my site was the kick in the pants to get these changes done that come from the accountability of working in a group project. Without that, I am not sure how much of our changes would have been accomplished this year, even though they are goals set out in our LRIP.”
- “This project was a much more creative approach than we normally take in the NPS and a good lesson in the value of thinking differently.”
- “I think the most valuable for the site was the push to evaluate what we offer and figure out how we could do it better. We have talked about doing different things for a while, but this really focused us.”
- “Although implementing the project may be a slow process, I think the catalyst is now there, where it was not before.”
- “I would do it all over again in a minute.”

Findings Summary

In summary, key findings include that there is a great deal of value in interdisciplinary collaboration, collaboration among parks and regional office staff who typically don’t work closely together, and perspectives from outside of your site and/or organization. The most successful projects are those that are connected to current site and/or organizational priorities and where teams have a good working relationship and have already begun to think about, discuss, plan and research the visitor experience. Systems of accountability, particularly those that arise from shared outcomes in a team setting were found to be important. Support from organizational and/or site leadership is also key to conferring legitimacy to a project as well as reinforcing the necessity to prioritize and make time for the project. And finally, undertaking these types of projects not only jump starts visitor engagement efforts at a site, it also serves as both a foundation for and impetus to continue this type of work.

Key Recommendations

These recommendations are in addition to the success factors from above and are based on analysis of survey results and observations by the core team. They focus on refinements to specific aspects of the pilot project in areas either noted by participants as lacking, suggested as improvements by same or observed from the core team as areas that had room for improvement.

Balance of in person and online content and structure: Participants feel strongly about the value of field trips, site visits and in-person workshops for a variety of reasons. In fact, the in-person workshops were the highest rated overall components of the project. (See figure 2). These types of activities reinforced the creation of a strong Community of Learning and Practice (CLIP) by providing in-person opportunities to learn and interact with their peers as well as better understand their peer's sites and the challenges surrounding their goals for this project. Interacting in person is the preferred means of communication to better assist communication, team building, discussion and facilitation. "Also, the in-person workshops allow for face to face talking." "It is not as easy to read people or have personal conversations in group webinars." Definitely valuable to meet with people face to face. Otherwise, I wouldn't have any connection to the voices on the phone."

For reasons of budget and time, on-line sharing of content is a valuable and necessary tool for a project that seeks to include participants from a larger geographical area. However, there are drawbacks, as reflected by the participants' ratings of the overall value of the online components with an average of 3.33, the lowest of any rated project component. In analyzing the narrative answers and accompanying comments, this seemed to be more a result of frustration with inadequate technologies, the likelihood of being more easily distracted during a webinar and the ease of non-participation rather than a reflection of the online content. Therefore, ensuring an appropriate balance of on-line and in-person opportunities would ensure an even better experience for participants. Future projects would benefit from one additional in-person workshop to capitalize on the above benefits.

Leadership: The core team grappled with how to approach leadership in individual teams. In some instances, the superintendent (similar to a museum/historic house CEO) was a formal part of the team and was conferred, or assumed much of, the leader role during the project, particularly when working at his or her own site. In one instance, a leader emerged organically based on interest, aptitude and other park specific factors that allowed for this. "Sites where a leader was in place, or emerged, allowed for the program to remain a priority, move forward, *actually* try something and generate feelings of self-esteem/team efficacy that something new is possible and build trust across the interdisciplinary team."

For teams where neither of the above occurred, and a "shared leadership" was assumed, or purposely adhered to, seemed to result in confusion about who was doing what, lack of prioritization of the project and its related tasks, a delay in decision making and less trust that true change was possible, which inevitably resulted in feeling overwhelmed or skeptical about the ability to change. The core team's struggle surrounded whether or not to require the designation of a lead at the beginning of the project, particularly when a team seemed resistant to do so in the belief that not assigning a leader was valuable as they also did not want to inhibit a leader naturally occurring in a group regardless of where they rank in the hierarchy.

While the project leader does not have to be formally designated, nor does it need to be the formal leader of a site, a leadership role in the team is necessary for effective communications and project success. Additionally, while the overall site leader does not need to be a formal member of the project team, it is important that he or she identify a clear role in and methodology of support for the project to ensure that all are aware of this as a sanctioned priority.

Readiness Factors: While many of the right questions were asked and vetted during the application process, it emerged that there were more subtle factors at play regarding team dynamics, previous thinking or work together on the given topic, a shared general direction of the outcome of this experience,

how the initiative fit in with current site priorities and motivations for participating. Enhancing and modifying of the application questions to better get at these issues as well as an interview process is recommended (via phone or in person) by members of the core team to have an opportunity to gauge some of the above in relationship to applicants.

Accountability: Given the sheer amount of work for staff involved in these types of projects, hard and fast deadlines with specific tasks is preferable to "optional" items. Participants expressed a desire for more oversight or prodding from the core team: "I think the continuous intervention by people like you and other leaders of the program kept us on our feet and kept us producing." "I like the timeframe of the project...I think it is the right amount of time, but the time between interactions is filled with all the other park stuff, and it makes it hard to come back to what we discussed previously." "I think I could personally use some help from the project in keeping my head in the game." Others expressed concern that unless there was deadline looming, this project fell to the back burner.

Enhanced Content: To support accountability and enhance the overall experience, it is recommended that additional tasks be incorporated to serve as opportunities to reinforce concepts introduced during webinars and workshops. This "homework" should be very specific with worksheets and/or guidelines for each. Field trip assignments should include visits to local historic house museums or sites for observations, critiques and inspiration and ideally should include interaction with site staff.

Additional Coaching and Support: Because much of this work and methodology is nuanced and a new way of working for the project participants, additional mentoring, facilitation and modeling will be necessary for full successful implementation of a physical project, to move the parks beyond the professional development aspects of the pilot and into full integration of the techniques and methodologies into regular work patterns and plans. For sites that were moving forward with their projects, site visits or calls from core team members to weigh in on and provide advice or structure to decision making

and processes seemed to be appreciated and resulted in more momentum and decision making overall. However, no sites initiated these types of interactions with the core team despite being informed multiple times that the team members were available for this type of work. As goal setting and achievement were singled out in survey questions, this area became apparent as one in need of additional support. In several cases, respondents were not sure what their goals were or if their site had any for the project. Core team surveys also highlighted the need for more support and skill building in this area: "Goal setting was challenging...yet is not how we approach the work in our organizational culture." "Park teams seemed to find it challenging to move from idea to practice/implementation." "The parks clearly were not equipped to establish and stick to their own goals."

Additional support is also suggested as when asked about their confidence in their team's ability to move forward with similar projects, some felt very confident, others were confident depending on team make up, project content and park structure, while others were not confident at all with an average response of 3.875. (See figure 2). In addition, the core team's combined responses for confidence in the parks' ability to move forward with similar projects averaged a 3 indicating that this is an area for improvement.

If the project were not to be continued or repeated, many lessons learned are applicable across the NPS as effective means of improving all work products. Professional development that focuses on collaboration and communication, exploring new ideas and taking risks, creates effective opportunities for parks to collaborate not only internally across park divisions but also with other parks, exploration of non-NPS sites as models and incorporates outside points of view and experts can allow for better outcomes in all areas of work.

Conclusion

Overall this project was perceived as a success, particularly in terms of additional learnings and skill building for all participants as well as the core team. As stated above, because the NPS project goals were created before the project was fully iterated, as the project progressed, it was found that some of the initial goals weren't as achievable during the project timeline as originally thought due to specific conditions within the NPS system (no baseline measurements or effective way to measure target audience attendance changes) or within individual parks (lack of sufficient skill sets in formulating goals and making progress on same). The core team was diligent in continuous refinement and reorganization of the project content and logistics to best support participants. This was key in shifting the project priorities from a physical outcome to one of professional development and skill building. While this aspect of the shift in project goals was not formally made, it was communicated to project participants to ensure them of their progress and to understand that the journey was in fact, more important than the destination.

The importance of collaboration across parks as well as park divisions, input from outside content experts, opportunities to collaborate in person with colleagues and to have shared learning experiences emerged as were key factors for success as well as a sense of satisfaction from participants. Ensuring that park teams had a baseline understanding and agreement as to what an outcome related to visitor experience should look like at their sites and that this type of project was prioritized and realistically aligned with ongoing park priorities, also proved to be key for teams' success.

Individuals who were a part of this pilot project repeatedly indicated their appreciation for this experience, willingness to participate in it again, possibly serve as mentors, and to eagerly recommend it to fellow colleagues as a worthwhile expenditure of effort, time and budget.

A quote from a core team member sums up the overall outcome of this pilot project, "I feel pretty strongly that this is the type of work that regional staff should prioritize. It is challenging to create and sustain networks of practitioners

working on real problems related to visitor experience at the park level is a challenge to maintain, it is a no brainer that regional office staff would take on the role of convener of a community of practice." This pilot project is a first step in exploring new ways to promote a radical re-thinking of the visitor experience through interpretation at Historic House Museums and the work will continue to evolve as the lessons learned from this project are incorporated and utilized in future projects.

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APPENDIX A

Historic House Museum Application: Individual Park Review

Reviewer Name: _____ Site Reviewing: **SAMPLE** _____

Part I: Assessing Site Readiness

Instructions: respond to these questions and rank to the *best of your ability*. Consider the responses to the application questions, and supporting materials (list of cohort participants, letter of park superintendent support) in your assessment.

	1 Poor	2 Weak	3 Passable	4 Good	5 Strong	Score
Quality of park interest <i>Why is your site interested in being part of this pilot?</i>	Does not demonstrate legitimate interest in the project	Not clear that the park understands how it will benefit	Park identifies reasons to participate, but unclear that the pilot will help address these	Park identifies a reasonable purpose, which could be addressed through pilot participation	Demonstrates thoughtful consideration of participation and how park will benefit, and these interests will likely be addressed through participation	
Park expectations for participation <i>What do you hope your park will get from this experience?</i>	Limited or unrealistic expectations	Not clear that the park has expectations for their participation	Park articulates expectations/ goals, but unclear that the pilot will be able to address	Park articulates expectations/ goals which will probably be addressed through pilot participation	Park thoughtfully outlines goals which can reasonably be achieved through pilot participation	
Awareness of needs/ issues facing house <i>What is the biggest issue facing your historic house museum?</i>	Does not demonstrate awareness	Needs addressed do not relate to historic house museums	Park struggling to articulate needs, or needs articulated can not possibly be addressed by this pilot	Park needs clearly defined, but are likely somewhat beyond what this pilot can address	Park needs clearly defined, and can likely be addressed by this pilot	

	1 Poor	2 Weak	3 Passable	4 Good	5 Strong	Score
Connection to larger issues (What is the biggest issue facing historic house museums in NPS?)	Does not reflect awareness of larger currents in NPS/ historic houses	Issues discussed do not relate to historic house museums	Reflects some understanding of and connection to larger movements/ issues/ currents, but unable to clearly articulate	Reflects some thinking and connection to larger currents in the field of historic house museums	Demonstrates self-awareness of larger trends in the field, and how this site relates/ can relate to those issues	
Quality of cohort identified	Cohort reflects no diversity, or is incomplete	Cohort reflects no or limited commitment to an interdisciplinary approach	The cohort is minimally acceptable, with two disciplines represented, but not a lot of diversity otherwise	Reflects thoughtful variety of experiences and backgrounds, but somewhat lacking in at least one area	Reflects a commitment of staff from a wide variety of backgrounds, representing many different levels and kinds of experience	
Quality of superintendent support	No demonstration of support provided	Formulaic response, does not demonstrate engagement from park manager	Basic commitment of resources for pilot participation from park manager	Reflects interest and general support of park manager, indication of engagement in pilot	Reflects active and keen interest of park manager, full support of cohort and pilot participation	
Overall quality of application	Hastily prepared, incomplete	Complete, but hastily prepared, and does not suggest the park is in a position to prioritize this work	Complete and acceptable, suggests general interest, but lack of ability to fully engage with pilot	Reflects general thoughtfulness of site needs and the topic, and demonstrates a general interest	Demonstrates that park has carefully and thoughtfully considered their needs and interests, and is fully engaged in pilot participation	
Total						

Part II: Basic Qualification Criteria

This information summarizes the qualification factors collected through the site's application.

Note if you have any questions or concerns about the information each park provided in the optional comments section, and use this information, along with your assessment, above, to prepare your overall assessment score for this park, and your final recommendation of which sites to participate in the pilot.

Park has identified a qualifying historic house.	Yes
The historic house identified is...	Furnished but flexible
The house is well-documented with recent baseline documentation.	Yes
Park curator:	Jane Curator
Park interp lead:	Susanne Ranger
Park manager:	Jill Superintendent
Willing to support park's full participation throughout duration of pilot?	Yes
Willing to support 60 hours of professional development?	Yes
Willing to support travel?	Yes

Comments (optional):

Part III: Overall Assessment

Use the information and your assessments above, and respond to the best of your ability.

	2	4	6	8	10	Score
Overall, how ready do you think this park is to participate in this pilot?	Not at all ready; do not recommend participation in pilot	Not quite ready: display interest, but limited capacity	Somewhat prepared: park displays interest and some capacity, but is missing at least one key element that will make participation difficult	Prepared: Park demonstrates interest and capacity, with only a few small concerns or questions	Very prepared: a top candidate for pilot participation	
Overall, how much do you think this park will benefit from participation in this pilot?	Very low: Limited or no benefit seems possible	Slight: A slight benefit is possible, such as professional development for staff, but no lasting impact to the site is likely	Moderate: A small benefit is likely, through new approaches which will incrementally improve the overall visitor experience at the site	High: The park will very likely benefit positively, further enhancing park operations and positively impacting other aspects of site management	Very high: A huge benefit is possible, which could have long-lasting and wide-ranging positive impacts on the site and its staff; participation will contribute to necessary and otherwise impossible positive change	
Overall, how well do you think that this park will contribute to the pilot cohort?	Poorly: site does not demonstrate interest or capability to contribute to a community of practice	Somewhat: park demonstrates minimal capability to enrich other's learning as well as their own	Moderately: park reflects interest and capacity to contribute fully to a cohort approach	Well: park reflects likelihood of being a strong member of the cohort, willing to contribute to individual and collective goals	Significantly: park has the potential to be an essential component to success in the cohort and of the pilot	
Total (Out of 30)						

APPENDIX B

Project Schedule, Webinar and Workshop Agendas

Project Schedule

- Online webinar 1; February 15, 2018: building community, establishing common language, and making a case for urgency
- In person, full participant workshop 1; March 19-21, 2018; Thomas Edison National Historical Park: building community, building creativity, problem-solving skills, some time spent inside Glenmont as part of workshop activities, workshop cut short by large snowstorm which precipitated the necessity of individual site workshops in an effort to address content that was eliminated due to inclement weather.
- April - May, 2018; at each site individually: team-building, individual park goal-setting, and rapid prototyping to develop a cohesive project idea
- Online webinar 2; May 18, 2018: building community, giving and receiving feedback on project ideas across park teams
- Office hours/Hang-Outs June 26, 2018 and August 16, 2018 (2-hour blocks) to allow for more casual interaction and feedback amongst participants and core team.
- Individual site calls/meetings to check in, assess readiness and progress before December workshop. (October 30 - November 19, 2018)
- Online webinar 3; September 26, 2018: building community; refining, re-iterating, and ideating project ideas
- In person, full participant workshop 3; December 4-7, 2018; George Washington Birthplace National Monument: building a community of practice, using data to define audiences, creating audience-centered experiences, refining project ideas
- Online webinar 4; February 28, 2019: building a community of practice, introducing evaluation, beginning to close out
- Online webinar 5; June 27, 2019: building a community of practice, summary of accomplishments and potential next steps, initial evaluation findings, future opportunities to stay engaged with this work.

Webinar and Workshop Agendas

Webinar 1

February 15, 2018 1:00 - 2:30 pm

1:00	<ul style="list-style-type: none">● Thank you for setting aside the time.● This is different from everything else on your calendar● Core Team: we're here to guide you● Our goal over the course of the next 18 months is to create a community of learning, inquiry, and practice and create space to innovate and experiment. At the end, my hope is that you will have new ways of thinking, new tools for doing, and new networks of support to tap into
1:04	<ul style="list-style-type: none">● Prototyping: trying new things together, celebrating successes together, critiquing what's not working together, tinkering and trying again.
1:05	<ul style="list-style-type: none">● Ask participants to list ground rules for our discussions, which we can keep refining as we work together. Some suggestions to get started:<ul style="list-style-type: none">● Be respectful and open-minded, assume good intentions, speak your own truth, share the air, ask questions to clarify, honor confidentiality
1:07	<ul style="list-style-type: none">● Functionality of platform: list of participants, chat feature, emojis<ul style="list-style-type: none">● Give a green check if you've done a WebEx before, and a red X if you haven't
1:08	<ul style="list-style-type: none">● Give 30 seconds to read slide and think● Go around the "room" and answer the question in 30 seconds or less – start with core team to give people an extra couple of minutes to think, then suggest working down the WebEx list
1:23	<ul style="list-style-type: none">● Suggest automatic timer to go off every 30 seconds to keep things moving
1:24	<ul style="list-style-type: none">● Introduction: We're going to be working closely together over the course of the next 18 months, and to do that, we wanted to start off by getting to know each other better.● Instructions: 15 slides, 20 seconds each. Core team will start!● After each, set a timer for 90 seconds x 2:<ul style="list-style-type: none">● In the chat or on the phone: what's one thing you learned?● In the chat or on the phone: what's one thing you were surprised by?
2:07	<ul style="list-style-type: none">● Closing out the activity: Congratulations on your hard work● Synthesis: Highlight similarities, and acknowledge differences/ variety of different skills and experiences in the (virtual) room
2:08	<ul style="list-style-type: none">● What makes this group unique is that we're all here because we all share a common passion and need, to try and improve and diversify the ways that visitors experience our historic house museums

2:09	● What do you see as the biggest problem facing historic house museums?
2:10	<ul style="list-style-type: none"> ● In the chat or on the phone: Which word best summarizes your feelings about what the biggest needs are? Why? (Discuss—site specific and as a whole)
2:13	<ul style="list-style-type: none"> ● What do you hope to get out of participating in this pilot project? ● In the chat or on the phone: Which word represents something that you are most excited to explore? Why?
2:16	<ul style="list-style-type: none"> ● Plus/Delta: What worked for you today? What do you need us to do differently?
2:20	<ul style="list-style-type: none"> ● In the chat: What's one thing you're excited about?
2:22	<ul style="list-style-type: none"> ● What's one thing you're still unsure of?
2:23	<ul style="list-style-type: none"> ● Next Stop: Workshop 1! ● The next time we connect will be March 19 – 21! We'll follow up with an e-mail including more information about what to expect and what to prepare. In the meantime, please send April your travel itinerary
2:25	<ul style="list-style-type: none"> ● Congratulations for your hard work today, and for setting aside the time to work with this community. Thank you for your contributions, and I can't wait to see you next month!

Global roles:

- **Timekeeper:** Keep an eye on the time points in the far-right column and politely gesture when it's time to move on. Also, managing setting timers and letting them make their noise known to the group when it's time to collectively signal moving on.
- **Tech facilitator:** Get things set up, troubleshoot any issues, facilitate a robust discussion in the chat box, and keep an eye there and drawing attention to any comments/ questions for larger discussion.

Webinar 2

May, 18, 2018 12:30 - 2:00 PM

12:35	<p>Welcome</p> <ul style="list-style-type: none">● Revisit workshop at EDIS● Summary of the last 2 months: Met for a day and a half at Edison NHP, started to get to know each other, established urgency and purpose for our work, expanded our minds to think creatively● Then: Snow scramble!● After, members of facilitation team traveled to all 4 sites, established site specific goals, and brainstormed ideas for "how might we" accomplish those goals● Today: all 4 teams have an answer to that question, and will share with the whole group for feedback <p>12:39</p> <ul style="list-style-type: none">● Agenda for today<ul style="list-style-type: none">● Lead off with a little more community-building● Spend most of our 90 minutes together giving and receiving feedback● Tools of the Webex: Chat, tabs● Reminder of our ground rules
12:40	<p>Community-building: BBQ</p> <ul style="list-style-type: none">● Summer is almost here! Let's pretend the next time we get together we're having a BBQ. What are you bringing?● 30 seconds or less per person, set a timer to audibly go off● Work down the list of participants in the Webex? Have park teams go around their rooms?
12:55	<p>Learning: Peer Feedback Circles</p> <ul style="list-style-type: none">● Introduce peer feedback circles: Goal is to refine your proposals, and to get feedback from this community. By the end of our session, our hope is that you feel ready to go out and do.
12:56	<ul style="list-style-type: none">● Tips for giving good feedback<ul style="list-style-type: none">● Lead in with what works ("I liked how...")● Be positive and constructive ("Yes, and...")● Use conditional language ("What might happen if...")
12:58	<ul style="list-style-type: none">● Core team models<ul style="list-style-type: none">● Cris: present to the group (30 seconds or less): I'm trying to eat more healthy● Ted, Ann, Nikki: ask questions to clarify (15 seconds or less)● Ted, Ann, Nikki: give feedback (30 seconds or less)● Cris: reflect (15 seconds or less)
1:00	<ul style="list-style-type: none">● Park turn!<ul style="list-style-type: none">● Present a proposal to the whole group (2 min)● Group asks questions to clarify which the team responds to (2 min)● Group gives feedback to team (5 min)● Team reflects. What resonated? Where might we go from here? What's next? (3 min)

1:50	<p>Closing Out</p> <ul style="list-style-type: none"> ● So far we've set goals, ideated, rallied in our park teams around an idea, and just now received feedback from our colleagues. Next is to go <i>DO</i>. In the chat or on the phone: What else do you need to get started? ● Next steps <ul style="list-style-type: none"> ● In the next week: We'll follow up with a survey: identifying needs, and checking for your availability ● Over the summer: start experimenting! Work toward achieving your project. Get feedback from each other. Get feedback from your facilitators. Experiment. Ask: what worked, and why? Wash, rinse, repeat. ● Fall: webinar.... in October? to report out, and prepare for... ● Audience-centered experiences workshop, in... November? Will refine through the survey, and follow up with a save the date! <ul style="list-style-type: none"> ■ GEWA? SARA? Philly? Other? ● Go forth and do great things!
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Webinar 3

September 26 2018 10:30 - 12:00

10:35-10:40	<p>Welcome</p> <ul style="list-style-type: none"> ● Greeting <ul style="list-style-type: none"> ● Will be using the WebEx today ● Phone, chat, whiteboards ● Try to keep your phone on mute if you're not talking, to keep background noise to a minimum ● Share your video! ● Summary of where we are now <ul style="list-style-type: none"> ● Two virtual meetups during the summer, saw many of you at ● You've all been very busy working on your projects! ● Purpose of conversation today: ● Check in and not check-up. Two goals: to re-connect and prepare for our face to face in December, and to support one of our goals as your facilitation team, and further lay a foundation for you to be able to connect to each other ● Agenda for today <ul style="list-style-type: none"> ● Will start off with a little community-building ● Then some group discussion around 5 questions ● Will conclude with a look ahead to December
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10:40-10:55	Community-building <ul style="list-style-type: none"> ● What's one thing you learned this summer? <ul style="list-style-type: none"> ● Surprised with discomfort with perceived as not successful ● Playing with new technologies/platforms such as Slack and VTC ● Backfilling for a colleague, learning a lot about a different facet of our work and appreciating different skills
10:55-11:00	Discussion <ul style="list-style-type: none"> ● Introduce <ul style="list-style-type: none"> ● Rather than have you give didactic presentations <i>to</i> us, we want you to join a conversation <i>with</i> us ● Have 5 topics for discussion. Three ways to contribute <ul style="list-style-type: none"> ■ White Board ■ Chat feature ■ Talk over the phone line (make sure you unmute yourself if you want to talk) ● No order, popcorn around. You can respond as a group or as yourself.
11:00	<ul style="list-style-type: none"> ● What have you been up to this summer? How are your activities helping you to reach your larger HHM goal? (10) <ul style="list-style-type: none"> ● What are your goals? ● What are you learning? What advice do you have for the other cohorts? (10 min) <ul style="list-style-type: none"> ● What's working? Why is it working?
11:15	<ul style="list-style-type: none"> ● What's a challenge you are facing? (20 min) <ul style="list-style-type: none"> ● What do you need to overcome it? ● How might you use your colleagues at other sites to help you with these challenges?
11:30	What feedback do you need to help you overcome this challenge?
11:40	Closing Out <ul style="list-style-type: none"> ● Rapid fire around the room, 1 word: how you're feeling as we're approaching the December workshop? ● Sneak Peek of December workshop ● Travel card housekeeping <ul style="list-style-type: none"> ● Will follow up with a logistics email ● Will follow up with a logistics e-mail within the next week <p>Happy fall, will see you all soon!</p>
11:55	Homework <p>Come prepared to the workshop with:</p> <ul style="list-style-type: none"> ● What's one piece of advice you have to share with the group? ● What is one thing you are looking for feedback on?

Webinar 4

February 28, 2019 10:30 - 12:00

10:35- 10:40	<p>Welcome</p> <ul style="list-style-type: none">● Greeting<ul style="list-style-type: none">• Will be using the WebEx today• Phone, chat, whiteboards• Try to keep your phone on mute if you're not talking, to keep background noise to a minimum• Share your video!● Summary of where we are now<ul style="list-style-type: none">• Acknowledge that it's been 3 months since we met, with holidays and government shutdown in between.• Shutdown made for interesting times, to say the least, and has impacted much of our work and priorities, including this project• Circling up today to recall great learning and planning accomplished while at GEWA in December and continue to chart our individual and collective course forward.● Purpose of conversation today:<ul style="list-style-type: none">• Check in and not check-up. Two goals: to re-connect, remind ourselves of December workshop work, and to support one another as we make progress on milestones and goals.● Agenda for today<ul style="list-style-type: none">• Will start off with a little community-building, as always• We'll take a virtual "gallery walk" to refresh ourselves on all that we did way back in December• Check-in on project team next steps and our buddy contacts• Chat next steps
10:40-10:55	<p>Community-building</p> <ul style="list-style-type: none">● What's one thing you got done during the government shutdown that you didn't think you would?● Participants responses <p>Transition</p> <ul style="list-style-type: none">● Regardless of our individual experiences during the shutdown, we know that 35 days of lost productivity has impacted the HHM project. We wanted to take time today to ground-truth this assumption and support each other as a community of practice to pivot where necessary.
10:55 -10:58	<p>Grounding into where we left off</p> <ul style="list-style-type: none">● Virtual "gallery walk" of December workshop: We know we needed to remind ourselves of the December workshop and we thought it would be useful for you as well. As we go, feel free to share comments/ reflections in the chat.

<p>11:00 -11:50</p>	<p>Discussion</p> <ul style="list-style-type: none"> ● At our December workshop we dedicated some time to building support across the project. This included the walk and talk on our last day that resulted in each team identifying next steps, writing down one “ask” that you’d like someone to follow up with you on, and then selecting a buddy. During the More of/Less of/ Same exercise we heard that specific check-ins are a key piece of moving this project forward and keeping it on the “front burner” relative to all of our other responsibilities. ● BUDDY CHECK-INS: Has anyone had a chance to follow-up with the “buddy commitments”? ● How is that going for everyone? Is this something that is working the way you hoped it would? ● TEAM CHECK-INS: We also did a “walk and talk” where we invited you to think about your individual needs for this project, and then we rolled that up to TEAM NEXT STEPS. <ul style="list-style-type: none"> ● As we sent out with the meeting reminder, take a look at what you articulated at the December workshop as team next steps. Take a moment to look at your team’s planned needs as of December? ● Take a silent minute to reflect on these needs/plans 2.5/3 months later. What have you accomplished already? What still rings true? What is no longer needed? Can your team break any of the larger chunks into manageable next steps? Have other needs surfaced? <p>Introduce idea of identifying project lead:</p> <ul style="list-style-type: none"> ● A project lead can help to ensure that this effort remains a priority. We all know how important this is as we head into the busy season and want to ensure that our communication is as streamlined and efficient as possible. <ul style="list-style-type: none"> ● Given your team’s goals and next steps, what might be the key qualities for a key point of contact or project lead for this project? Share on whiteboard. ● Assignment: make a team decision about who is the appointed team lead, based on goals, priorities and let us know via email no later than March 8, 2019
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<p>11:50 -12:00</p>	<p>Close out/ Next Steps</p> <ul style="list-style-type: none"> ● Evaluation <ul style="list-style-type: none"> • Ann has reached out to you individually, and to schedule site visits as part of the evaluation of this program and will be finalizing soon. • Purpose of the evaluation is to understand how well the model works and why, and what we can plan better for next time ● Other Next steps <ul style="list-style-type: none"> • Peer Feedback Circles on 4 different models at GEWA. We need to circle up to reflect and report out. • Plan was to report out on that today, but with the shutdown, that work hasn't happened. • We heard from you all that group accountability is important, and we want to share our thinking after reflecting on your feedback. So, another webinar seems appropriate! When is the best time for you to circle up next? (Poll) <ul style="list-style-type: none"> ■ Before May/ Before seasonals start ■ Early summer: between May and July 4 ■ Late summer: After July 4
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Webinar 5

Thursday, June 27, 2019 10:30 - 12 noon

<p>5 min</p>	<p>Welcome</p> <ul style="list-style-type: none"> ● Greeting <ul style="list-style-type: none"> • Will be using the WebEx today • Phone, chat, whiteboards • Try to keep your phone on mute if you're not talking, to keep background noise to a minimum • Share your video! ● Purpose today: Final share out, close out ● Agenda for today
<p>5 min</p>	<p>Community Building</p> <ul style="list-style-type: none"> ● We've accomplished a lot together. One thing we learned is that it's about the journey and celebrating is important so we put a slide show together to remember how far we've come
<p>30 min</p>	<p>Park report-outs, Pecha Kucha (5 min each)</p> <ul style="list-style-type: none"> ● Park presentations answer: What has been the overall impact of this experience for your team? ● Format 15 slides, 20 seconds each ● As you are listening, write down: What's resonating? What's similar to your experience? What's different? ● Order (alpha by house name): EDIS, SAIR, GEWA, Planning Team, SARA ● Discussion/ debrief: what's resonating? What's similar? What's different?
<p>10 min</p>	

10 min	Evaluation initial findings <ul style="list-style-type: none"> ● Acknowledge that we've accomplished something in this pilot project, but also that the work continues/ we're at the beginning of something else
5 min	Proposal for next steps <ul style="list-style-type: none"> ● Project is at a close, but we're still here as support. Reach out to your regional SMEs and your colleagues at other parks for support, to share ideas, for feedback. ● Your feedback helped shape our recommended next steps. We'll have a final evaluation by the end of the summer, and will share it with you and broadly with our NPS colleagues and museum professionals outside NPS ● Strong proof of concept. We have shared park accomplishments and our cohort-based model with NER leadership ● Consensus at the regional level that the model is replicable and scalable, and there's a lot of interest in thinking about how we can widen this to support broader NER priorities. ● There will be 2020 iteration. We will tweak the "domain" (the problem we are collectively trying to solve). It will be open more widely. We are moving towards an annual opt in/ opt out model. We will define the outline of FY20 activities in the next month and ask parks to apply to participate by the end of summer. We will invite your park to recommit if you are interested in continuing in FY20. Know that there is always a home for you in this community.
10 min	Closing Circle/ Super Strong Closing <ul style="list-style-type: none"> ● What's one thing that you learned in this project that you will apply in your work going ahead? ● What do personally walk away with from this project?
10 min	

Workshop 1

Facilitation Schedule

March 19 - 21, 2018

Edison National Historical Park; West Orange, NJ

Goals for Workshop 1

- Build community among participants and between park teams
- Get park teams thinking about identifying target audiences and stories relevant to those audiences
- Support participants to think creatively and expansively about how to tell stories in their HHMs
- Identify and practice telling stories which reflect multiple perspectives

Pre-Workshop Homework

- Fill out the By the Numbers Worksheet to establish some baseline data on community and potential audiences
- Complete Self-Assessment sheet to start thinking about stories, and to establish a baseline for participants' comfort with assessment, evaluation, and collaboration practices
- Recommended (optional) reading: Nina Simon's *The Art of Relevance*

Day 1 Agenda

Monday, March 19 1:00 - 5:00 PM

Meet at Labs

Timeframe	Activity
10:00 - 12:00	Room prep
12:00 - 1:00	Eat lunch, final walk through agenda, participants start arriving
1:00 - 1:50	Community-building: Breaking the Ice <ul style="list-style-type: none">● Welcome, Purpose, Overview of Agenda, Revisit ground rules, distribute dance cards (15)● Icebreaker (35)● If possible: segue from icebreaker into 6 groups?

1:55 - 2:55 1:25 - 2:00 2:00 - 2:30	<p>Community-building: Refining Goals</p> <ul style="list-style-type: none"> ● Break into 6 groups ● 3 prompts: Historic House tour, training, teamwork. Each group is assigned one of these prompts, and to describe either the [house tour] from heaven, or the [house tour] from hell (7 min), and report out in 30 seconds to the group (3 min) ● Transition: we want this experience only to reflect the heaven lists! Keeping those characteristics in mind.... ● Working in same 6 groups, each group is going to take one of the 6 project goals. Take 5 minutes to read the goal and reflect. Is this goal also one of your goals? How might we revise this goal? What is it missing? Mark up the sheet. After 5 minutes, switch, rotating through all 6 goals. (30 min) ● Synthesis: How closely do these goals align with your own goals for being here? We'll update and refine these based on your feedback.
2:30 - 3:00	<p>Break</p> <ul style="list-style-type: none"> ● Come back from break and shuffle up groups
3:00 - 4:00	<p>Learning: Challenging Assumptions of Audiences</p> <ul style="list-style-type: none"> ● In groups of 4-6 (TBD based on number of KYOB articles), read a short article from Know Your Own Bone, Colleen Dilenschneider's blog about museums (10 min) ● Discuss as a group: how does this connect to your site? One thing that resonates? One question you have? (20 min) ● Share out to the larger group (15 min) ● Discuss as large group: How does this connect to the audiences you identified in your By the Numbers Worksheet (15 min)
4:00 - 4:45	<p>Skill-building: Storytelling</p> <ul style="list-style-type: none"> ● Basics of storytelling (10) ● In partners: Storycubes (20) ● Share out to the larger group/ segue into closing out (15)
4:45 - 5:00	<p>Closing Out</p> <ul style="list-style-type: none"> ● +/Δ for the day ● How feeling going into tomorrow? ● Preview for tomorrow ● Exit assignment, written on an index card: 1 question I want answered before I leave on Wednesday ● Happy Hour logistics ● Sign up for group dinner Tuesday night
After Hours	<p>Free Time</p> <p>Facilitate informal and optional group gathering/dinner</p>

Day 2 Agenda

Tuesday, March 20 9:00 - 5:00 PM

Timeframe	Activity
9:00 - 9:30	Community-building <ul style="list-style-type: none">● Introductions, ice breaker with Greater Hudson Heritage Network
9:30 - 10:00	Creative Learning: What is creativity? Why do we need it? How to nurture it?
10:00 - 11:30	Group Activity Stations: Working in groups of 3, choose 8 stations out of 9 to rotate to. <ul style="list-style-type: none">● Legos● Storytelling● List of 100 uses● Doodle Square● Write a note from the perspective of...● Wrong side Up● Ode to a _____? A rhyme, a limerick, or a poem● Build it! Build a concept model● Puzzles and Brain Games <p>Report (10 minutes) as a group: what activity spoke to you? What was the most challenging activity? What challenges my brain outside its usual boundary?</p>
11:30 - 12:00	Glenmont House <ul style="list-style-type: none">● Take your smart phone and take 2 photos of objects that speak to you
12:00 - 12:45	Working Lunch (And more time in Glenmont if necessary)
12:45 - 3:30	Cornell Boxes <ul style="list-style-type: none">● Create Cornell Boxes (2 hours)● Break (10 minutes)● Pecha Kucha Exhibit, 5 min per group (2:55 - 3:30)
3:30 - 5:00	Closing Out <ul style="list-style-type: none">● Report out● +/Δ for the day● Preview for tomorrow● Exit assignment: One thing I learned today, one thing I want to practice more, one question I still have
After Hours	Community-building <ul style="list-style-type: none">● Group Dinner

Day 3 Agenda*

Wednesday, March 21 9:00 AM - 1:00 PM

Timeframe	Activity
Early	Free Time Coffee, snacks set up Set up a poll: dates for next webinar, range of dates for next in-person workshop
9:00 - 9:15	Community-building <ul style="list-style-type: none">● Debrief from Day 2● Review agenda, goals for the day
9:15 - 11:00 9:15 - 9:30 9:30 - 9:45 9:45 - 10:00 10:00 - 10:15 10:15 - 11:00 (and break as needed)	Skill-building: Rapid Prototyping <ul style="list-style-type: none">● Working in park teams, revisit By the Numbers activity/ debrief from Day 1. As a group, pick 1 specific audience to focus energy on for this activity. Highlight that this doesn't need to be a permanent choice, but you'll work with this audience for (15 min)● "Yes, and" activity to generate ideas for ways to engage with that audience. Write each idea on a sticky (15)● Arrange stickies on an impact/ feasibility grid (15)● As a group, decide on one idea to workshop (15)● As a group, create a prop (using paper, tape, to describe your idea to the group (30)
11:00 - 12:30 11:00 - 11:13 11:13 - 11:20 11:20 - 12:05 12:05 - 12:10 12:10 - 12:25 12:25 - 12:30	Learning: Peer Feedback Circles <ul style="list-style-type: none">● 3 Simple Steps to give good peer feedback (13 min)● Core team models first: (7 min)<ul style="list-style-type: none">● Present a proposal to the whole group (2 min)● Group asks questions to clarify which team responds to (2 min)● Group gives feedback to team (2 min)● Team reflects (1 min)● Park turn! Each park pairs with one other park team, core team will rotate and help facilitate. After both paired parks go, they will rotate to another park team (14 min per rotation, 3 rotations = 45 min)● Quick synthesis: how did that activity go? (5 min)● In park teams, debrief: What feedback was really helpful? What ideas are you taking back to your park? Did this make you see anything differently? What? Why?● Close: as a group (in 1- 2 sentences), write the Yelp review that you want to have most upvoted, by this time next year (5)

12:30 - 1:00	<p>Strong Closing</p> <ul style="list-style-type: none"> ● Individually, have participants journal: what (they learned) so what (how this connects for them), now what (reflect on what they want to do next). Write down two additional ideas that you generated this morning but didn't have an opportunity to workshop ● Each participant writes on a sheet of paper their name, a way that they want to apply their learnings from this workshop to their work, and a deadline for when they want to have it done by. Take a picture with your phone. Fold it into an airplane, throw it. Everyone picks up an airplane and commits to following up.
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*Due to inclement weather, this day was deleted from the in-person workshop. After consultation and de-briefing within the core team, it was decided that subsequent individual site visits would be held by various core team members.

Workshop 2

Tuesday, December 4 - Friday, December 7, 2018

Goals

- Continue building community among participants and especially between park teams
- Individual participants build skills in giving and receiving feedback, and creating audience-centered experiences
- Park teams build on existing work by refining short and long-term goals

Monday, December 3 Travel Day

Timeframe	Activity
6:00 - 8:00 PM	Optional Social Gathering

Day 1 Agenda

Tuesday, December 4 8:30 am - 5:00 pm

Location: Log House, George Washington Birthplace NM; Colonial Beach, VA

Timeframe	Activity
8:30	We'll start promptly at 8:30 am; please give yourself a little extra travel time on the first day to find the Log House. See directions at the bottom of this agenda.
Morning	<p>Community-building: Welcome</p> <p>Learning: Trends Bootcamp with IMPACTS: Perceptions, Barriers, and Opportunities</p>
12:00	Lunch (see note on lunch logistics at end of this agenda)

Afternoon	<p>Learning: Trends Bootcamp with IMPACTS (continued): Reputation and Visitor Satisfaction</p> <p>Learning: Basics of Audience-centered visitor experiences: essential questions</p> <p>Skill-building: Peer Feedback Circle #1</p> <p>Close out, Prepare for tomorrow</p> <p>Evening:On your own</p>
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Day 2 Agenda

Wednesday, December 5 9:00 am - 4:00 pm

Location: George Washington's Mount Vernon; Mount Vernon, VA

Timeframe	Activity
	<p>Drive to Mount Vernon See driving logistics at the bottom of this agenda</p>
Morning	<p>Community-building: Welcome</p> <p>Skill-building: Peer Feedback Circle #2</p> <p>Learning: Fundamentals of Audience-centered Experiences, with the International Coalition of Sites of Conscience</p> <p>Skill-building: Observing Best Practices: Mansion and Slavery Tours with Mount Vernon Staff</p>
12:00	<p>Lunch (see note about lunch logistics at the end of this agenda)</p> <p>Q&A with Mount Vernon Staff</p>
Afternoon	<p>Skill-building: Observing Best Practices: Lives Bound Together exhibit and Be Washington education center, with Mount Vernon Staff</p> <p>Learning: Unpacking today's field trip</p> <p>Close out, Prepare for tomorrow</p>
4:00 - 5:00	<p>Optional: Free time at Mount Vernon (closes at 5 PM)</p> <p>Drive back</p> <p>Evening on your own</p>

Day 3 Agenda

Thursday, December 6 8:30 am - 5:00 pm

Location: Log House, George Washington Birthplace NM; Colonial Beach, VA

Timeframe	Activity
8:00 - 8:30	Arrive George Washington Birthplace NM

Morning	Community-building: Welcome Skill-building: Peer Feedback Circle #3 Learning: Techniques of Audience-centered Experiences, with International Coalition of Sites of Conscience
12:00	Lunch
Afternoon	Skill-building: Peer Feedback Circle #4 Skill-building: Rapid Prototyping of Audience-centered Experiences Close out, Prepare for tomorrow
Evening	Optional: Group Dinner

Day 4 Agenda

Friday, December 7 8:30 am - 12:00 pm

Location: Log House, George Washington Birthplace NM; Colonial Beach, VA

Timeframe	Activity
8:00 - 8:30	Arrive George Washington Birthplace NM
Morning	Community-building: Welcome Skill-building: Park teams share prototypes for feedback Community-building: Next steps for this community of practice
12:00	Lunch
Afternoon	Travel Home

More information:

- Peer Feedback Circles
 - We'll be asking each team to participate in one peer feedback circle as a presenter/ in the hot seat (and three giving feedback). Your team will need to present for 2 minutes (and 2 minutes only!) sharing out what you have been working on since we last saw each other in March
 - This should not be a formal presentation/ you don't need to spend a lot of time preparing for this. But you might think about what kind of visuals you might want to bring with you to help illustrate your project and your activities to this community of practice

APPENDIX C

Survey Questions Pre-Site Visit for Historic House Museum Pilot Program (Parks)

Please type your answers directly into this document. Always feel free to add additional comments, particularly to the 1 to 5 scale questions. As a reminder, these answers are confidential, no comments will be identified with anyone specifically and all identifying details will be removed from final publication. Please email me with any questions at alointerim@gmail.com.

Overall

- 1.** What do you feel has been most valuable for you during this pilot project? Your site?

- 2.** On a scale of 1 to 5, 1 meaning the least prepared and 5 the most, how ready do you feel you and your site were to participate in this project?

Additional comments:

- 3.** What do you think are key readiness factors to participate in this project/process?

- 4.** What do you feel were key success factors for your team?

- 5.** What were your personal goals heading into this project? Do you feel you were able to achieve them? Why or why not?

- 6.** On a 1-5 scale, 1 being no change at all and 5 being a great deal of change, how much have your perceptions about audience experience at your site changed since participating in this project?

Additional comments:

- 7.** What were some unintended outcomes?

- 8.** With 1 being not confident at all and 5 being very confident, how confident do you feel in you and your team's ability to move forward with similar initiatives at your site?

Additional comments:

- 9.** With one being not at all and 5 being a great deal, how much you see yourself utilizing any skills learning during this experience in your future work?

Additional comments:

- 10.** On a scale of 1 to 5, 1 meaning a poor return and 5 meaning a great one, what return on investment do you feel the outcomes of this project provided? (Time, travel \$, etc.)

Additional comments:

- 11.** What do you feel are lessons learned for you and your park?

Process

- 12.** Please indicate project components you were able to participate in:

- Webinar #1 #2 #3 #4 #5
- Office hours #1 #2
- Workshop #1 #2
- Pre-workshop #2 phone meeting
- Post-workshop #1 site meeting to set/refine goals

- 13.** Was your park successful in setting and meeting its project goals? Why or why not?

- 14.** How did this project fit into ongoing work and work priorities?

- 15.** What role did your Superintendent play in this project for your site? How do you feel this role affected the success of your project?

Community of Practice

16. After this experience, do you work differently with your team, your park?

17. After this experience, do you work differently across the NPS system?

18. Was connecting with your counterparts and other NPS staff at other sites useful for you? In what ways?

19. How do you feel your relationship with the regional office affected or was affected by your involvement in this project?

20. On a scale of 1 to 5, 1 meaning the least valuable and 5 the most, what are your thoughts about the value of the in-person workshops? (particularly at a participating site?)

Additional comments:

- 21.** On a scale of 1 to 5, 1 meaning the least valuable and 5 the most, what are your thoughts about the value of the on-line components of this project?

Additional comments:

- 22.** On a scale of 1 to 5, 1 meaning the least valuable and 5 the most, what are your thoughts relating to the influence or value of outside consultants as a part of this project?

Additional comments:

Additional

- 23.** What would you like to see added to the project?

- 24.** What would you like to see removed from the project?

- 25.** Anything else about your experience with this project that you'd like to share?

APPENDIX D

Survey Questions for Historic House Museum Pilot Program—Core Team

Please type your answers directly into this document. Always feel free to add additional comments, particularly to the 1 to 5 scale questions. As a reminder, these answers are confidential, no comments will be identified with anyone specifically and all identifying details will be removed from final publication. Please email me with any questions at alointerim@gmail.com.

Overall

1. Given your initial expectations for this project, what changed during the course of execution? How and why?
 2. What were your personal goals heading into this project? Do you feel you were able to achieve them? Why or why not?
 3. What do you feel were key success factors for the Core team?
 4. What do you feel were key factors for success for the Parks?
 5. What were some unintended outcomes?

- 6.** With 1 being not confident at all and 5 being very confident, how confident do you feel in the participating sites' abilities to move forward with similar initiatives at their sites?

Additional comments:

- 7.** On a scale of 1 to 5, 1 meaning a poor return and 5 meaning a great one, how do you feel about the ROI of your time and expertise for this project?

Additional comments:

Process

- 8.** What were the initial expectations for readiness for the participating parks (what readiness criteria were used to choose participants) and what do you think are readiness factors now that you've been through the project once?
- 9.** On a scale of 1 to 5, how do you feel about the overall structure of this project in these areas?
- Amount of time/effectiveness of online content and participation
 - Amount of time/effectiveness of in-person content and participation

Additional comments:

- 10.** How do you feel about the level of participation from each of the parks?
- a. In online learning opportunities
 - b. Office hours/hang outs
 - c. In person meetings
 - d. In person workshops
 - e. On their own in-between any structured project time

Additional comments:

- 11.** Any thoughts regarding the clear need for, yet not taken advantage of, additional support from the core team such as office hours, coaching or mentoring?
- 12.** On a scale of 1 to 5, with 1 being not at all, how successful do you feel participants were in setting and adhering to their own goals?

Additional comments:

- 13.** How do you feel about the Core team's role in goal setting with the parks?
- 14.** Should we have made some of the Core team's goals (i.e. for CLIP) Park goals as well?

- 15.** How much and in what way(s) do you see supervisor involvement as a factor in the outcomes of this project?

- 16.** What outcomes did you see that you feel were directly related to the community of practice created with this project?

Core Team

- 17.** What do you feel has been most valuable for you during this pilot project? The Regional Office/your team?

- 18.** After this experience, do you work differently across the NPS system?

- 19.** How do you feel about your ability to prioritize this project with your other work?

- 20.** On a scale of 1 to 5, 1 meaning the least valuable and 5 the most, what are your thoughts relating to the influence or value of outside consultants as a part of this project both as a part of the core team as well as content providers?

Additional comments:

21. What do you feel are lessons learned for the Core team?

Additional

22. What would you like to see added to the project?

23. What would you like to see removed from the project?

24. Anything else about your experience with this project that you'd like to share?

Resource Kit for Skill Building

This toolkit outlines the basic steps and key components to approach the process of building necessary skill sets of staff to re-shape the approach to interpretation in Historic House Museums and is designed for staff members who have some level of familiarity with the basic concepts of interpretation and visitor engagement, as well as a desire to improve same. These steps address topics and issues in general and should be used as an outline for individual sites or programs to create content and timing specific for its particular needs. While this kit was created to accommodate multiple sites, it can easily be adapted for a single site.

Is Your Site Ready?

Ask yourselves the following questions, either individually or as a potential team. While each of the answers do not need to be in the affirmative, having these basic foundational tasks thought through as well as general agreement regarding the answers will greatly enhance your team's chances of success.

- Has your team thought about and had discussions regarding your current visitor experience and how to change it? Have they done any research and/or attended conferences or seminars to gain foundational information in this area?
- Are there generally agreed upon desired outcomes for an enhanced or changed visitor experience?
- Is updating or re-inventing interpretation for the visitor experience a part of your site's current goals and priorities?
- Can your site commit to providing appropriate financial and moral support for this project?
- Is your site willing to be open minded and think about the visitor experience in entirely new ways?
- Is your site comfortable with being flexible and continuously improving your process?

- Do potential team members have good and respectful working relationships with each other?
- Why is your site interested in engaging in this type of project?
- Can your site commit to dedicate the appropriate amount time to focus on this project and all of its components including workshops, webinars, travel, field trips and homework?
- If some project content will be delivered/received online rather than in-person, does your site have sufficient wi-fi signals and computer terminals and software to ensure full accessibility for these types of learning experiences?

Resources Required

Suggested Project Budget

Project budgets will vary depending on number of participants, which consultants are used, how many consultants are used, if there will be multiple sites/teams involved, if the facilitation and coordination will be the responsibility of an existing team member or an Outside Facilitator. The below estimates assume one facilitator, three content experts, three in-person workshops that require travel for consultants and participants, and five individual team members.

Outside Facilitator	\$7500
Travel for Outside Facilitator	\$4500
Independent Content Consultants	\$10,000
Travel for Content Consultants	\$4500
Workshop Supplies (Books, markers, flip charts, notepads, creativity tools, etc.)	\$500
Workshop Meals/Refreshments	\$2000
Team Members Travel	\$22,500
TOTAL	\$51,500

Additional Budget Implications

In addition to the above costs, the below also need to be kept in mind, but will vary by site, project structure, team make-up, etc.

- Staff time for team participation in the project, approximately 70 hours of dedicated time, not counting travel time.
- If you do not use an Outside Facilitator, additional staff time for whomever assumes this role, approximately an additional 40 hours.
- Staff time for site leader to be brought up to speed, set the tone with the remaining staff regarding importance and prioritization.
- Additional staff and volunteer time if it is decided to bring them into the feedback loop during the process.
- Upgrading technology, if necessary, to ensure appropriate access for online components.
- Physical space needs. Will a space need to be set aside or outfitted differently to allow your team to do its best work?
- Could some of the above travel and meal costs be a part of existing professional development budgets?
- Additional costs related to physical changes needed to implement interpretation changes, i.e. new labels, exhibit fabrication, programming staff or tools.

Suggested Team Composition

The ideal team size is five while the maximum number for efficiency is seven (not counting Outside Facilitator).

- 1-2 members from education/interpretation to serve as education, interpretation and visitor engagement experts (ideally equal numbers from these first two categories)
- 1-2 members from Curatorial/resources/archives to serve as content experts (ideally equal numbers from the first two categories)

- 1 member from the frontline staff to serve as visitor perspective and implementation experts (Visitor Services or Security if not a formal part of interpretation)
- Other areas of expertise/staff members should rotate in and out if/as needed
- 1 Outside Facilitator

Because it is difficult to focus on a specific project given all other responsibilities staff have and to eliminate the perception of internal agendas, it is recommended that you include a team member from outside of your site that has been trained in facilitation. This team member will be able to have more time to focus on the process and progress of the project and will assist in accountability and decision making for your team. This person could be an independent consultant or a staff member from another site or area within larger organizations.

When considering potential team members, keep in mind the following criteria/questions:

- Are the working relationships amongst these members respectful, collegial and professional?
- Will these members bring different perspectives to the table?
- Carry his or her own weight?
- Contribute in meaningful and thoughtful ways?
- Be able to dedicate time towards the project?
- Be flexible and open to thinking about interpretation in new ways?
- Willing to be accountable to each other and the project as a whole?

Be sure to define roles and responsibilities to encourage accountability while leaving room for flexibility, organic change and growth during the process. For instance, will there be a key liaison between the site team and the Outside Facilitator? Site team and site administration/management? If not using an Outside Facilitator, who will schedule meetings and field trips? Who has decision making authority and for which areas? How will decisions be made?

In addition, you may want to agree upon a set of assumptions regarding participation such as, everyone is expected to participate, everyone's opinions and thoughts will be respected, everyone will make every effort to attend meetings, everyone will keep an open mind, etc.

Timeline

Timelines for skill building and project execution will be dependent on number and locations of participants, desired final outcome, budgets and other internal factors. The suggested timeline below is approximately 19 months for content webinars and workshops but can be accelerated depending on individual sites' needs. Project ideation, goal setting and execution are built both within the sessions as well as "down time" between sessions. However, a minimum of one month between formal workshops/webinars/sessions is recommended to allow the group ample time to process what they've learned and complete possible homework or field trips.

Month	Time Frame	Event	Time
0	Within two months of project approval	<ul style="list-style-type: none"> • Team member identification • Initial discussions of expected project outcomes 	
2	Within two months of completion of above tasks	First webinar/workshop	1.5-2 hours
4	Within two months of first webinar/workshop	Second webinar/workshop	1.5-2 hours
7	Within three months of second webinar/workshop	First in-person workshop	3-4 days
9	Within two months of first in-person workshop	Third webinar/workshop	1.5-2 hours
11	Within two months of third webinar/workshop	Second in person workshop	3-4 days
14	Within three months of second in-person workshop	Fourth webinar/workshop	1.5-2 hours
16	Within two months of fourth webinar/workshop	Third in-person workshop	3-4 days
19	Within three months of third in-person workshop	Final/fifth webinar/workshop	1.5-2 hours

Suggested Content Outline

The below are general guidelines only. Ultimately, customized content and sequencing will be necessary for each site and workgroup.

Online webinar 1: (ideally in-person workshop)

- Introductions, include site challenges and initial expectations for project outcomes
- Introduction of overarching project objectives (see Suggested Overarching Project Objectives in Resources section)
- Participation assumptions
- Team/community of practice building
- Discussions of common issues with interpretation in Historic Homes
- Reflection/feedback

Homework/Activity between online webinar 1 and 2:

- Read background articles/chapters related to interpretation at Historic Homes, audience research
- Field trip to a local historic home to observe their visitor experience, particularly in relationship to interpretation
- Connect with Outside Facilitator if additional support is needed

Online webinar 2:

- Review of participation assumptions
- Team/community of practice building
- Reminder of overarching project objectives
- Reporting out on homework and field trip discussions and how those might influence your site's project/process
- What other types of information or support do you need?
- Reflection and feedback

In-person workshop 1:

- Review of participation assumptions
- Reminder of overarching project objectives
- Team/community of practice building
- Presentation of research of audience characteristics
- Presentation addressing diversity, equity and inclusion
- Team discussions about presentations and how they will inform individual site projects
- Individual site discussion regarding project specific goals
- Large group discussion, modeling and facilitation of SMART goal structure to begin to refine individual site project goals (See Resources section)
- What other types of information or support do you need?
- Reflection and feedback

Homework/activity between in-person workshop 1 and online webinar 3:

- Refine and finalize individual site project goals using SMART goal framework
- Work with site leader to ensure goals also align with current site goals and priorities
- Work with site leader and Outside Facilitator to decide on appropriate roll-out of goals to additional site staff and volunteers
- Field trip to a local historic home to observe their visitor experience using the lens of information learned from audience research and telling more inclusive stories (Diversity, Equity, and Inclusion research)
- Meet with field trip site's staff to discuss your mutual experiences in relationship to audience behaviors and expanding the narratives beyond those traditionally focused on in historic sites
- Begin brainstorming of potential projects to achieve agreed upon goals, choose two to present at next webinar
- Connect with Outside Facilitator if additional support is needed

Online webinar 3:

- Review of participation assumptions
- Reminder of overarching project objectives
- Team/community of practice building
- Peer feedback and discussion of individual site goals
- Comparison and sharing related to roll outs of goals at individual sites, yes or no, techniques used
- Sharing of initial project ideas to support goal achievement
- Peer feedback of same
- Introduce sample project completion schedules
- What other types of information or support do you need?
- Reflection and feedback

Homework/activity between online webinar 3 and in-person workshop 2:

- Create a draft plan for interpretive project execution
- Begin prototyping project ideas/components
- Connect with Outside Facilitator if additional support is needed

In-person workshop 2:

- Review of participation assumptions
- Reminder of overarching project objectives
- Team/community of practice building
- Creativity and problem-solving content and activities
- Team presentations and peer feedback on project schedules, feasibility and goal alignment, successes and frustrations
- Team presentations of progress on projects, if appropriate, workshop site will be a participant and host to present their project in its actual physical space
- Peer and facilitator feedback on project progress presentations

- Individual team discussions to refine schedules and project based on feedback
- Presentation of refinements for feedback
- What other types of information or support do you need?
- Reflection and feedback

Homework/activity between in-person workshop 2 and online webinar 4:

- Continued refinement and work on individual site projects with agreed upon tasks and deadlines amongst the team
- Contact Outside Facilitator if additional support needed

Online webinar 4:

- Review of participation assumptions
- Reminder of overarching project objectives
- Team/community of practice building
- Progress reports on projects
- Share successes and frustrations/roadblocks, have group share potential solutions based on their experiences
- What other types of information or support do you need?
- Reflection and feedback

Homework/activity between online webinar 4 and in-person workshop 3:

- Continued refinement and work on individual site projects with agreed upon tasks and deadlines amongst the team
- Contact Outside Facilitator if additional support needed

In-person workshop 3:

- Review of participation assumptions
- Reminder of overarching project objectives

- Team/community of practice building
- Progress reports on projects
- Team presentations of progress on projects, if appropriate, workshop site will be a participant and host to present their project in its actual physical space
- Peer and facilitator feedback on project progress presentations
- Individual team discussions to refine projects based on feedback
- Discussion of next steps at individual sites once projects are completed
- What other types of information or support do you need?
- Reflection and feedback

Homework/activity between in-person workshop 3 and online webinar 5:

- Continued refinement and work on individual site projects with agreed upon tasks and deadlines amongst the team
- Contact Outside Facilitator if additional support needed

Online webinar 5:

- Review of participation assumptions
- Reminder of overarching project objectives
- Team/community of practice building
- Progress reports on projects
- Peer and facilitator feedback on project progress presentations
- If necessary, individual team discussions to refine projects based on feedback
- Summary and celebration of accomplishments
- Discussion of next steps at individual sites once projects are completed
- Reflection and feedback
- What other types of information or support do you need?

Key Success Factors

- **Communication:** Good communication will be key to keeping your team and your leadership and your site informed and help remove speculation about possible change.
- **Know your audience:** Take the time to develop rapport/trust/respect with each other core team and outside consultants.
- **Flexibility:** Be willing to re-arrange, modify, add or subtract to your content or projects as dictated by group needs.
- **Modelin:** Modeling techniques and behaviors you want the group to emulate is a proven way to encourage new skills.
- **Discipline:** Despite your very busy schedule commit to setting aside the dedicated time necessary to make the project successful.
- **Alignment:** Be sure this project aligns with ongoing park priorities and goals
- **Bring in outside perspectives:** Points of view from outside of your site or organization provide a fresh set of eyes, ensure you aren't working in a bubble, allow for additional expertise and serve to provide a "neutral" point of view.
- **Additional coaching and support:** Because much of this work and methodology is nuanced and a new way of working for project participants, additional mentoring, facilitation and modeling will be necessary for full successful implementation.
- **Defined roles:** When roles aren't clearly defined, forward movement is generally impeded as there is resulting confusion about who is doing what and delays in decision making which can lead to skepticism that change is possible.
- **Reflective practice:** Taking the time to reflect on each meeting, workshop or encounter as to what is working, what isn't and what else might be needed is built into the suggested content outline.

- **Good team dynamics:** Team members that feel respected in their abilities, supported, included and trusted ultimately created better products.
- **Support:** When the leadership at sites reinforce the importance and priority of the projects, it allows provides additional and important legitimacy/permission to the project.

Resources

Suggested Overarching Project Objectives

- Collaboratively develop programs, experiences and materials to connect with visitors to provide them with the most engaging and educational visits possible.
- Enhance mission/sites messages.
- Ensure that all interpretive communications to our community and our visitors are welcoming, accessible, interesting and relevant.
- Advance an internal culture of teamwork through creative and open communications and clear roles and procedures for the planning and implementation of all interpretive projects and initiatives.

Specific Project/Site Goals SMART goal framework

- Three goal maximum for the project

S	M	A	R	T
Specific	Measurable	Achievable	Realistic	Time-based
What do you want to do?	How will you know you've done it?	Is it in your power to accomplish it?	Can you realistically achieve it?	When do you want to accomplish it?

Sample Smart Goal:

A new exhibition about candlesticks will be installed in the house's living room by March 2019.

- **Specific:** There will be a new candlestick exhibition installed in the living room.
- **Measureable:** If a new exhibition, about candlesticks is installed in the living room, you will be able to say the goal is completed.
- **Achievable:** Provided you are allowed to re-install the living room with an exhibition, that the living room would be an appropriate place for such an exhibition, and that such an exhibition exists.
- **Realistic:** Provided there is enough time to get and install the exhibition and that finances allow for the rental and installation of this exhibition.
- **Time-based:** It will be completed no later than the last day of March 2019.

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Greater Hudson Heritage Network,
<http://www.greaterhudson.org/creativity-incubator.html>

IMPACTS, <https://www.colleendilen.com/interactive-workshops>

International Coalition of Sites of Conscience, coalition@sitesofconscience.org

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National Park Service Participating Parks:

Thomas Edison National Historic Park, West Orange, New Jersey,
www.nps.gov/edis/index.htm

George Washington Birthplace National Monument, Colonial Beach, Virginia,
<https://www.nps.gov/gewa/index.htm>

Saugus Iron Works National Historic Site, Saugus, Massachusetts,
<https://www.nps.gov/sair/index.htm>

Saratoga National Historical Park, Stillwater, New York,
<https://www.nps.gov/sara/index.htm>