

Introduction to Evaluation of Interpretation and Education

Participant Guide


September 30, 2008

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Welcome

Welcome to today's TELNPS course titled, *Introduction to Evaluation of Interpretation and Education*. This class is from 1:00PM to 3:00 PM EST on September 30, 2008 and will consist of live instruction via Technology Enhanced Learning (TEL) from the US Fish and Wildlife Service National Conservation Training Center in Shepherdstown, West Virginia. Thank you for joining us today. We look forward to your participation.

Background:

Join us for the first session of a new series, *Evaluation for Interpretation and Education*, designed for Interpretation and Education managers and practitioners. Each TEL course will inspire, provide content and resources, offer take-away tools, give activities to try, and encourage exchange with colleagues and specialists.

This first Tel course will focus on what we mean by evaluation and planning for evaluation. Examples from the field will be used throughout the program to highlight real issues, approaches, and findings.

This TEL series is sponsored by the National Education Council and presented by the Education Evaluation Coordination Team. It supports the Servicewide Interpretation and Education Evaluation Strategy and the I&E Renaissance Action Plan

How to Interact with the Instructors

We encourage you to ask questions and share your comments with the instructors throughout this TELNPS course.

If you were physically in the classroom with the instructor, you would raise your hand to let her/him know you had a question or comment. Then you would wait for the instructor to recognize you and ask for your question. We are all familiar with that "protocol" for asking questions or making comments.

With TELNPS courses, there is also a “protocol” to follow to ensure you can easily ask questions and others can participate as well. It may seem a little strange at first asking a question of a TV monitor. Remember, it is the instructor you are interacting with and not the monitor. As you ask more questions and participate in more TELNPS courses, you will soon be focusing only on the content of your question and not the equipment you are using to ask it.

As part of the TEL station equipment at your location, there are several push to talk microphones. Depending on the number of students at your location, you may have one directly in front of you or you may be sharing one with other students at your table.

When you have a question, press and hold down the push to talk button, maintaining a distance of at least 12-18 inches and say, “Excuse me [instructor’s first name], this is [your first name] at [your location]. I have a question (or I have a comment).”

Then release the push to talk button. This is important. Until you release the button, you will not be able to hear the instructor. The instructor will acknowledge you and then ask for your question or comment. Stating your name and location not only helps the instructor, but also helps other students who are participating at different locations to get to know their classmates.



Coarse Goal and Learning Objectives

Coarse Goal and Objectives:

The main course goal is to demystify evaluation and foster more evaluation of I&E services. The course will address benefits, planning, and priority setting.

After this workshop, learners should be familiar with

- What evaluation means and the benefits for programs and parks
- How to decide what to evaluate and how to set priorities
- How to plan for an evaluation project

Additionally, the learner will be able to

- Locate and consult resources
- Identify key contacts and sources of support



Closing Remarks and Class Credit

To Receive Credit for this Course:

Take the on-line evaluation at

www.nps.gov/training/tel

Click on the DOI Learn tab

Go to the link under Class Evaluations for *Evaluation of Interpretation and Education*.

Please complete the evaluation within 2 weeks of the course, by
October 14, 2008.

Introduction to Evaluation of Interpretation and Education

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Introduction to Evaluation of Interpretation and Education

Moderator: Lyn Carranza
Presenters: Michael Duffin
Sam W. Vaughn

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Definition of Evaluation

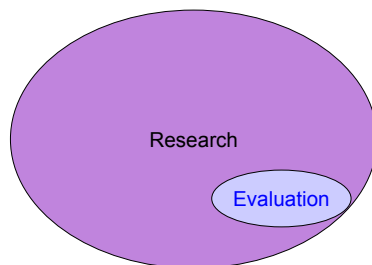
The **systematic** collection of information about what programs do, are like, and achieve

- Evaluation is about learning
- Ultimately, evaluation informs **decision making**
- Things we can learn and decide about include:
 - Ways to improve program efficiency, effectiveness, and results
 - Collaboration and relationships among people who care about a program

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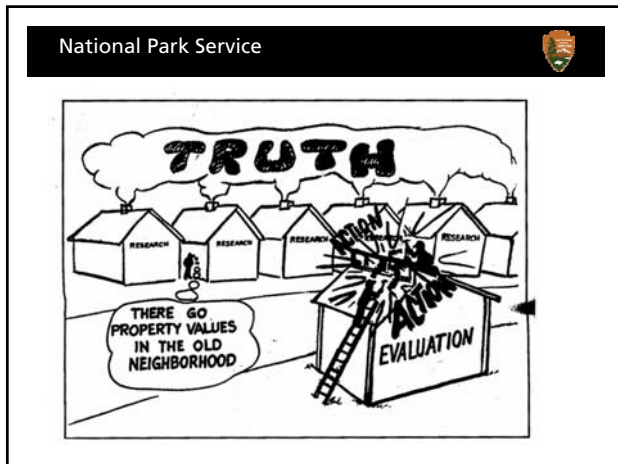


Evaluation vs. Research?



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<i>Evaluation vs. Research?</i>			
	In a Nutshell	Scope	Type of inquiry
Evaluation	Supports <u>action</u> in local contexts	Tends to be more <u>program specific</u> and shorter term	<u>Decision</u> -oriented inquiry
Research	Produces <u>knowledge</u> across contexts	Tends to be more <u>generalized</u> and longer term	<u>Conclusion</u> -oriented inquiry



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Rationale for Evaluation

- Accountability
- Program Development and Improvement
- Leverage for Funding
- Recent Focus on Outcomes
- Benefits for Informal Learning

Evaluation presentation slide(s) compiled by
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If I knew...

(fill in the blank)

about (my educational program)
I would be able to do my job better.



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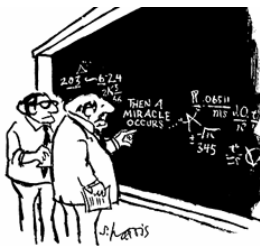
If _____ knew...

(fill in the blank)

(about my program), then they would be able to
make better decisions.



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"I think you should be more
explicit here in step two."

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At what stage of the project will evaluation give you the information you need?

For each individual program/activity, there are **three** stages where evaluation can help:

- Front-end
- Formative
- Summative/Remedial

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Front End Evaluation

Occurs during program/media planning phase

- Assesses existing beliefs, motivations, interests, misconceptions
- Addresses axiom: "Know your audience"

Example: Shenandoah Visitor Center exhibits

- VC used for orientation; Park visits for scenery, hiking; half of VC users talked to staff; popular exhibits were topo model and animals/habitats

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Formative Evaluation


Occurs during design stage

- Are people interested? Does it work? Are directions clear? Are messages clear? What improvements?

Example: Great Smoky Mountains Discovery Center Exhibits

- Some content unclear
- Interactives worked
- Components appealing; reading level OK
- suggestions for changes

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Summative/Remedial Evaluation
Occurs after the completion of program/media

- Effectiveness; meeting objectives; reactions of audience segments

Example: Sequoia NP: Giant Forest Museum & Plaza

- Some wayside placement ineffective
- Outdoor media needed visual appeal
- Exhibits enjoyable; average stay less than 10 minutes


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Evaluation Tools

What they think	What they do	How they feel
Staff Judgment	Staff Judgment	Staff Judgment
Interviews	Interviews	Interviews
Surveys/Tests	Surveys	Surveys
Focus groups	Observe/Track	Focus groups
Post-it surveys	Visitor diaries	Post-it surveys
Comment cards	Video	Comment cards
Visitor diaries	Foot/Nose prints	Visitor diaries

What we think they think, do, feel

Critical Appraisals
Evaluation presentation slide(s) compiled by Wells Resources, Inc. 2007. marcellawells@comcast.net

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How to choose the best evaluation tools?

- We already evaluate every activity. Are we using the best methods?
- Consider costs, benefits, budgets, schedule, and the questions you're asking.
- Consider professional help.
- This will be addressed later on today, and in a subsequent TEL.

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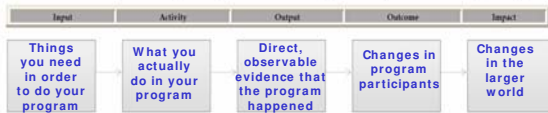
What exactly do I evaluate?

- How is the larger world changed for the better in the long term as a result of our program?
- What kinds of changes in program participants need to occur before those big picture, long term changes in the world will happen?
- What program activities are most likely to help participants change in the ways we hope for?
- A logic model creates a road map for the cause and effect steps from strategy to intended outcomes

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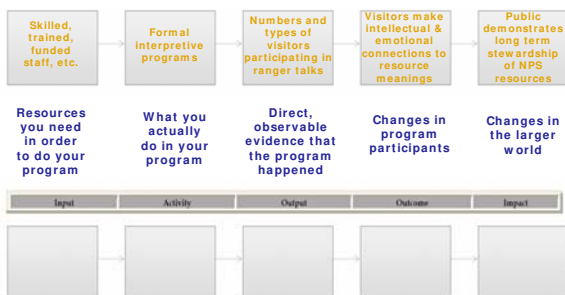
(a rock) → (throwing a rock into a pond) → (splash from the rock) → (ripples from the splash) → (waves at the pond's edge)



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A Simple Mapping Exercise...



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Formal Method to Plan for Evaluations

Factor-based, such as CBA

Factors:

- Importance
- Confidence level
- Evaluability
- Usefulness of Applying Results

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Summary of Formal Planning for Evaluation

- Model Program (logic model) or list components
- Rate advantages according to factors
- Reconsider rankings
- Consider easier evaluations
- Consider methods, professionals, funding, priorities

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Example of Evaluation Planning Matrix

	School	Walks	Exhibits	Vis Exper
Importance	8	6	4	9
Confidence	3	2	2	4
Evaluability	7	5	7	6
Application	5	4	7	5
Total	23	17	20	24
Rank	2	4	3	1

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Informal methods

- Discuss with staff, considering these and/or other factors
- Discuss, free-form
- Evaluate what you're most interested in
- Others?

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Basic Evaluation Process

1. Determine Evaluability
2. Identify Stakeholders
 1. Collect some data! –
3. Develop an Evaluation Plan
“We need a survey!!!”
4. Collect Data
5. Analyze and Interpret Data
6. Use the Findings



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Writing up your Evaluation Plan

- Step 1: Set it up
- Step 2: Do it
- Step 3: Use it


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Program Evaluation Planning Form

The image shows the top portion of a presentation slide. At the top left, the text "National Park Service" is displayed in a white serif font against a dark background. To the right of this text is the official National Park Service arrowhead logo, which features a bison silhouette and a landscape with a tree and mountains. Below the header, the title "Internal/External Studies" is written in a large, bold, italicized black serif font. Underneath the title, the question "What can park staff do on their own?" is presented in a blue sans-serif font. At the bottom of this section, a bulleted list in black sans-serif font outlines four key actions: "Overall Program assessment, planning", "Literature reviews, stay current", "Watch, listen, discuss, consider", and "With Training: focus groups, interviews, observations, tracking, Post-It Note surveys".

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Suggest seeking professional help with:

- Really important programs, services, questions
- Surveys
- Statistical analyses
- Multi-method studies
- Staff training for evaluation
- OMB-recognized external assessments

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Sources of Professional Help

- WASO Office of Social Science
- Harpers Ferry Center
- Regional Offices
- CESUs, universities
- Contractors
- Professional Societies

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**Focus on what
you need to
know**

**Map out the
program's
logic**

**Involve
stakeholders**

Be systematic

Use results



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Sam_W_Vaughn@nps.gov

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Course Credit

Take the on-line evaluation at :

- www.nps.gov/training/tel
- Click on the DOI LEARN tab
- Go to the link under class evaluations for *Introduction to Evaluation of Interpretation & Education*
- Please complete the evaluation within 2 weeks of the course, by October 14

Basic Overview of Program Evaluation

What is Evaluation?

We as humans evaluate all the time. Listen in on conversations and you'll hear: "I loved that movie last night". "He is a terrible cook!" "That car isn't worth the price they're charging." In more formal terms, most of us have been evaluated by teachers through the school system or by employers in the work place – often leaving us with negative connotations about both the process and the end results.

Evaluation is a term that is used to represent judgments of many kinds. What all evaluations have in common is the notion of judging merit. Someone is examining and weighing something against an explicit or implicit yardstick. The yardsticks can vary widely, and include criteria such as aesthetics, effectiveness, economics, and justice or equity issues. One useful definition of program evaluation is provided below, with an analysis of its components:

Evaluation is the systematic assessment of the operation and/or the outcomes of a program or policy, compared to a set of explicit or implicit standards, as a means of contributing to the improvement of the program or policy. (Weiss, 1998)

Dr. Weiss breaks the definition down into several key elements, which serve to highlight the specific nature of evaluation:

Systematic assessment: this emphasizes the research nature of evaluation, stressing that it should be conducted with rigor and formality, according to accepted research canons. Therefore, an evaluation of an environmental education program should follow specific, well-planned research strategies, whether qualitative or quantitative in nature. Scientific rigor can take more time and be more costly than informal methods, yet it is an essential component of successful evaluations. This is especially so in education, where outcomes are complex, hard to observe, and made up of many elements that react in diverse ways.

The activities and outcomes of a program are the actual focus of the evaluation – some evaluations study process, while others examine outcomes and effects. An educational program evaluation would usually look at both the activities of the program (how it's delivered, by whom, etc.) and its outcomes for participants (skills, knowledge, attitudes, values change, etc.).

Standards for comparison: this is a set of expectations or criteria to which a program is compared. Sometimes it comes from the program's own goals or mission statement, as well as from the objectives of program sponsors, managers and practitioners.

Improvement of the program: the evaluation should be done not to point fingers or assign blame but to provide a positive contribution that helps make programs work better and allocates resources to better programs.

Evaluation Planning: A Background

Evaluation has become very popular over the past two decades, as an important tool for program funding and decision-making, organizational learning, accountability and program

management and improvement. How do we as environmental educators go about developing evaluation programs that work for us?

Evaluation planning can be a complex and cyclical process. One must identify the key questions for a study, decide on the best measurements and techniques to answer the questions, figure out the best way to collect the data, develop an appropriate research design, implement it and promote appropriate use of the results. Here are some evaluation definitions and descriptions to provide some background.

Formative and Summative Evaluation

Michael Scriven introduced these two terms, formative and summative, in 1967, to describe the evaluation of educational curriculum. Formative evaluation produces information that is fed back during the course of a program to improve it. Summative evaluation is done after the program is finished, and provides information about its effectiveness. Scriven later simplified this distinction, as follows: “When the cook tastes the soup, that’s formative evaluation; when the guest tastes it, that’s summative evaluation.” (In Weiss, 1998, p. 31)

Programs are seldom “finished;” they continue to adapt and modify over time, in response to internal and external conditions. Therefore, the need for “formative” information continues – to be fed back to program staff to improve the program.

Outcome and Process-Based Evaluation

Focusing on the results of a program or its outcomes is still a major aspect of most evaluations. Outcomes refer to the end results of a program for the people it was intended to serve – students, teachers, and volunteers – whoever your audience is. The term outcome is often used interchangeably with result and effect. Some outcomes of a program are the results the program planners anticipated. Other outcomes however are effects that nobody expected – and sometimes that nobody wanted – yet are important information for program improvement. Change is a key word here – what is the change that results from a particular program? Is it an increase in something, such as knowledge? Or a decrease in something, such as environmentally detrimental behavior?

The process of a program is also important to evaluators – a systematic assessment of what is going on. Evaluators need to know what the program actually does – what is actually happening on the ground. Sometimes process is the key element of success or failure of a program – how is it delivered, what services does it provide, is there follow-up, do students like it? Studying program process also helps one to understand outcome data.

Initially, there seems to be a lot of similarity between formative, summative and process-outcome evaluations. However, the two sets of terms have quite different implications. Formative and summative refer to the intentions of the evaluator in doing the study – to help improve the program or judge it. Process and outcome have nothing to do with the evaluator’s role, but relate to the phase of the program studied. Often there is a combination of evaluations going on – the study of a program’s process or what goes on during a program, in a formative sense, combined with a look at outcomes – the consequences for participants at the end.

What is Outcomes-Based Evaluation?

Outcomes-Based Evaluation is quickly becoming one of the more important means of program evaluation being used by non-profit organizations. Is your program really doing the

right activities to bring about the outcomes you want? Or are you just engaging in busy activities that seem reasonable at the time? Funders are increasingly questioning whether non-profit programs are really making a difference. (McNamara, 1999)

Outcomes-Based Evaluation looks at the impacts, benefits, or changes to your clients – students, teachers, etc.– as a result of your efforts during and/or after their participation in your program. It helps you find out if you’re really doing the right program activities to achieve some pre-specified outcomes. Outcome-Based Evaluation is a method of evaluation that is based on a program logic model; the measurement of the success of a program relies on the measurement of several components of the logic model system.

Program Logic Model

A logic model is an approach to planning and managing projects that helps us to be clear both about what our projects are doing and what they are changing. The word ‘logic’ is used because of the logical link between the system components: inputs are a necessary precondition to activities; activities need to take place before outputs are possible, etc. Think of your program as a system that has inputs, activities, outputs and outcomes:

Input: The materials and resources that the program uses in its activities. These are often easy to identify, and are common to many organizations and programs. For example: equipment, staff, facilities, etc. These are the resources you need to get the outcomes you seek.

Activities: Activities are what you do to create the change you seek; they are what you do with the inputs you have. Under the headings promotion, networking, advocacy, or training, you describe what the project is doing.

Outputs: Outputs are the most immediate results of your project, and each relates directly to your activities. More importantly, outputs create the potential for desired results; they create potential for your outcomes to occur. Outputs are usually measured as are statistics, and indicate hardly anything about the changes in clients. (Example: 61 students attended our Ecology Camp).

Outcomes: Outcomes describe the true changes that occur to people, organizations and communities as a result of your program. These are the actual impacts, benefits, or changes for participants during or after your program, expressed in terms of knowledge, skills, values or behaviors. Outcomes may be expressed in terms of enhanced learning, such as increased knowledge, a positive change in perceptions or attitudes, or enhanced skills. For example, an objective of your program might be to “demonstrated increase awareness of the causes and prevention measures of climate change”. Outcomes may also be expressed in terms of physical conditions, such as the development of school-grounds garden.

Impact: This describes your vision of a preferred future and underlines why the project is important. It refers to the longer-term change that you hope your project will help create.

.....

Excerpted from “Measuring the Success of Environmental Education Programs” by Gareth Thomson, Canadian Parks and Wilderness Society; and Jenn Hoffman, Sierra Club of Canada, BC Chapter

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If I knew...

(fill in the blank)

about (my educational program)
I would be able to do my job better.



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If _____knew...

(priority stakeholder)

(fill in the blank)

(about my program), then they would be able to
make better decisions.



Evaluation Tools*

What they think	What they do	How they feel
Staff Judgment Interviews Surveys/Tests Focus groups Post-it surveys Comment cards Visitor diaries	Staff Judgment Interviews Surveys Observe/Track Visitor diaries Video Foot/Nose prints	Staff Judgment Interviews Surveys Focus groups Post-it surveys Comment cards Visitor diaries

Interviews & Surveys

What: A series of questions used to explore visitor knowledge, attitudes, opinions, behaviors, demographics, etc.

- Can be written (survey) or oral (interview)
- Can be mail, phone, face-to-face
- Can be self-administered or administered by evaluator
- Can range from structured to unstructured
- Items can be forced-choice or open-ended

When: front-end, formative, or summative

How:

- Develop questions or protocol
- Develop sampling strategy
- Administer

Focus groups

What: group discussion about a theme, idea, or concept; used to brainstorm ideas, gather opinions, interests and preferences and to understand group perceptions

When: typically front-end; can be formative

How:

- Develop protocol
- Select trained moderator/facilitator
- Arrange for room
- Facilitate discussion

Comment cards

What: a self-administered mechanism to collect general feedback from visitors (note: In this context comment cards are general in nature and do not ask specific questions.)

When: front-end, formative, or summative

How:

- Arrange space with comment cards, writing space, locked drop-box, and writing utensils
- Collect and compile responses

Visitor diaries

What: open-ended collection of information that documents respondents' feedback and/or behavior over time

When: front-end, formative, or summative

How:

- Determine format for collection and storage
- Provide respondent with necessary materials
- Decide ownership
- Develop rubric for scoring
- Develop administration and management process

Post-it surveys

What: a very brief, focused, open-ended, self-administered inquiry to determine perceptions (or misperceptions) about a topic or idea

When: primarily front-end, can be formative

How:

- Arrange space where visitors can write and post (i.e. foyer or entry)
- Supply easel pad or dry erase board with post-its and writing utensil
- Pose question
- Monitor (and photo) responses

Observation (including video)

What: systematic approach for observing and recording visitor characteristics and behaviors

When: front-end, formative, or summative

How:

- Develop objectives
- Design observation form to capture who, what, where, when, how
- Develop sampling strategy
- Conduct observations

**Information adapted from Evaluation presentation slide(s) compiled by Wells Resources, Inc. 2007. marcellawells@comcast.net*



A Simple Mapping Exercise...



Resources
you need
in order
to do your
program

What you
actually
do in your
program

Direct,
observable
evidence that
the program
happened

Changes in
program
participants

Changes in
the larger
world

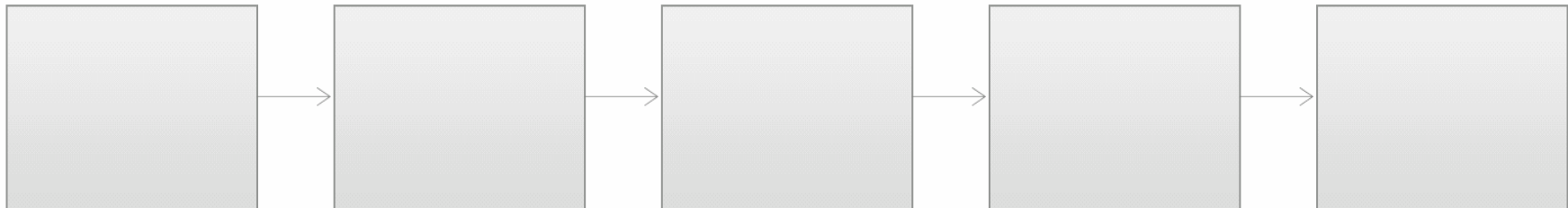


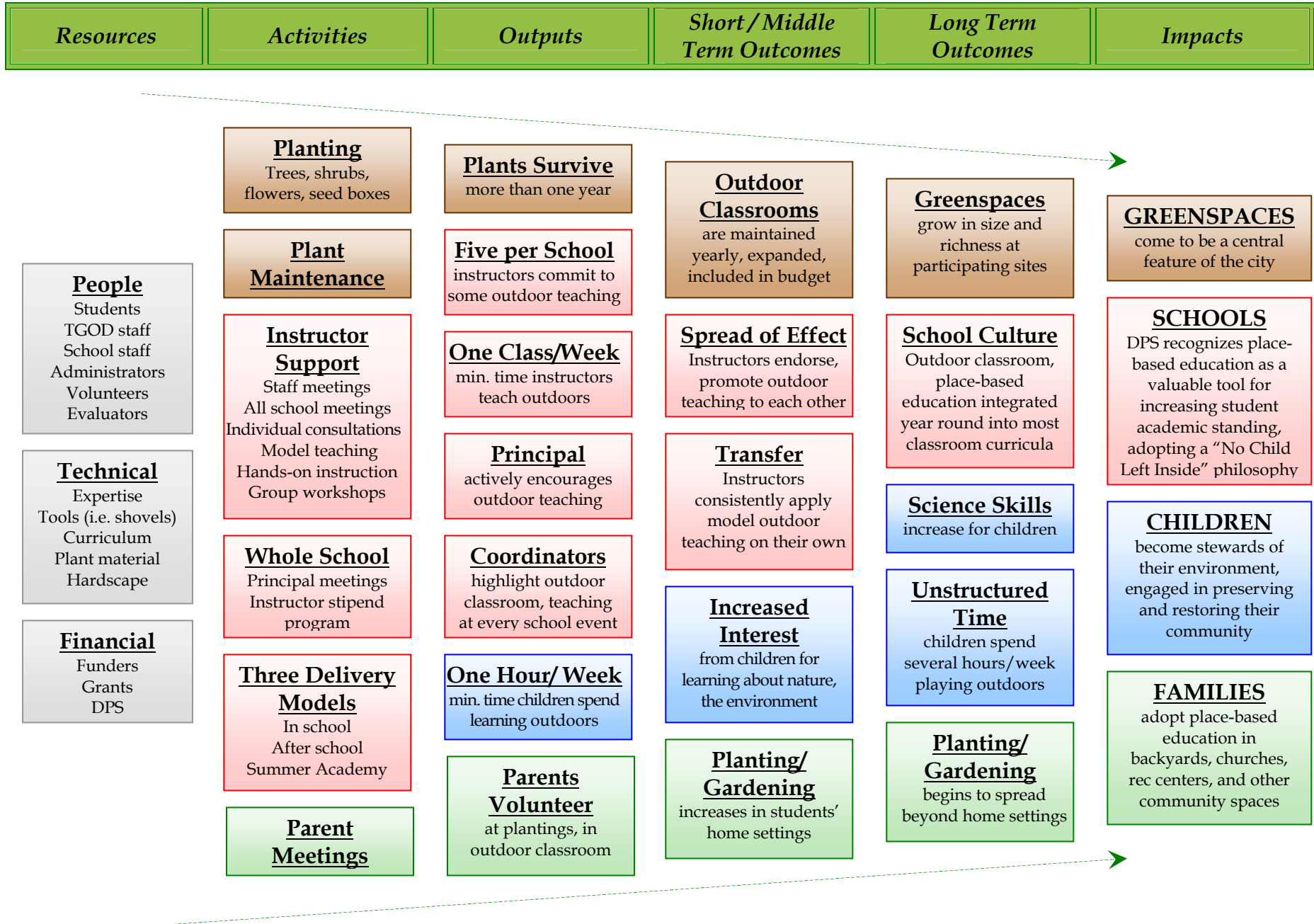
Figure 2. National Park Service Interpretation and Education Program Logic Model

Premise: If the NPS offers high quality interpretive, curriculum-based, and informational programs to a diverse public, the public will have better quality of life and will be better equipped to help preserve and protect the National Park System for future generations.



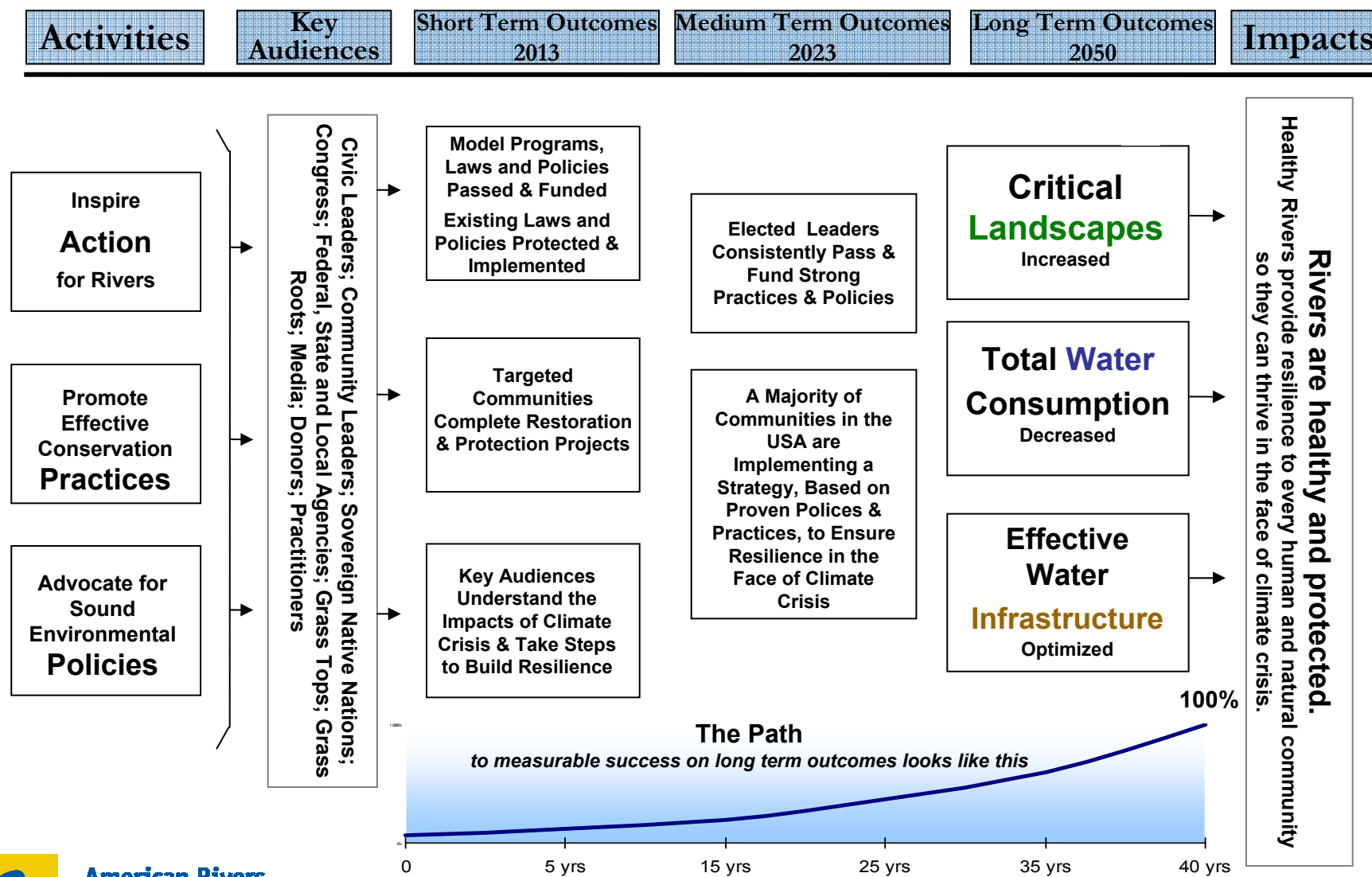


Premise: Designing, building, using, and maintaining an outdoor classroom with live trees instills an ethic of care in the next generation.





Strategic Direction: A Vision for the Future



Who are a program's stakeholders?

A stakeholder can be defined as *anyone who affects or is affected by a program...or anyone else who cares.*

Primary Stakeholders:

- Funders
- Program designers
- Program staff

Secondary Stakeholders:

- Program participants and family members
- Administrative staff
- Governing boards
- Legislators
- Community members
- Professional colleagues, potential program adopters

Adapted from Russ-Eft & Preskill, 2001

Program Evaluation Planning Form

Directions: At the outset of an evaluation process, whether formal or informal, program stakeholders can brainstorm the answers to these questions, with or without an external evaluator. The key idea is to determine the answers to the first six questions *before* deciding upon the method to be used (question seven). With the answers to these questions in hand, you are ready to plan the specific details of your evaluation (e.g. tool acquisition or development, which participants to involve, whether OMB approval may be needed, what timeline you will follow, scheduling the logistics, etc.).

1. What will be evaluated?
2. Who wants the evaluation?
3. How will the results be used?
4. Who will conduct the evaluation?
5. How will the evaluation be funded?
6. What *questions* do you want this evaluation to answer?
7. What *methods* will be used to collect information to answer these questions?
8. How will the data be analyzed?
9. How will data be presented to the user?
10. *Optional:* How will the findings be disseminated beyond program stakeholders, to inform the broader field?

NPS FOCUS

NPS Focus is an on-line catalog that houses NPS technical reports and images. Electronic access to the Social Science Studies Collection is available through NPS Focus. Currently, the Social Science Studies Collection is comprised of more than 370 records including study reports, images, and other documents produced by or for the NPS from disciplines such as recreation resource management, economics, geography, psychology, political science, and sociology. The Social Science Studies Collection is the largest collection of social science research in the NPS.


As studies are completed and reports are written, the database is continuously being updated to provide users with the most recent results and information. In order to use NPS Focus most efficiently for report reading and downloading, it is necessary to download the program DejaVu onto your computer. This may require the assistance of your IT representative, but overall, the program is not too difficult to download and is fairly easy to use.

NPS Focus Homepage:

<http://npsfocus.nps.gov/npshome.do?searchtype=npshome>


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WHAT'S HERE? ... a growing collection of thousands of images, documents, drawings and maps about the cultural and natural resources maintained by the National Park Service.

(To start: type in a search term above like lighthouse or wild flower - OR- choose Browse below.)
-OR- Browse images by Subject



-OR- Browse images by Park

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1. Type in search term(s)
2. And/Or select options from Limit Search boxes
3. Click on Search at the bottom of screen

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☒ and ☐ not ☐ or

Word(s) Anywhere

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Limit search

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Time Coverage of Content

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2. Fill in your keywords, author's name, affiliation, etc. relating to your search (e.g. evaluation) and limit the search to the Social Science Studies Collection. Your search will look something like this:







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Advanced Search

1. Type in search term(s)
2. And/Or select options from Limit Search boxes
3. Click on Search at the bottom of screen

Word(s) Anywhere

evaluation

☒ and ☐ not ☐ or

Word(s) Anywhere

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Limit search

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Social Science Studies Collection

Material Type

Time Coverage of Content

☐ From Year To Year

Search

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3. After filling in your search terms and limiting your search, hit “search” and a results page will appear:

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HAPPY SEARCHING!!!!

**National Park Service
U.S. Department of the Interior**



Social Science Program

Guidelines and Submission Form for Expedited Review of NPS-Sponsored Public Surveys, Focus Groups and Field Experiments



June 2006

**Additional copies of this document and the attached approval form are available on the
National Park Service Social Science Program Web site at:
<http://www.nature.nps.gov/socialscience/survey.htm>**

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Introduction

The National Park Service (NPS) sponsors public surveys to provide park managers with information needed for park planning, management, operations and evaluation of performance related to protecting park resources and meeting the needs of the public. In consultation with the Office of Management and Budget (OMB) and the Department of the Interior (DOI), the NPS has developed an expedited review process for NPS-sponsored public surveys. It streamlines the approval process required by the Paperwork Reduction Act of 1995. This booklet provides guidelines as of May 2006 for using the expedited process and a copy of the necessary submission form.

What Kinds of Studies Are Covered?

The program of expedited review applies to NPS-sponsored surveys designed to furnish *useful applied knowledge to NPS managers and planners*. Questions asked under the expedited review must show a clear tie to NPS management and planning needs. The expedited review may only be used for *non-controversial surveys that are unlikely to attract or include topics of significant public interest* in the review process. Investigators who are unsure if a study qualifies under the expedited review are strongly encouraged to contact the Social Science Program for clarification early in the planning process.

Who May Be Surveyed?

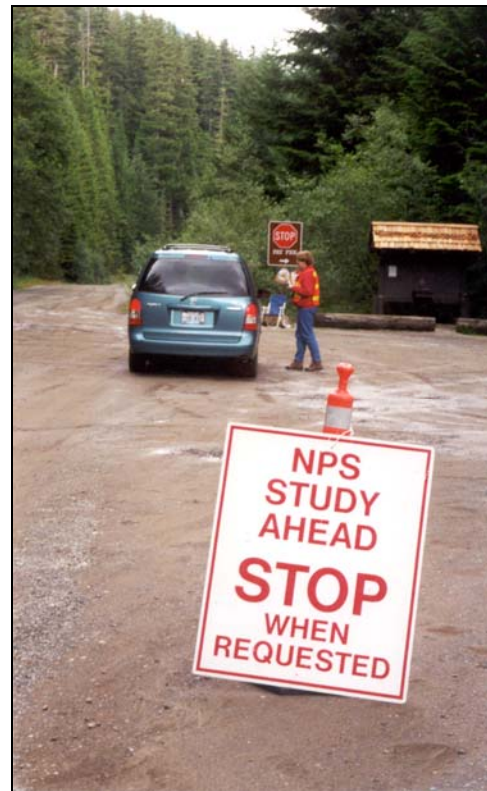
The program of expedited review is limited to three specific segments of the public—*park visitors, potential park visitors, and residents of communities near parks*.

Park Visitors: Park visitors include persons visiting any unit of the National Park System for recreational purposes, to participate in educational activities, to use resources legally available in a given unit, and for non-recreational purposes, such as traveling through or making deliveries. “Visitors” include the general public, participants in organized tour groups, teachers and students participating in NPS programs or activities, commuters, concession or partner employees, and subsistence resource users.

Potential Park Visitors: Potential park visitors include those individuals who might visit any unit of the National Park System for recreational purposes,

to participate in educational activities, to use resources legally available in a given unit, and for non-recreational purposes, such as traveling through or making deliveries.

Residents near Parks: Residents near parks include people living in gateway communities near any unit of the National Park System, communities within the boundaries of park units and related areas (e.g., National Heritage Areas, National Scenic Trails), in-holders, concession or partner employees, and subsistence communities within park boundaries or who traditionally use park resources.



What Kinds of Information Collection Methods Are Covered?

The requirements described in this publication apply to any information collection in which *the same questions are asked of ten or more people*. This includes all forms of surveys (mail, on-site, telephone, Web-based), focus groups, semi-structured interviews, and field experiments. Studies in which information is collected about people solely through observation are exempt from the approval process.

Authorities and Guidance

The authorities and guidance that apply to the expedited approval process are:

- Paperwork Reduction Act of 1995 (P.L. 104-13 May 22, 1995)
- 5 CFR Part 1320: Controlling Paperwork Burdens on the Public; Regulatory Changes Reflecting Recodification of the Paperwork Reduction Act
- United States Code, Title 44, Chapter 25: Coordination of Federal Information Policy
- OMB, The Paperwork Reduction Act of 1995: Implementing Guidance (draft, August 16, 1999)
- DOI Collection of Information from the Public: Interim Guidelines (March 20, 1997)
- NPS Director's Order #78, Social Science, Section III (October 7, 2002)
- NPS, Social Science Surveys and Interviews in the National Parks and for the National Park Service: A Guide to NPS and OMB Approvals (July 2002)
- OMB, Guidance on Agency Survey and Statistical Information Collections: Questions and Answers When Designing Surveys for Information Collections (January 2006)

Within the Scope of the Expedited Review - Topic Areas

To qualify for the expedited approval, all questions in a survey must fit within one or more of the approved topic areas and must be approved by the NPS and OMB. Researchers have flexibility, within accepted standards of good survey design and OMB regulations, to develop specific questions within the topic areas. The seven topic areas are identified below. A description of the scope of each topic area follows.

Topic Area 1 - Individual Characteristics

Individual characteristics are attributes of individual park visitors or visitor groups, potential visitors or groups, and residents of communities near parks. Examples include age, zip code or country of residence, group type and size, ethnicity, race, disabilities and impairments, language abilities, socio-economic status, level of educational attainment, and frequency of visits. Individual characteristics relevant to the mission, management, and/or

operations of National Park System units are included in the scope of this topic area.

Demographic questions should be limited to those that are germane to the topic being studied, useful and relevant to the park and its managers and included in the final report. Qualitative studies that do not generalize to a specific population should minimize the number of demographic questions or eliminate them altogether. An exception may be made when a demographic question (e.g., race or ethnicity) is intrinsic to the qualitative research topic (e.g., a focus group on interpretation of slavery at Civil War sites).

Topic Area 2 - Trip/Visit Characteristics

Trip/visit characteristics include aspects of travel which affect a trip or decisions which individuals make prior to, during, or following their trips to parks, related areas, and nearby communities. Also included are aspects of travel influencing potential visitors to units of the National Park System. Examples include use of overnight accommodations, transportation, trip route, trip origin, trip destination(s), payment of entrance/user fees, ability to obtain tickets, and length of trip. Trip characteristics relevant to the mission, management, and/or operations of National Park System units are included in the scope of this topic area.

Topic Area 3 - Individual Activities and Uses of Park Resources

Individuals participate in many activities during their visits to parks, related areas and nearby communities. Important examples of these activities include sightseeing, using visitor centers, day hiking, backpacking, picnicking, camping, shopping, observing wildlife, attending ranger-led programs, taking photographs, boating, fishing, and many others. Individuals use a variety of park or related-area resources, including natural and cultural resources, as well as park infrastructure and visitor services when they visit these areas. Examples include roads, trails, restrooms, parking lots, drinking water, viewpoints and overlooks, visitor centers, gift shops, stores, and overnight accommodations. Depending on the site, individuals may harvest berries, fish, game animals, firewood, or sea shells; travel cross-country in road-less parts of the park or related areas; travel through historic structures or landscapes; or handle historic

objects. Individual activities or uses of natural and cultural resources which are relevant to the mission, management, and/or operations of National Park System units are included in the scope of this topic area.

Topic Area 4 - Individual Expenditures

Individual expenditures include both time and dollar costs that people incur visiting parks and surrounding areas. Individual expenditure data include information on expenditure patterns in the park or surrounding area (direct expenditures) and expenditures associated with their travel to access the park, nearby communities, or related areas (indirect expenditures). *Contingent valuation questions may be included only if they are limited to goods and services currently or potentially provided by the NPS, cooperating associations, concessioners, and other NPS partners.*

Questions about entrance fees should describe what the fees would be used for, so respondents can evaluate whether the fee level is appropriate. Contingent valuation questions regarding non-market goods are not allowed under the expedited review. In general, contingent valuation questions should include enough context, including trade-off information, to allow respondents to make an informed decision. Thus, careful attention should be paid to writing contingent valuation questions to ensure that respondents are aware of the important trade-offs involved in choosing an alternative. Individual expenditures which are relevant to the mission, management, and/or operations of National Park System units are included in the scope of this topic area.

Topic Area 5 - Individual Evaluation of Park Services

Individual evaluation data include quality and importance ratings of services which individuals used or could have used during a visit to a park or nearby area. Evaluation of services and facilities provided by NPS, concessioners, or other cooperators in the park or nearby area are included in the scope of this topic area.

Topic Area 6 - Individual Perceptions of their Park Experiences

Individual perception data include the public's awareness and observations of the natural and

social environments in the parks and nearby areas they visit. Examples are perceptions of the values and benefits of parks and nearby areas and how public awareness and individual observations influence overall experiences. For purposes of the expedited review, *please limit perception questions to topics the park or the NPS can control and manage.* For example, visitors' satisfaction regarding interactions with members of their party would not be appropriate. Individual experiences regarding natural and cultural resources, other visitors, park and other employees, and infrastructure and services in the parks and nearby areas are included in the scope of this topic area.



Topic Area 7 - Individual Opinions on Park Management

Individual opinions about park management include the ideas, beliefs, attitudes, preferences, and values that visitors, potential visitors, and residents of communities near parks express regarding all aspects of NPS park management. Included in the scope of this topic area are individual opinions about how the parks manage natural and cultural resources, maintain physical structures, guide human uses of park resources and facilities, and provide educational and other services to the visitors, potential visitors, and residents of communities near parks.

Surveys outside the scope of the expedited approval require clearance through the standard information collection approval process outlined by the Paperwork Reduction Act and its implementing regulations.

Submission and Approval Process

The Principal Investigator (PI) is responsible for initiating a request for expedited review and providing a complete and accurate package of review materials. PIs may be park resource management specialists, NPS interpretive designers, agency scientists, researchers from universities, and individuals from organizations cooperating with the NPS, among others. The approval package must include:

- (a) a completed expedited review form,
- (b) a complete copy of the proposed data-collection instrument (e.g., survey or interview guide), and
- (c) other supporting materials (such as cover letters, introductory scripts, follow-up letters, and survey logs).

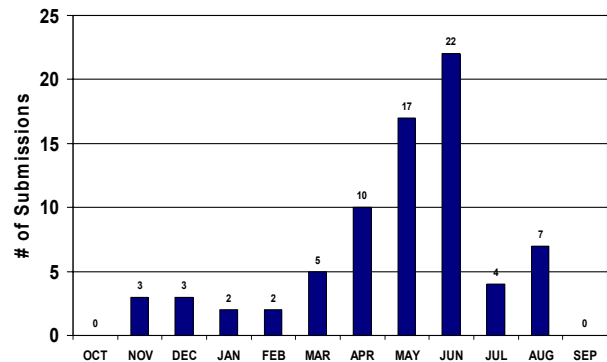
The expedited review form is available in this booklet and online at the following Web site:

http://www.nature.nps.gov/socialscience/docs/ex_guide.pdf

The request for expedited review and submission of a complete and accurate approval package must be made **at least 60 calendar days** prior to the first day the PI wishes to administer the survey instrument to the public. ***Submissions received in the busiest months of May and June will likely experience significant delays in review times.***

The NPS will provide an administrative and technical review of the submitted materials and notify the PI of the results. If revisions are necessary, the PI should complete them as soon as possible so that the NPS can forward materials to OMB in a timely fashion. If no revisions are necessary, the NPS will promptly submit the review package to OMB for review. A description of the steps in the expedited review process follows.

Submissions Received by Social Science Program
by Month (Fiscal Year 2005)



Step 1

The PI completes the Expedited Review Form and prepares the proposed data-collection instrument. Instructions are provided for each item on the form (see page 6). In addition, questions in the proposed data-collection instrument ***must have each topic area clearly identified***. Please list topic areas by number and title; for example "Topic Area 4—Individual Expenditures." Topic areas need to be included with all instruments, both quantitative and qualitative (including focus group questions). Submissions lacking this information will be returned to the PI, resulting in delays in the review process.

Step 2

The PI submits the completed form and a copy of the proposed survey instrument to the NPS Social Science Program for review. The submission package must include: a) any introductory script used in contacting the public, b) all cover letters, postcard reminders or follow-up letters to be sent to potential respondents, c) all survey or interview questions, each question being clearly identified as to the topic area under which it is being submitted (topic area number and title), d) necessary Paperwork Reduction Act compliance language inserted into the survey instrument¹, e) if applicable, scripts for non-response bias analysis

¹ Samples of Paperwork Reduction Act compliance language can be found on the NPS Social Science Web site at <http://www.nature.nps.gov/socialscience/survey.htm>.

follow-ups, and f) any other supporting materials (such as survey logs). Be sure that for qualitative surveys (including focus groups) there is an introductory script, including the necessary PRA compliance language. For person-to-person information collections, such as on-site interviews, telephone interviews and focus groups, a short statement describing how the PI intends to communicate PRA compliance information to respondents is required in the description of the survey methodology.

All submission packages must be formatted as MS Word documents (any recent version up to and including MS Word XP) and sent via e-mail to the NPS Social Science Program at the following address:

Megan_McBride@contractor.nps.gov

Please do not send materials in PDF format, as these cannot be edited.

Step 3

The NPS Social Science Program staff conducts an administrative and technical review of the submission. The staff recommends either approval, revision, resubmission under the Standard Paperwork Reduction Act approval process, or rejection of the proposed survey. The NPS Visiting Chief Social Scientist makes a decision based on the staff recommendation, and the PI is promptly notified. Should a submission be rejected, the PI may submit an appeal, in writing, to the Associate Director, Natural Resource Stewardship and Science, for a final decision.

Step 4

If approved by the NPS, the NPS Social Science Program staff transmits the submission to OMB for final review.

Step 5

OMB reviews the submission and notifies the NPS of approval or necessary revisions. Should OMB have specific questions about the survey instrument or proposed methodology, the NPS Social Science Program staff will immediately inform the PI and work with the PI to make necessary revisions. The NPS Social Science

Program staff will submit the PI's revisions to OMB and inform the PI of the results.

Step 6

If approved by OMB, the NPS Social Science Program staff notifies the PI immediately and assigns an OMB number, a unique NPS identification number, and an expiration date not to exceed three years or the expiration date OMB has assigned to the program approval (currently January 31, 2008), whichever comes sooner. The standard expiration date applied to expedited approvals is six months after the survey dates listed on the approval form. If OMB requires any special conditions for the approval (e.g., furnishing actual response rates to surveys), the PI will be informed and the conditions must be met for approval.

Step 7

The PI prepares a final revised survey instrument, submitting both a final electronic copy and hardcopy to the NPS Social Science Program.

The final survey instrument must include the following: a) the OMB number, b) the unique NPS identification number, c) the expiration date, and d) the Paperwork Reduction Act compliance statement.

Additions or changes to a survey instrument after it has been approved, even within the specific topic areas, are not allowed by OMB. An exception is that questions may be deleted after approval by OMB, if necessary.

In addition, the PI must provide the NPS Social Science Program with an archive copy of the final report describing the results of the survey. All archive copies of reports will be catalogued in the Social Science Studies Collection, physically housed in the NPS Washington Office. Reports housed in the Social Science Studies Collection will also be made available electronically to park managers and the public through the NPS Focus Digital Library and Research Station.

Other Approvals

In addition to OMB approval, PIs conducting surveys within units of the National Park System must meet requirements of the National Park Service Research Permit and Reporting System. Research permits under this system are issued by the specific park unit(s) in which the research takes place. Parks may have additional requirements as well. PIs should contact staff members of respective park sites to make this determination. Information on the NPS Research Permit and Reporting System is available online at the following Web site:

<http://science.nature.nps.gov/research>

Frequently Asked Questions

1. Is approval required for information collected in focus groups or field experiments?

Information collected in focus groups or field experiments must be approved if the participation includes ten or more persons and they are asked identical questions. If a series of focus groups is conducted on the same topic using substantially similar questions and the total participants in all groups combined is more than ten, then approval is required.

2. I am a graduate student conducting a study of national park visitors. Do I need approval for my study?

NPS and OMB approval is required if the study is conducted, sponsored, or funded by the NPS. If you are receiving financial or in-kind support from the NPS, approval will be required. The submission should list your major professor or faculty advisor as the PI. Approval by university Institutional Review Boards (Human Subjects Committees) does **not** substitute for NPS and OMB approval. However, research occurring in national park units that is funded by external sources (e.g., independent grants) and is not assisted or reviewed by the NPS in any way does not require NPS and OMB approval.

3. I intend to study visitor response to interpretive exhibits. I will observe visitors' behavior as they approach, read, and interact with the exhibits under different experimental conditions. Will I need approval?

Observations are exempt from the review and approval process if no information is solicited from the public. Also exempt are questions asked of the

person that are specific to that individual or result from observation. Approval is needed if standardized questions will be asked of ten or more observed people.

4. How long does the expedited review process take?

The request for expedited review, and submission of a complete and accurate review package, must be made **at least 60 calendar days** prior to the first day the PI wishes to administer the survey in the field.

5. How do I provide Paperwork Reduction Act compliance information to the respondents of my survey?

Respondents to NPS-sponsored surveys must be informed that the information collection is approved and in compliance with the Paperwork Reduction Act. Depending on the type of survey instrument used, compliance information is passed along to the respondents in different ways. The compliance information can be printed on an on-site or mail-back questionnaire. General compliance information can be presented verbally in face-to-face interviews, focus groups, or telephone surveys. Additional information will need to be made available to respondents upon request. Sample compliance information appropriate to different situations can be found on the NPS Social Science Program Web site.

6. I will be surveying small groups of park visitors. Is approval required?

NPS and OMB approval is required if identical questions are asked of ten or more persons.

7. Do I need approval if I am pre-testing a survey for later submission?

Pre-testing of survey instruments and methodology is encouraged. If pre-testing involves collecting the same information from ten or more members of the public, clearance for the pre-test is required. The request for approval of the pre-test can be submitted separately or with the final survey package, whichever is appropriate. However, if done with 9 or less people, pre-testing instruments prior to submission is recommended, especially if you are new to the survey design process and/or the survey includes questions that have not already been well-tested.

8. *I intend to offer respondents to my survey a small token of thanks from the park cooperating association. Is this acceptable?*

Generally, OMB discourages use of incentives in federal surveys because of the possibility of biasing a sample. Under certain circumstances, non-monetary incentives can be used. You should contact the NPS Social Science Program staff to discuss your proposed use of an incentive in your survey.

9. *Are there any restrictions on the use of Web surveys?*

Use of Web surveys as an option for respondents is acceptable. The Web should not be the only method of survey administration. There are restrictions on surveys of Web site users. If you intend to do a survey of this population, please contact the NPS Social Science Program early in your planning process. Further, in terms of sample selection, the Web should not be the means by which a sample population is recruited, since this will bias the sample. An exception occurs when the population being surveyed consists of visitors to a Web site, such as www.nps.gov. Contact the Social Science Program if you are planning such a survey.

10. *How should I anticipate my expected response rate?*

Expected response rates should be based on previous like studies in which the method of data collection and sample population were similar. In reporting your expected response rate, please be sure to justify it with specific reference to these similar studies. If you are having difficulty with this, please contact the Social Science Program for assistance.

11. *Can I assure my participants that their identity (if known) will remain confidential?*

Information collections approved under this program are subject to Freedom of Information Act requests. The Department of the Interior has no statutory authority to exempt studies from such requests. Therefore, confidentiality cannot be pledged. However, any information on surveys that identifies respondents can be removed or stored separately from survey databases so that the two are not linked. These steps should be disclosed to respondents.



Expedited Review Form Instructions

1. Insert a title for the proposed study and include park name, if appropriate (e.g., Yosemite National Park Visitor Study). Include the date of submission of the approval request to NPS.
2. Summarize the proposed study with an abstract not to exceed 150 words.
3. Fill in the PI contact information. The NPS Social Science Program will communicate with the PI listed here throughout the entire approval process. For studies in which graduate students are taking an active role, please list the faculty advisor as the PI.
4. Fill in the park or program liaison contact information. List only one park liaison for the purposes of the approval process, even if a PI is conducting a multi-park study.
5. List the park(s) in which the data collection will be conducted or the park(s) for which the data is being collected.
6. List the time period in which the survey will be conducted, including specific starting and ending dates. The starting date should be at least **60** days after the submission date.
7. Check the type(s) of information collection instrument(s) that will be used. If “other,” please explain.
8. Provide a brief justification for the study, its purpose, goals, need for specific information, and utility to managers. NPS Social Science Program staff can provide assistance as needed.
9. Provide a description of the survey methodology. This description must be specific and include **each** of the following:
 - a) the respondent universe (e.g., all adult visitors over 16 years of age to Yosemite National Park from Memorial Day to Labor Day 2006);
 - b) the sampling plan and all sampling procedures, including how individual respondents will be selected and a justification for the planned sample size;
 - c) how the instrument will be administered in the field, including follow-up procedures to increase response rates;
 - d) expected response rate and confidence levels, ***including a justification of the anticipated response rate*** by citing specific studies similar to the proposed one and their response rates;
 - e) a plan for analyzing and reporting the implications of any non-response bias detected (include a copy of your survey log, if applicable);
 - f) A description of any pre-testing and peer review of the methods and/or instrument.
10. Fill in the total number of initial contacts and the total number of expected respondents.
11. Fill in the estimated time to complete the initial contact and the survey instrument (in minutes).
12. Fill in the total number of burden hours. Burden hours refer specifically to interaction with the sample, including initial contact, reviewing instructions, and filling out a survey. Burden on non-respondents (such as initial contact interviews with individuals declining to participate) should be included in this total.

13. Provide a brief description of the reporting plan for the data being collected. This might include a final technical report to the park, a briefing for park managers, a *Park Science* article, a peer-reviewed journal article, etc. A copy of all survey reports must be archived with the NPS Social Science Program for inclusion in the Social Science Studies Collection. Please note this in the reporting plan.



Expedited Review for NPS-Sponsored Public Surveys

1. Project Title | Submission Date:

2. Abstract:

(not to exceed 150 words)

3. Principal Investigator Contact Information

First Name: Last Name:

Title:

Affiliation:

Street Address:

City: State: Zip code:

Phone: Fax:

Email:

4. Park or Program Liaison Contact Information

First Name: Last Name:

Title:

Park:

Park Office/Division:

Street Address:

City: State: Zip code:

Phone: Fax:

Email:

Project Information

5. **Park(s) For Which Research is to be Conducted:**

6. **Survey Dates:**

(mm/dd/yyyy)

to

(mm/dd/yyyy)

7. **Type of Information Collection Instrument (Check ALL that Apply)**

☐ **Mail-Back Questionnaire**

☐ **On-Site Questionnaire**

☐ **Face-to-Face Interview**

☐ **Telephone Survey**

☐ **Focus Groups**

☐ **Other (explain)**

8. **Survey Justification:**
(Use as much space as needed; if necessary include additional explanation on a separate page.)

9. **Survey Methodology:** (Use as much space as needed; if necessary include additional explanation on a separate page.)

(a) Respondent universe:

(b) Sampling plan/procedures (including justification for the planned sample size):

(c) Instrument administration:

(d) Expected response rate/confidence levels :

(e) Plan for analyzing potential non-response bias:

(f) Description of any pre-testing and peer review of the methods and/or instrument (recommended):

10. **Total Number of Initial Contacts | Expected Respondents:**

<input type="text"/>	<input type="text"/>
----------------------	----------------------

1
1.

Estimated Time to Complete Initial Contact | Instrument (mins.):

<input type="text"/>	<input type="text"/>
----------------------	----------------------

12. **Total Burden Hours:**

<input type="text"/>

13. **Reporting Plan:**

Checklist for Submitting a Request for Expedited Review

- ☐ Survey population includes **only** park visitors, potential park visitors, and/or residents of communities near parks.
- ☐ **All** questions in the survey instruments are within the scope of the topic areas covered by the expedited review, are non-controversial, and are designed to furnish useful applied knowledge to NPS managers and planners.
- ☐ The expedited review package is being submitted to the NPS Social Science Program at least **60** days prior to the first day the PI wishes to administer the survey to the public.

The expedited review package includes:

- ☐ a completed expedited review form
- ☐ a copy of the survey instrument or telephone interview script (with **each** question clearly identified as to the topic number and area under which it is being submitted)
- ☐ other supporting materials, such as
 - ☐ cover letters to accompany mail-back questionnaires
 - ☐ scripts for initial contact of respondents and for any follow-up calls as part of a non-response bias check
 - ☐ a survey log recording the disposition of contacts, including refusals
 - ☐ necessary Paperwork Reduction Act compliance language
 - ☐ follow-up letters/reminders sent to respondents

The survey methodology presented on the expedited review form includes a specific description of:

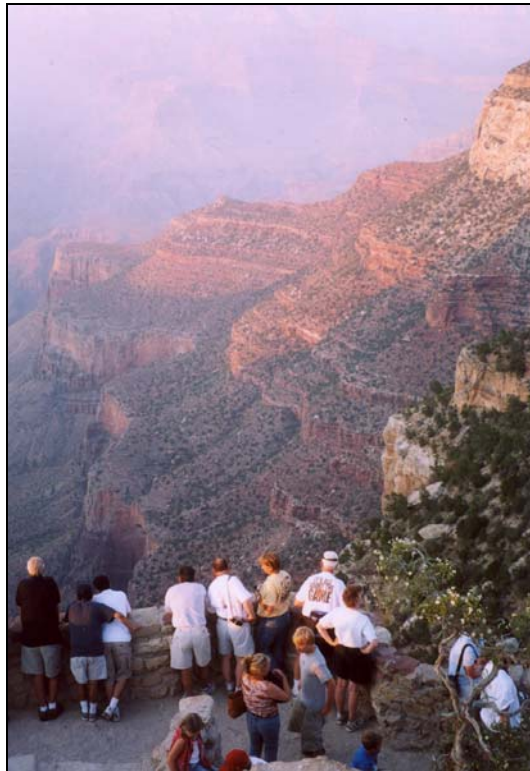
- ☐ the respondent universe
- ☐ the sampling plan and all sampling procedures, including how respondents will be selected and a justification for the planned sample size
- ☐ how the instrument will be administered, including follow-up procedures
- ☐ expected response rate (with justification) and confidence levels
- ☐ plan for non-response bias analysis
- ☐ a description of any pre-testing and peer review of the methods and/or the instrument
- ☐ The burden hours reported on the expedited review form include the number of burden hours associated with the initial contact of all individuals in the sample (i.e., including refusals), if applicable, and the burden associated with individuals expected to complete the survey instrument.
- ☐ The package is properly formatted and sent to the NPS Social Science Program.

All submission packages must be formatted as MS Word documents (any recent version up to and including MS Word XP) and sent via e-mail to the NPS Social Science Program at the following address:

Megan_McBride@contractor.nps.gov

Mission Statement

The objectives of the NPS Social Science Program are to conduct and promote state-of-the-art social science related to the mission of the National Park Service and deliver usable knowledge to NPS managers and to the public.



For additional information, contact:

Social Science Program
National Park Service
1849 C Street, NW (2300)
Washington, DC 20240
tel: 202.513.7190
fax: 202.371.2131
<http://www.nature.nps.gov/socialscience>

Education Evaluation Coordination Team

Deanne Adams, Chief of Interpretation, Pacific West Region, NPS

Brad Bennett, Chief of Interpretation, Alaska Region, NPS

Lyn Carranza, Chief of Interpretation, Petrified Forest National Park, NPS *

Cathleen Cook, Chief of Interpretation and Education, Great Smoky Mountains National Park, NPS

Michael Duffin, Principal PEER Associates, Inc., in collaboration with NPS through a Cooperative Agreement between the NPS Conservation Study Institute and Shelburne Farm. *

Lakita Edwards, Former EECT Member *

Sheri Forbes, Chief of Interpretation and Education, Glacier National Park, NPS

Marylou Herlihy, Exhibit Specialist/Interpretation & Education, Pacific West Region, NPS *

Elizabeth Hoermann, Program Manager for Program Development and Evaluation, Northeast Region Office of Interpretation and Education, NPS *

Arlene Jackson, Supervisory Park Ranger, Jefferson National Expansion Memorial National Historic Site, NPS *

Megan McBride, Senior Research Associate, Social Science Program, NPS*

Nora Mitchell, Assistant Regional Director for Conservation Studies, Northeast Region Director, Conservation Study Institute, NPS

Amy Powers, Principal PEER Associates, Inc., in collaboration with NPS through a Cooperative Agreement between the NPS Conservation Study Institute and Shelburne Farm. *

Patti Reilly, Acting Superintendent, Jamaica Bay Unit, Gateway National Recreation Area, NPS *

Sam Vaughn, Associate Manager, Interpretive Planning, Harpers Ferry Center, NPS *

** September 30, 2008 TEL Development Team*