

## **NOPI Survey Guidance**

**Background:** The National Outreach Program Initiative (NOPI 2.1.3) includes within its charge a performance measure (Performance Measure 1) regarding surveying our audiences about the overall effectiveness defined as satisfaction toward our exhibits and education and public programs.

**Approach:** L appointed a LPM survey committee to create a standard survey tool for each area of our public outreach programs—exhibits and education and public programs that occur at our facilities or at our host facilities. The standard survey takes the form of a *Master Survey* that will include questions in those areas, which offices, field locations and Presidential libraries can tailor to meet their independent needs for detailed information regarding their targeted audiences. Each survey created will not need to be sent to NARA survey authorities, since it will come from the pre-approved buffet of questions in the *Master Survey*. This will allow for a more dynamic and flexible survey apparatus for our public outreach programs. Also, each unique survey created from the *Master Survey* will be stored and shared, creating a bank of surveys for other staff to use.

However, these resulting surveys are only for the standard operational work in these public outreach areas. They will not replace other sponsored surveys that offices or Presidential libraries may use to gather information for larger projects such as museum redesigns, major exhibit redesigns, and other market research. Those surveys will still need to follow NARA policy and process to get separate approval. Also, the survey is limited to those areas within the larger National Outreach Program Initiative (NOPI 2.1.3), so it will not include survey options for special events and those associated question types as they are beyond the scope and purpose of this endeavor.

**Master Survey Form and Function:** The *Master Survey* will be available for customization on LPM's "National Outreach Program Initiative" workspace in the "The Forum" on NARA's ICN page until it is added to the NARA Forms page.

<https://icn.nara.gov/groups/the-forum/projects/national-outreach-program-initiative-work-space>

The survey will be a Microsoft Word document with fields that must be altered to reflect the area, type, location, date, etc of the exhibit or education and public program. A user guide will accompany the *Master Survey*, so staff can appropriately craft specific surveys for their use.

The *Master Survey* will have multiple sections corresponding to the three main program areas in NOPI. Staff will employ deletion logic to simply highlight and delete questions that are outside of those areas they wish to include in their survey, and may delete particular questions that are not of interest or irrelevant to their program. Also, the survey will need to meet a few **requirements** in order to be permitted *see NOPI Survey Instruction Manual*

**Survey Expectations and Frequency:** Best practices and professional standards suggest that public outreach staff involved in exhibits and education and public programs regularly survey their visitors, participants, or attendees. Their feedback is vital for improving our programs as well as engaging with new audiences and adapting to changes in public interest. While some offices and Presidential libraries met this prevailing practice, others have not due to resource restrictions and internal policy barriers. The survey resources are meant to remove some restrictions providing an in-house tool and freedom to implement dynamically without unnecessary policy and process. With the barriers to surveying removed, the obligation to conduct surveys increases.

While there will be no expectation of a specific number of surveys by unit by month, the Executive for L expects adoption and use of the survey and will be monitoring the results. In fact, the overall allocation of surveys approved for public outreach staff use in Fiscal Year 2016 is 10,000, which represents surveys completed and retrieved, not given out. All program offices have been given a 600 allocation of this office-wide allotment to plan and implement. The standard level of success acceptable is a seventy-five percent (450 surveys), which are the expected returns. The new orientation

is to understand this endeavor as a natural extension of public outreach and staff should be eager to engage and measure their ability to meet audiences' expectations, satisfaction, and needs using the survey tools.

**Survey Process and Requirements:** The implementation and daily operation of surveying will require particular actions to incorporate the rules and regulations agreed to between the authorities involved. First, all NOPI program executives will create an annual Strategic Survey Plan indicating programs in which they intend to survey. The plan leads to the development of the individual surveys that must include the required elements. The required elements are determined by the program area being targeted for survey, but include basically a few questions about a) effectiveness or satisfaction, b) facilities and technology (operations), c) demographics, and d) free answer for context. Once those requirements are met, any question remaining from the *Master Survey* are open for inclusion given staff interests.

Also, each survey developed will become an official NARA form, so every survey draft must be submitted to the NOPI program manager to ensure compliance and complete a form to accompany have the survey added to the list. This process should take no longer than 10 working days upon receipt of survey draft, and surveys cannot begin until NARA form number is attached to draft. The final survey will be stored on the NARA forms page for use without undergoing this process again.

The NOPI program executives must also maintain a local record of additional questions for reference and recording to allow for information to be captured for future analysis.

**Survey Reporting:** As state above, there are required survey questions that are tied to NOPI program performance metrics to be reported on a monthly basis. The specific questions required for reporting all have a three digit number attached to it for ease of tracking and reporting *see Survey Instruction Manual* for details and examples.

Surveys will be made available to visitors, participants and attendees of those programs included in your strategic survey plan. The surveys are to be filled in voluntarily, and those surveys that are turned in will be reported and stored on file locally with data entered into local database or spreadsheet. The metric is about audience impact not number of individuals surveyed nor response rate, so tracking total amount of surveys given out or those left incomplete is unnecessary. Public outreach staff only need to provide enough resources for anyone interested in voluntarily filling out the survey and a method for collecting them.

**Recordkeeping:** Our obligation to reporting the survey also extends to its record management. The records are to be stored within the Customer Service area of the records schedule in the 132 file series, are temporary and disposable to be destroyed when 6 years old. (N1-64-00-8, item 8a).