

# *Visitor Studies Association*

## *Evaluator Competencies for Professional Development*



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### III. Rubrics for Assessing Competency Proficiency

#### **Competency A: Principles and Practices of Visitor Studies**

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

**General Guiding Question:**

**Does the learner understand visitor studies in the broadest sense both currently and historically?**

| <b>Criteria</b>  | <b>Excellent</b>  | <b>Competent</b>   | <b>Needs Strengthening</b>  |
|--|---|--|---|
| A.1<br>The learner demonstrates knowledge of the purpose of visitor studies.   | Demonstrates considerable knowledge of the history and purpose of visitor studies by citing relevant, broadly based literature.   | Demonstrates basic knowledge of the history and purpose of visitor studies by citing relevant, but not broadly-based literature.                                 | Demonstrates no knowledge of the history or purpose of visitor studies.   |
| A.2<br>The learner demonstrates familiarity with the terminology of visitor studies.   | Demonstrates considerable knowledge of the terminology of visitor studies by using terms specific to visitor studies such as visitor centered; front-end, formative, summative, remedial evaluations; visitor experience, informal learning, etc. | Demonstrates basic knowledge of the terminology of visitor studies by using only few terms specific to visitor studies   | Demonstrates no knowledge of the special visitor studies terminology.   |
| A.3<br>The learner demonstrates knowledge of major research, evaluation, and/or marketing research specializations in Visitor Studies and critical issues associated with that specialization. | Identifies more than one of the specializations of visitor studies and explains some critical issues in that specialization.  | Identifies at least one of the specializations of visitor studies and identifies one critical issue in that specialization.                                      | Cannot identify any of the specializations of visitor studies and knows none of the critical issues of importance to visitor studies. |
| A.4<br>The learner can describe major trends in the history of Visitor Studies field over the last century.  | Presents considerable detail in describing major trends in the Visitor Studies field. Identifies at least three historically important trends, contributions, or leaders in the field.  | Presents basic understanding of the history of Visitor Studies. Identifies less than three historically important trends, contributions or leaders in the field. | Has no knowledge of the history of Visitor Studies and is unaware of any of the field's leaders.                                      |
| A.5<br>The learner shows evidence of basic understanding of other disciplines/ fields that may inform visitor studies.   | Has evidence that information from at least three related disciplines is applied in their approach to visitor studies.  | Has evidence that information from at least one other disciplines is applied in their approach to visitor studies.   | No evidence that the learner has awareness of the relevance of other disciplines to visitor studies.                                  |
| A.6<br>The learner demonstrates knowledge of historical and current visitor studies literature.  | Identifies more than 15 published reports, books, journals, etc. that relate to visitor studies.  | Identifies 10-15 published reports, books, journals, etc. that relate to visitor studies.  | Identifies less than 10 published reports, books, journals, etc. that relate to visitor studies.                                      |

### **Competency B: Principles and Practices of Informal Learning**

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

#### **General Guiding Question:**

**Does the learner understand informal learning and the contexts within which visitors studies takes place?**

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

**Competency C: Knowledge of and Practices with Visitor Studies Research**

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

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

**General Guiding Question:**

**Can the learner demonstrate that he/she can effectively conduct and communicate visitor studies research and evaluation?**

| <b>Review Panel's Criteria</b>   | <b>Excellent</b>  | <b>Competent</b>  | <b>Needs Strengthening</b>   |
|--|---|---|--|
| C.1<br>The learner understands the need for and can develop a detailed evaluation plan.  | The learner has developed more than 10 evaluation plans that include all the important categories of information.   | The learner has developed 3-10 evaluation plans that include at least the following categories: background/situation, research question(s), methods and methodologies, data analysis, sampling and selection of respondents, reporting and dissemination, ethical treatment of respondents, timeline, and budget. | The learner has developed less than 3 evaluation plans for research projects and/or has developed plans that are missing certain essential categories.                                 |
| C.2<br>The learner is familiar with, understands, and can select and apply appropriate research methodologies and methods.                               | Has developed innovative, practical, and theoretically sound visitor research techniques that have been used appropriately on a number of research and evaluation projects. | Is knowledgeable about and understands the appropriateness of a variety of different research methods, and is skilled at applying them in the appropriate situation.  | Has a very limited and/or superficial understanding of research methods and methodologies. Tends to revert to a limited set of tools regardless of their appropriateness for the task. |
| C.3<br>The learner is skilled at collecting and analyzing data.  | Has collected and analyzed data in a manner that adhere to industry standards for more that 12 research/evaluation studies.   | Has collected and analyzed data in a manner that adhere to industry standards for 2 – 12 research/evaluation studies.   | Either has collected and analyzed data on less than 3 studies, or does so in a manner that consistently violated one or more tenets of high quality research and evaluation.           |
| C.4<br>The learner is skilled at reporting and presenting the results of research and evaluation studies.  | Consistently writes reports/presents findings for all the studies conducted and writes/present them in a manner to ensure the greatest utility by clients                   | Has written report/presented findings for the majority of studies conducted.  | The learner collects data but does not report or present it, or reports/presents it in a manner which is of limited usefulness.  |
| C.5<br>The learner understands important issues surrounding the ethical treatment of respondents including IRBs, and demonstrates a history of doing so. | Has developed a special interest in and a sophisticated understanding of the complexities of treating respondents ethically.  | The learner understands the importance of and has implemented strategies to ensure the ethical treatment of respondents. S/he is familiar with the role of an IRB.  | Is unfamiliar with the concept of the ethical treatment of respondents, and/or has a limited history of implementing strategies to ensure the ethical treatment of respondents.        |

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

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

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

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

### Competency E. Professional Commitment

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

#### General Guiding Question:

**Is the learner committed to the advancement the field of visitor studies?**

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