

Case Study

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Making Sure They Want It: Managing Successful Public Programs

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Abstract: Archivists and educators who seek to create successful public programs must base them on sound information about what their public wants. This case study, based on the author's experience in managing the National Archives school materials programs, describes simple ways to find this out and act on it.

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SOON AFTER BEGINNING TO direct the production of learning materials for the secondary school classroom for the National Archives in 1979, I attended a local museum educators' roundtable to which teachers had been invited. On the platform, an education curator of a nearby museum bemoaned the failure of his plan to provide learning materials to local classrooms. His staff had produced well-conceived, classroom-oriented material and had put it conveniently in the hands of local teachers. The staff had congratulated themselves on their diligence and waited for a response. Silence roared back at them. They heard no praise, no criticism, nothing. "What had happened?" he asked.

From her place at the back of the room a tiny, gray-haired woman rose. "I have been teaching in the public schools of this city for forty-two years," she said. "Tell me—did you ask us if we wanted it?"

That comment seared itself on my memory and became my first, visceral, and probably most important lesson in public program management. This lesson had immediate applicability when the Educational Programs staff, then under the direction of Dr. Virginia C. Purdy and already busy with an active program of conferences, collegiate-level workshops, short courses, and professional training, began to examine the possibility of introducing documents into the secondary school classroom via a national publication series.¹ The process and progress of this project provide a valuable case study of the key challenge in the effective management of public programs. How do you make sure they want it?

Targeting the Audience

First, identify—target—the public you seek to reach. Be as specific as possible.

¹Virginia C. Purdy, "Education at the National Archives" (Background paper presented to the National Archives Advisory Council, 21 April 1975), 6 pp.

The National Archives found the elementary/secondary school market attractive for several reasons. The division had been working successfully for seven years with young people on-site and in local schools, had developed teaching strategies that worked, and by this time had enough contact with teachers to know that they regarded this as useful learning. Second, the market was large and accessible. Unlike purchasing at the college level, which tends to be individualized and idiosyncratic, secondary school purchasing is frequently departmental or media-center based, so that selling one or two packages can reach a half dozen teachers and several hundred students. Third, middle and secondary school curricula at that time tended to be statewide and more or less uniform, which facilitated development of a package that could be used nationally in any American history or government course.

Finally, working to improve the teaching of history could benefit not only the National Archives but also the archival profession, whose business is history and whose clientele could profit from understanding the nature of documentation and the value of saving and using documents. A presence in the education community could serve this purpose.

Determining the Audience's Needs

Having identified a target audience, the next step in public program management is finding out what the target public needs or wants. At the beginning of the project, the program staff expended considerable time—more than a year—and hard work in an assessment of the needs of teachers and students. But it was time and effort that shaped the program and its objectives and provided the definition that it has retained to this day. Equally important, the information gathered during this assessment provided the documentation needed to advance or defend the program later.

Initially the staff sought information from three sources: examination of materials then available nationally for teachers; a review of the literature available to teachers about methodology, curricular trends and sources of supply; and interviews with more than 150 educators at all levels. They visited two area school system curriculum laboratories, evaluating more than fifty teaching kits from more than thirty publishers with an eye to whether the kits used documents, how they used them, the content of teaching guides, and their general format. Seeing the kits was instructive.² They varied widely in quality and cost; most came in destructible cardboard boxes and contained filmstrips and/or cassette tapes. Most did not include document reproductions other than occasional photographs.³ Teachers' guides had certain uniform characteristics: objectives, activities at varying levels of sophistication, some historical background information, a bibliography, and, occasionally, transcripts.

These visits demonstrated that if teachers were interested in reproductions of documents in American history from the National Archives, there would be no competition for the archives' product. These explorations also suggested that the market would have to be trained to buy, since no previous product had prepared the way for this one. Finally, studying available kits adjusted our eyes to what teachers expected to see in a product, which helped in defining the format.

A review of thirty professional journals traced trends in statewide social studies

curricula and methodology. This study also identified periodicals that might later publish articles about the advantages of teaching with documents.

The most useful information by far came from the more than 150 interviews with teachers, undertaken after school in teachers' lounges in metropolitan Washington and at local teachers' meetings, always at the convenience of the interviewees. An informal telephone network with these teachers evolved, and these informants remained available for questions or advice for many years. The staff also consulted with museum educators, who had been providing material to schools for years, and with school administrators, social studies coordinators, and a few students.

Generally interviewers sought the same information and grouped their questions into three categories. First, they asked about life in the classroom. How long is a class period? Do you have access to a copying machine? What kind of audiovisual equipment do you have? What history text do you use? What supplemental material do you use? Second, staff sought information on teaching styles by asking questions such as "How often do you let your classes work in groups?" and "In a typical week, how often do you lecture and how often do you conduct discussions?" Still another set of questions explored the school bureaucracy. Who orders teaching material? How often? How much would your system pay for the package we described? Does your local school board review supplemental material?⁴

Among the many things we learned were that most teachers still used lectures and question-and-answer as their principal teaching method; that they valued material they could put in students' hands as well

²[Elsie F. Freivogel], "Outreach Materials—School Programs" (Memorandum to the Assistant Archivist for Educational Programs, National Archives and Records Service, 1 November 1976), 2.

³Freivogel, "Outreach Materials." Two exceptions were the popular Jackdaws series, then published in England and now published in the United States, which consisted entirely of document copies on facsimile paper or parchment, and a package of 135 individual documents with no instruction for their use.

⁴Comstockery is alive and well among school boards, who today review nearly all of the material purchased by a school or media center, including supplemental material.

as on the bulletin board; that all used textbooks but few liked them; that very few had ever used documents, not because they did not understand their value but because getting them was too time-consuming and strategies for using them too elusive; and that all were worried about beating the syllabus clock and therefore were unwilling to introduce more material into a fifty-minute class unless it served existing curricular and skills-building purposes.

We also learned that librarians ordered as much supplemental material as did teachers, and that they had specific size and storage requirements; that there were fairly clear price cutoff points between material that could be ordered independently and material that required administration or even board approval; that a publisher's credibility was an important issue with librarians and teachers; and that everyone worried about the quality of history education and the future of history in the classroom.⁵

These conversations provided a cameo picture of life in schools, and the shadowy package began to take on definite outlines as it was drawn and redrawn based on the information gathered in the interviews. From beginning to end, teachers' responses shaped the format of the packages, their content and, to a great extent, their promotion and marketing.

Meeting the Needs

Teachers wanted documents but were uncertain how to use them. They sought quality material at a reasonable cost, and most of all they sought credible material.

Documents from the National Archives were the real stuff; the trick was to reproduce them in a way that would entice teachers and students to use them.

The solution proved to be a package of thirty-five to forty documents, supplied on copyable stock and as true in size and appearance to the originals as possible. No combination of documents would take more than one class period to present. And because media centers purchased and shelved a great deal of supplemental material, the kits would be housed in durable packages and would come in a size the librarian could put on a typical media center shelf.

An accompanying guide included a note to the teachers on the background of the documents, teaching objectives, supplies needed, and questions and exercises emphasizing historical skills—gathering information, identifying biases of both creators and users of the document, comparing information in relation to other data, and drawing reasonable conclusions from the material at hand. Activities would be designed for large and small groups and would cover a range of other skills.⁶ The topics of the packages would be those encompassed in the typical secondary school history course (e.g., the Civil War, the Progressive years), and would focus on short chronological periods. A line of packages would span the range of American history.

Because teachers were unclear about how to use documents, the packages would give specific instructions in methodology and provide worksheets usable with any documents. Archival staff would also organize and publicize workshops, in-service training, and professional association panels, emphasizing strategies for using documents in the classroom.

⁵The interviews proved so valuable that the staff repeated the survey in 1981 and 1983 on a smaller scale, modifying the package on the basis of results. (Memorandum from Elsie T. Freeman to Acting Assistant Archivist for Public Programs and Exhibits, NARS, 9 May 1983), 8 pp. Information on changing classroom needs and priorities is also obtained through evaluations distributed to workshop participants and from responses to the twenty or more presentations that staff give annually to groups of teachers.

⁶Aware from our survey of how few teachers used group learning we also devised single-student activities. However, the survey had also demonstrated a relationship between teachers who used supplementary material and teachers who used group activities, and we therefore focused on group activities.

Staff developed learning objectives based on the teacher survey. We wanted students to be able to identify the factual evidence in a document; identify points of view; collect, reorder, and weigh the significance of the evidence; and develop defensible inferences, conclusions, and generalizations from it. Although historical content of the packages was important, analytical skills were primary.

The significance of these objectives, which were observed throughout all subsequent planning, lies not in their content but in their source: demonstrated audience needs. These objectives became benchmarks for weighing other potential projects and served as a healthy brake on flights of fancy, however creative, that did not fit the audience's needs.

An understanding of these needs also helped the staff assess their own resources, including time, personnel and money, and ability to meet the needs of the audience. The National Archives could research and develop the material in each unit, selecting documents, preparing activities and producing a teacher's guide that was complete and correct in its particulars; edit it; and use it in teacher workshops. What the archives could not readily do was print the material efficiently, package it, and fulfill orders in the time required by the average school district.

Working with a Publisher

A partnership with an outside publisher was clearly needed. Our survey had shown us that packages had to be available on a long-term sustained service basis, which required a publisher accustomed to providing such a service. But the need to deliver a product that would be within the discretionary budget of individual departments and media centers—teachers frequently mentioned \$30 as the cutoff point—eliminated major textbook publishers, who required a much larger margin, as well as contract agents.

The National Archives reached an agreement with SIRS, Inc. that satisfied the required division of labor and the demands of the target audience. Had staff not found SIRS, this project would have been abandoned in favor of one that the staff alone could manage.

In any public program knowledge of the target group—how they discover new products and under what circumstances they will accept them—is also the first step in developing a marketing plan. We knew that the choice of supplemental material was quite casual at the time, done either by teachers themselves, a department committee or, most crucial, the school media center staff. And these individuals most often learned about new products from each other and from reading journals and other over-the-desk information.

SIRS already had an impressive track record for similar products, mounting extensive direct mail campaigns, hiring sales staff, and exhibiting at regional and national meetings of teachers and school librarians. Thus the company provided direct sales access to the target market, access that the National Archives lacked.

Maintaining Credibility

But selling is only one part of the larger concept of marketing. Another critical component is credibility—the authenticity of material, a history of service, and evidence that the product creators have done their homework. Credibility among educators translated very simply: do these archivists know what happens in the classroom? Do they know what we need? Do they understand our constraints?

Continuing consultation with the informal advisory committee which had evolved from our earlier interviews and with participants in the workshops helped establish the archives' credibility, forging human connections among members of two bureaucracies. Any archives seeking to work with

teachers would be well advised to create such a council or work closely with a local or regional professional teachers association. The principle is straightforward: peers attract peers.

Formal or informal advisory committees and continuing audience surveys can also become a tool for evaluating the product at every stage of its development, the final and in many ways most important step in developing successful public programs. Evaluation does not have to be complicated, time consuming, or mystifying. But whether statistical or anecdotal, written or oral, structured or casual, evaluation must be ongoing, intentional, reasonably systematic, and recorded in written form.

The National Archives conducted three surveys concerning the learning packages, the first oral (described earlier as the basis of the package development), and the last two pencil and paper. Just as helpful have been short surveys conducted at the end of each workshop, conversations with teachers about how they use the packages, and observation. The patterns they revealed provide information about teaching trends, teaching styles, topical interests, logistics, and opinions about the usefulness of the packages.

Conclusion

The mission of an archives, the nature of its holdings, its outreach priorities, its staffing and its capacity to sustain a particular program must all be weighed before any repository undertakes outreach to a particular public. Equally important, however, is learning what, and in what form, outreach programs can meet the needs of that public. Outreach can build on previous successful programs, and avoid those that have been less successful, only if archivists understand why one program worked and another did not; only the target public itself can provide this information.

But ask them; don't decide for them. For the National Archives, this maxim became the basis of what is today one of its most successful outreach programs. Fourteen years and twelve learning packages later, the project is a sophisticated mix of publications, teacher training programs, and national education networks seeking to establish the use of primary sources in subject matter and curricula at every level from elementary school through college. And it all began with a simple survey of teachers who would use the packets.