STATEMENT OF WORK

“Articulating and Implementing a Vision and Framework
for the NMNH Office of Education, Outreach, and Visitor Experience”
Aug. 1, 2023

The primary deliverable of this project is to assist National Museum of Natural History (NMNH) by designing and facilitating a process to address the first three recommended actions of a recently concluded evaluation of the Office of Education, Outreach, and Visitor Experience (EOVE), namely to 1) More clearly articulate a vision for the work of EOVE and its overarching intended outcomes with priority audiences 2) Ground EOVE’s decision-making process for audiences, activities, and programs in a strategic framework and 3) Scale the programs and activities to varying levels of departmental capacity.

1. PROJECT BACKGROUND

The work of EOVE is driven largely by the belief that everyone can learn science. Working within an informal-learning space such as a museum offers the EOVE team both the freedom and opportunity to explore and develop ways of making science accessible to a tremendous diversity of onsite and online learners.

The team of education, public programs, and visitor experience professionals works closely with others from across the museum to create programs, products, and environments that help visitors, K-12 students and teachers, families, adults, and youth to advance their understanding of and connection to natural history. They begin by first addressing the physical, emotional, and intellectual needs of audiences so that they are ready and open to learning on their own terms.

Building on experience, evaluation findings, and published research, as well as public engagement best practices, EOVE strives to meet the needs of various audiences. EOVE’s diverse group of experts collaborate to solve challenges, find opportunities to innovate through iterative and evidence-based processes, and advance the field of informal-science learning. They aspire to make the National Museum of Natural History one of the best museums in the world for learning science.

While this is a good description of how the department works and some of the values inherent in its work, it is not enough to help clarify departmental priorities and decisions and the use of limited resources. EOVE is committed to support Smithsonian and NMNH priorities, but lacks both a clear, specific, and memorable vision statement that staff can rally around and a strategic framework that can drive decision-making.

EOVE has a critical role within NMNH’s strategic plan. While EOVE does not necessarily need its own strategic plan, it does need a guiding document that (1) is built upon its newly articulated vision, (2) clearly defines priorities and intended outcomes for audiences, (3) outlines priorities for the short, medium, and long term, (4) connects to NMNH’s strategic plan and initiatives, and (5) is aligned with and supports Smithsonian Education's mission, vision, values, and goals.
A vision and strategic framework is necessary for a shared sense of clear direction, greater impact with audiences, and employee retention and satisfaction. It's also necessary for this strategic framework to be flexible to accommodate varying levels of departmental capacity.

2. DELIVERABLES:

- **Vision and Framework:** Work with EOVE and stakeholders to design and implement a process for the creation and communication of the department’s vision and the creation of a strategic framework document to guide its decision-making. Facilitate and lead the process.
  - The vision and framework document should identify and reflect the important core values of the museum and department.
  - The process should thoughtfully involve staff and stakeholders in creating it.
  - The document could take the form of an impact framework, a logic model, or a theory of change—or it may include elements of each. It will be a living document that is referenced and revisited often, and it will guide decisions.
  - The document should keep the department’s current situation and staffing levels in mind, but also the ideal situation as EOVE stabilizes and rebuilds in the aftermath of the pandemic and other challenges.
  - The document should help EOVE evaluate new requests and build scenario planning into the process of developing the framework.
  - It should include a defined decision-making rubric to gauge the feasibility, necessity, and mission-alignment of current and potential work products.

- **A Decision-Making Process:** Work with EOVE and stakeholders to develop a consistent process for decision-making rooted in the new guiding framework.
  - Apply a defined decision-making rubric to gauge the feasibility, necessity, and mission-alignment of current and potential initiatives.
  - Work with EOVE to look at existing programs and initiatives as a whole to identify departmental gaps, strengths, and redundancies.
  - Implementation: Work with EOVE to identify opportunities to share and reiterate the vision statement again and again, and model referencing it when making critical decisions.

- **Benchmarking:** To help ensure the EOVE approach and NMNH benefits from the work of the broader community of museum- and informal-science learning venues, the vendor will connect with leading practitioners in the museum field to learn about their processes for guiding strategic decision-making and incorporate relevant findings in the EOVE document.

- In preparation for this work, it is expected that the contractor shall gain an understanding of EOVE operations and capacities through review of the SI and NMNH strategic plans, EOVE department documents (including formal evaluations of EOVE, Q?rius, and other programs), The Smithsonian Education Strategy, the Informal STEM Education and Evaluation (ISEE) framework (a system of strategic outcome learning progressions NMNH and partners have been developing with NSF support), as well as the
organizational chart and staffing plans, program descriptions and online resources, meetings with staff and stakeholders, and observations.

- **Final Report:** In addition to the vision and guiding framework document, the contractor shall present findings and recommendations in a draft written report and provide a final report that incorporates any necessary comments and edits. In consultation with the EOVE director, the contractor shall also develop a slide presentation for use by the department’s director with stakeholder audiences, such as board members, donors, and Smithsonian executives that summarizes the findings, approach, and plan for the department. Finally, the contractor will provide up to two information sessions to management and staff.

3. **DUE DATES**

- Conclude discovery work at NMNH and benchmarking of other practitioners no later than Feb. 15, 2024.

- Draft vision statement and guiding strategic framework due no later than May 1, 2024 for internal discussion and comment.

- Revised vision and strategic framework due no later than May 30, 2024.

- A decision-making rubric to gauge the feasibility, necessity, and mission-alignment of current and potential initiatives due no later than May 15, 2024.

- Implementation of the rubric with staff to review existing programs and initiatives to identify departmental gaps, strengths, and redundancies by June 15, 2024.

- Up to two information sessions to management and staff no later than June 30, 2024.

- Provide a slide presentation to the EOVE director for ongoing internal use no later than June 30, 2024.

- Final report that includes all the above-listed elements by June 30, 2024.

Offerors may propose a different schedule of delivery for these milestones provided that all work is completed and delivered by June 30, 2024.

4. **PERIOD OF PERFORMANCE**

Work under this order may begin Nov. 13, 2023, or thereafter. All work shall conclude by June 30, 2024.

5. **PAYMENT SCHEDULE**
Payments shall be made in up to 4 installments according to a schedule of milestones and acceptance of work as required herein and receipt of proper invoices.

6. WORK LOCATION/TRAVEL

Work will be performed at contractor’s place of business. Meetings with NMNH staff and stakeholders can be held through video conferencing and phone calls. If contractor will need to perform work onsite at NMNH (e.g. to lead group meetings or workshops), the quote should itemize transportation costs and travel allowances (per diem) of personnel authorized to undertake out-of-town, overnight travel under this contract, if applicable.