

## ADMINISTRATIVE EFFECTIVENESS EVALUATION (7.3) TEMPLATE

Department/Unit: Office of Strategic Cultural Partnerships

**Expectation Name** – Choose from the dropdown list: 1. Efficient & Effective Operations or 2. Quality of Service/ Stakeholder Satisfaction.

Efficient & Effective Operations: The unit establishes and maintains efficient and effective operations, optimizing processes and resources (budgetary, human, technological, physical) to achieve targets.

**Expectation Description** – What is your unit/department trying to accomplish? Please describe: 1) one measurable aspect/outcome relating to this expectation that is appropriate for your unit to evaluate this year; 2) why this aspect/outcome is important to evaluate; and 3) how this aspect/outcome relates to W&M's strategic plan, Vision 2026.

1) Measurable aspect/outcome relating to this expectation that is appropriate for your unit to evaluate this year:

Develop and sustain engagement with the Williamsburg Bray School Descendant Community as demonstrated by new and continuing one-on-one contacts, new and continuing participation in Bray School Lab-generated and sponsored events, initiation and completion of oral histories, establishment of genealogical lines, and/or other forms of engagement.

2) Why this aspect/outcome is important to evaluate:

Engagement with key external partners and facilitating connections with university initiatives and experts is a core element of the mission of Strategic Cultural Partnerships. Collaboration with the Williamsburg Bray School Descendant Community contributes directly to this goal and supports the broader partnership between William & Mary and The Colonial Williamsburg Foundation in the joint Williamsburg Bray School Initiative, through which Colonial Williamsburg restores and reinterprets the Bray School building and the Bray School Lab produces and disseminates archival, oral history, and other research and leads Descendant Community engagement. This work also contributes to William & Mary's academic mission through the production of new knowledge and directly serves Virginia citizens through facilitating genealogical research. Descendant engagement is also a core component of Strategic Cultural Partnership's grant responsibilities in working with the Mellon Foundation, a generous lead funder of our work.

3) How this aspect/outcome relates to W&M's strategic plan, Vision 2026:

1.c. Elevate civic engagement and service for the 21st century -- Promote community-engaged teaching, research and learning

This community-engaged research in turn supports the Vision 2026 Democracy initiative by contributing new and more expansive histories of our nation's founding (viz. "W&M will ensure that our nation's origin stories are expansive, honest and that they unite us in a commitment to knowledge as a public good.")

### **Expectation Evaluation Plan**

**Participants** – Describe who is involved in collecting, reviewing, and analyzing your data/information.

Margaret Morrison, Administrative Coordinator  
Danny Devlin, Senior Director of Outreach & Engagement  
Maureen Elgersman Lee, Bray School Lab Director  
Tonia Merideth, Bray School Oral Historian  
Elizabeth Drembus, Bray School Genealogist

**Data Sources, Collection, & Review Process** – Describe the data/information sources, collection, and review process: 1) what data/information you will collect and from what sources; 2) how/what methods and when you will collect the data/information; 3) when you will review the data/information and report the results.

*1) Data/information you will collect and from what sources:*

Guided by the rubric established at the 2018 National Summit on Teaching Slavery, “Engaging Descendant Communities,” (<https://montpelierdescendants.org/rubric/>) Strategic Cultural Partnerships defines the Williamsburg Bray School Descendant Community at a minimum as those whose ancestors, free or enslaved, were educated at the Williamsburg Bray School; individuals related to Ann Wager, the Williamsburg Bray School’s only teacher); and those whose ancestors sent enslaved children to the Bray School for education. Additional categories of descendant identification may be established through the research and interpretation process. Contact with those who believe they may be a member of this Descendant Community, but have not yet established a genealogical connection, is also part of this work.

Descendant engagement can be quantified as total contacts during the evaluation period, repeat contacts during the evaluation period (descendants or potential descendants who engage with William & Mary on a recurring basis), and new contacts during the evaluation period (descendants or potential descendants who engage with William & Mary for the first time). To the extent possible contacts will be counted at the level of the individual but may in some cases constitute engagement with an organization, such as a community group.

Types of contact include, but are not limited to, descendant or potential descendant participation in

- One-on-one correspondence or meetings with SCP staff
- Participation in workshops, e.g. introductions to genealogical research
- Participation in conferences or events (e.g. Slate Seminar, Descendant Engagement Week, etc.)
- Push communications from the Bray School Lab to identified Descendant Community members, such as invitations, newsletters, etc.
- Participation in other collaborative projects (e.g. Bray School book)
- Descendant engagement can also be quantified through research production, including genealogical lines established or expanded, oral histories initiated or completed, and other types of community-engaged knowledge creation
- Descendant engagement can also be quantified through research production, including genealogical lines established or expanded, oral histories initiated or completed, and other types of community-engaged knowledge creation.

*2) How/methods and when you will collect the data/information:*

- Ongoing tracking of individual contacts by Bray School Lab staff, including analysis of new and recurring contacts
- Ongoing tracking of registrations and attendance for workshops, events, and conferences, including analysis of new and recurring participation
- Recording of number of identified Descendant Community members receiving Bray School Lab communications
- Tracking and analysis of research productivity, including genealogical lines and oral histories.

*3) When you will review the data/information and report the results:*

December 2023, May 2024

**Expectation Achievement Target** – How will you know that you have met this expectation? Describe the intended qualitative and/or quantitative performance level/outcome of this evaluation.

-Net increase in quantity of Descendant Community engagement from Fall 2023 to Spring 2024

-Consistent addition of new individuals to Descendant Community network

As discussed in greater detail below, while SCP endeavored to collect Descendant contact records as far back as Spring 2023 in order designate "New" contact events as accurately as possible, this data set is incomplete and likely has artificially low totals for the February 2023 - June 2023 period. Comparing July 2023, the month immediately preceding the evaluation period, with August 2023, we observed total contacts to increase by 23.8% (21 total contacts increasing to 26 total contacts). An increase greater than 25% in Descendant Community engagement between Fall 2023 and Spring 2024 could be understood as significant for this initial evaluation, and data collected during this cycle will establish the baseline for determining more specific numeric targets for ongoing Descendant Community engagement.

**Primary Responsible Person** – Provide the name and job title of the main individual in charge of this evaluation.

Margaret Morrison, Administrative Coordinator

**Additional Responsible Person(s)** – Enter the names(s) and job title(s) of the individual(s) responsible for aspects of this evaluation process.

Ann Marie Stock, Presidential Liaison for Strategic Cultural Partnerships

Danny Devlin, Senior Director of Outreach & Engagement

Maureen Elgersman Lee, Bray School Lab Director

## **Evaluation Results and Target Achievement**

**Summary and Analysis of Evaluation Results** – Summarize in this field the results of your evaluation for this expectation as outlined in your plan above. Include a description of what you evaluated. You may attach full results in Planning.

Strategic Cultural Partnerships (SCP) initially identified a net increase in the quantity of Williamsburg Bray School Descendant Community engagement from Fall 2023 to Spring 2024 and the ongoing addition of new individuals to the Descendant Community network as the performance metrics for our goal outcome of developing and sustaining engagement with the Williamsburg Bray School Descendant Community. In order to assess performance across these two dimensions, SCP created a "Bray School Descendant Contact Log" which 1) listed all identified members/potential members of the Williamsburg Bray School Descendant Community and 2) logged interactions with these individual community members by date, staff point of contact, and category of contact (e.g. workshop, individual meeting, etc.). The subsets of contacts pertaining to an individual Descendant Community member were then coded to designate the earliest chronological contact event as "New" and all following contact events as "Repeat." While the period of evaluation for this report is Fall 2023 (i.e. August 2023 to December 2023) to Spring 2024 (i.e. January 2024 to May 2024), to the extent we were able SCP staff collected contact records stretching back to Spring 2023, so contacts coded as "New" in August 2023 can be reasonably understood to represent truly new additions to the Descendant Community network for Fall 2023.

Reviewing this contact data, the overall trend is a net increase in Descendant Community member contacts from the August 2023 to December 2023 period (111 total contacts) to the January 2024 to May 2024 period (673 total contacts), a considerably greater increase than the 25% change between July 2023 and August 2023. There was a particularly steep increase in monthly Descendant contacts between January 2024 (31 contacts) and February 2024 (106 contacts); early in

the Spring 2024 semester, SCP's Bray School Lab implemented a program of weekly email bulletins with information on upcoming and past events, new research products, and other departmental activities. Implementation of this robust constituent communications program fundamentally shifted the quantitative landscape for Descendant Community contacts; the arithmetic mean of monthly contacts rose from 22.2 in Fall 2023 to 134.6 in Spring 2024.

While the new program of regular email push communications drove much of the increase in absolute contact numbers, the overall trend is still a net increase when push communications are excluded from the data set. More interactive contact event categories (individual emails, meetings, and phone calls, the six phases of collecting a Descendant's oral history, attendance at workshops, presentations, and receptions, and other miscellaneous contacts) increased from the August 2023 to December 2023 period (50 total contacts) to the January 2024 to May 2024 period (138 total contacts). Mean monthly interactive contacts were 10 in Fall 2023 and 27.6 in Spring 2024.

New contacts were added to the Descendant Community network every month except November 2023. Total new contacts added to the network were 11 during the August 2023 to December 2023 period and 25 during the January 2024 to May 2024 period. The largest number of new contacts (13) appeared in February 2024, associated with a Bray School Descendant Community forum that SCP co-hosted with Colonial Williamsburg. The most common type of New contact across both periods was Push Communication (Descendant Community members and any other individuals interested in the Bray School Lab's work can sign themselves up for the mailing list), followed by Individual Email. The mean number of new contacts added per month increased from 2.2 in Fall 2023 to 5 in Spring 2024.

The increase in mean monthly interactive contacts and mean monthly new contacts between Fall 2023 and Spring 2024 indicates progress in developing and sustaining engagement with the Williamsburg Bray School Descendant Community. With the program of weekly push contacts via the email bulletin establishing a new baseline minimum of contacts per month, SCP staff can work to grow the number of monthly interactive communications in support of research production (genealogy, oral history, etc.), research dissemination (speakers, workshops, etc.) and direct community engagement (in person meetings, receptions, etc.). SCP will also continue to pursue a wide variety of modalities for Descendant Engagement in order to continue adding new contacts to the Descendant community network.

**Achievement Target Status** – Did you meet this expectation? Select “Met,” “Partially Met,” or “Not Met” from the dropdown list.

Met

**Action Plan** – (IF THE ACHIEVEMENT TARGET STATUS IS PARTIALLY OR NOT MET) Describe actions – improvements, updates, and changes – you plan to implement to meet this expectation's achievement target. If you have already started to implement actions, state what you have done and what remains to be done.

N/A