



## Museums Empowered

Sample Application ME-253492-OMS-23  
Project Category: Organizational Management

### Perot Museum of Nature and Science

Amount awarded by IMLS:	\$209,711
Amount of cost share:	\$209,711

The Perot Museum of Nature and Science will develop a leadership professional development program to attract talent and help grow the next generation of museum leaders. The program consists of four training categories: a core values academy where participants will learn how to lead with clarity, confidence, and connection; leadership training that develops curious leaders; crucial conversations for mastering dialogue training that helps leaders develop dialogue skills to have important conversations in the moment; and crucial conversations for accountability training that prioritizes the person and not the process through candid coaching, identifying goals, and supporting professional development. The project will generate an empowered and passionate workforce who recognize their value in serving the museum's mission creating a culture of welcoming and excitement for learning for all visitors.

Attached are the following components excerpted from the original application.

- Narrative
- Schedule of Completion

When preparing an application for the next deadline, be sure to follow the instructions in the current Notice of Funding Opportunity for the grant program and project category to which you are applying.

## Project Justification

### Project Goal/Category

The Perot Museum of Nature and Science is seeking a Museums Empowered grant under Goal 4 Organizational Management: Strengthen and support museum staff as the essential part of a resilient organizational culture; Objective 4.1: Develop comprehensive organizational learning opportunities that address one or more emerging priorities facing a museum. This project will support the IMLS's strategic goals of championing lifelong learning, knowledge sharing and professional development. All aspects of the project will be conducted through the lens of diversity, inclusivity, equity and accessibility. The Perot Museum is a bilingual institution with a diverse staff serving a diverse population with great intentionality.

One of the three primary goals of the MFA program is to champion lifelong learning. For museums to be truly effective in their endeavor to inspire a love of learning, they need to start within their own house by supporting the training and professional development of their workforce. The Perot Museum strives to be an excellent place to work whether it is for a season or to build a career in informal education. To attract talent and help grow the next generation of museum leaders, the Museum is intentionally building a people-centered coaching and learning culture that will result in a more engaged, innovative, collaborative and empowered workforce. This grant project will provide training to roughly 120 full-time Museum employees, advancing skills by building interpersonal relationships, listening for understanding, team building and using coaching to lead change. The Museum is building a highly capable coalition of lifelong learners.

Additionally, this project will support MFA's goals to champion lifelong learning for external audiences and strengthen community engagement. An empowered and passionate workforce of individuals who recognize their value in serving the Museum's mission will in turn create a culture of welcoming and excitement for learning for all who engage with the Museum through onsite and community-based programming. The Museum's training program reinforces its goal of embedding diverse, equitable, accessible and inclusive (DEAI) principles into all aspects of its work internally with employees and externally with the communities it serves. The Museum's strategic plan is centered on creating greater access to STEM-learning, especially for underserved populations. This effort requires Museum employees to possess skills like listening for understanding and being able to be flexible and responsive to the needs of diverse audiences.

### Strategic Plan Alignment

The Perot Museum implemented a new five-year strategic plan in 2021. Its four pillars focus on expanding access to STEM-learning by: 1) increasing community connection; 2) leading STEM-learning in North Texas and beyond; 3) welcoming new audiences and better serving visitors; and 4) activating outdoor space.

As the engine behind its mission of inspiring minds through nature and science, the Museum's staff is integral to the strategic plan and in maintaining its status as the premier science museum in North Texas. The third pillar of the strategic plan, welcoming new audiences and better serving visitors, includes specific goals for staff professional development:

- Create a museum-wide new employee onboarding program
- Develop an ongoing staff training program
  - Staff and board engagement with diversity, equity, inclusivity and accessibility training and organizational efforts
  - Activity-based employee-led trainings
  - Standardizing Guest Experience Training for all staff

Gallup defines employee engagement as the involvement and enthusiasm of employees in their work and workplace. The professional development project is designed in response to several employee surveys, focus groups, benchmarking and studies that reflected the need for greater intentional DEAI integration throughout the entire organization. Surveys also identified the significant gaps in people skills, listening skills, team building and leading by example. These results reflect the need for a fundamental shift in the Museum's leadership culture to turn relationships into results at the scale needed for systemic change.

An HR Capabilities and Strategies study identified the core competencies needed in the Museum's human resources (HR) team and led to the restructuring of the team to focus more on employee recruitment, development, engagement and culture. The restructure led to the hiring of a Chief People Officer and a new position, Employee Engagement and Training Specialist, with a charge to make the Perot Museum a best-in-class employer with a dynamic and coveted workforce.

In December 2021, the Museum staff participated in the Gallup Engagement Survey, which focused on core questions that predict employee engagement. The survey showed that 43 percent of the staff were considered engaged. The Museum will utilize the Gallup engagement survey annually to measure progress toward increasing engagement scores with a goal to increase the engagement level to include at least 60 percent of staff

Already, the Museum has implemented DEAI training with a focus on dismantling unconscious bias. Over the next year, prior to the implementation of this grant-funded project, the Museum is implementing CliftonStrengths, Speed of Trust and Leading at the Speed of Trust. CliftonStrengths is a way for employees to build self-awareness and start to understand and develop their unique talents for the betterment of their careers and their work at the Museum. Employees will attend workshops to better understand the assessment and ways to leverage their strengths. Managers will receive training on discerning and developing strengths and leading with strengths. All full-time staff will participate in the Speed of Trust workshop, and managers will participate in Leading at the Speed of Trust. These two courses help leaders build the skills needed to establish trust, maintain trust, diagnose issues and restore trust when it is broken. Managers will learn how to clearly communicate expectations and work with their team members on action plans focused on building strengths and skill sets. These trainings are the building blocks of professional, team and culture development. Additionally, the Museum will continue to expand on the DEAI work by implementing work groups that will evaluate every aspect of the Museum's operations from a DEAI lens and determine solutions for improvement.

Over the next year, the Museum will also implement a robust onboarding program for new hires. In that program, the focus will be on establishing strong connections within the Museum for the new hire, ensuring that they understand expectations in the role and on their team from both a task and behavioral perspective. The Museum will offer training to support their career development and work to ensure they can thrive in their career. Program impact will be measured at several points during the employee's first year.

The Museum is also in the process of restructuring the performance management process to support a focus on strengths-building and coaching. By integrating the Gallup Engagement Survey, the new Employee Engagement and Training Specialist will use that data to create action plans with managers and work directly with them to implement and evaluate their plans. Quarterly pulse surveys, conducted through the Gallup Engagement Survey tool, will be available to gauge improvement.

This grant-funded project will level up the Museum's professional development efforts by layering advanced communication, team building and leadership skills on top of the foundational skills gained during FY23. All current and new full-time employees will participate in this training program, which, after three years of intentional practice, will create a people-centered coaching and learning culture.

#### Need for Professional Development

In 2020, like many museums, the Perot Museum closed its doors in response to the COVID-19 pandemic. With this closure, 37.4 percent of full-time staff roles were eliminated, and as a result, the employee culture experienced major upheaval with the remaining staff picking up extra work and grieving the loss of their teammates. As the museum re-opened its doors, it struggled to recruit and retain a talented and engaged workforce. Thirty-nine percent of the current staff have been with the Museum for less than a year.

In 2021, the Perot Museum began working to identify employee engagement issues and opportunities to develop a more engaged DEAI work culture. The Museum sought to understand the problem before creating a solution. A variety of surveys, focus groups, benchmarking and other studies were conducted including:

- American Alliance of Museums Workforce (AAMW) Demographics Survey by SMU-Data Arts, as part of the National Center for Arts Research

- Organizational Vital Signs (OVS) by Eric Polite and Associates
- Culture Thumbprint by PwC
- HR Capabilities and Strategies Study by PwC
- Gallup Engagement Survey by the Gallup Organization

The first three studies enabled leadership to better understand the demographics, as well as identify areas of strength and concern related to DEAI. The OVS and the Culture Thumbprint pointed to many opportunities to improve communication, systems and processes that would serve the entire organization. The AAMW Demographics Survey painted a picture of the organization in 2021 and illuminated opportunities to increase staff and board racial and ethnic diversity to ensure that the Museum better reflects the community it serves. The OVS measured organizational climate — an indicator of the collective feelings, relationships and reactions in the workplace — which influences critical employee behavior, such as communication, problem-solving and accountability. These are key factors that drive engagement, enable healthy conflict and fuel performance. The most significant gaps identified were people skills, listening skills, team building and leading by example.

#### Target Group

The primary target group is Museum staff. They have provided feedback and input through the strategic planning process, surveys, assessments and focus groups. With a goal of truly living out a learning culture, the Museum hired a Senior Director of Data and Insights and has been implementing measurable feedback loops for internal and external audiences to provide real-time data to inform decision-making.

Currently, the Museum has roughly 96 full-time employees. Fifty-four percent of staff are white, 31 percent are Hispanic or Latinx, nine percent are Black or African American, four percent are Asian, and two percent are more than one race. Thirty-nine percent have been with the Museum for less than one year. An additional 11 percent joined last fall, so about half the Museum staff have a tenure of 0-15 months. Seven C-Suite staff members have been with the organization between six months to eight years (COO). The CEO has been with the Museum for five years. Eight people serve on the senior leadership team (SLT), which as one open position. Two SLT team members have recently joined the Museum (within four months); one has been with the Museum for 11 months; and the others have been with the Museum from 2.5 years up to 17 years. The Museum's VP of Science has been with the Museum 17 years and the VP of Exhibits has been with the Museum for 12 years.

#### Ultimate Beneficiaries

The ultimate beneficiaries of the project are the Museum's visitors. Last fiscal year (October 1, 2021-September 30, 2022), 723,385 unique visitors came to the Museum through camps, facility rentals, general admission, membership programs, public programs and teacher workshops. (Including community and online outreach programs, the number of unique visits increased to 836,075.)

Most Americans tend to believe that science learning predominantly takes place within schools, but research on STEM learning over the past 40 years demonstrates that informal STEM learning opportunities (i.e.: learning outside of school settings) are "major predictors of a child's development, learning and educational achievement" (Falk and Dierking, 2010). The Perot Museum is uniquely positioned to ensure all members of the community, regardless of their zip code, race, ethnicity or socioeconomic status, have access to innovative, inspiring STEM learning to fuel the next generation of scientists, medical workers and engineers. Access to the Museum and its STEM programming is a catalyst for promoting racial equity and provides critical resources for society.

Dallas, where the Museum is located, will benefit from a high-quality STEM education. Data on the experience of guests from marginalized populations, input from focus groups and interviews with community leaders influenced the Museum's strategic focus on improving cultural competency and deploying Museum resources and social capital to meet the acute needs of the city's most disenfranchised populations. The student population of the Dallas Independent School District (DISD) is more than 68 percent economically disadvantaged and 90 percent of students are Black or Hispanic/Latinx. According to the National Assessment of Educational Progress test results over the last decade, Black and Hispanic 8th grade DISD students showed a steady and substantial decline in STEM-related scores every year between 2011-2019. To put the declines in perspective for Black students, out of nine similarly situated urban districts

(Atlanta, Baltimore, Boston, Chicago, Cleveland, Houston, Los Angeles, Miami and Milwaukee), none had a greater drop in test scores. For 8th grade students, the 2019 scores indicated a lack of readiness for high school and these results did not yet reflect the huge learning loss that resulted from the pandemic. Based on current estimates, DISD students entering high school may be as much as two grade levels behind where their peers were a decade ago (*The Dallas Morning News*, January 2022).

In Dallas, a high-quality STEM education is more important now than ever. STEM-related jobs in Texas are growing at a rate that is two times greater than the national average (U.S. Bureau of Labor Statistics, Texas Education Association). As one of the fastest growing metropolitan areas in the country, Dallas-Fort Worth (DFW) is considered a place of opportunity for people with the right education and job skills. In 2015, the DFW region ranked among the top three U.S. metro areas for business expansions, relocations and employment growth (JPMorgan Chase, “Strengthening Dallas-Fort Worth”). Many of these companies reported facing a labor shortage due to an under-skilled labor market, and even in those pre-COVID-19 days, Dallas was facing significant opportunity inequities. Not all areas of Dallas were benefiting from economic growth. Dallas had, and still has, one of the highest concentrations of poverty in the country, making the higher-paying jobs, many of which are STEM-related, out of reach for under-skilled residents in the southern sector. Intentional efforts must be made to prepare current and future generations of DISD graduates for well-paying, high-demand jobs.

Supported by well-trained staff, the Museum’s next decade will be defined by creating more equitable access through deep connections with community-based organizations and school districts. Long-term, multi-pronged and multi-year partnerships will focus on improving educational outcomes for underserved communities. The Perot Museum currently partners with school districts, charter school networks, private schools, local universities, public libraries and community organizations, such as DISD, Uplift Education, For Oak Cliff, United to Learn, Children’s Health and the North Texas Food Bank.

### **Project Work Plan**

Eric Polite & Associates outlines the four vital ingredients for a positive and inclusive culture: positive awareness, connection and collaboration, shared purpose and meaning, and learning and autonomy. “Positive cultures have a lot of energy, openness to ideas and others, good relationships based on trust and authenticity, participation, support for others, and an eye for positive potential. They cherish learning and development, collaboration, a meaningful shared purpose and professional autonomy. Most importantly, they deliver extraordinary performance.”

### Activities

Between September 1, 2023 – August 30, 2025, the Museum will train roughly 120 employees, accounting for growth and attrition during the two-year grant cycle with four nationally recognized trainings that will be required for leadership level staff and strongly encouraged for all other full-time staff at all levels of the organization.

These trainings will be customized to the needs of the Museum and provided strategically in the order below, as the training concepts build upon each other. (Refer to Supportingdoc2)

### Core Values Academy

All full-time staff will be required to complete this self-paced three-to-four-hour training independently online within quarter one of the first year of the grant term and then within the first month of employment for new employees thereafter (total of 120 full-time employees trained during grant term). Training participants will receive a certificate of completion that will be turned in to their supervisor and HR for completion tracking.

This course is designed to prepare participants for the Dare to Lead training, which builds upon an understanding of personal values. Participants take a life assessment and explore their values, learning how to operationalize them in work and life. Core Values Academy combines principles and tools from mindfulness, self-awareness, neuroscience and coaching to learn how to lead with clarity, confidence and connection. Museum employees will have lifetime access to the training and may revisit it as often as they like.

### Dare to Lead (DTL)

All full-time staff will participate in this in-person training, beginning in year one, second quarter. It will be delivered by certified DTL facilitators in six four-hour sessions (24 total hours of training time). Sessions will be offered at 4-8 week intervals depending on the museum event schedule. Participants that complete all sessions will receive a certification in DTL. C-suite leaders will participate in a one-hour leadership coaching sessions to discuss how to apply the content to their work leading the museum. Additional opportunities to discuss and apply the principles covered in the course will be available between sessions for anyone attending the program. These sessions will be led internally by the CPO and the Employee Engagement and Training Specialist.

DTL builds upon the Core Values Academy by continuing to build self-awareness, vulnerability, psychological safety, listening, communication and resilience skills. This program is designed to develop curious learners who seek understanding, increasing the opportunity and ability to collaborate in a productive manner within and across teams.

### Crucial Conversations for Mastering Dialogue

All staff will participate independently in this 12.5-15-hour self-paced online training beginning in July 2024 and then within three months of employment for new employees thereafter. Training participants will receive a certificate of completion that will be turned in to their supervisor and HR for completion tracking. One hour in person practice sessions will be offered bi-weekly for the main training cohort and new hires can receive individual or small group coaching to practice the skills as they progress through the training.

This training focuses on dialogue skills that equip leaders to have the conversations that matter most in the moment. Skills development includes overcoming fears and personal stories that inhibit conversation and understanding; staying focused on maintaining the relationship through honesty and respect, managing communication styles under stress and assuming good intentions. Ultimately, the goal is to learn how to move from healthy conversations to action and results.

### Crucial Conversations for Accountability

People and program managers (30) will be required to participate independently in this 12.5-15-hour self-paced online training beginning in December 2024 and then within six months of employment for new employees thereafter. Managers will have 8 weeks to complete the course and will receive a certificate of completion that will be turned in to their supervisor and HR for completion tracking. 1-hour in person practice sessions will be offered bi-weekly to support managers in applying the skills learned in the course.

Effective performance management is about coaching through challenges and holding people accountable consistently. Difficult conversations don't always come naturally. Crucial Conversations prioritizes the person and not the process through candid coaching, identifying goals and supporting professional development.

Between January 2025 to September 2025, the human resources team will revisit Core Values Academy and conduct a Dare to Lead book reading and discussion for new team members followed by 1:1 or small group cohorts for Crucial Conversations and Crucial Accountability. These efforts will help new employees catch up with training.

### Risks

**Schedule Delays:** The schedule of completion has some flexibility in terms of timeline. The implementation team will navigate through schedule delays as needed to ensure that the entire training program is implemented by the end of the grant term. Dare to Lead can be implemented virtually if needed. It's not the ideal delivery method, however, the consultant often delivers the entire course virtually, so she is very effective with this mode. It would be easier to reschedule if the virtual option were used for a course. It will be a challenge to stay on course with the Museum closures. Depending on the Museum's events schedule, it may launch the Dare to Lead training earlier to stay on track.

Many of the trainings are implemented online at the pace of the participant giving them ample time to complete them. The discussions and application sessions are being run in-house, so those may be scheduled flexibly.

**Lack of Motivation/Participation:** The Museum will position this as an opportunity for career and leadership development across the organization. It is an investment in skill-building and will include content that will become part

of the Museum's performance management programs. Additionally, by making some of the training accessible online, participants may complete it in smaller blocks of time. By hosting the Dare to Lead sessions on days the Museum is closed to the public, the program will be more likely to get a large portion of the staff to participate. To make the training fun and encourage participation, the implementation team will provide food at the in-person activities and time for socialization. The Museum will also utilize the in-house facilitators and DEAI change team (will evolve into a culture advisory and action team) as ambassadors to encourage participation. The implementation team will track attendance and follow-up with managers as needed to promote attendance.

**Loss of Key Staff:** Consultants can be engaged as needed to fill in staffing gaps. The Employee Engagement and Training Specialist or another in-house facilitator can become certified on Crucial Conversations and Accountability and run the application sessions. Crucial Learning has good resources for practice sessions available. If the Chief People Officer were to leave the Museum, Dare to Lead can be run by the consultant with some help from other in-house facilitators and/or the use of another certified Dare to Lead training provider. The Museum would need to fund the cost of an additional facilitator in that scenario. A significant change in the CEO role could impact the project, however, the Board and other executive team members are in support of the project, so it would still be implemented. Receiving this grant would ensure that the funding is available to do that regardless of a staff change.

### Implementation Team

Lorea Seidel, Chief People Officer, has been with the Museum for under a year. She brings 25 years of experience providing and supervising services in the areas of career and talent management, leadership development, employee engagement, organizational development, and talent acquisition/retention. Lorea has a master's degree and extensive doctoral work in counseling with a focus on organizational behavior, career development, and executive coaching. Lorea is responsible for designing and managing the grant project and overall professional development and performance management programs for the Museum. Lorea is also a certified Dare to Lead Facilitator. It is anticipated that she will spend about 25 percent on the implementation of this grant project.

Destiny Price, Employee Engagement and Training Specialist, will spend 75 percent of her time implementing this training program over the two-year grant cycle. Destiny is a certified career coach with seven years of talent management experience.

Lizzy Perez has a PhD in leadership studies and is a certified Dare to Lead Facilitator. She will provide the consultation and implementation support for the Dare to Lead training.

### Resources

**Training/Curriculum:** The Museum will acquire the official training curriculum and materials associated with the following trainings: Core Values Academy, Dare to Lead, Crucial Conversations for Mastering Dialogue and Crucial Conversations for Accountability.

**Facilitators/Personnel:** Lorea and Lizzy are Dare to Lead Facilitators and experienced professional development trainers. Destiny will be primarily responsible for implementing the project as a certified career coach and experienced trainer.

**Funders:** The Museum is invested in this project as a high priority and the Museum's development department is dedicated to ensuring that the cost match is secured.

**Learning Management System (LMS):** The Museum is sourcing an LMS in FY23. It needs to be able to house attendance and completion records for in-person and online training. It will be able to load in job aids, discussion guides and additional training videos that will benefit the learner and support the content associated with the trainings implemented through this grant project. It will be used to implement onboarding by sharing materials and tracking training completion.

### Measuring Progress

Progress will be measured with several different tools including new hire survey data, the annual Gallup engagement and quarterly pulse surveys, learning management system data, employee retention rates, training evaluations, employee diversity statistics and data from the performance management system. Strategic plan progress reports will also be reviewed regularly to determine if there is a correlation between successful implantation of the training program and performance measures for the Museum's overall goals. Additionally, Museum guest surveys and attendance will be referenced throughout the grant term to determine if there is a correlation between guest experience and employee engagement scores. Data points from the different measurement tools will be analyzed on a quarterly basis to determine progress toward grant project goals as well as evaluated to determine the overall impact of the training program on the Museum's performance, culture and impact in the community.

### **Project Results**

This project will achieve the following results at the end of the grant term:

- 120 full-time staff will receive training
- 80 percent of full-time staff achieve Dare to Lead certification
- 80 percent of full-time staff will participate in the Gallup Engagement Survey
- 75 percent of employees surveyed will express that they are satisfied with the Museum as a place to work based on the Gallup Engagement Survey
- The percent of staff who are engaged will increase from 43 percent to at least 60 percent according to the Gallup Engagement Survey
- Overall staff scores related to questions on the Gallup Engagement Survey about trusting their peers and organizational leadership will increase by .02 points each year
- Overall staff scores related to questions on the Gallup Engagement Survey about feeling empowered will increase by .02 points each year
- Overall staff scores related to questions on the Gallup Engagement Survey about professional development and coaching will increase by .02 points each year
- The Museum will maintain a full-time staff attrition rate under 15 percent
- Progress made on the four pillars of the strategic plan based on the strategic plan dashboard report reviewed by the Board of Directors.
- 80 percent of new hires will select a rating of satisfied or higher about their employee experience at the year mark according to an employee survey
- The Museum will increase diversity of staff by 10 percent
- With a newly hired Sr. Director of Insights and Analytics, the Museum will establish guest satisfaction baselines in FY23, looking at general attendance and an intentional focus on lower socioeconomic visitors. The Museum will review satisfaction ratings over the two-year grant period to determine if there is an increase that may correlate with the training program with a particular interest in increasing guest satisfaction ratings for underserved populations.

### Sustainability

The Museum will be working to embed the language and practices of Dare to Lead and Crucial Conversations throughout its performance management processes such as onboarding, creation of a template for one-on-one coaching, team meeting guides, idea generation and problem-solving projects and developmental planning with teams and individuals. The Museum's goal is to incorporate these principles to simply become part of its culture.

