



## Museums Empowered

Sample Application ME-245659-OMS-20  
Project Category: Diversity and Inclusion

### Georgia O’Keeffe Museum

Amount awarded by IMLS:	\$177,542
Amount of cost share:	\$183,885

The project description can be viewed in the IMLS Awarded Grants Search:  
<https://www.imls.gov/grants/awarded/me-245659-oms-20>

Attached are the following components excerpted from the original application.

- Narrative
- Schedule of Completion

Please note that the instructions for preparing applications for the FY2021 Museums Empowered grant program differ from those that guided the preparation of FY2020 applications. Be sure to use the instructions in the Notice of Funding Opportunity for the grant program and project category to which you are applying.

## 1. PROJECT JUSTIFICATION

**Needs addressed and their identification:** The Georgia O’Keeffe Museum (The O’Keeffe/the Museum) respectfully requests \$177,542 from the Institute of Museum and Library Services (IMLS) Museums Empowered grant in the diversity and inclusion category. Funding from IMLS will empower The O’Keeffe to invest in a two-year program of extensive professional development workshops for staff across the organization to build capacity in diversity, equity, accessibility, and inclusion (DEAI). Funds will support onsite workshops with three facilitators experienced in organizational change, inclusive design methodologies, and accessibility. (See Supporting Document #1: Letters of Commitment from Sina Bahram and Corey Timson, Prime Access Consulting, Inc. and Dina Bailey, International Coalition of Sites of Conscience). An experienced museum evaluator will track progress, assist with risk mitigation, and guide sustainability planning. (See Supporting Document #2: Letter of Commitment from Kate Livingston, ExposeYourMuseum).

Early in her career, Georgia O’Keeffe made the bold decision to eschew traditional representational art methods in favor of “a new way of seeing.” This choice resulted in the world’s first pure abstractions of the natural world, a boldness that stunned and enamored New York City’s avant-garde art scene. The O’Keeffe and its staff seek a radical reconfiguration worthy of the Museum’s namesake. *A New Way of Seeing: Building Capacity Through the Lens of Inclusivity* will create a two-year cultural change plan that works with the entire staff, board, volunteers/docents, and community stakeholders. Experienced facilitators will guide participants in trainings, hands-on activities, and self-reflection. These will result in the development of structural processes and templates that equip all of The O’Keeffe to cultivate inclusive practices. This focus on inclusivity has a wide range of applicability, from exhibition spaces to governance documents that guide employee culture. Importantly, it is a lens that will guide The O’Keeffe in making decisions that inform every aspect of the visitor experience.

Since 1997, The O’Keeffe has introduced four million people in Santa Fe to Georgia O’Keeffe, a pivotal American artist of the twentieth century, through her art, life, and legacy in the context of multicultural New Mexico. In addition to the facilities in Santa Fe, the Museum operates The O’Keeffe Welcome Center in Abiquiú, New Mexico, and cares for O’Keeffe’s two homes and studios in Abiquiú and Ghost Ranch. The timing of this request is critical as The O’Keeffe is currently in the quiet phase of a \$45 million capital campaign. Anchored by a new 50,000-square-foot exhibition, education, and collections facility, the campaign positions The O’Keeffe as a world-class, visitor-centric, community-minded museum for the twenty-first century. The new O’Keeffe campus will have accessibility at the fore of its design and organizational culture, to foster an environment that is welcoming and inclusive of all.

As the campaign advances towards a public opening, tentatively scheduled for 2023, now is the time for O’Keeffe staff to also transform. The O’Keeffe aspires to an inclusive visitor experience that will invite audiences to engage with the life and art of Georgia O’Keeffe, as well as the unique landscape and people of northern New Mexico. The O’Keeffe aims to create deep and lasting relationships with our neighbors by becoming a trusted and indispensable asset. Integration with the community will shape our process. Through content co-creation, locals will see themselves and their heritage reflected in the stories shared within The O’Keeffe’s walls. From the accessible campus design, to making equity a driving force in our staff’s work, this grant will allow The O’Keeffe to embody DEAI principles.

**Problem addressed elsewhere:** The American Alliance of Museums' (AAM) pioneering activities in the areas of Diversity, Equity, Accessibility, and Inclusion (DEAI) have been a source of inspiration for an elective DEAI committee at The O'Keeffe. AAM created a Working Group on DEAI in 2017 and it remains a focus of their strategic plan. Announced in spring 2019, an Excellence in DEAI Task Force is part of the Facing Change: Advancing Museum Board Diversity & Inclusion initiative. The AAM task force represents a diverse selection of museum leadership across the United States. The task force is currently working through a list of objectives that includes several best practice resources that will be available in 2020. The O'Keeffe is proud to have support from the American Alliance of Museums for this proposal. (See Supporting Document #3: Letter of Support from Laura Lott, President and CEO American Alliance of Museums).

Through the Diversifying Art Museum Leadership Initiative, the Ford Foundation and Walton Family Foundation support innovative strategies and programs to advance diversity across the sector, including the Fisk University Museum Leadership Program. For the past two years, The O'Keeffe has partnered with Fisk's Museum Leadership Program, an innovative, practice-based initiative designed to educate, train, and advance the careers of underrepresented minorities in the field of museum leadership, by providing an intensive one-week onsite experience annually. (See Supporting Document #4: Letter of Support from Jamaal B. Sheats, Director and Curator of Galleries, Fisk University).

**Project beneficiaries:** The project beneficiaries are twofold. The first to benefit from workshops about unconscious bias and inclusive design are The O'Keeffe's staff, volunteers, docents, and board. The O'Keeffe employees 105 staff in both Santa Fe and Abiquiú. At present, there are 46 docents and volunteers, and 22 board members. The full list of workshops is identified in the activity sequence. Onsite planning meetings and two public programs have been designed to coincide with The O'Keeffe's board meetings to allow for their involvement. Ultimately these professional development activities are designed to benefit The O'Keeffe's anticipated publics – tourist and local. The O'Keeffe is based in the oldest capital city in the United States, Santa Fe, with a complex multicultural population of over 83,000. The United States Census Bureau estimates a prevalence rate of 18.7% of people with a disability. However, this statistic is higher in Santa Fe, where disability impacts 25.1% of the population. The city's legendary history and culture attracts over one million tourists annually. In 2018, over 200,000 visitors enjoyed The O'Keeffe, and 15,000 attended tours of the Home and Studio in Abiquiú. Based on census estimates, this would indicate over 37,000 and 2,000 visitors with disabilities at each location, respectively.

**Advancing The O'Keeffe's strategic plan:** The O'Keeffe's leadership team revisits the Strategic Master Plan annually for alignment. The team is comprised of the Director; Senior Director of Operations; Senior Director, Advancement and Communications; Director of Human Resources; and Director of Finance. The strategic plan summary document identifies the strategic initiatives. The learnings achieved through DEAI training will result in a remarkable experience for The O'Keeffe's publics (initiative #2). All programs (public, inward facing, and school groups) will be strengthened through inclusivity (#3). Internally and externally, the project grows a culture of learning and participation (#4) through workshops and public programs from leaders in the field. Because these professional development opportunities are inclusive of stakeholders and designed around regional cultural issues, they will expand upon The O'Keeffe's commitment to be

integrated into the community (#5). Lastly, the alignment of internal resources and systems to be DEAI focused will support the accomplishment of The O’Keeffe’s priorities (#6).

**Alignment with Museums Empowered goals, Diversity and Inclusion category:** This opportunity provides The O’Keeffe with a holistic action plan to promote DEAI principles throughout The O’Keeffe. Moving forward, this will become inherent to The O’Keeffe’s culture and ingrained in the visitor experience. Diversity, equity, accessibility and inclusion work is difficult and complicated in that it often comes face-to-face with long-standing societal inequities and biases. Addressing these issues meaningfully requires a concentrated and sustained organizational effort that cross-cut departments to generate systemic change. As a result of this training, The O’Keeffe’s relevance will be heightened in the region, an important step towards increasing local and statewide engagement.

## 2. PROJECT WORK PLAN

**Specific activities and evaluation:** This project spans two years with professional development workshops and public programs at the heart. The O’Keeffe proposes a total of 12 workshop modules, with recurring sessions for all-staff participation. (See Supporting Document #5: Workshop Overview). As much as possible, workshops coincide with board meetings and include community stakeholders. The grant period is book-ended with events that include all facilitators and the evaluator. A DEAI/equity audit will take place prior to the inaugural meeting so that findings inform the work plan. The first public program, *Addressing Issues of Inclusion in Cultural Institutions* is scheduled during the kick-off phase (October 2020), so that all facilitators may participate. Similarly, *Revisiting Inclusion in Cultural Institutions* will occur at the end of the project (July/August 2022).

- Three workshops relate to all-staff, the board, and volunteers/docents: the first on diversity and inclusion, the second on building a foundation on inclusive design, and the third about lessons learned through the process.
- Five workshops have been prepared for The O’Keeffe curatorial team that includes four divisions: digital, library, fine art, and education. The curators will be joined by two collaborators from Thinc Design, the leading New York exhibit design firm co-planning design, interpretation, and experiences for the new campus.
- One workshop is for public-facing staff at both facilities, to learn how to better serve the visiting public through all stages of a typical museum visit.
- Three workshops for the key project staff and leadership team are dedicated to institutionalizing values and creating a roadmap of milestones. Stops on the roadmap include: dates assigned to each area of concern in the equity audit, addressing recruitment, retention, and advancement of staff in all human resources policies.

At the start of the project, a logic model workshop with key staff, facilitators, the board, and The O’Keeffe leadership team will inform the final evaluation questions, methodology, and design. Evaluation, analysis, data interpretation and reporting will be iterative and will begin at the onset of the project, continue during project implementation, after the DEAI audit, following each workshop, and at the conclusion of the grant period. This approach ensures the project benefits from near real-time data and informed decision-making, allowing for course corrections as needed.

**Maturity level, piloting to mainstreaming:** As The O’Keeffe develops schematics for a modern, thoughtful and larger exhibition building, building internal capacity in diversity and inclusion is a priority. Such training is integral as The O’Keeffe incorporates DEAI into all facets of the Museum. Historically, the Human Resources department has hosted ad hoc training in unconscious bias and sexual harassment. However, strides have been made recently across departments in specific areas of diversity and inclusion. Two different trainings were introduced by the Operations and Education departments respectively in 2019: mental first aid, and best practices in welcoming visitors with processing differences. The O’Keeffe’s grassroots/staff-organized inaugural DEAI Committee met in July 2019 with four meetings since and high staff involvement.

For the purpose of this grant, the previous trainings are considered exploratory. The piloting phase will take place when all facilitators, key project team, and leadership convene to confirm workshop and training topics, discuss evaluation, and identify attendees. Additionally, this is when the first public program and DEAI audit takes place. The workshops and public programs are encompassed by the second phase. In mainstreaming, the findings from the audit, workshops, and public programs will be publically shared.

**Project risks and monitoring:** Risks associated with this kind of institution-wide training are primarily about logistics and reception. Because all-staff attendance is a significant component, and The O’Keeffe is open every day in two locations that are 45-miles apart, careful planning is required to determine when sessions will be scheduled, their location, and repetition. The O’Keeffe is committed to this project under Director Cody Hartley (see Supporting Document #6) and the leadership team. Securing the involvement of this group is critical to ensuring that all staff are engaged in trainings. To this end, all staff and community stakeholders will be paid for their involvement. (See Supporting Document #7: Letters of Support from Thomas Graham and Terri O’Hare).

The evaluator will design, conduct, and report on findings throughout the project, documenting the process as well as the final outcomes and summative results. Time has been allocated throughout the schedule for reflection and course correction. A final noteworthy risk is that diversity and inclusion are inherently challenging topics and encompass huge issues that elicit emotional responses. For this reason, the facilitator team represents leaders in the field, which is considered a significant investment towards beneficial outcomes.

**Planning, implementation, and management:** Preliminary project planning took place between the five members of The O’Keeffe key project staff in conversation with facilitators in fall 2019. With the key project staff and facilitators in place, the first step towards implementation once the grant period begins is an on-site kickoff meeting with the broader group of key project staff, leadership, and board members. This meeting is imperative for effective implementation because it establishes the initiative in the context of The O’Keeffe’s envisioned transformation. This convening will also familiarize facilitators with the organization and its unique needs, set expectations around communication, and review plans for the new campus. Key project staff will meet once a month throughout the grant period to manage the project. The leadership team will have quarterly check-ins with the key project staff and the project will be presented at three board meetings. The entire project is managed by Liz Neely, Curator of Digital Experience, who brings to her role extensive DEAI experience, particularly in the digital realm, and the remaining four members of the key project staff.

**Project team makeup:** The project team of staff and facilitators includes diverse perspectives that come from differing races, ethnicity, gender, abilities/impairments, and sexual identities that behooves a program for a cross-section of staff and the public. The facilitators will work collaboratively to acknowledge the intersections of the issues and maximize lasting impact on the organization.

Key project staff: shares two members of the leadership team: Benjamin Finberg, Senior Director of Operations, and Sylvia LaRocque, Director of Human Resources. Benjamin Finberg has been with The O’Keeffe for over seven years and oversees over 50% of staff. Sylvia LaRocque is a native of Santa Fe and a new addition to The O’Keeffe staff. A seasoned Human Resources professional, Sylvia LaRocque is familiar with best practices for staff training and evaluation. Additional key staff members include Giustina Renzoni, Historic Site Manager, who is based in Abiquiú and was the founding member of The O’Keeffe Museum’s DEAI committee. Finally, Katrina Stacy, Curator of Education and Interpretation, has been a museum educator for over 20 years with demonstrated experience in accessibility. Facilitators: Dina Bailey has extensive experience in the areas of strategy and organizational change broadly surrounding DEAI and will lead the Implicit Bias workshops. Sina Bahram and Corey Timpson are renowned for their inclusive design work that ensures consideration of the full range of human diversity. Bahram and Timpson will lead the inclusive design and accessibility focused workshops. Kate Livingston is an experienced evaluator who prioritizes projects with clear inclusion, access, equity, and anti-oppression missions and values.

**Equitable collaborations:** The O’Keeffe has developed partnerships with the facilitators and evaluator engaged in this project because of a mutual desire to advance the field of DEAI in museums. The facilitators’ objectives, preferences, and desired workshop outcomes were considered in assembling the project team. Following best practices for thorough evaluation (12%-18% of total grant amount), 14.1% of the total grant funding has been dedicated to the services of Kate Livingston, excluding travel costs and per diem. Facilitators proposed fees are in line with fair market values and are reflect non-profit rates. (See Supporting Documents #7 and #8: Quotes from Prime Access Consulting, Inc. and International Coalition of Sites of Conscience). Community stakeholders that reflect New Mexico’s diverse population will be involved in three workshops and invitees to the public programs and paid a stipend of \$100-\$250 for participation.

**Activity sequence:** Major dates 2020: September: Preparing for project kick-off, workshop and public program planning commences. October: Project kick-off. Facilitators and evaluator convene in Santa Fe for orientation with key project staff, leadership, and board. First public program. Kate Livingston to conduct logic model workshop, interview key staff/board, and evaluate public program. October-December: DEAI audit is conducted by Dina Bailey. Online evaluations will follow each workshop.

Major dates 2021: Asterisks indicate the involvement of ten community stakeholders. January: Audit results presented to Board. January-March: Bailey: *Diversity and Inclusion, and Understanding Implicit Bias* (all-staff); *Co-Creation Workshop\**; *Workshop for Public Facing Staff; Operationalizing Inclusion: Implicit Bias*. April-June: Sina Bahram and Corey Timpson: *Building a Foundation* (all-staff) and *Hands-on Inclusive Design in Exhibition and Programming*. July-September: Bahram and Timpson: *Inclusive Design in Digital Infrastructure and Media Products;*

*Visual Description Workshop, Design Review. October-December: Bahram/Timpson: *Workshop for Public Facing Staff, Operationalizing Inclusion: Inclusive Design; Design Review.* \**

Major dates 2022: January-March: all facilitators on-site. *Sustaining a Welcoming and Inclusive Museum and Inclusive Design Roadmap Development*. Livingston to conduct final interviews with key staff and board members. April-June: Final evaluation draft report by Livingston. July-August: Project wrap-up. Final all-staff session, *Lessons Learned, Next Steps*. Presentation to the board and second public program, *Revisiting Inclusion in Cultural Institutions*, scheduled for July. Livingston to evaluate public program and final report. Grant period of performance concludes on August 31.

**Resources:** IMLS funding is requested for all expenses associated with hiring three facilitators and an evaluator. The O’Keeffe has additionally requested grant funding to offset 25% of the salary and fringe for the Project Director’s time on the project. The O’Keeffe is cost-sharing salaries and fringe for all additional staff involvement, expenses associated with space rental, food, and supplies. The O’Keeffe will additionally compensate the ten community stakeholders.

**Progress tracking:** Progress will be tracked by the key project staff in monthly meetings and reviewed by the leadership team quarterly with any barriers being addressed as soon as possible. Key project staff will review the schedule to ensure activities are completed and work with the facilitators to gauge reception to the ongoing training. Reviewing results of evaluation throughout the project will also help ensure the efficacy of the process throughout the project. Additionally, the project has key touch points with The O’Keeffe’s board of directors to ensure tracking and feedback at the governance level.

**Result sharing:** Two public programs are planned to allow for community feedback and engage discussions around DEAI issues in New Mexico cultural institutions. Santa Fe proper has over a dozen museums and many more cultural institutions who could participate in these discussions. The final public program would share the results of this project with the local community and continue to invite ongoing dialogue. A public version of the road map and values for ongoing sustainability of DEAI work will be published on The O’Keeffe’s website. The key project team will work with facilitators to share the results at professional conferences, such as the American Alliance of Museums.

### 3. PROJECT RESULTS

**Intended results:** The O’Keeffe’s desired transformation to be a stronger asset in the local community and to have broader impact on its visitors depends on an exuberant and generous visitor experience that emphasizes inclusion, reaches across generations, embraces multiple perspectives, and stimulates new ways of seeing, feeling, and being. Just as Georgia O’Keeffe translated complex ideas and emotions into accessible art, The O’Keeffe aims to create a space that feels open and accessible to everyone. The intended results of the project are to increase awareness surrounding issues of DEAI and design, create, and implement a sustainable inclusive design and accessibility practice across the organization. The key project staff will work with the evaluator and facilitators to more finely define these indicators and track progress through the project. Deliverables are indicated under tangible products.

**Change in knowledge, skills, behaviors, and/or attitudes:** An inclusive design methodology considers all aspects of human difference at the outset of design and development, in order to produce inclusive and accessible outcomes, to any and all audience members. To accomplish the goals that link The O’Keeffe’s unique resources to our visitors in a welcoming and accessible campus, the Museum needs to build internal capacity in issues of diversity, equity, accessibility and inclusion. Staff will learn how to work differently and to exercise inclusive practices within operating facilities such that the concepts, frameworks, and workflows are fully incorporated into the fabric of the organization. A logic model process will identify specific indicators with the evaluator, leadership team, facilitators, informed by key project staff. Project leaders will measure the indicators throughout the project period.

**Barriers in adaptation:** Areas of concern relate to ongoing commitment and implementation of learnings throughout the The O’Keeffe after the grant period. In order to continue momentum, the schedule for new staff training, as well as annual refresher courses in cultural competency and unconscious bias training will be scheduled into the future. The cost of ongoing training will be included in the annual budget.

**Strengthening internal capacity:** This project includes all of The O’Keeffe’s staff, board, and community stakeholders in an extensive workshop and training program focused on an inclusive practices that consider all audiences, perspectives, and aspects of human difference—age, ability, gender, ethnicity, religion, etc. While The O’Keeffe has implemented various DEAI focused trainings and has the staff-run committee, this project aims to vastly strengthen these efforts through extensive holistic workshops involving all staff, deep dive hands-on training with specific functional areas and a road map to operationalize these practices.

**Data collection:** Data collection will be led by the project’s external evaluator, Kate Livingston. During the project kick-off, a logic model workshop with key staff, facilitators, the board, and The O’Keeffe leadership team will inform the final evaluation questions, methodology, and design. Customized instruments will be created to measure key outcomes and indicators throughout the project period. Data will be collected in adherence to the American Evaluation Association’s “Guiding Principles” (2018), including abiding by current professional ethics, standards, and regulations (including informed consent, confidentiality, and prevention of harm) pertaining to evaluation participants.

**Tangible products:** (1) DEAI audit; (2) evaluation reports; (3) staff training materials; (4) DEAI road map, which is a series of milestones that include: increasing programming and partnerships for underrepresented groups; best practices for the exhibition, interpretation, and collections management of culturally sensitive subjects; updating policies that relate to hiring and staff retention; website audit and more (5) documented organizational values surrounding the integration of this work into The O’Keeffe’s operations, such as a museum-wide diversity plan.

**Sustaining benefits:** The project has been designed to identify the most pressing need for DEAI training across organization, through the kick-off meetings and public program as well as the DEAI audit. While the training addresses these current needs, the key project staff and facilitators will simultaneously design a road map to incorporate DEAI work and training into the operations of the organization. The investment in evaluation will also ensure that The O’Keeffe is effectively building capacity.



	Year 1 of Grant												Year 2 of Grant												
	<u>2020</u>				<u>2021</u>								<u>2022</u>												
	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	
Activity 1: Evaluation by Kate Livingston. Monthly meetings with key project staff and facilitators	[Solid black bar]																								
Activity 2: Project kick-off preparation	[Solid black bar]																								
Activity 3: Project begins, all facilitators on-site, first public program		[Solid black bar]																							
Activity 4: DEAI audit by Dina Bailey		[Solid black bar]	[Solid black bar]																						
Activity 5: Audit results board presentation				[Solid black bar]																					
Activity 6: Dina Bailey's workshops				[Solid black bar]	[Solid black bar]																				
Activity 7: Sina Bahram and Corey Timpson workshops						[Solid black bar]	[Solid black bar]	[Solid black bar]																	
Activity 8: Bahram and Timpson workshops									[Solid black bar]	[Solid black bar]															
Activity 9: Bahram and Timpson workshops											[Solid black bar]	[Solid black bar]													
Activity 10: All facilitators on-site for final workshops														[Solid black bar]	[Solid black bar]	[Solid black bar]									
Activity 11: Evaluation analysis																	[Solid black bar]	[Solid black bar]							
Activity 12: Project wrap up, final evaluation report, last all-staff session, presentation to the board, and second public program																						[Solid black bar]	[Solid black bar]		