



## Museums Empowered

Sample Application ME-249585-OMS-21  
Project Category: Evaluation

### Museum of Science, Boston

Amount awarded by IMLS:	\$155,232
Amount of cost share:	\$158,435

The project description can be viewed in the IMLS Awarded Grants Search:  
<https://www.imls.gov/grants/awarded/me-249585-oms-21>

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.

## NARRATIVE

The Museum of Science, Boston (MOS) proposes a two-year diversity, equity, access, and inclusion (DE&I) focused professional development initiative, *Goal-setting for Relevant and Overarching Workplace DE&I (GROW DE&I)*. With expert support, we will gain an understanding of DE&I concepts and best practices and then incorporate them into our organizational accountability system of Objectives and Key Results (OKRs). We will review the existing OKR system; learn from experts, such as Marguerite Fletcher at Fletcher Consulting, LLC, about how to integrate DE&I into our goals; design training modules for the entire staff about DE&I concepts and how to incorporate them into the OKR process; and refine and formalize the training process so it can become a sustainable part of Museum operations moving forward. This will help the Museum produce an approach for ongoing DE&I work that is comprehensive, democratized, strategic, action-oriented, and transparent.

## PROJECT JUSTIFICATION

### Need, Problem, or Challenge

Diversity, equity, and inclusion have been important topics in museums for years, but the murder of George Floyd in May 2020 and the subsequent social movements around the country spurred many museums, including MOS, to make new public statements in support of or commitments to DE&I initiatives, especially around race and racism (Dafoe & Goldstein, 2020). These statements and commitments have drawn public attention (Greenberg & Solomon, 2020), as lack of diversity among visitors and staff has been a longstanding issue in the museum field. The most engaged and loyal museum visitors are generally much less diverse than the overall population, and apart from directors of human resources, the vast majority of directors and senior staff at U.S. science and children's museums are white (Jennings & Jones-Rizzi, 2017). At MOS, organizational efforts to connect and engage with communities of color and other groups who are underrepresented in science, technology, engineering, and mathematics (STEM) has traditionally focused on access to the Museum, but we have not yet fully grappled with more transformative aspects of equity work, including assessing internal organizational culture (CAISE, 2018). A recent workplace climate study conducted by Fletcher Consulting, LLC highlighted employee concerns around the lack of racial diversity at all levels and recommended more training and equitable professional development opportunities for all staff (Fletcher & Williams, 2020). In addition, a recent staff survey showed that one-quarter of the approximately 200 respondents have felt uncomfortable, unwelcome, or discriminated against at MOS, and only 55 percent said they had access to resources and training to support an inclusive climate (Museum of Science, 2020).

With the full support of new President Tim Ritchie, the Museum is now making a strong push to change and refocus on the development of our staff. The Museum is currently acting on another recommendation from Fletcher Consulting, LLC by creating a permanent DE&I Committee to serve as the Museum's point of contact for organizational DE&I efforts. To meet the demand for action on DE&I, MOS created an Interim DE&I Task Force in Summer 2020 to draft recommendations and a charter for the permanent DE&I committee. Among the responsibilities of the DE&I Committee will be to ensure that DE&I is embedded in Museum policies and practices and to set and track quarterly and annual organizational DE&I goals using the Museum's OKR system (see *Supporting Document 3, DE&I Committee Charter*). The OKR system originated in the technology industry, and companies like Google have credited it for helping them achieve growth and strategic alignment (Doerr, 2018). OKRs are especially useful for aligning strategic efforts across an organization, as OKRs are set at multiple levels, from organizational to individual (Wodtke, 2016). Given that the emphasis on DE&I and the OKR system are both new to MOS, we seek comprehensive training and professional development that will help us optimize OKRs to align DE&I best practices that help push the Museum to achieve its DE&I goals.

### Studies, Plans, or Best Practices

Goal setting and strategic planning around DE&I are challenges across the museum field. While many museums state that DE&I are priorities for them, establishing and tracking DE&I practices across organizations is less common. According to a recent study, fewer than half of the 580 museums surveyed have created DE&I action plans, and 89 percent have not established metrics to track progress on DE&I goals (Garibay & Olson, 2020). In a

similar vein, the MASS Action project is currently assessing museums' recent public statements on racial justice for six key criteria: 1) acknowledgement of racism; 2) structural analysis of the organization's role in racist practices; 3) actions the organization will take to address the problem; 4) desired outcomes; 5) deadlines; and 6) financial investment to achieve these outcomes. While their analysis of 572 statements is ongoing, they point out that very few statements include specific deadlines or mention financial investment (MASS Action, 2020).

Along with DE&I training and professional development, the OKR system is well suited to addressing the above problems. OKRs encourage alignment across museums. Accounting for and working to align different elements of an organization can positively contribute to creating sustainable change (Martins & Coatzee, 2009).

At MOS, OKRs are posted online and accessible to all, creating transparency and opportunity for learning. As recommended by MASS Action's analysis, OKRs are time-bound, which can motivate quick progress toward a goal (Wodtke, 2016). Other sectors also use OKRs for goal setting in diversity, equity, and inclusion. In recent years, companies such as Twitter, Crunchbase, and Fractured Atlas have incorporated DE&I into their OKR system in order to hold themselves accountable for change in these areas (McConnell, 2020; Thomas, 2020; Wagner, 2015). With effective training, OKRs can be uniquely suited to advancing a new vision of DE&I at the Museum.

### Project Beneficiaries

All Museum of Science staff, interns, volunteers, and visitors will benefit from this project at different phases. Most importantly, all staff will benefit by informing the development of, and ultimately participating in, training modules. Additionally, those who participate in the front-end and formative evaluations of the modules will be able to shape their content and format. By participating in the final trainings, staff will build their understanding of DE&I concepts as well as their capacity to use the OKR system for effective goal setting. Ultimately, enhanced staff capacity to work towards DE&I will influence the visitors and learners who interact with all of the Museum's educational opportunities, from exhibits to programs to online resources and more.

Throughout the project, the newly formed DE&I Committee will benefit from Marguerite Fletcher's extensive knowledge of the field and expertise in supporting similar committees across different types of organizations. The Committee will learn about best practices for organizing and operating together as a group, as well as performing the tasks set out for them in their draft Charter (see *Supporting Document 3, DE&I Committee Charter*). Participating in the evaluation with Sarah Cohn of Aurora Consulting will also benefit the Committee by helping them learn how best to conduct an annual staff survey and collect ongoing feedback from all staff about DE&I efforts at MOS. An effective DE&I Committee will push the Museum to put its DE&I values into practice.

Human Resources staff will also benefit by growing their knowledge and capacity of effective DE&I trainings, and the project will support their work of training the 300 staff members at the Museum through the creation of multiple training modules. After the trainings are presented to current staff, recordings of the live portions will be housed in our Human Resources Information System (HRIS) and shared with all new hires, interns, and volunteers. The virtual trainings will provide a universal message and understanding of DE&I practices and how all members of the MOS community can incorporate them into the OKR system.

### Advancing Institution's Strategic Plan

The 190-year history of MOS is a story of growth driven by public curiosity, an ever-expanding definition of science, rapid changes in technology, and a need to stay relevant in an ever-changing world. The Museum is now proposing a bold new direction to open itself up to the community in both literal and figurative ways, with a singular goal: to inspire a lifelong love of science in everyone, in order to create a world where science belongs to each of us, for the good of all of us. This will be the largest transformation in the Museum of Science since its move to Science Park in 1951, becoming a Museum that centers the community's needs first, foremost, and always, and imagines action-oriented, inclusive solutions for the most exciting scientific challenges of our time. The COVID-19 crisis has brought into clear focus the need for a more science-engaged and science-literate society. The Museum

has accelerated its strategic plan in direct response to this crisis, with heavy emphasis on equity and inclusion. To ensure the Museum's ability to create experiences that empower everyone to see themselves in science and STEM, it is critical that everyone's voices, including our staff, are included and respected and that staff are empowered to advance DE&I and develop skills for using the Museum's OKR accountability system. (See *Strategic Plan Summary*.)

### Addressing Goals of ME Initiative

This proposal addresses the Museums Empowered goal of Building Capacity by equipping staff with knowledge about how to advance DE&I in a museum and developing staff skills for using the organization's OKR accountability system to align individuals' efforts towards collective impact. The training materials developed through this project will be widely available to all staff, and the capacity building efforts will also support the Museum's DE&I Committee in providing ongoing assessment and guidance about how to be strategic and comprehensive in pushing DE&I changes. This work will have far-reaching impacts throughout every Museum department and division, influencing the ways we work with one another and the ways our work serves and improves the well-being of our communities.

### Alignment with ME Project Category

Building on its prior effort that focused on professional development for culturally responsive evaluation (Building ICE, MA-40-19-0277-19), this project expands the scope of capacity building so that all staff have access to training resources about DE&I and enhancing their cultural responsiveness, no matter what job they hold. Training in integrating that knowledge into practice through the OKR system will empower each staff person to advance DE&I in their work, whether this is their first time thinking about DE&I or whether they are seasoned advocates. This approach will support the breadth of DE&I work, with staff implementing changes from Human Resources to community outreach to exhibition design to facilities, and beyond. In addition, the DE&I Committee, working with E20, our expansive leadership team, will provide regular recommendations about how the OKRs can support depth by aligning efforts towards key priorities for supporting the Museum's DE&I efforts strategically.

## **PROJECT WORK PLAN**

### Project Activities

The project activities will involve four phases, as described below. The different phases build upon one another to support a data-informed, iterative process of developing, testing, improving, assessing, and disseminating products that will support the Museum in amplifying its DE&I efforts strategically and will inform other museums doing similar work.

*Phase I - Information gathering:* During this initial stage, the project team will collect relevant information that will inform project activities. First, the project's external evaluator, Sarah Cohn of Aurora Consulting, will hold three focus groups with 24-30 staff representatives from across the Museum about what they would most value in a training module about using OKRs to advance DE&I. Additionally, external experts will provide coaching for the DE&I Committee members to build their capacity for ongoing information gathering, which will persist past the end of the grant period. The DE&I Committee's Charter states that the Committee will conduct an annual staff-wide survey to inform DE&I work and a quarterly assessment of OKRs related to DE&I. To support the Committee in doing this work, Sarah Cohn will coach the DE&I Committee's Survey Subcommittee in how to conduct a staff-wide survey about staff's needs and interests for training about DE&I. This survey will also serve as a benchmark for the summative evaluation (see Phase IV below). Marguerite Fletcher of Fletcher Consulting will coach members of the DE&I Committee's OKR Subcommittee through a process of assessing past OKRs with regards to DE&I. These coaching activities will continue throughout the project timeline in a scaffolded way that moves from learning about how to assess past OKRs to developing a process about how to make recommendations on how staff can optimize the OKR process for strategic, collective impact. Both coaching efforts will culminate in the development of a guide for DE&I Committee members (see Phase IV below).

*Phase II - Develop, deliver, and formatively evaluate the prototype training platform:* Using the information gathered from Phase I, Marguerite Fletcher will work with the project team to create two training modules: *DE&I Basics* and *Incorporating DE&I into Your OKRs*. Although the exact content will be informed by the results of Phase I, we envision that the first session will establish shared definitions for DE&I work as well as theories and research-based best practices about effective strategies for advancing DE&I in museums. The second training will focus specifically on how to use the OKR process to set strategic and effective goals for DE&I. Each module will consist of a set of short training videos and activities that will be easily update-able and will apply the Universal Design for Learning framework (CAST, 2018), an approach for optimizing inclusive learning experiences for all people. These recorded videos and activities will be hosted on the learning management platform in MOS's HRIS. This platform will be accessible to all staff and can be used to track completion of the sessions. In addition, the project team will develop a curated library of resources about DE&I and OKRs that employees can access on demand through the learning management platform should they wish to pursue additional learning beyond what is included in the modules.

In Phase II, Marguerite Fletcher will continue to coach members of the DE&I Committee in assessing OKRs at the end of each quarter and co-create recommendations about how to strategically align DE&I efforts in the upcoming quarter. Marguerite Fletcher will also provide specialized training for managers about how to support staff through the process of developing OKRs. The DE&I Committee's recommendations and manager trainings will be shared on the learning management platform as well. Once the prototype *DE&I Basics* and *Incorporating DE&I into Your OKRs* trainings and resources are posted on the platform, the project team will test it with a group of approximately 30 staff from across the organization. The Museum's Research & Evaluation Department will gather surveys and conduct focus groups with these 30 staff to provide formative data about the prototypes (see Data Collection section below), which will inform revisions in Phase III.

*Phase III - Revise and deliver full-staff training:* Based on the formative evaluation findings from Phase II, the project team will make improvements to the training platform before offering it to all staff.

*Phase IV - Summative evaluation and documentation:* Phase IV will focus on measuring the outcomes of the training and developing dissemination products. Sarah Cohn, the external evaluator, will produce a summative evaluation report that shares the results of this work, which will be posted publicly on [informal.science.org](https://informal.science.org) (see Data Collection section below). The centerpiece of the project's documentation will be the resources on the learning management platform of MOS's HRIS, which will be a lasting repository of tools that will be shared with all current and future MOS staff. In addition, Marguerite Fletcher, Sarah Cohn, and members of the DE&I Committee will co-create a guide, drawing on work from all phases of the grant, that outlines a process for the DE&I Committee to use for quarterly reviews of OKRs across the organization and writing recommendations that help guide staff goal-setting. Finally, two staff will propose and present an interactive conference session about incorporating DE&I into the goal-setting process at the American Alliance of Museums 2023 Annual Meeting in Denver, CO.

### Project Risks

There are several risks associated with the work of the *GROW DE&I* project. There may be a feeling among MOS staff that the Museum's existing practices are adequate and do not need to explicitly integrate DE&I initiatives. This feeling may make staff resistant to changing their OKRs or broader practices. The trainings will also be mandatory for all staff, so they may be resistant to adding a new training on top of their existing work. To address this issue and encourage broad institutional buy-in, we will include a range of MOS staff in the project to ensure that any changes we make are sensitive to all our stakeholders' needs.

### Key Staff

Three key staff will carry out primary duties of this proposal:

- *Margo Smith*, Director of Talent Acquisition & Development, will serve as Project Director and will oversee all project activities including budgeting; coordination with the DE&I Committee, Fletcher Consulting,

LLC, and Aurora Consulting; development of project deliverables; and dissemination, including rolling out the trainings to all MOS staff.

- *Elizabeth Kunz Kollmann*, Manager of Research & Evaluation, will manage all internal evaluation activities for the project, including overseeing the staffing for the formative evaluation of the training modules as well as acting as a liaison with the external evaluator, Aurora Consulting. She is the Project Director of the Museum's current IMLS-funded grant about culturally responsive evaluation (MA-40-19-0277-19).
- *Alexander Lussenhop*, Research & Evaluation Associate, will lead the formative evaluation of the training materials, including designing an evaluation plan, as well as data collection, analysis, and reporting.

### Project Team

In addition to the Key Staff listed above, all ten members of the DE&I Committee will contribute to the information gathering in Phase I, the development of training modules in Phase II and the revision of those modules in Phase III, and the development of a guide about using the OKR process to advance DE&I change in Phase IV. Two external partners will also play key roles in this work:

- *Marguerite Fletcher*, Founder and President of Fletcher Consulting, LLC, a DE&I practitioner who has previously worked with the Museum to conduct a staff climate survey and to deliver staff-wide implicit bias training. She is a graduate of Harvard Law School and has worked with numerous Boston cultural institutions to support their DE&I efforts. She has experience coaching DE&I Committees and developing and leading high-quality trainings.
- *Sarah Cohn*, Principal Consultant at Aurora Consulting, has more than ten years of experience working in informal learning environments as an evaluator, planner, and leadership development expert. She is the evaluator of the Museum's current *Building ICE* grant (MA-40-19-0277-19) during which she has provided valuable, data-informed insights to enhance project outcomes. She will build on that work through the proposed project as the external evaluator. She will offer her expertise in organizational change and intercultural competence development as advisor to the DE&I Committee.

### Schedule of Work

The attached Schedule of Completion details the timeline for the project's activities.

### Project Resources

The resources needed to complete this project successfully are the time of MOS staff and the two external experts. Beyond staff and consultant time commitments, the project will rely on the learning management platform in the Museum's HRIS. IMLS support will be fully integrated into the Museum's development of the DE&I Committee and staff OKRs, and matched by MOS funds. The Museum will meet the 1:1 cost share requirement through general operating funds, individual gifts, foundation grants, and/or endowments.

### Project Evaluation

The MOS Research & Evaluation Department (MOS R&E) will conduct formative evaluation in Phase II and Sarah Cohn from Aurora Consulting (AC) will provide external evaluation services throughout the project. For the formative evaluation, MOS R&E will gather surveys from the 30 staff who pilot test the training modules immediately after they complete the trainings and focus groups with the staff after they have applied their learning by writing OKRs that align their work with the organization's DE&I efforts. The survey and focus groups will identify the strengths and weaknesses of the training modules and gather insight about how they could be improved to better support comprehensive change.

For the external evaluation, AC will work collaboratively with the DE&I Committee and Fletcher Consulting to ensure that all elements of the evaluation are supportive of the Committee's goals and appropriately designed to capture the growth, change, and iterative development of both individual staff and organization-wide change efforts. The overarching evaluation questions that will guide the external evaluation include: 1) In what ways does GROW DE&I change MOS staff's understanding and use of use of OKRs to guide diversity, equity, and inclusion

in their work? 2) How do DE&I Committee members and Committee efforts develop as a result of the *GROW DE&I* project? 3) In what ways does the *GROW DE&I* project change how MOS identifies and works to improve issues of diversity, equity, and inclusion at the individual, departmental, and organization-wide levels?

The external evaluation will gather data at multiple points throughout the two-year project to monitor individual and institutional changes over time. The annual survey, which will be developed and used by the DE&I Committee during and after this project, will be used within this project to assess and monitor how staff shift in their awareness, understanding, confidence, and application of DE&I in their personal OKRs. Focus groups in Phase I will capture how individual staff and departments think about DE&I within the Museum, how they imagine shifts and personal effort may support organization-wide change, and what they hope to learn or do through the *GROW DE&I* project. DE&I Committee member and team interviews and discussions over the course of the project will track how the Committee develops both shared language and goals for the Committee's and the Museum's work as well as Committee structures and processes over time that support DE&I practices.

### Communications Plan

Target audiences for the communication plan are Museum of Science staff and staff at other museums who are engaged in DE&I work and wish to make their work more strategic and integrated throughout their organizations. The communication plan involves three key strands. First, a lasting result of the project will be a suite of materials to be hosted on the new training platform, including: 1) the *DE&I Basics* training module, 2) the *Incorporating DE&I into Your OKRs* training module, and 3) a curated library of resources about DE&I and OKRs that staff can use to deepen their learning. Through the platform, these materials will be available to all MOS staff and will be shared through all-staff emails and embedded in the HRIS system. New staff will be required to take the trainings as part of their onboarding process. Second, the project team will produce a fourth product, a guide for DE&I Committee members about how to conduct a quarterly assessment of OKRs and make recommendations about how staff can align their OKRs for collective impact. The guide will also include support for conducting the Committee's annual staff survey, and will incorporate evaluation findings from the external evaluation that support the Committee in doing its work moving forward. This document will be available on the HRIS homepage and will also be posted on the Museum's forthcoming DE&I webpage and shared in other public venues. Third, staff will propose a conference session for the American Alliance of Museums 2023 Annual Meeting to share findings from the project. Two staff will plan to travel to Denver, CO to present this session.

## **PROJECT RESULTS**

### Project Results

In alignment with IMLS Agency-Level Goal 2: Building Capacity, all Museum staff members will:

1. Increase their awareness and understanding of how to craft strategic and actionable DE&I goals as a part of their OKRs.
2. Increase their interest in crafting DE&I goals as a part of their OKRs.
3. Increase their confidence in their abilities to craft DE&I goals as a part of their OKRs.
4. Practice crafting DE&I goals as a part of their OKRs.

Additionally, members of the DE&I Committee will:

1. Increase their understanding of how to analyze OKRs about DE&I and make recommendations about how staff can align their OKRs for greater impact.
2. Increase their confidence in their abilities to analyze and make recommendations about DE&I-related OKRs.
3. Practice analyzing OKRs about DE&I and making recommendations based on findings.

### Audience Change

As these goals show, *GROW DE&I* is focused on increasing the capacities of individual MOS staff as a way to improve the Museum's ability to achieve its DE&I-related goals. During the grant timeline, MOS will experiment

with how to craft and train staff to craft DE&I goals as a part of their quarterly OKRs. However, it will take longer than the grant period for these new practices to be implemented in an ongoing way at the Museum. During the grant period, we anticipate more impacts on individuals than the institution overall. As MOS continues to integrate DE&I goals into OKRs after the grant period, we expect to see more organizational-level learning and change.

### Data Collection

As the Project Evaluation section above describes, data collection will consist of: 1) a Museum-wide, annual survey to assess staff needs and interests for DE&I-related trainings and track changes in awareness, understanding, confidence, and application of DE&I in OKRs before and after the trainings; 2) three focus groups (totaling 24-30 people from across the Museum) at the beginning of the project about what types of resources would best support them in integrating DE&I goals into their OKRs; 3) quarterly reviews of the Museum's OKRs; 4) surveys and focus groups with the approximately 30 pilot testers of the prototype training platform to identify areas of improvement; and 5) interviews and discussions throughout the project with DE&I Committee members to evaluate the Committee's use of the OKR process over time.

### Tangible Products

As described in the Communications section above, the products from this project will include: 1) an introductory DE&I training module, 2) a training module about integrating DE&I into the OKR process, and 3) a curated library of DE&I and OKR resources that staff can draw on to deepen their learning, all to be hosted on the Museum's learning management platform. The project will also produce 4) a guide for DE&I Committee members about how to conduct quarterly reviews of the institution's OKRs and make recommendations about how staff can support strategic DE&I efforts; how to conduct an annual survey to gather staff input about DE&I issues that OKRs should address; and evaluation findings from the external evaluation. Finally, the project will create 5) a conference session and associated materials (e.g., slides and handouts) for the American Alliance of Museums 2023 Annual Meeting.

### Project Sustainability

*GROW DE&I* will provide MOS with the opportunity to learn from experts who specialize in DE&I and explore our OKR system. The premise of the project is that, by allowing staff to learn from outside experts and apply what we learn, we will set the groundwork for the long-term integration of DE&I practices in our work. Therefore, a critical outcome of the *GROW DE&I* project is that participants, particularly the DE&I Committee members and MOS Human Resources, have the chance to build both the knowledge and the skills necessary to both analyze and provide guidance to the Museum about using the OKR process to achieve our DE&I aims. Both Committee members and Human Resources should also be able to train all staff in how to include DE&I practices in their OKRs. To ensure growth in skills, the DE&I Committee and MOS staff will practice including DE&I efforts in their OKRs as well as analyzing OKRs to understand trends and provide recommendations. By practicing these processes as a part of *GROW DE&I*, we will be able to learn how to optimize these processes and determine how to integrate this work into our ongoing operations. To sustain the benefits of *GROW DE&I* beyond the lifecycle of this grant, we will create training resources for all staff about DE&I practices and how to include them in quarterly OKR goals. These materials will be shared through the learning management platform in the Museum's HRIS, which will be accessible to all staff and will be used as a part of the on-boarding process for new staff so all staff at the Museum are supported to advance our core DE&I initiatives in a way that coordinates individual agency towards deep strategic impact.

**Schedule of Completion for Goal-setting for Relevant and Overarching Workplace DE&I (GROW DE&I)**

	2021				2022												2023								
	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	
<b>Phase I</b>																									
Conduct staff focus groups	█																								
All-staff survey				█	█																				
Review OKRs	█				█												█								
<b>Phase II</b>																									
Gather and curate DE&I resources			█	█																					
Develop training module 1					█	█																			
Evaluate training module 1																									
Develop training module 2																									
Evaluate training module 2																									
<b>Phase III</b>																									
Revise training modules																									
Deliver full-staff trainings																									
<b>Phase IV</b>																									
Use virtual platform on ongoing basis																									
Conduct summative evaluation																									
Develop guide for DE&I Committee																									
Present project learning at conference																									

- █ Fletcher Consulting with DE&I Committee
- █ Aurora Consulting and DE&I Committee
- █ Research & Evaluation Department
- █ All staff
- █ Aurora Consulting
- █ Fletcher Consulting, Aurora Consulting, and DE&I Committee
- █ Two project team members, to be determined