Museums Empowered

Sample Application MA-40-18-0519-18
“Empowering Innovation: A Community of Practice at Naper Settlement”

Naper Settlement

Amount awarded by IMLS: $84,811
Amount of cost share: $179,519

Attached are the following components excerpted from the original application.

- Abstract
- Narrative
- Schedule of Completion

Please note that the instructions for preparing applications for the FY2019 Museums for America grant program differ from those that guided the preparation of FY2018 applications. Be sure to use the instructions in the FY2019 Notice of Funding Opportunity for the grant program and project category to which you are applying.
ABSTRACT
The Naperville Heritage Society, administrators of Naper Settlement, an outdoor history museum in the western suburbs of Chicago, proposes a capacity building project to support institution-wide learning in organizational transformation, leadership, and new professional practices. Naper Settlement has outlined an ambitious vision in its recent strategic plan to transform the 19th century pioneer history village into a community-oriented museum relevant to the concerns and issues of a diverse, rapidly changing city. The museum’s leadership has been supporting staff throughout the first two years of implementation of the plan but has concluded that all would benefit from further shared training, coaching, and support to develop the skills to realize that vision. Over two years, Naper Settlement staff will work with professionals and a toolkit of information and leadership models to develop the capacity to be agile and innovative in a complex and rapidly changing environment. This Learning Institute, designed to support the process of institution-wide change, will cultivate institutional knowledge and expertise, providing information and models that will lead to a shared vision and the creation of a common language across the organization. IMLS support of $84,811 is requested.

There are four components to the Learning Institute (Scheduleofcompletion.pdf):

- 8 facilitated Organizational Management Navigation sessions
- 6 field study trips
- 8 Innovation Workforce Seminars, led by transformational leaders
- A book club with staff engaged in a series of shared readings

Additionally, a communications feedback committee will be responsible for internal and external communications. (Supportingdoc2.pdf)

The primary direct beneficiaries will be the staff of Naper Settlement, at all levels, from executive leadership to emerging professionals. In reality, the real beneficiaries will be the community. When we are successful in transforming Naper Settlement into a vibrant, relevant organization, our residents will have a place where they can come together to see their own stories and discuss the city’s past and future.

Empowering Innovation’s goal is to create a culture of learning and a community of practice, so that each staff member may continue to learn and contribute at their highest level. We also expect that a new organizational structure, new policies and procedures, and new services and programs will be created as a result of what we learn.

Staff learning and openness to contemporary museum practices will be assessed through pre and post evaluation results about staff attitudes, engagement and learning. While specifics will remain confidential, this evaluation will provide data and insights that can be shared through our consultant’s work with nonprofits across the United States and with other interested museum and historical associations.

Each of the speakers participating in the project’s Innovation Workforce Seminar will write a paper with their key recommendations and thoughts presented to Naper Settlement’s staff. This compendium of collected essays will be shared with the field at large, through blog, publications, conference presentations and webinars.
Naperville Heritage Society (Administrator of Naper Settlement)
IMLS Empowering Museums FY18 Grant Proposal

Empowering Innovation: A Community of Practice at Naper Settlement

Project Justification:


The Naperville Heritage Society, administrators of Naper Settlement, an outdoor history museum in the western suburbs of Chicago, proposes a project in the Organizational Management category. Over a two-year time period staff will have direct access to professionals who have proven expertise in transforming organizations and be provided with a toolkit of information and leadership models to be agile and innovative in a complex and rapidly changing environment. This Learning Institute, designed to support the process of institution-wide change, will cultivate knowledge and expertise, providing information and models that will lead to a shared vision and the creation of a common language across the organization. The Institute will include immersion in subject matter that will assist staff in developing a new approach to their work. Learning will take place across ALL levels of the staff team, with the Naperville Heritage Society Board participating at key points in the learning process. IMLS funding support of $84,811 is requested is requested for this project.

Naper Settlement is near its 50th anniversary in 2019. Nationally accredited, the outdoor history museum is in transition from telling a primarily 19th century white-European pioneer story in a historic village setting, to being a museum campus that is fully reflective of the City’s contemporary history and diversity. Naperville’s 20th and 21st century history is a nationally significant story of suburbanization, changing from a community reliant on agriculture to becoming what some are now calling a technoburb. When the museum was founded Naperville’s population was 21,675. Today, the population is over 147,000, with Naperville being the fifth largest city in the state. The population has shifted from being essentially an all-white community to one that is now 20% Asian American, 5% Latino and 5% African-American.

A decade ago, the museum changed its mission from being limited to 19th century history, to interpreting history through today. While the site has had critical infrastructure improvements, these large-scale projects have not been matched with creativity and innovation in the exhibits and historic settings. Exhibits are stagnant. The historic houses in the village reflect only the 19th century and the museum’s major history exhibit, Brushstrokes of the Past, was installed in 1996 and remains virtually unchanged.

It is well documented that history museums based primarily upon period historic buildings and interiors are struggling for relevancy. We have known for years that this model is not sustainable. In response, the museum has made a commitment to its whole and inclusive history. For example, a recent public program was a presentation to the City Housing Commission to explain why they exist (a result of outlawing racially restrictive covenants) and new initiatives to share inclusive histories through travelling exhibits and community conversations. In 2016, the museum received a National Endowment for the Humanities grant to work with Naperville’s Asian American (from India and China) communities to collect oral histories and digitize two-dimensional materials, which will result in a community-curated exhibit. Understanding and putting into practice what it takes to tell the stories of its modern community is essential if we are to be successful.

Unfortunately, many staff are experiencing difficulty with these changes. They are entrenched in long standing approaches and practices and apparently cannot move beyond their comfort zone to become more agile and focused on relevancy. Many staff, challenged to be innovative in their thinking and in practice, are resistant to the new ways. This will take work. We are committed to supporting our staff through these changes but we need everyone in alignment with the vision for the future.
Structurally, the organization has been undergoing change since 2011, when a reorganization resulted in significant changes to the operating structure, as well as the elimination of 8% of staff positions. A year later, the CEO, who had been head of the organization for 33 years, retired. This allowed the Board of Directors to determine the type of leader they wanted for the future of the organization. In 2014, Macarena Tamayo Calabrese was hired as President and CEO. Calabrese, an attorney and non-profit leader, had experience with a number of non-profit organizations, some international in scope. Upon her arrival, the museum immediately undertook the development of a strategic plan (supported by outside expertise specialists in strategic planning) integrating the existing master plan, which outlines the addition of three new exhibit facilities for the site (an agriculture interpretive center; Welcome Center with digital exhibit space; and a large building that will allow for exhibits, events, and administrative space).

Calabrese set to work assembling her leadership team, which included restructuring the group, creating the Chief Operating Officer Position, realigning the Vice President of Museum Services to become Vice President of Advancement and Capital Projects, and creating hiring for a new position, Vice President for Community Engagement and Audience.

With the endorsement of the Board of Directors, this leadership team made a commitment to providing opportunities for Naper Settlement’s workforce to become the leaders, directors, coordinators, curators, educators, thinkers, implementers, and producers that will advance the strategic plan. The investment in the team is already underway. During the past two years, seven staff members, from the VP, director and coordinator levels of the organization have, or are, working with an executive coach to strengthen their leadership and/or management skills and abilities. In 2016 Laura Roberts, Principal of Roberts Consulting, facilitated two full-day meetings for the Leadership and Director teams on effective leadership of teams. Roberts identified that the Director Team was skilled and committed to the organization but in need of additional training and support to be able to be effective change managers.

**Project Work Plan:**
Modeled in part after the Getty Museum Leadership Institute and the Seminar for Historical Administration (SHA), *Empowering Innovation* will combine subject-matter workshops, change management sessions, field study trips, a series of one-and-a-half day seminars, webinars, and a book and blog club into an Institute that has components that reach ALL staff. This strategically developed series of activities has been designed around building a culture of learning, leading to a staff that embraces change and can innovate to achieve the goals set forth in the institution’s strategic plan. Each program component is designed to create knowledge and understanding, tear down silos, reduce fear of failure and create a team that is not risk averse.

The project design is based on core principles found in:

**Magnetic: The Art and Science of Engagement:** Six practices of Magnetic Museums
1. Build Core Alignment
2. Embrace 360 Engagement
3. Empower Others
4. Widen the Circle and Invite the Outside In
5. Become Essential
6. Build Trust Through High Performance
Empowering Innovation: A Community of Practice at Naper Settlement

EmcArts: Five Principles to guide adaptive change

1. We value the interdependence of the ecosystem over our own organizational or individual self-interest
2. We integrate the voices of citizens into or work as a means of culture-making
3. We see reciprocal rather than transactional relationships as a path to enduring capacity for change
4. Our organizations authentically value inquiry and use questions as a way to drive adaptive change
5. Our organizational cultures value the creative potential inherent in ambiguity and complexity

Harvard Business Leadership Development: 6 Design Principles for Leadership Development

1. Learning in context
2. Learning by doing and reflecting
3. Learning over time
4. Learning by teaching
5. Learning through engagement
6. Learning in context

Learning activities will involve staff at every level and from all departments (Supportingdocs2-3-4.pdf). By providing a best-practices knowledge base to ALL staff, rather than a single staff member periodically attending a conference or institute like SHA, there will be a magnification of results, because all staff are acquiring knowledge and putting it into practice, at the same time. A Communication Feedback Committee will keep the organization’s Board of Directors involved and knowledgeable and will help to build their capacity during a time of transformation and organizational change.

An informal survey of museum professionals from across the country helped to identify the participating museum professionals and the museums that will be visited. The professionals identified to participate in the program are each highly regarded in the field and have independently served to advance field-wide museum knowledge. They lead organizations (some leading from the middle) that are innovative or have undergone significant successful transformation. Each will provide thought leadership around specific topics.

Empowering Innovation, is designed to occur over two years, from 10/1/2018 -9/30/2020. See the schedule of completion (Scheduleofcompletion.pdf), which identifies each activity by its type, month of occurrence, and staff levels participating.

The project scope is comprised of four project segments to create a mix of experiences for various staff levels, as well as provide shared experiences and a common knowledge bank for the entire staff team of 40. (It should be noted that major activities were purposely avoided in December and July due to the museum’s program calendar and the respective holiday and vacation seasons.)

Prior to project activities commencing, all staff will participate in an anonymous online evaluation developed by Susie Wilkening of Wilkening Consultants to establish initial benchmarking and assist in developing a value proposition of the seminar series to be offered to increase staff interest and engagement. At project completion, Wilkening will develop a final evaluation to assess change over time, what aspects of the project had the most impact and why, and how staff have changed their practices and perceptions as a result of participation.
Organizational Management Navigation Sessions (See Supportdoc2.pdf)

Project Year 1 (Led by Laura Roberts, Roberts Consulting)

October 2018-Session 1 - ½ day: Demands of adaptive leadership during times of institutional transformation, held while on first site visit. Readings: Good to Great and the Social Sectors as well as other texts on leadership recommended by project resources.

January 2019-Session 2 - 1 day: Project kickoff ALL staff will include breakouts for the leadership team, director team and emerging professionals group (this pattern will follow for all future seminars). Readings: Apples Are Square and other assigned blogs.

April 2019 –Session 3 - 1 ½ days: EMC Arts model of adaptive change and creating a fundamentally different relationship with an organization’s “ecosystem.” Magnetic: The Art and Science of Engagement.

June 2019-Session 4 - 1 ½ days: Sustaining a culture of innovation, risk-taking and change, as part of a cycle of continuous improvement.

Sept 2019-Session 5 - 1 ½ days: Processing the lessons learned from the first year of the project and refining project goals and content for the second year. Reading: The Art of Relevance

Project Year 2 (Led by Laura Roberts, Roberts Consulting)

January 2020-Session 6 - 1 ½ days: Creating a culture of reflective practice and using assessment to support responsive and deliberative change. Reading: 6 Principles for Leadership Development.

May 2020-Session 7 - 1 ½ days: Study changing practice in related fields and applications for the work of Naper Settlement. Reading: a book also from outside the museum field, (TBD) perhaps from the corporate or public sector that related back to innovation and its implications for leadership.

Sept 2020-Session 8-1 ½ days: Project wrap up with a discussion of what we have learned and the application of those lesson, as well as strategies for sustaining momentum.

Field Study Trips – The leadership team (CEO, COO, two VP’s) will travel to the identified museums listed below, selected for the innovative, transformative work achieved in their respective spheres. 3-4 days of travel is planned for each trip to allow adequate time to partake in the offered museum experiences at each museum, in addition to meeting time with the respective CEO’s, senior management teams and trustees, for discussion centered around the following questions:

1. Relative to the changes you made, what was the biggest challenge or impediment you faced?
2. What resources did you need to overcome it? If required, how did you strategically manage any re-allocations? What effect did that alone have?
3. Tell us about a moment during the significant organizational change you undertook and why it stands out to you now.
4. What has been the biggest organizational failure you encountered and what did you learn from it?

October 2018: Heritage Museum & Gardens, MA and Harriet Beecher Stowe Museum, CT
November 2018: The Strong Museum and Corning Museum of Glass, NY
September 2019: Minnesota History Center, Oliver Kelley Farm (MHS), Minneapolis Museum of Art, and the Jerome Foundation (Ben Cameron).

In Supportingdoc4.pdf, each of the museums are described, the key participants identified, and the relationship to the Naper Settlement Strategic Plan identified.

In addition, two field study trips are planned for the staff from the leadership team, director team and emerging professionals group. Please see the staff project chart in Supportingdoc2.pdf for delineation of the specific staff positions within each grouping. These field study trips are intended to create shared experiences of what transformative museums are doing, and for all three levels of the staff to hear from the respective CEO’s and senior management team regarding their perspectives on creating a culture of change. The same framework of questions will be used.

May 2018: Conner Prairie History Park, Indianapolis Children’s Museum, Indiana State Museum, and Fair Oaks Farm, IN

October 2019: Jane Adams Hull-House, IL

Innovative Workforce Seminar – Modeled after SHA, this seminar series is designed to bring museum leaders and consultants who have experience in creating agile, adaptable teams to speak with the staff at Naper Settlement. Opportunities for short-term wins and lessons learned will be built in to the process. The day and a half seminars will be attended by all staff, with breakout sessions included for the leadership team, director team and emerging leaders. A total of 8 seminars are planned, with 4 to occur in each of the project years – Year 1: February, April, June and September 2019 and Project Year 2: October 2019, February, April and June 2020. Following are the participating speakers:

Abbe Museum -Cinnamon Catlin-Legutko, President & CEO & Darren Ranco, Ph.D., (Penobscot)
Conner Prairie Interactive History Park -Norman Burns, President & CEO & Rich Cooper, Chief Program Officer
Heritage Museum & Gardens - Ellen Spear, President & CEO
Minnesota Historical Society - Melanie Adams, Ph.D., Senior Director, Guest Experience & Educational Services
Mountain Top Vision – Dina Bailey, CEO
President Lincoln’s Cottage at the Soldier’s Home – Erin Mast, Executive Director and CEO, and Callie Hawkins, Associate Director for Programs
Pacific Science Center-Anna Johnson, Portal to the Public Specialist
Wilkening Consulting - Susie Wilkening, Principal

Naper Settlement Book/Blog Club - All staff will read the following four books over the course of the project, as well as read a minimum of four blogs (or online webinars, video series, etc.) to be determined by Laura Roberts.
Book #1: Apples Are Square by Susan Smith Kuczmarski and Thomas D Kuczmarski
Book #2: Magnetic: The Art and Science of Engagement by Anne Bergeron and Beth Tuttle
Book #3: The Art of Relevance by Nina Simon
Book #4: TBD – Laura Roberts will help select the appropriate final book based on project direction & needs

Project Evaluation: Susie Wilkening is the principal in Wilkening Consulting, and has nearly 20 years of experience in museums, including over ten years leading custom projects for museums as well as fielding groundbreaking national research on the role of museums in American society. Wilkening will assess the impact of our work and survey our entire staff both at the commencement and conclusion of the project.
This will not be a standard evaluation of the speakers, but instead a more comprehensive look at the attitudes and behaviors of our staff on an individual and collective level. Much of Susie's work focuses on intrinsic vs. extrinsic motivations for learning, especially among museum-goers and the general public. These motivations often correlate to greater openness to new ideas. This work will greatly inform her work with our organization, as she assesses how intrinsically motivated our staff is in their work, and how that may correlate with a willingness to try new ideas, take risks, and push our organization to be more effective and integrated in our community. Her survey instrument will assess those underlying motivations on an individual and aggregate level to help us frame the thought-leader sessions in ways that will engage those that are more extrinsically motivated in their work (e.g., perhaps a more explicit "why this makes your work easier"). At the conclusion, she will compare results individually, by department, and in the aggregate to understand what worked, what didn't, and why. While she will also assess which speakers were more effective than others as well, the focus will be more on how it changed our staff. (Note: Susie will maintain strict confidentiality in the individual responses in order to minimize "false positives" that are not necessarily accurate. Supervisors and human resources will not have access to individual survey results.)

**Project Management:** Donna Sack, with over 30 years’ experience in leading projects ranging in size from $10,000 to over $1,500,000, will serve as the project manager. Sack has extensive expertise in providing professional development for museum professionals, trustees, and volunteers. Britney Risley and Tricia Runzel will serve as project coordinators. These emerging museum professionals have experience in coordinating events, speakers’ series, and other related programming.

**The Schedule of Completion** included in the grant will serve as the roadmap for development of a delineated action plan upon successful grant. The project schedule, action plan and financial reports will be updated monthly and quarterly to ensure milestones are being met. (The Naperville Heritage Society has successfully managed projects totaling over $7.25 million in grants in the last decade, including those from IMLS, NEH, NEA, CDBG, and the US EPA.)

The resources to carry out *Empowering Innovation* consists primarily of the following:

1.) The IMLS grant funds requested in the amount of $84,811 to support the contracted professional services and travel of the identified consultants and museum professionals
2.) The IMLS grant funds to support the travel of the museum staff participating in the field study trips to visit museums in three regions of the country to speak with their transformative leaders.
3.) The personal time of all 40 Naper Settlement staff, to be contributed in-kind, toward successful project completion, and totaling over 3,693 hours at a value of $166,605.

Progress toward achieving attended results will be tracked internally through the Communication Feedback Committee. The Project Manager will work closely with Laura Roberts to develop interim reports and to adjust the plan of work as needed. Project results will be shared internally and externally and methodologies are outlined in Section 3.
Empowering Innovation is a Learning Institute that will meet the following IMLS Performance measures:

1.) Train and Develop Museum Professionals
   MEASURES: Increase in understanding, interest in the subject and confidence in applying what’s been learned.

2.) Support Communities of Practice
   MEASURES: Increase in understanding, interest in the subject and confidence in applying what’s been learned.

The Naperville Heritage Society will contract with Wilkening Consultants to complete pre- and post-assessments that will measure the impact of the project on an individual and collective level. Included in the assessments, the de-identified data corresponding to the above performance measures will be collected and reported to IMLS.

Results: Empowering Innovation’s goal is to create a culture of learning and a community of practice, so that each staff member may continue to learn and contribute at their highest level.

Additionally, it is fully expected that the mission and vision of the organization will be updated and a new organizational structure in place as a result of what will be learned. Because of their exposure to field-wide models of change, staff are expected to accept these changes more readily.

Staff learning and openness to contemporary museum practices will be assessed through Wilkening’s pre and post evaluation results about staff attitudes, engagement and learning. This evaluation (which will account for any changes in staffing) will provide project data that can be shared via Wilkening’s work with nonprofits across the United States and other interested museum and historical associations (such as AAM and AASLH).

Each of the speakers participating in the project’s Innovation Workforce Seminar will write a paper with their key recommendations and thoughts presented to Naper Settlement’s staff. Laura Roberts will write an introduction for this compendium of collected essays, which will be shared with the field-at-large, through blogs, session participation and webinars.

We generate more and better ideas when we have deep expertise in the area where we are trying to problem solve. Therefore, another way to build your creative thinking skills is to learn everything there is to know about a particular topic...It’s common for us museum people, when we’re first starting out in the field, to put a lot of effort into acquiring knowledge-whether its related to a specific content area (archeology, art history, physics) or to professional training ... but then we slow down considerably once we are established in a museum job. That’s enough to keep going day to day, but it is not enough for creative practice. For creative practice, you need to activate the lifelong learner inside you, around your core, day-to-day work. Think of a learning curve that never flattens out, but keeps on reaching for the sky, higher and higher. And then, ideally, eventually, we can develop learning cultures at each museum that engage and support the entire staff in developing expertise and improving skills. From Creativity in Museum Practice, Linda Norris and Rainey Tisdale, 2013
### SCHEDULE OF COMPLETION FOR 2-YEAR GRANT PROJECT

#### PROJECT YEAR 1

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#### PROJECT YEAR 2

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<th>March</th>
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<td>ORG. MANAGEMENT NAVIGATION SESSIONS</td>
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<td>SESSION #6:</td>
<td>1.5 days Naperville, IL Breakouts w/ LT, DT, EP, and ALL</td>
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<td>Project Wrap-up: 1.5 days Naperville, IL Breakouts w/ LT, DT, EP, and ALL</td>
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<td>Jane Addams Hull-House Museum, &amp; LT, DT, EP</td>
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<td>Conner Prairie History Park ALL</td>
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<td>Mountain Top Vision ALL</td>
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<td>President Lincoln’s Cottage at the Soldier’s Home ALL</td>
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<td>Minnesota Historical Society ALL</td>
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<td>BOOK #3:</td>
<td>The Art of Relevance ALL + Board</td>
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<td>ASSIGNED BLOG #3: TBD ALL</td>
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**Naperville Heritage Society (Administrator of Naper Settlement)** - IMLS Empowering Museums FY2018 Grant Proposal

**Empowering Innovation: A Community of Practice at Naper Settlement**

**Staff Participation Key:**

- **LT**: Leadership Team (CEO, COO, 2 VPs)
- **DT**: Director Team (Chief Curator & 6 Dept. Directors)
- **EP**: 5 Emerging Professionals (B&S Coord., Curator of Exhibits & Interp., Gifts Officer, Learning Exp Coord., Special Events Coord.)

- 24 staff in addition to the 3 groupings above, making up the 40-person total museum staff team (See Organizational Chart in supporting documents)

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**SCHEDULE OF COMPLETION FOR 2-YEAR GRANT PROJECT**

- 3-5 page papers from each expert compiled into compendium and shared via AAM and AASLH distribution channels (links to NS website with PDF, etc.)
- Preparation of Project Written Report
  - Project Mgr: VP-Engagement
  - Grant Manager: VP-Advancement
  - MEETING #4: Presentation of Final Report - Board-Staff Team