



**Museums for America
Sample Application MA-20-13-0288-13
Project Category: Community Anchors**

New England Aquarium Corporation

Amount awarded by IMLS:	\$149,770
Amount of cost share:	\$240,312

Attached are the following components excerpted from the original application.

- Abstract
- Narrative
- Schedule of Completion

Abstract

The New England Aquarium (NEAq) Volunteer Program has untapped potential that we propose to develop through a capacity building effort that will expand service to potential volunteers we currently cannot accommodate, while providing a higher level of engagement and increased leadership opportunities for some of our most capable current volunteers. Volunteers are a critical resource for NEAq. With more than 1000 volunteers, the program is very popular in the region. Yet it is often seen as being inaccessible due to several barriers to participation. A one-day-per-week/6-month commitment allows volunteers to build skills and provide consistent service, but is too high for many interested candidates. In addition, our acceptance rates are low; we are able to place only about 15-20% of applicants because of low turnover and a limited number of available positions. Several years ago, we began a program for “one-shot” volunteers, but these opportunities do not tend to meet the interests of those applying, nor do they meet our vision for providing great experiences for our volunteers and engaging them in our mission.

Through the Live Blue Service and Civic Leadership Initiative (LBS Initiative), we will reduce barriers by creating new, more accessible service opportunities. We will increase capacity by working with partner organizations in need of volunteer assistance and drawing on our experienced volunteers to lead episodic service efforts.

The two-year LBS Initiative will include three major efforts: hand-on, engaging episodic volunteer opportunities; leadership training; and community partnerships. Each year, 4-6 one-day service events will increase our capacity to engage volunteers who are not able to meet the rigid requirements of regular service. Service events will take place on and off-site and will include educational preparation around the environmental issues being addressed. Events will assist the many environmental organizations in our area that share our environmental stewardship mission and are in need of volunteer help. We will work with current and new organizational partners to assist in their stewardship goals.

To develop leadership among our current volunteers, we will introduce a training and engagement opportunity for those who have exhibited the interest and capacity. The Live Blue Service Leaders will participate in eight training sessions. Two cohorts of leaders will emerge from this grant period. The Year 1 group will help plan and execute the episodic service projects during year 2.

Throughout this initiative, we will share LBS Volunteer and Leader experiences with the public. We will solicit at least eight volunteer blog entries each year for our website. We will incorporate these stories within the Aquarium for the benefit of our 1.3 million annual visitors, using a large screen in our new Blue Planet Action Center, an exhibit space where we present information about ocean threats and what people can do to “live blue.”

Through an external evaluation, we will measure the success of this initiative using the following indicators:

- Developing 900 new volunteer slots over the course of two years, filled by at least 600 unique individuals.
- Volunteers’ perception of preparedness for service, increased sense of civic engagement, and increased knowledge of environmental stewardship issues.
- Relationships developed with at least 6 non-profits resulting in a minimum of 8 service projects over two years; positive feedback on services received from NEAq volunteers; and intent for future involvement.
- Recruitment, training and higher level of engagement of at least 20 leaders over the course of two years; increased understanding of project management, civic leadership, and environmental issues.

The Live Blue Service and Civic Leadership Initiative will increase the capacity and impact of our volunteer programs, expand the reach of our mission, and provide inspiration for individuals to become active in their own communities. These service opportunities will allow NEAq to be more responsive to a greater number of participants while helping other organizations fulfill unmet needs for service. By connecting individuals with hands-on activities related to specific conservation outcomes, we will increase the base of engaged and active supporters of our mission.

Narrative

1. Project Justification

The New England Aquarium (NEAq) Volunteer Program has untapped potential that we propose to develop through a capacity building effort to expand service to potential volunteers we currently cannot accommodate while providing a higher level of engagement and increased learning and leadership opportunities for some of our most capable current volunteers.

The NEAq Volunteer Program

NEAq relies on the dedication and hard work of a strong corps of volunteers working in many capacities. More than 1000 active volunteers assist 250 regular staff members with day-to-day operations and program delivery, including exhibit maintenance, care of living collections, visitor education, administrative support, and special projects in our conservation and research departments. Volunteers are a valuable resource: in 2011, they donated 108,000 hours equivalent to 59 FTEs and valued at \$2.8 million. Their contribution is also a critical element in achieving our mission of protecting the blue planet.

The NEAq Volunteer Program supports continuous learning for those who make a commitment to the institution. We require volunteers to work one full day per week for a minimum of 6 months. In return, volunteers are placed in hands-on positions that provide opportunities to learn new skill sets and gain an understanding of issues affecting the ocean and its inhabitants. Through their experiences, our volunteers become ambassadors for the Aquarium's mission, encouraging people in their own communities to "live blue." Living blue means making consumer and lifestyle choices that protect ocean life and habitats.

Needs and Opportunities

Despite the Volunteer Program's success and popularity, it is often seen as being inaccessible due to several barriers to participation. The commitment is too high for many interested candidates and our acceptance rates are low; we are able to place only about 15-20% of applicants because we have low turnover and a limited number of positions available. Several years ago, we began a program for "one-shot" volunteers, but these opportunities (such as filing and special event help) do not tend to meet the interests of those applying, nor do they meet our vision for providing great experiences for our volunteers and engaging them in our mission.

Through the Live Blue Service and Civic Leadership Initiative (LBS Initiative), we will reduce barriers by creating new service opportunities that are more accessible to applicants who might otherwise not be able to meet our requirements. We will increase capacity through two means: working with partner organizations in need of volunteer assistance and drawing on our experienced volunteers to lead episodic service efforts.

NEAq works collaboratively with many organizations that share our environmental stewardship mission, including local conservation commissions, watershed associations, state and federal agencies, nature/science centers, and other non-profits. Many have unmet volunteer needs; we have interested volunteers but currently lack an effective way to mobilize them to help out. Through this initiative, we will work with partners to assess their needs, identify those that best match our objectives, and develop a process for utilizing our volunteers to increase capacity for both organizations. Episodic service events will provide engaging and rewarding opportunities for an expanded volunteer corps and will be led by a new cadre of Live Blue Service Leaders.

Among our current volunteers are tenured and accomplished members whom we would like to offer a deeper level of engagement and personal growth. Through the LBS Leader Program, we will provide training in volunteer leadership and civic engagement and then work with participants on planning and leading volunteers in an event of their own design. These events will provide exciting episodic opportunities for an estimated 600-900 volunteers over two years (depending on repeat service) and thousands more in the coming years.

This initiative is based in part on a similar effort to expand opportunities for teens. The Live Blue Ambassador program invites teens ages 13 and older to take part in different types of service learning opportunities,

including habitat clean-up and restoration, public education and outreach, and citizen science. For each of these episodic opportunities, participants learn about the environmental issues they are helping to address.

Live Blue Service and Civic Leadership Initiative: Outcomes and shared benefits

Volunteerism is a force for civic and personal change. According to the Corporation for National & Community Service's 2010 analysis of service-related census statistics, "People who serve by volunteering, by working directly with their neighbors to fix community problems, or by attending public meetings where community issues are discussed, are more likely to participate in other elements of civic life." (Civic Life in America: Key Findings on the Civic Health of the Nation). Through service, volunteers connect with each other, with their institutions, and with their communities. Becoming an active volunteer provides individuals with an understanding that they are empowered, increasing the likelihood that they will become civically engaged.

This initiative will increase opportunities for service and then provide a clear path for those interested in deeper engagement and leadership. NEAq and partner agencies will benefit from the expanded volunteer workforce, volunteers will have learning opportunities and meaningful experiences, and we will help to build social capital and civic engagement in environmental stewardship. The initiative also addresses an important objective from NEAq's strategic Action Plan, to create "new program opportunities for adult learners, including both learning experiences and opportunities for sustained engagement with the Aquarium."

2. Project Work Plan

This initiative comprises three major efforts that together enhance the NEAq Volunteer Program: volunteer service opportunities, leadership training, and community partnerships. It will be managed by Lace Anderson Garland, CVA, NEAq Manager of Volunteer Programs and Internships, with support and guidance from William Spitzer, Vice President of Programs, Planning, and Exhibits.

Garland's first steps in launching the effort will be to meet with the consultants: RMC Research Corporation will be conducting external evaluation of the initiative (described below); Jen Hetzel Silbert of Innovation Partners International (see Supportingdoc1) will consult on the leadership development aspects of the program; and two highly qualified individuals have offered pro-bono consulting. (See attached letters in Supportingdoc5.)

Concurrently, Garland will recruit and hire for a new position, the Live Blue Service Coordinator to coordinate the leadership institute, develop relationships with community partners, recruit volunteers, and organize service events. (Job description is attached as Supportingdoc2.) This individual will also work with NEAq's communications team to document the LBS Initiative successes and promote via social media and our website.

Activities and Timeline

Live Blue Service: Episodic volunteer opportunities

Periodic, one-day volunteer opportunities that require no further commitment will increase our capacity to engage volunteers who are not able to meet the rigid requirements of regular service. Service events will take place on and off-site and will include educational preparation around the environmental issues being addressed. They will be managed by the Live Blue Service Coordinator, with support and supervision from Garland.

Year One

October 1-December 31, 2013

- Develop policies and procedures for engaging volunteers in offsite volunteer projects.
- Develop curriculum for orientation and a process for on-boarding new volunteers into the LBS Initiative.
- Implement an enhanced volunteer tracking system, building on or supplementing the existing Volgistics software, which will not adequately accommodate an episodic service program. The new software will build in enhanced methods of recruitment, click-to-sign-up registration, improved reporting and data analysis.

January 1- March 31, 2014

- Select 4-6 appropriate opportunities and finalize logistics, required training, and educational components.

- Design a recruitment strategy and work with in-house marketing and communications team to design and implement recruitment for the new LBS Initiative.
- Conduct orientations. Participants gain insight into the importance of volunteerism, environmental concerns affecting New England, NEAq's mission and programming.

April 1-September 30, 2014

- Launch first cycle of projects managing pre-project communications, training and educational components, onsite problem solving and follow-up assessment/evaluation of service for the agency.
 - 4-6 projects occurring within this period will engage 15-25 volunteers from NEAq's episodic volunteer pool for approximately 4 hours of service related to environmental stewardship.
 - NEAq Volunteer Department will plan one large scale project which will work to engage 100 volunteers for 4 hours of service related to environmental stewardship.
- Continue to offer orientations for new LBS volunteers.
- Hold an appreciation event for LBS volunteers. Costs are not included in the IMLS budget.

Year Two

October 1-December 31, 2014

- NEAq will research and design a large scale Day of Service to engage 300 LBS volunteers in 2015. Volunteers will receive preparatory training and/or education materials around specific stewardship topics. We anticipate 300 available opportunities, each lasting 2 hours. As an example, we annual hold a free on-site celebration of World Ocean Day each June, which would benefit from a larger contingent of volunteers. The 5-hour program takes place across our outdoor campus and extends to the public Rose Kennedy Greenway. It features activities for kids and adults presented by NEAq and 28 partner organizations. Activities include music, sustainable seafood cooking demonstrations by chefs from local Boston restaurants, an open house on the IFAW Song of the Whale research vessel, free cruises by Boston Harbor Cruises, a Sea Perch ROV demo, scavenger hunts, music, and more.

January 1- September 30, 2015

During 2015, the Volunteer Department will incorporate findings from the first year's evaluation in planning and launching the second round of projects. We will bring in Service Leaders (described below) to help plan these events and manage pre-project communications and onsite problem solving. 4-6 projects will engage 15-25 volunteers as in 2014; 3 projects will engage 100+ volunteers and one project will serve 300.

Live Blue Service Leadership Program

To develop leadership among our volunteers, we propose to offer a training and engagement opportunity for those who have exhibited the interest and capacity to become leaders. The Live Blue Service Leaders (LBS Leaders) will participate in a training program and help plan and execute service projects described above. Garland will plan this in consultation with Silbert of IPI, also consulting with current volunteers and others who have offered pro-bono assistance. (See Supportingdoc5.) Logistics will be managed by the LBS Coordinator.

Each year's class will participate in eight, three-hour sessions that will deliver a thorough understanding of the importance of community service, volunteer and project management, NEAq's mission and conservation efforts, regional environmental issues, and how to encourage people to "live blue" by becoming stewards for the oceans. (Draft curriculum outline attached as Supportingdoc3)

October 1- December 31, 2013

- To launch this effort, Volunteer Department staff will work with Consultant Silbert to:
 - Assess current opportunities for volunteers including education, leadership and community mobilization.
 - Advise NEAq staff on needs discovered through assessment, assist in research, development of curriculum components, and design of lesson plans appropriate to LBS Leadership Program.

- Train the staff (3) of the Volunteer Programs Department to deliver the Service Leadership curriculum.
- Provide ongoing consultation for problem solving and program adjustments based on evaluation.
- The Volunteer Department will develop policy and procedures (communications, recruitment, parameters for Service Leader designed projects, etc) ensuring all groundwork is in place for launch.

January 1- March 31, 2014

- Design a recruitment strategy and work with in-house communications team to design and implement marketing strategy for the LBS Leader program.
- Assemble a review committee to select 10 participants representing a cross-section of NEAq volunteers.
- Work with consultant on training to deliver the curriculum.

April 1-June 30, 2014

- Launch trainings for 2014-2015 class of LBS Leaders. Participants attend three sessions during this period focused on community service, volunteer management, and NEAq's mission.
- During this period, LBS Leaders will have the opportunity to gain a deeper understanding of volunteerism in action by shadowing Volunteer Department staff as they work to develop and deliver service projects in the field (as described above.)

July 1- September 30, 2014

- Training continues with a second set of three sessions. Participants gain a deeper understanding of environmental stewardship and project management.
- LBS Leaders will have opportunities to co-lead LBS events alongside NEAq staff. They will be asked to reflect upon experiences, assess the effectiveness of the opportunities and make recommendations.
- LBS Leaders will plan an LBS volunteer appreciation event. Costs are not included in this budget.

October 1-December 31, 2014

- Training program will continue with the final two sessions. These will provide a deep dive into New England-based conservation concerns and a study of successful New England-based environmental non-profits and service projects.
- LBS Leader participants will team up to design and propose service projects for potential inclusion in the LBS Calendar. To create proposals, teams will be asked to assess their selected community, select a focal environmental concern, research that concern, and identify potential actions.
- LBS Leaders will be recognized at our Volunteer Appreciation Night. Costs are not included in this budget.

January 1-March 31, 2015

- LBS Leaders will meet monthly with staff to develop their proposed projects. Participants will reach out to community organizations and develop recruitment strategies and educational components.
- NEAq Staff will assess the proposed projects and select viable initiatives for the 2015 LBS calendar.
- Launch 2015-2016 Service Leader cycle
 - With evaluator, assess Year 1 curriculum and strategy. Adjust as necessary.
 - Assemble a review committee to select 20 participants.
- NEAq Volunteer Department will review participation and interests of 2014-2015 Service Leaders. If appropriate candidates exist, they will be invited to assist with training and mentoring the 2015-2016 class.

April 1- September 30, 2015

- 2014-2015 LBS Leaders will continue implementing successful projects.
- Volunteer Department will launch training for 2015-2016 class. The curriculum will follow the first year's curriculum but with adjustments made after evaluation.
- The new round of LBS Leaders will be given the opportunity to co-lead LBS activities alongside an NEAq staff person and/or successful Leader from the 2014-2015 group.

- Service Leaders help plan appreciation event for LBS volunteers. Costs are not included in the budget.

Community Partnerships

There are numerous agencies and environmental organizations in Eastern Massachusetts that share our environmental stewardship mission and are in need of additional volunteer help. By increasing engagement with some of our current partners and building new partnerships, we will be able to expand our volunteer program beyond our walls, providing new mission-oriented service opportunities for our volunteers; increasing our engagement with the local community; and strengthening our community profile. At the same time, we will assist our service partners in achieving their own program and mission goals. Examples of partners and projects include: beach cleanups with a state agency (Dept of Conservation & Recreation for a state-owned beach, for example) or community (e.g., city of Revere for their beach); a habitat restoration project at a salt marsh, done with a partner such as a town, conservation agency, nonprofit (e.g., Trustees of Reservations); assistance with the annual Town of Weymouth Herring Run clean-up; participation in horseshoe Crab spawning survey; or public education/outreach at Town Beach in Sandwich MA. The existing Live Blue Ambassador teen program has had success with several of these partners. The LBS Coordinator will reach out to potential partners and manage the relationships, with support and guidance from Garland.

October 1-December 31, 2013

- Develop communications and language regarding the Live Blue Service Initiative to use while engaging and recruiting potential partner agencies.
- Design core criteria for agency partnership in the LBS Initiative.
- Research and vet potential partner agencies, seeking 8-10 organizations that meet our criteria and offer excellent service opportunities for our episodic volunteers.

January 1- March 31, 2014

- Establish communication with the 8-10 potential partner organizations and set up in person informational meetings to inquire about potential service offerings.
- Select 4-6 appropriate service opportunities and work with partners on finalizing logistics.

April 1-September 30, 2014

- Launch first cycle of projects as described above, managing pre-project communications, onsite problem solving and follow up assessment/evaluation of service for the agency.

October 1-December 31, 2014

- Develop and deliver a component of appreciation/recognition for participating agency.
- Assess need for program growth and research up to 5 additional partners.

January 1- March 31, 2015

- Establish communication with the potential partner organizations. Hold in-person informational meetings to discuss potential service offerings.
- Select 6 or more (if appropriate) service opportunities for the 2015 cycle and finalize details.
- Establish meetings with organizations on behalf of/alongside Service Leader partners.

April 1-September 30, 2015

- Launch second cycle of projects as described above.

Evaluation

RMC Research Corporation will conduct an external evaluation. (Letter, budget and summary of plan are attached as Supportingdoc4). RMC will create formative and outcomes-based evaluation and assess the impact on participants including episodic volunteers, Service Leaders, and representatives from partner agencies.

During the first year, evaluation will focus on three areas 1) the success of the episodic volunteer opportunities from the volunteer perspective; 2) the effectiveness of collaborating with community partners; and 3) the impact

of the LBS Leader training. These data will identify strengths and weaknesses to inform planning for the second year components including orientation, curriculum and recruitment of potential Service Leaders.

During the second year, data will be collected from episodic volunteers and partner agencies around the LBS Leader projects. Upon completion of the Leader directed-projects, reflective data will be obtained from the Leaders about their skill enhancement, knowledge gained, and intentions for future involvement. Training for the second-year cohort will provide additional data on the program's effectiveness. A final report will present medium-term findings and will address the success of meeting program goals. (Attached Schedule of Completion provides details on timing and number of surveys.)

Sharing Results

Throughout this initiative, stories will be shared through the NEAq website and on social media. Our website hosts several ongoing blogs with loyal followers. We plan to add a volunteer blog and invite LBS Leaders and Volunteers to share stories about their experiences and their motivation for volunteering. We plan to solicit at least eight Live Blue Service Initiative blogs each year. We also will incorporate volunteer stories within the Aquarium for the benefit of our 1.3 million annual visitors. A new exhibit, the Blue Planet Action Center, will open in July 2013. This interactive space will present information about ocean threats and what people can do to "live blue." We will use information from the blog on one of the exhibit's large screens. This is not included in the budget as the exhibit and its components were fully funded through a recently completed capital campaign.

Resources

The New England Aquarium is committed to increasing the capacity of our volunteer programs and will support the activities of this proposal beyond what is listed as matching support. Various regular staff members will help achieve the goals of this proposal including staff of our communications team, who will ensure that volunteer stories are shared on our website and social media. Education and other program staff will contribute time to the Leadership training sessions. In addition, the New England Aquarium will support staff travel to and from service projects and partnership meetings.

Explanation of Surplus/Deficit

NEAq takes definitive action to create operating surpluses (excluding depreciation expense, extraordinary non-cash income or expense and unrealized gains/losses) in order to meet capital improvement and debt service requirements. Surpluses are essential to our viability as a private not-for-profit institution. Long-term financial stability requires further debt reduction, rebuilding of unrestricted reserves and growing an endowment.

During the past ten years, NEAq has had operating surpluses as defined above. It is important to note that results reported on the IMLS Program Information Sheet are taken from NEAq's Form 990 which includes both temporarily restricted and permanently restricted changes in net assets. The deficit reported in this proposal for 2010 was due to a decrease in temporarily restricted (non-operating) net assets of \$4.2 million. That decrease was caused by the release from restriction of funds in excess of new temporarily restricted funds received during the year. In 2011, fundraising for our capital campaign resulted in a large surplus (again in temporarily restricted net assets), the expenses associated with those restrictions will be incurred in 2012 and 2013.

3. Project Results

Outcomes and outputs of the Live Blue Service and Civic Leadership Initiative are diagrammed on the attached Logic Model. (See Supportingdoc6.)

Products

The LBS Initiative will create several products including:

1. A strengthened volunteer management and tracking system that is both user-friendly for the participant and highly efficient for our staff. This product will dramatically increase our institution's capacity to administer service projects and serve participants, allowing us to expand our impact in the community and engage a range of non-profit partners and clients.

2. A new orientation program, required for new episodic volunteers. This orientation will provide necessary information to our new volunteers while also exposing them to the institution's mission and vision of community-wide ocean stewardship in a fun and engaging way.
3. A leadership curriculum, including activities and handouts that will be used during and after the grant period.
4. A series of presentations and written media to be published online and within the Blue Planet Action Center. These products will share stories, successes and challenges faced by active volunteers while providing opportunities for visitors to learn how to take action on behalf of the blue planet, and reaching a broad audience beyond those directly involved in volunteering.

Measures of Success

We will use the following indicators (see logic model and evaluation plan) to assess the success of this program:

1. Volunteers: meeting recruitment metrics of 900 potential volunteer slots created over the course of two years, filled by at least 600 unique individuals; perception of preparedness, sense of civic engagement gained through service; increased knowledge of environmental stewardship issues; and intent for future involvement.
2. Partners: relationships developed with at least 6 non-profits resulting in a minimum of 8 service projects over two years; positive perception of services received from NEAq volunteers; and intent for future involvement.
3. Service leaders: recruitment, training and higher level of engagement of at least 20 leaders over the course of two years; increased understanding of project management, civic leadership, and environmental issues.

Sustainability

This two year project is intended to demonstrate the feasibility and value of the LBS program, enabling us to make a case for continuing the program on an ongoing basis. Based on the program's success in creating new learning, service, and leadership opportunities; increasing community engagement through new partnerships; and increasing ocean stewardship, it will become a core part of our Volunteer Department. We will have developed the resources, partnerships, products, and staffing capacity to sustain the program. An expanded corps of Leaders will help manage logistics and deliver program elements. Ongoing staff and program costs will be incorporated into the NEAq operating budget, and we will seek foundation and other sources to supplement program funding.

Outcomes

The Live Blue Service and Civic Leadership Initiative will increase the capacity and impact of our volunteer programs, expand the reach of our mission, and provide inspiration for individuals to become active in their own communities. These service opportunities will allow NEAq to be more responsive to a greater diversity of participants while helping other organizations fulfill unmet needs for service. By connecting individuals with hands-on activities related to specific conservation outcomes, we will increase the base of engaged and active supporters of our mission.

The LBS Leader program will support and help sustain these efforts. Through information gained in the training sessions and experience helping coordinate and manage other volunteers, these individuals will be encouraged to become engaged at a higher level of leadership, service, and environmental stewardship.

The New England Aquarium's ultimate goal is to protect the oceans. Toward this goal, we provide our 1.3 million annual visitors with information about what they can do in their daily lives to reduce their impact on the environment. We encourage people to "live blue" by considering how their lifestyle choices may affect ocean health. By sharing volunteers' stories, successes and challenges within the building, on our website and through social media, this initiative will inspire people to take a more active role by becoming volunteers and civic leaders in their own communities. This initiative will increase the number of individuals motivated by NEAq's conservation mission, given opportunities to work toward it, and equipped with the skills and knowledge to motivate others.

New England Aquarium--Live Blue Service Initiative

