



## National Leadership Grants for Museums

Sample Application MG-10-17-0040-17

Project Category: Learning Experiences

Funding Level: \$50,000-\$1,000,000

### San Jose Children's Discovery Museum

Amount awarded by IMLS: \$495,625

Amount of cost share: \$517,532

Attached are the following components excerpted from the original application.

- Abstract
- Narrative
- Schedule of Completion

Please note that the instructions for preparing narratives for FY2018 National Leadership Grants for Museums differ from those that guided the preparation of FY2016 and FY2017 applications. Most obviously, project categories have changed and have increased in number from three to four. Be sure to use the narrative instructions in the FY2018 Notice of Funding Opportunity for the grant program and project category to which you are applying.

**Children's Discovery Museum of San Jose  
Cultural Competence Learning Institute: An Expanded Reach**

**Abstract**

Museums have long recognized their role welcoming people of all backgrounds as visitors, employees, and board members. Since the 1992 publication of *Excellence and Equity*, inclusion in museums generally has followed a familiar track that relies on education and outreach efforts to welcome diverse audiences. The specific groups a museum seeks to include will vary and may include ethnic-specific communities, people with disabilities, LGBT communities, and others. Inclusion efforts that expand beyond programmatic efforts to become an organic part of the organization and flow through all aspects of operations are less frequently found.

Children's Discovery Museum of San Jose's (CDM) deep commitment to inclusion and diversity began more than two decades ago with multifaceted, institution-wide initiatives to establish relationships with key minority audiences in Silicon Valley, particularly the Latino and Vietnamese communities. Inclusion at CDM is not limited simply to outreach and the visitor experience but rather is the foundation of our work with our staff, Board and audience. Through decades-long, deeply intensive and intentional organizational capacity building, today, all of CDM's functions and systems, from exhibits and programs, to operations and facilities, to events and human resources, build upon this commitment to inclusion.

Much as Silicon Valley models inclusive business practices for the U.S. business community, CDM's passion for, expertise in, and commitment to inclusion offer a model for the broader museum field. Over the past three years, CDM developed a new training model for museums that reaches beyond externally focused diversification to internal organizational change that leads to inclusive practices throughout the institution. The *Cultural Competence Learning Institute* (CCLI) is both a professional development process and set of resources designed to help museums increase their institutional capacity around diversity and inclusion.

Created with support from a 2012 IMLS grant and in partnership with the Association of Children's Museums (ACM), the Association of Science-Technology Centers (ASTC), and Garibay Group, CCLI invites and supports museums to engage in an organizational change process by identifying and building from their strengths in order to maximize the benefits of diversity within their workforce and improve the services offered to people from different backgrounds. CCLI has proven very successful for participating museums, who report enduring, positive impact and that success has led to interest from the broader museum field to participate.

Children's Discovery Museum of San Jose proposes the *Cultural Competence Learning Institute: An Expanded Reach* with the following goals:

1. Expand the scope of CCLI to work with 15-18 museums from across museum sectors in organizational change processes to become more culturally competent organizations -- internally and externally;
2. Shift the national dialogue in museums about diversity, equity, and inclusion from a focus on traditional outreach efforts by individual institutions to a field-wide conversation about organizational change as a crucial element of cultural competence and inclusive practice for individual museum staff; and
3. Develop benchmarks/metrics/indicators to gauge organizational change around cultural competence and to provide the ability to document shifts in museums across discipline by conducting a field-wide National Landscape Survey to help in assessing progress. We will work with three national associations, including ACM, ASTC, and the American Alliance of Museums (AAM) on the Survey with the goal of creating a community of practice that will help sustain museums' commitment to inclusive practice.

The ultimate goal of the *Cultural Competence Learning Institute: An Expanded Reach* is to develop, track, promote, and sustain organizational change within individual institutions and field-wide in order to build museums' capacity to engage with issues of inclusion and cultural competence. CDM and its partners believe that CCLI's peer-driven approach to diversity and inclusion responds to the need voiced by the broader museum field and can help shift twenty-five years of conversation about diversity to tangible actions that will empower museums to provide high-quality, inclusive experiences that reflect and respond to the needs of the entire community.

## 1. Project Justification

Museums have long recognized their role as gathering spaces, their ability to initiate dialogue that helps to create a sense of community, and their responsibility to welcome people of all backgrounds as visitors, employees, and board members. The landmark 1992 report *Excellence and Equity: Education and the Public Dimension of Museums* by the American Alliance of Museums, then known as the American Association of Museums, helped codify inclusion as a standard for all types of museums. Focusing the field's attention on the idea that museums must listen, reflect, and react to the needs of their local communities, this document strongly influenced how museums define their responsibilities to their communities. Its publication "recast the definition of excellence not merely to include equity, but to require it—for museums to embrace cultural diversity in all facets of their programs, staff, and audiences, in order to have any hope of sustaining vitality and relevance."<sup>1</sup>

Inclusion in museums frequently has followed a familiar track that relies on education and outreach efforts to welcome diverse audiences. These efforts often depend upon particular staff for their ongoing success, may be sporadic, and assume that existing exhibits and programs are of interest to the targeted audiences. In 2004, Bonnie Pittman and Ellen Hirzy reiterated the need for museums to "move beyond simply setting goals and developing outreach programs in order to reach a deeper level of engagement. Visitors must be integrated into the museum's vision and identity, permeating all levels of the organization."<sup>2</sup> Inclusion efforts that expand beyond programmatic outreach efforts to become an organic part of the organization, stemming from the museum's mission, vision, and values, embraced by the museum's governing body, and flowing through all aspects of operations are found less frequently. Achieving Pittman and Hirzy's vision of integration requires approaching inclusion efforts as *organizational culture change efforts*, which require attention to strategic leadership approaches, reflection on organizational norms in communications, staffing, training, and other policies, and an understanding of culture change processes.<sup>3</sup>

The ideas of *inclusion* and *diversity* are complex, and different museums interpret and use these terms in different ways. This proposal defines *inclusion* as bringing people who have not historically been part of a dialogue or process into the group, activity, or practice. We also use the term to describe the processes of social change and of addressing inequities in the people museums represent. We use *diversity* to refer to all of the ways in which human beings are similar and different from each other, including demographics, experiences, beliefs, etc. The specific groups a museum seeks to include will vary and may include ethnic-specific communities, people with disabilities, LGBTQ communities, people of different religious beliefs, older adults, youth, and people with differing political beliefs. As noted above, *inclusion* and *diversity* are the terms most commonly used to describe equity efforts in the museum field. In this proposal, we will focus on the idea of *cultural competence*—an ongoing learning process that results in an *inclusive* environment in which the benefits of *diversity* are maximized for all stakeholders.

In the words of Tim Sands, president of Virginia Tech University, when calling on alumni to recommit to the university's motto, *Ut Prosim* (That I may Serve): "You cannot serve those you don't understand. This is much more fundamental than politics. Empathy takes work, time, commitment, and courage. I ask you to commit to having these difficult conversations as thoroughly and as frequently as your humanity will permit. While your individual contribution will seem small, you will be modeling the only behavior that will lead us forward."<sup>4</sup> Empathy is a key element of cultural competence, and both require patience, commitment, and hard work to create individual and organizational change.

The San Jose Children's Discovery Museum (CDM) has long recognized the opportunity to bring the diverse residents of San José together. San José is known as the capital city of Silicon Valley and is home to the high-tech and electronics industries. According to the 2010 census, more than one-third of San José's residents are of Hispanic background; another one-third are of Asian background; approximately forty percent are of Caucasian background.<sup>5</sup> Thirty-eight percent of the city's population is foreign-born.<sup>6</sup> San José also is a community of

extreme inequality: the Human Development Index (a measure of life expectancy, education, and per capital income) gives East San José a score of 4.85 out of 10, while nearby Cupertino, home of Apple, receives a 9.26.<sup>7</sup>

CDM's mission, *to inspire creativity, curiosity, and lifelong learning*, means that we work to welcome all the children in our community to the museum, no matter their economic, racial, or immigration status. Our approach is grounded in the process of cultural competence, meaning that we keep an awareness of our own cultural identities and views about difference while desiring to learn and build upon the varying cultural and community norms of people from other backgrounds. Our awareness of our own perspectives as well as our commitment to understanding our visitors, employees, board members, and community members' perspectives helps to inform and expand our work in the museum.

One example of the growing cultural competence of our museum is reflected in our human resources practice.

*Cultural Competence: a Lifelong Learning Process*

- *Results in knowledge, skills, behaviors, and attitudes that allow us to work effectively with others from different cultural backgrounds;*
- *Increases organizations' ability to maximize the benefits of diversity within their workforces;*
- *Improves the services we offer stakeholders.*

In this instance, a new hire to the museum revealed that they are transgendered and were in the process of transitioning. Based on our own internal trainings and policy supports, our leadership team was able to work with this employee to discuss and co-create strategies to support their transition experience and to provide guidance to the rest of the CDM team on transgender issues and do's/don'ts on colleagues' medical issues. We are very proud of this moment, since we recognize that earlier in our cultural

competence journey, we would have relied on privacy policies and not actively acknowledged this situation with our new team member nor with the rest of the staff. Instead, our team had both the personal awareness tools and workplace policies to create a truly inclusive and respectful path forward for the entire CDM team. While this example reflects an internal change, our experience is that it is just this type of change that helps the museum "walk its talk" with respect to cultural competence, and directly informs all aspects of the visitor experience as well.

Five years ago, we realized that CDM's work to create a culturally competent staff and board working in tandem with our community did not mirror practice in the broader museum field. Despite more than twenty-five years of diversity and inclusion efforts in the museum field since *Excellence and Equity's* publication, boards and staff at individual museums still may not fully understand inclusion or know how to practice it. As William Harris, then Vice Chair of the AAM Board of Directors, acknowledged in a 2014 interview, "While there are decades worth of work, we need to really look at why diversity and inclusion [haven't] gotten traction."<sup>8</sup>

Conversations in the museum field continue to reflect museums' desires to be inclusive organizations. In 2016, the annual meetings of the American Alliance of Museums (AAM), the American Association for State and Local History (AASLH), the Association of Children's Museums (ACM), the Association of Science-Technology Centers (ASTC), and the Association of Zoos and Aquariums (AZA) included at least one concurrent session (if not more) that supported inclusion efforts.<sup>9</sup> In 2017, the theme of AAM's annual meeting will be diversity and inclusion, examining museums as "Gateways for Understanding: Diversity, Equity, Accessibility, and Inclusion."<sup>10</sup> In addition, each of the above associations provides information to their members about the importance of diversity and reflecting their communities.<sup>11</sup>

Because CDM is an active member in the Association of Children's Museums (ACM) and the Association of Science-Technology Centers (ASTC), we approached both associations about how our work at CDM could be a model for other museums. We realized that existing inclusion resources do not support transformative processes to incorporate inclusion in all aspects of museum operations. Instead, most focus on including a particular audience segment or diversifying a program.<sup>12</sup> Museums that want to create organizational change and embrace

inclusion in their business practices must either look for resources outside the museum field or navigate the process independently. We believed that, just as Silicon Valley models inclusive practices for the U.S. business community, CDM's passion for, expertise in, and commitment to inclusion could offer a model for museums.

With the support of a 2012 IMLS 21st Century Museum Professionals grant, Children's Discovery Museum created and tested a model for the museum field, drawing from the literature on organizational change and strategic leadership,<sup>13</sup> that focuses on the design and implementation of an internal organizational change initiative that lays the foundation for a culture of lifelong learning and awareness building that is critical for becoming a truly culturally competent organization. CDM developed the *Cultural Competence Learning Institute (CCLI)* in partnership with ACM, ASTC, and Garibay Group, a research and consulting firm. Then, eleven museums (six children's museums; four science centers; one zoo) tested CCLI's capacity to support organizational change that leads to the growth of culturally competent museums.

Building from the 2009 IMLS report *Museums, Libraries, and 21st Century Skills*, the *Cultural Competence Learning Institute* focuses on three 21st century skills that are particularly relevant to helping institutions advance their cultural competence: creativity and innovation, communication and collaboration, and global awareness. CCLI introduces a new model for museums to consider these 21st century skills within the context of inclusion and diversity along with additional tools and resources such as ongoing peer support for staff.

The CCLI curriculum (see Supporting Document 2) encourages institutions to identify and build from their strengths in order to maximize the benefits of diversity within their workforce and improve the services offered to people from different cultural backgrounds. As the evaluation of the pilot phase of the *Cultural Competence Learning Institute* indicates, museums' participation in the CCLI Cohort process leads to organizational change, resulting in greater cultural competence. (See Supporting Document 5 for evaluation of the CCLI pilot.)

The pilot phase of CCLI has proven successful for the participating museums, and that success has led to increased interest from other museums. At the 2016 ASTC annual conference, seventy-five people attended a concurrent session about the *Learning Institute*, and the majority of them expressed their avid interest in participating. In September 2016, we issued a formal call to participate in the 2017 CCLI Cohort in the final year of our IMLS grant. 16 applications were received from museums, but we could only accommodate 5.

As evidenced by the demand to participate in CCLI in addition to ongoing need as indicated by museum conferences and response from current and past CCLI participants, we are proposing the *Cultural Competence Learning Institute: An Expanded Reach*. Our proposed project has these major goals:

- 1) Expand the scope of CCLI to work with 15-18 museums from across the field in organizational change processes to become more nimble, culturally competent, and inclusive organizations, both internally and externally;
- 2) Shift the national dialogue in museums about diversity, equity, and inclusion from a focus on traditional outreach efforts by individual institutions to a field-wide conversation about organizational change as a crucial element of cultural competence and inclusive practice for individual museum staff, museum organizations, and national associations.
- 3) Develop benchmarks/metrics/indicators to gauge organizational change around cultural competence, to provide the ability to document shifts in individual institutions and national field-wide initiatives and associations.
- 4) We would like to gauge the impact of the CCLI effort on the wider museum field's inclusion efforts. We propose a National Landscape Survey to **study the awareness of the core components of CCLI model and the influence of participating institutions** so that we can assess our progress.
- 5) Build the broad museum field's capacity for enriching the national cultural competence dialogue by cultivating a cadre of Mentors/Coaches to support local work and inform the national conversation.

- 6) Engage top business consulting firms, expert advisors, and national associations to investigate the resources, business practices, and personnel necessary to sustain the *Cultural Competence Learning Institute beyond IMLS* funding.
- 7) Implement a nationwide public relations campaign to raise the profile of the national dialogue about diversity, inclusion, equity and access, emphasizing the *Cultural Competence Learning Institute* as an important tool that supports positive internal organizational change as the first step in creating lasting best practice around cultural competence.
- 8) We will continue to **evaluate the effectiveness of CCLI** to improve Cohort museums' cultural competence.

The ultimate goal of the *Cultural Competence Learning Institute: An Expanded Reach* is to develop, track, promote, and recognize organizational change within individual institutions and field-wide in order to build museums' capacity to engage with issues of inclusion and cultural competence, both internally and externally. We believe that CCLI answers the need for effective diversity and inclusion training voiced by the broader museum field. We want to help shift the museum field from twenty-five years of conversation about diversity to tangible actions that empower museums to make organizational change that supports high-quality, inclusive experiences that reflect and respond to the needs of the entire community.

Through *CCLI: An Expanded Reach*, we propose to expand CCLI's reach to the broader museum field and create value and recognition of the *Cultural Competence Learning Institute* as a tool to support inclusion. We have designed this project with a three-year timeline, and each year's work will build upon the previous year's activities. Children's Discovery Museum of San Jose will manage and oversee *CCLI: An Expanded Reach*, and our partners will contribute to specific activities germane to their missions and reach.

## 2. Project Work Plan

Children's Discovery Museum of San Jose, the Association of Children's Museums, the Association of Science-Technology Centers, and Garibay Group have worked closely over the past four years to develop and pilot the *Cultural Competence Learning Institute*. The yearlong Institute uses a series of in-person and virtual trainings to create a commitment to inclusion in every aspect of museum operations. (See Supporting Document 2 for the CCLI curriculum and framework.)

During the year-long *Cultural Competence Learning Institute* Cohort, each museum:

- articulates a strategic initiative that can be addressed and implemented by an identified leadership team.
- develops strategies, timelines, and processes for achieving the strategic initiative.
- receives facilitated instruction to increase institutional capacity for cultural competence.

Museums that participate in CCLI identify a strategic issue that they want to address through the lens of cultural competence. At least two staff members represent each museum at in-person and virtual coaching sessions, and they work with the museum's leaders and staff to share results and increase cultural competence throughout the museum. CCLI builds from the successful cohort model developed for the IMLS-funded Noyce Leadership Institute; cohorts of four to six museums support one another by sharing experiences, learnings, and challenges.

In *Cultural Competence Learning Institute: An Expanded Reach*, we propose to continue this work, but **extend the Institute so that it reaches different types of museums** than those that participated in the pilot phase. We believe the Institute can positively affect all types of museums, and we want to test that assumption.

During each of the three years of this project, CDM will work with a cohort of four to six museums, reaching twelve to eighteen museums over the three-year project. We will work with our association partners (as well as other national and regional museum associations) to share information broadly about CCLI and recruit participants. Additionally, we will invite our museum association partners to attend training meetings as

observers, which we believe will help inform each association about issues that museums confront in an organizational change process as well as increase their knowledge of CCLI and cultural competence.

We will identify participants through an application process and will use a variety of criteria (museum readiness, museum discipline, governance, budget size, geographic location, etc.) to ensure a balanced cohort. We want to reach beyond the children's museum and science center disciplines to reach all types of museums, as well as evaluate the Institute's effectiveness with museums with varying governance structures, budget sizes, geographic locations, and community sizes.

As we have piloted CCLI, our hypothesis that, in order for the CCLI experience to be successful, participating museums must meet a certain threshold of readiness and commitment to explore complex, sensitive social issues that affect the museum, its community, and society. These criteria include a history of effort in these areas either through trainings or programmatic efforts, acknowledgement and direct support of the chief executive, and the ability to identify internal issues impeding progress. Not every museum is ready to implement a process designed to transform the museum's operations and relationships with its stakeholders. We recognize that CCLI's expansion should be coupled with the development of benchmarks to indicate institutional capacity to engage with issues of inclusion and cultural competence, both internally and externally.

Museums that participate in CCLI identify a strategic goal and then use a process of self-assessment, goal setting, strategy development and implementation, and evaluation to create organizational change. Each museum begins CCLI by completing the Cultural Competence Self-Assessment Survey. The Self-Assessment, which we developed during the pilot phase, surveys museum staff to identify institutional strengths and areas of growth. Data is analyzed using Survey Monkey tools and placed in a report template developed by Garibay Group. Each museum uses its report as a valuable springboard for goal setting and strategy development. Upon completion of the Self-Assessment, each cohort attends an in-person, introductory workshop, held in a geographically central location, along with monthly learning and sharing opportunities, which are offered virtually through an online platform provided by ASTC. These ongoing trainings and "check in" opportunities ensure that museums progress toward successful completion of their strategic initiatives. Jenni Martin, CDM's Director Strategic Initiatives, leads each training with support from ACM, ASTC, and Garibay Group.

Throughout the three CCLI cohorts, CDM will be working to answer the question: *How can we best support individual museums from a variety of leadership structures and other factors to create organizational change focused on cultural competence?* Participant feedback and evaluation results will help us adjust and refine the CCLI curriculum to ensure optimum effectiveness. For example, evidence from previous CCLI cohorts indicates that CEO engagement and support helps to indicate whether an organization will improve its cultural competence. As larger museums, or museums with different governance structures participate in CCLI—for example, an art museum with a \$100 million operating budget or a state-governed history museum—we recognize the need to develop new supports that respond to the unique needs of those institutions.

Each of the museums that participate in the *Cultural Competence Learning Institute* makes a major institutional commitment, both financially and in staff time. Participating museums agree to hold regular internal meetings about their CCLI work. For example, museums agree to hold monthly leadership team meetings and quarterly all-staff meetings in addition to weekly core team meetings. Core team members also agree to travel to two in-person meetings. As museums implement their strategic goals, we expect that each museum will contribute up to \$10,000 in staff time in addition to other museum resources.

During our pilot phase, we offered stipends and travel funds to help offset museums' contributed staff time, particularly in consideration of their "above and beyond" contributions to the development and evaluation of the CCLI curriculum. Now that our process is more established, we do not plan to offer this support to participating

museums. Instead, we will offer travel stipends to museums that otherwise would be unable to participate in CCLI because of the expense. More information is available in our Budget Justification.

As we continue to assess what will make the *Cultural Competence Learning Institute* as successful as possible, we recognize that peer support buttresses successful organizational change. As we have concluded each cohort of the CCLI pilot phase, we also recognize that the staff who have represented their museums are highly engaged, want to deepen both their own and their peers' knowledge of inclusion, and believe that cultural competence is an effective tool for organizational change. For example, Aimee Terzulli, Director of Programs at Long Island Children's Museum, participated in the CCLI pilot and then used her new cultural competence knowledge to present at conferences as well as community meetings. (See Supporting Document 4 for Letters of Recommendation from participants from past Cohorts and a Summary of museum Strategic Initiatives.)

As part of the expansion of CCLI, we propose to develop a plan that will **leverage CCLI "graduates" as mentors for current CCLI participants**. Directing the collective knowledge and expertise of past CCLI participants toward cross-cohort communication will encourage resource sharing and help build field-wide capacity for cultural competence. The Association of Children's Museums will help to lead this component because their staff has particular experience with establishing communities of practice that support organizational change. The planning and design process will identify the tools and trainings necessary to transition from CCLI "graduate" to "mentor." In Year Two, ACM and CDM, with support from ASTC, will develop and test these tools, as well as establish protocols for the mentors' work processes and potential compensation. The Mentor Network will launch in Year Two of *CCLI: An Expanded Reach*.

In addition to testing the effectiveness of the *Cultural Competence Learning Institute* in different types of museums, we believe, as do our association partners, that CCLI can help measure the museum field's inclusion efforts. Despite years of conversation about inclusion, there is not a mechanism to assess whether we have made progress, other than the number of conference sessions about diversity and inclusion and salary and workforce surveys. Because we believe that becoming inclusive institutions requires change at the organizational level, we propose to **study the awareness of the core components of CCLI model and the influence of participating institutions** so that we can begin to assess the museum field's readiness for this scale of change.

During the first year of our project, CDM and Garibay Group will work with the American Alliance of Museums, the Association of Children's Museums, and the Association of Science-Technology Centers to develop and distribute a **National Landscape Survey**. The survey will gather data from all museum field sectors about the state of the field in terms of inclusion, equity-related norms, cultural competence practices, and the conditions that foster or prevent inclusion-related change using the core components of the CCLI model as a foundation for exploration. The National Landscape Survey will include questions pertinent to all museum sectors; a subset of questions may be developed for particular types of museums.

The Landscape Survey is intended gather data from all museum field sectors about the state of the field in terms of inclusion, equity-related norms, cultural competence practices, and the conditions that foster or prevent inclusion-related change. Survey questions will focus on gather data about:

- Extent to which member organizations are currently engaging in visitor-facing inclusion initiatives;
- The presence and implementation of internal mechanisms to support a culturally competent organizational culture; and
- The nature of leadership involvement (i.e., the museum CEO and the board of directors) in supporting these efforts.

The National Landscape Survey will include questions pertinent to all museum sectors. We may develop a subset of questions for particular types of museums, if deemed necessary.



AAM, ACM, and ASTC have committed to distributing the National Landscape Survey to their members and through the Council of Regional Associations and the Council of Affiliates, reaching museums from all sectors. Most likely, distribution will occur through emailed newsletters to each association's members. We have initiated conversations with the American Association for State and Local History, which works with more than 6,000 museums, and the Association for Zoos and Aquariums, which works with 230 accredited zoos and aquaria, for their assistance distributing the survey.

Respondents will complete the survey through an online platform. Garibay Group will analyze the data collected and provide results to the associations. Each of our association partners will have access to and be able to disseminate the aggregated data results, allowing us to preserve respondents' anonymity. Survey results will help AAM, ACM, and ASTC assess the state of diversity and inclusion in their sectors, mirroring the collection and use of data collected in the Self-Assessment Survey by museums.

As part of the analysis process, we will convene an expert panel with expertise in museums and organizational cultural competence that will meet virtually two to three times to review and provide feedback on the results. The Expert Advisors have different backgrounds ranging from marketing, to inclusion research, to experience leading national initiatives from a local museum. Please see the Key Project Staff List and Letters of Support for more information on each Expert. We hope to be able to draw conclusions about the state of diversity and inclusion across the museum field, which we plan to share as broadly as part of conference sessions and through published articles in association publications, such as ASTC's *Dimensions* magazine, ACM's *E-Forum* newsletter, or AAM's *Aviso* newsletter. We will also ask each expert to share our results with their networks.

Because of the broad distribution of the survey instrument, as well as the underlying interest about diversity and inclusion in the museum field, we believe that there will be interest across the museum sector about the results of the National Landscape Survey. We plan to share this information broadly, again reaching out to our association partners to share results through their regular communications channels. We also plan to host a webinar about the Survey, and we will advertise the webinar broadly, again through our association partners. Finally, we plan to submit session proposals to share our project results at museum conferences.

The final area of work that we propose to undertake during this project relates to the **development of a sustainable business model** for the *Cultural Competence Learning Institute*. Our goal is to examine and develop fee structures and faculty models that will enable us to make CCLI a sustainable initiative of our museum. We must address all aspects of the operations of CCLI to ensure its sustainability. For this component of our project, we plan to work with our association partners, Expert Advisors, and consultants in order to create a model that supports all aspects of CCLI's continuing operations.

CDM has a commitment from PwC to create a business plan for the *Cultural Competence Learning Institute*. PwC (formerly PriceWaterhouseCoopers) is a long-time partner of our museum, and they share our commitment to cultural competence and inclusion. PwC is an expert in business management, helping organizations work smarter by solving their most complex business issues, from strategy to implementation.

PwC's work will focus on three specific questions:

- 1) What type of business model best positions CCLI for financial sustainability? (e.g., tuition only; mix of earned/contributed income; a subscription model, etc.)
- 2) What is the best governance structure for managing CCLI? (e.g., a department of the museum; a university program similar to Getty Leadership Institute; an independent 501(c)(3) organization, etc.)
- 3) What faculty/mentor/host site contribution and compensation strategy will the business model and governance structure support?

During Year One of the project, PwC will identify and analyze financially successful models of museum training programs, create and test scenarios for CCLI, and then recommend an operations strategy to the Museum. Existing models include programs such as the Getty Leadership Institute, Jekyll Island Management Institute, and the Noyce Leadership Institute, and CDM will work with our association partners to identify other models. We plan to test PwC's recommended fee structures in Years Two and Three of the project. (See Budget Justification for additional details.)

We also plan to work with the world's largest public relations firm to develop a strategy and tools to promote the idea of cultural competence as well as the *Cultural Competence Learning Institute* to the museum field. This consulting firm is a long-time partner of CDM and agreed to consider contributing their expertise to this project when the grant is awarded. Their preliminary plan is to work closely with the Museum and our association partners to draw from the National Landscape in order to raise the awareness and importance of cultural competence widely throughout the museum field and galvanize action that leads to increased cultural competence.

The national firm's public relations support will focus on the following four areas and will be informed by the results of the National Landscape Survey:

- Developing a strategy that will 1) create a universal message for all associations that communicates cultural competence as essential, urgent, and attainable; and 2) raise the level of awareness and importance of the *Cultural Competence Learning Institute* above other cross-sector initiatives;
- Identifying and building tools for individual associations to use that reinforce the imperative of cultural competence and leverage existing communication vehicles;
- Generating ideas about ways to communicate with museums and local and regional media; and
- Directing execution and timelines of the public relations campaign.

We plan to begin work with the PR firm during Year Two of our project and launch our campaign at the end of Year Two and continue into Year Three of *Cultural Competence Learning Institute: An Expanded Reach*. The relationships with PwC and the PR firm will be managed by CDM's executive director, Marilee Jennings.

### *Project Team*

Over the last four years, Children's Discovery Museum of San Jose has developed successful partnerships with the Association of Children's Museums, Association of Science-Technology Centers, and Garibay Group in support of the *Cultural Competence Learning Institute*. The American Alliance of Museums is a new partner who will enable us to reach the broader museum field. Each organization brings a deep commitment to cultural competence and contributes to different aspects of the project. CDM brings experience negotiating this work within a museum; ACM and ASTC bring experience supporting initiatives throughout a museum discipline; Garibay Group brings experience identifying the latest research related to inclusion coupled with an expertise in evaluation that ensures CCLI's effectiveness.

For twenty-five years, CDM has successfully served the community of San Jose with exhibits and programs, including seventeen federally funded projects, of which ten are IMLS grants. CDM annually plans, implements, and completes at least one exhibit, large-scale educational program, audience development, or expansion/space renovation project, ranging in size from \$500,000 to \$3,000,000.

Jenni Martin, Director of Strategic Initiatives, will serve as Project Director and will authorize all aspects of the project including budget, timeline, and contractor activities; she will act as the grant administrator. As the project director for CCLI's pilot phase development and its lead facilitator, she brings the depth of experience that enables the learning framework to be scaled to museums of all disciplines. In our proposed project, Ms. Martin will continue to lead CCLI's training sessions. She brings more than 28 years of experience, including 18 years at CDM, where she has led six IMLS grants and six National Science Foundation grants.

Marilee Jennings, Executive Director, will manage the relationships with national association partners (ACM, ASTC, and AAM), consultants (Garibay Group, PwC, and PR firm), and the Expert Advisors. Focused on the long-term sustainability of CCLI, Ms. Jennings' experience as CEO of a local institution and President of a national association (ACM, 2014-16) provide critical perspectives to the CCLI communication initiative.

In Year 3, CDM will hire a full-time CCLI Program Manager who will become the understudy to the CCLI Project Director, learning cohort facilitation skills, managing the cohort participation process, and developing a long-term staffing plan. An experienced project manager, with a background in inclusion facilitation, the CCLI program manager will also be responsible for the curricular/logistical components of the cohort experience.

Ms. Martin, Ms. Jennings, and the CCLI Program Manager will be assisted by Brittany Waxman, Exec. Assistant, who will provide administrative, scheduling, and logistical support during project implementation.

The American Alliance of Museums champions museums and nurtures excellence in partnership with its members and allies. Representing more than 30,000 individual museum professionals and volunteers, and institutions serving the museum field, the Alliance stands for the broad scope of the museum community.

The Association of Children's Museums champions children's museums and supports more than 350 museums with professional development programs, publications, and other resources. Jen Rehkamp, Director, Field Services will lead ACM's work on this project, with additional support provided by Laura Huerta Migus, Executive Director. Ms. Huerta Migus is an experienced developer of professional development programs that support individual and organizational growth and will lead ACM's work on the CCLI mentor program.

The Association of Science-Technology Centers is a global organization providing collective voice, professional support, and programming opportunities about informal science learning for more than 600 member organizations in nearly 50 countries. Ann Hernandez, Program Manager, Diversity Initiatives, will lead ASTC's work on this project with support from Dr. Margaret Glass, Director, Professional Development.

Garibay Group is a nationally recognized audience research and consulting firm working on culturally responsive issues in informal learning environments. Cecilia Garibay, Principal, will this project.

The **Total Budget for CCLI: An Expanded Reach** is \$1,013,157, which includes a request to IMLS of \$495,625. CDM has developed this budget based on experience executing other IMLS-funded projects and estimates specific to this project. CDM and its partners are contributing \$517,532 in cost sharing. We provide a detailed explanation of the budget in the Budget Justification.

### **3. Project Results**

As stated in the Project Justification, the ultimate goal of the *Cultural Competence Learning Institute: An Expanded Reach* is to develop, track, promote, and recognize organizational change within individual institutions and field-wide in order to build museums' capacity to engage with issues of inclusion and cultural competence, both internally and externally. We believe that the conversations in the museum field about encouraging diversity and inclusion need to change from program-specific or person-driven activities. Instead, we want to create and support organizational growth that leads to a change of culture about inclusion within specific museums but also within the broader museum field.

Cecilia Garibay of Garibay Group will lead all project evaluation efforts, which include two separate strands of assessment: one focuses on outcomes for museums participating in the CCLI coaching and organizational development activities, while the second focuses on the state of inclusion and equity-efforts in the museum field. Detailed information is available in Supporting Document 5, Capacity Analysis and Evaluation Plan.

Evaluation data of CCLI's pilot phase indicates that CCLI creates organizational change. All museums that have participated in CCLI successfully implemented a strategic initiative to address a specific cultural competence issue within their organizations. Every participant reported, "their museums' involvement in CCLI has deepened their organizations' cultural competence as a whole," with eighty percent indicating a significant influence and twenty percent indicating a moderate influence. Additionally, every participant reported that CCLI has had a "significant (seventy-five percent) or moderate (twenty-five percent) influence on their organizations' inclusion efforts."<sup>14</sup> This data also indicates that one of CCLI's strengths is its flexibility and adaptability "to all organizations who have been involved regardless of museum size and has worked in both a children's museum and science center context."<sup>15</sup> (See Supporting Document 5 for the evaluation report of CCLI's pilot phase.) CCLI has provided the impetus to address challenges and/or deepen engagement with inclusion work at participating institutions.

As noted in Section 2, *Cultural Competence Learning Institute: An Expanded Reach* will integrate new types and sizes of museums into the Institute, which most likely will require the development of new curricular materials. Garibay's evaluation for the museums will focus on outcomes for the museum staff who participate in the in-person meetings as well as changes at the organizational level. Garibay will use a mixed-methods approach evaluation of outcomes, which will include quantitative and qualitative methods. The evaluation will assess the following outcomes for participating staff: increased understanding of cultural competence concepts and practices; increased confidence in ability to implement inclusion efforts at their organizations; deepened skills in leading inclusion efforts at their organizations; and increased interest/motivation to continue cultural competence/inclusion work at their organizations.

At the organizational level, the evaluation will assess the extent to which participating museums implement their strategic initiative and the influence of their participation in CCLI in helping advance their institutions' cultural competence. This strand of the evaluation data will help us report on two IMLS performance measure goals for the Learning category, train and develop museum professionals and support communities of practice.

The second strand of evaluation will increase our understanding of the museum field's cultural competence. Currently, most museums use audience demographics or their hiring practices to describe their inclusion efforts. We believe that cultural competence can be a new tool to understand if inclusion efforts reach beyond surface effects to become embedded in an organization's culture. As described in Section 2, CDM will work with Garibay Group and our association partners to gather data from all sectors of the museum field about the state of inclusion, cultural competence, and diversity in the field. The survey will gather data about museums that currently are engaged in visitor-facing inclusion efforts; museums that have internal mechanisms intended to support a culturally competent organizational culture; and the nature of CEO and governance engagement.

As we gather and analyze this data, we plan to share our results broadly through sessions at museum conferences as well as through the public relations campaign coordinated by the PR firm. We believe that organizational cultural competence is an important tool to create inclusive change, and we will work to ensure that as many museums as possible are aware of this instrument to create lasting change in their museums.

Supporting Children's Discovery Museum of San Jose and the *Cultural Competence Learning Institute: An Expanded Reach* supports inclusion through organizational change in museums located throughout the United States. CCLI provides an effective mechanism for all types of museums to become inclusive community resources. We know that museums that welcome all families in turn support children, youth, and adults' learning needs and help them to develop skills such as problem solving, creative thinking, adaptation, communication, and teamwork, which in turn support the development of a successful 21st century workforce. An investment in CDM and *CCLI: An Expanded Reach* is an investment in inclusive museums and communities throughout the United States.

