



Sparks! Ignition Grants for Museums

Sample Application MG-45-16-0025-16

Mountain-Plains Museum Association

Amount awarded by IMLS:	\$19,331
Amount of cost share:	\$4,145

Attached are the following components excerpted from the original application.

- Abstract
- Narrative
- Schedule of Completion

Please note that the Sparks! Ignition Grants for Museums program no longer exists as a standalone funding opportunity. However, IMLS welcomes proposals for similar work through its National Leadership Grants for Museums / Rapid Prototyping funding level. Instructions for preparing narratives for FY2017 applications differ from those that guided the preparation of previous applications. Be sure to use the narrative instructions in the FY2017 Notice of Funding Opportunity for the grant program to which you are applying.

Staying in the Game: Engaging Retired Museum Professionals in Service to the Field
Mountain-Plains Museums Association (MPMA)

ABSTRACT

Project Duration: August 1, 2016–July 31, 2017

Project Need: The Mountain-Plains Museums Association (MPMA) will create a retiree think tank through a project entitled *Staying in the Game: Engaging Retired Museum Professionals in Service to the Field* to explore how to bring retirees back into the museum field as participants, volunteers, trainers and mentors. More than ever before, museum professionals who are retired want to continue this involvement in the museum community. MPMA sees this trend in its own region from responses to a 2014 survey it conducted on retirement and from having the largest numbers of retirees attend its most recent conference. AARP calls this “re-careering” where more retirees are working to stay engaged, support a lifestyle or both. The general marketplace offers programs for retirees; however, there are no programs specifically for museum professionals. Moreover, staying in touch with the museum field appears to be more of a personal initiative and not something the museum profession has facilitated. With Baby Boomers facing retirement, this is a good time to investigate retirement programs, according to AARP: *In 2011, the first of the baby boomers reached what used to be known as retirement age. And for the next 18 years, American boomers will be turning 65 at a rate of about 8,000 a day. As this unique cohort grows older, it will likely transform the institutions of aging.* MPMA will explore how Boomers are redefining this life stage and generational milestone in a year-long series of meetings designed to develop no- and low-cost ways for retired museum professionals to have easier access to and better involvement with the museum community. MPMA will create a model in which this access can be done with intention and with an institutional support system. This support will come not from the museums but from museum professional organizations utilizing MPMA’s model.

Target Audience: The main audiences are retirees who want to stay connected to the museum field. By creating programs for them, they can participate as they are able and still stay in touch with colleagues and museums. Museums will benefit since retirees would provide museums with those hard-to-realize benefits including perspective, experience and knowledge gained over the years. Museum visitors would ultimately benefit through improvements in exhibits, visitor services, educational enrichment, research content and leadership. Museum service organizations, like MPMA, will benefit as retirees can serve as trainers, mentors and committee members.

Project Activities: MPMA proposes to investigate how retired museum professionals might return to the museum field by testing ideas with a selected group of retirees. With a retiree cohort, MPMA will test this group’s ideas to determine which ideas are suitable both for retirees and for MPMA and what can be rolled out within the grant year or be phased in over time. Survey data collection will provide measurements to guide this effort and align it with performance goals outlined in IMLS’ Level Goal #1 – Learning.

Tangible Products: MPMA will test and develop with retiree consultants no- and low-cost programs that are suitable to retired museum professionals. The five most promising programs to be developed could include: museum volunteer match program, retiree locator, social media outlets, mentoring, training services, blogging, conference scholarships, reduced registration fees, and senior awards.

Potential Impact and Benefit to the Museum Community: A program for retired museum professionals has the potential to transform many areas of the museum community. By providing an organizational structure to reach out to retirees, museums and museum associations could see an increase in the number of retirees willing to continue their involvement with benefits – financial, structural, knowledge, wisdom and mentoring. With documentation of each activity, the program will be reproducible so that any museum association can implement these same activities. MPMA will measure programmatic outcomes in surveys, asking respondents if they engaged in grant-specific activities for retirees and how these activities could be improved. Surveys will track responses not only from actual retirees, but also from museums using retirees; this measurement will indicate if these programs are useful to retirees and to museums. In addition, survey questions will be asked of grant participants, the project director, MPMA staff and board to get a measurement of how they viewed the program and its results.

NARRATIVE

1. Statement of Need: The Mountain-Plains Museums Association (MPMA) proposes to implement the project *Staying in the Game: Engaging Retired Museum Professionals in Service to the Field* to test the effectiveness of having a formal program for retired museum professionals. The project will test the use of specific programs designed for and by retirees, such as a volunteer match program with museums, mentoring opportunities, training museum professionals and networking outlets. By developing programs that retirees need and will use through the use of no- or low-cost tools, this project has the potential to be adopted by any association in the museum field. The project seeks to create a new constituency for membership, mentoring, training and donations. It will show the museum industry that this often neglected resource can be effectively utilized to support not only museums but also museum associations. The project will show the museum community how to utilize this untapped resource and to view retirement as a benefit that can enrich the entire museum field.

Millions of Baby Boomers are healthier, living longer and ready to increase their civic participation, particularly as volunteers. That information is according to sources like AARP and others that track activity after retirement. At MPMA, we are seeing the same trend. An increasing number of individuals from the MPMA region who retired from the museum profession are consulting, taking full or part-time and paid or unpaid work at museums. Clearly, they want to be back at a museum or in the museum profession. In 2014, MPMA had its largest number of retirees attend its fall conference and again in 2015. While the number was not large, this was the first time we have ever seen retirees attend the conference. We are also seeing for the first time recent retirees serving on MPMA's committees. They tell us they are participating with MPMA in hopes of getting consulting work, to network, to stay in touch with colleagues and to keep current on issues.

As a result of this anecdotal evidence, MPMA became curious about the potential of a retirement program and wanted to see if there was enough of a trend to justify such a program. In a survey conducted in November 2014 (see Supportingdoc4), MPMA identified retirement-age museum professionals in its 10-state region and asked them what they are doing in retirement or what they expect to do when they retire. The survey also asked how MPMA might facilitate these expectations. Of those who had retired, the majority of respondents indicated they are currently volunteering in a museum-related organization and staying in touch with colleagues. Some indicated they were paid consultants, and still others said they would like to continue working at a museum, but were not presently doing so. Those who are about to retire expect to do the same thing.

In addition, the majority of those who retired indicated they would be interested in a "museum think tank" where they could share their knowledge and engage in life-long learning and networking opportunities. The majority also expressed an interest in having MPMA help them stay in touch with colleagues. This survey confirms what we hear anecdotally: that museum professionals want to stay connected to the museum profession once they hit retirement age and that they could benefit from tools provided by MPMA to help them do this. MPMA's assessment of retirees' desire to stay connected to the museum profession matches what is a growing trend among retirees around the country: to stay engaged, have fun and enjoy more freedom. This makes them one of the most untapped constituent groups, as confirmed by recent studies on retirees.

A study by the Urban Institute concludes that "retirement patterns over the past 30 years finds that older adults are now working longer and taking more complex routes out of the labor force... and were much more likely than those born 20 years earlier to move to part-time work at older ages and return to work after retiring instead of following the traditional route of retiring only once directly from full-time employment." This study also concludes that choices and restraints confronting older workers contemplating retirement have changed rapidly. Today's older adults are generally better able to work than previous generations because health has improved at older ages and jobs have become less physically demanding. A recent study (February 2014) by Transamerica Center for Retirement Studies® provides financial insight into the retirement preparedness of American workers. Conducting national surveys of workers' attitudes towards retirement since 1998, Transamerica Center discovered the following trends for this year: 1. Workers' expectations to work past age 65 and even into retirement represent a dramatic change in the long-standing vision of fully retiring at age 65.

Staying in the Game: Engaging Retired Museum Professionals in Service to the Field
Mountain-Plains Museums Association (MPMA)

2. Retirement confidence is on the rise amidst signs of economic recovery. Sixty-four percent of workers are “somewhat” or “very confident” that they will be able to retire with a comfortable lifestyle, which represents an increase over 2013, 2012, and 2009/10.

2. Impact: What do these statistics mean for museum retirees? First, there are no statistics that address financial and retirement planning specifically for museum retirees. To collect that data would be a task too extensive for this grant. Secondly, while MPMA’s recent survey on retirement does not address the issue of financial constraints, it does show that retirees want to “work,” whether that means paid or unpaid. It should be pointed out that MPMA’s survey does not directly address why retirees would look to a museum service organization to reconnect back to the profession rather than a museum. However, it is clear from some of the responses that retirees would continue to look to MPMA in retirement for service and assistance just as they did before they retired.

That’s what MPMA does: it is a service organization that assists museum professionals in all aspects of their career and provides a network that connects people to others. Moreover, not everyone wants to return to the museum from which they retired or can return even if they wanted to, particularly if they have moved away to take care of elderly parents or be closer to their children, as some indicated they have done in MPMA’s survey. These people could benefit from MPMA’s networking and matching help. Having a museum service organization provide a way to connect back to the museum field is about providing options, which is perfect for retirees who like having choices in their newfound freedom.

In addition, retirees make good trainers for emerging and mid-career museum professionals. That is according to MPMA’s recent conference survey in which many respondents, when asked about their favorite session, cited the two sessions on career planning with retirees and about-to-retain presenters as some of the better sessions at the conference. [Comments included *It was thought-provoking for me. *They were all wonderful but the one *If I knew then what I know Now* was very helpful for my career. *I liked the panel discussion on transitions in each person’s professional life*As an early career professional, it was great to hear how others got into this career, their paths and their experiences for better or worse. *I absolutely loved the session on recharging your career and hearing people talk about how their career has grown and changed over their lives. Although I am very new to the field, I have already experienced some of the things they talked about, and this session eased some of my fears of burnout. *I enjoyed the panel that discussed their career path. I missed the first speaker but found each of the others very engaging and thought provoking.]

MPMA’s conference survey also asked about topics for next year and one responded by suggesting, “A session by older museum professionals to give advice to emerging museum professionals...in a wider variety of jobs/genders/races represented.” All of these survey responses point to retirees being an untapped resource that, if organized, could be a more productive resource for museum service associations and museums. Moreover, we say “untapped resource” since we are not aware of any museum association with a formal retirement program. The National Park Service has, over the years, contracted many of its retirees for short-term projects and schedules retirees to staff the NPS Staff Museum in Yellowstone National Park on a volunteer basis; yet it does not have a formal retiree program. It does hire retirees from all occupations to staff its park concessions, but has no program for retired museum professionals to do these jobs. However, other professions do have formal programs. For example, The Small Business Association’s (SBA) successful SCORE program has provided for many years an outlet for retirees to mentor small businesses. Founded in 1964 as the Service Corps of Retired Executives, SCORE has a successful record of accomplishment in helping small businesses succeed and grow by matching them with volunteer counselors or mentors through a framework of local chapters around the country. There are likely to be other models that MPMA will want to investigate. Our search for the model that suits this project will be aided by the collection of data from surveys following performance measurements in IMLS’ Level Goal #1 – Learning: Training and Community. We will learn from respondents to our surveys what they want in a retirement program and if they will use the activities we design.

Staying in the Game: Engaging Retired Museum Professionals in Service to the Field Mountain-Plains Museums Association (MPMA)

Furthermore, our surveys will help us know if we achieve the performance goal of passing along through training the wisdom of our retirees to a younger generation of museum professionals. The performance measurements that relate to IMLS' Level Goal #1 – Community will help us understand what our community of retirees wants and is able to do as well as what museums want from retirees.

Target Audiences: The grant's main audience is the retirees who want to stay connected to the museum field. This untapped resource can be a more productive one for museum service associations and museums, if it were organized. Retirees will benefit from the project as they can participate as they are able and still stay in touch with colleagues and museums. Having retirees participate in MPMA's association and in museums will provide them with new outlets, new networks and new ways to share their expertise. Museums will benefit since retirees would provide museums with those hard-to-realize benefits including perspective, experience and knowledge gained over the years. A program to match retirees to museums would provide affordable assistance to museums that might not have been able to find experts. An active retiree group can also help organizations overcome one of the most prevalent issues facing museums today: how to establish and maintain a good volunteer corps. Having an identifiable resource of active retirees would help the volunteer managers who are always struggling to find suitable volunteers. Museum visitors would ultimately benefit through improvements in exhibits, visitor services, educational enrichment, research content and leadership. While the initial investigation into this program would benefit MPMA, the tools and structure developed for the project would benefit museum service organizations across the country as they would have the ability to use retirees as trainers, mentors, committee members and the like.

Tangible Products: MPMA will test no- and low-cost programs that are suitable to retired museum professionals. Programs to be developed could include museum volunteer match program, social media outlets, mentoring, training services, blogging, conference scholarships, retiree locator and senior awards. The five most promising activities will be evaluated according to the following outcomes: are they suitable both for retirees and for MPMA, can they be rolled out within the grant year or be phased in over time, can they be replicated by other associations and will they require no or low financial investment by the host association through the use of retired volunteers as the primary administrators. MPMA will measure programmatic outcomes in surveys, asking respondents if they engaged in grant-specific activities for retirees and how these activities could be improved. Surveys will track responses not only from actual retirees, but also from museums using retirees; this measurement will indicate if these programs are useful to retirees and to museums. Data collected on these issues will relate directly to IMLS' Level Goal #1 – Learning: Training and Community in which survey data will provide direction from our community of retirees as well as the museums themselves on what programs are desired. Also, survey questions will be asked of grant participants, the project director, MPMA staff and Board to get a measurement of how they viewed the development of the program and its results; this measurement will indicate the ease or difficulty of launching a retirement program by a service association including staff/Board involvement and budget considerations. This applies to the community aspect in IMLS' Level Goal #1 – Learning: Community. All these measurements will help MPMA determine if this innovation is a fit for retirees, for museum service organizations and for museums. Information from these surveys and about the program will be shared in blogs, forums, Facebook, MPMA's publications, and in presentations to state associations, MPMA's conference and to the American Alliance of Museums through its Council of Regional Associations.

Potential Impact and Benefit to the Museum Community: A program for and by retired museum professionals has the potential to transform many areas of the museum community. By providing an organizational structure to reach out to retirees, museums and museum associations could see an increase in the number of retirees willing to continue their involvement and see benefits from this – financial, structural, knowledge, wisdom and mentoring. With documentation on each activity and by keeping the structure simple and low in overhead costs, the program will be reproducible so that any museum association can implement these same activities. Such a structure can be easily adopted industry-wide allowing both museums and service

Staying in the Game: Engaging Retired Museum Professionals in Service to the Field Mountain-Plains Museums Association (MPMA)

organizations to benefit from this untapped resource. It will also be innovative since it will be the first of its kind to use retired museum professionals in an in-depth program designed just for retirees.

3. Project Design: MPMA will structure its retiree program and then test it with a retiree cohort.

These tests will be conducted by MPMA staff, Board and the retiree cohort in a face-to-face meeting, conference calls and emails. The tests will also be conducted by surveys and follow IMLS' Level As the goal is to create a program that retirees will want to use, it will be important to have input from retirees and to give them leadership status so that they determine which activities to include in the retiree program. MPMA will select a group of retirees and those about to retire to participate in the project. This retiree cohort will take an active role in the year-long planning process. They will engage in discussions, investigate ideas and develop a priority list of activities; then they will create a plan to implement those activities. They will also serve as a focus group and will be asked what they want and don't want from a retiree program, the length of time they are willing to give to activities, what kind of costs they are able to bear and what their priorities will be when they return to the museum profession. This cohort will also ask other retirees the same questions during the testing phase. MPMA staff will assist the project director to provide logistical and administrative support. An advisory group of MPMA members will be available for additional support.

Project Activities: The project will be divided into three phases and carried out over a 12-month period beginning August 1, 2016, and ending July 31, 2017. The first phase will be dedicated to determining the structure of the retirement program and the various activities that will take place during the grant period (August–December 2016). The second phase will be dedicated to the implementation of the structure and activities (January–June 2017). The third phase will include conducting a final analysis, authoring a whitepaper and disseminating grant project findings (June–July 2017). The Schedule of Completion has a more detailed timeline of when project activities will occur.

Phase I: Determining the structure and activities of the retirement program (August–December 2016).

The kick-off face-to-face convening will be a meeting at MPMA's 2016 conference in Oklahoma City, OK. At the end of the day-long series of presentations and round-table discussions, the group will be expected to have formulated the main concepts of the project (overall goals, evaluative measures, dissemination, and replication), developed a work plan for the grant period, created a plan for identifying retirees in the MPMA region and how to communicate with them, assigned tasks and roles to group members and be well on its way to delivering a final plan at the next convening. Some participants will be asked to present a session at the conference on Career Path Advice and Retirement for Museum Professionals; also, they will be recognized at the conference as part of MPMA's new retirement program. Both of the latter two activities will be part of a larger effort to communicate the existence of the program to state and regional attendees.

Prior to the first all-day meeting, a series of conference calls will be held with the cohort, staff and advisors to get the project up and rolling. These conference calls are intended to prep the group and get it ready for its first convening. The goal is to get the group acquainted with one another and introduce the general concept and goals of the grant project before the day-long meeting. These pre-convening meetings will cover basic logistics of the project and include preliminary discussion and brainstorming so that group members are on the same page by the time of the first convening and fully prepared to meet the goals of that meeting.

Ideas for activities that the group may consider will include those that retirees, staff and board agree are activities that MPMA can support and that will appeal to retirees. These could include: •Mentoring program where retirees mentor museum staff; •E-mentoring program where retirees are available as online mentors; •Match program where retirees are matched geographically to museums looking for volunteers or consultants; •Articles where retirees submit articles, blogs or columns to MPMA's publications; •Social media where retirees create and monitor their own social media outlets; •Awards where a special award is created to recognize contributions to MPMA from retirees; •Scholarships which provide funding to retirees to attend MPMA conferences; •Training services where retirees are presenters and workshop leaders at MPMA's conference; •Networking where networking opportunities and events are created for retirees; and/or •Locator

Staying in the Game: Engaging Retired Museum Professionals in Service to the Field
Mountain-Plains Museums Association (MPMA)

program for finding retirees. At the end of the convening, grant participants will create a list of tangible programs that they will want to test to see if these are practical financially and appropriate for both MPMA and retirees. They will create a work schedule to test these ideas. They will also discuss the sustainability of these programs, including funding sources and a structure in which retirees administer retiree programs as volunteer.

Phase II: Implementation and testing of the program's structure and activities (January–June 2017).

In a series of conference calls and skyping, to take place in January, participants will discuss test results of programmatic ideas and then reduce the list of activities to the five that show the most promise. These activities will be implemented and tested between January and June to see how viable, sustainable and replicable they will be and how well they support retirees. Participants will be assigned a leadership role with each of these activities and be expected to oversee implementation and testing. Investigation of the activities will include determining the sustainability of carrying out and maintaining these activities beyond the grant period, finding ways to keep the activities operational within a no- or low-cost budget and determining if they appeal to retirees. Evaluation of the final list of activities will include all investigation results and the surveying of retirees to get their response to these ideas by an online survey via Constant Contact. These results will be presented to the MPMA board for its review and comment. The top five activities will be evaluated to determine if they are successful in providing the necessary support for retirees and how they can be administered in a no- or low-cost way.

Phase III: Analyzing project results, authoring a whitepaper, disseminating grant findings (June–July 2017).

MPMA will track how well its retiree cohort was able to function in the grant process by asking them to respond to questions about the program. This will provide information on how an association might develop its own program so that others can learn from MPMA's experience in launching a program for and by retired museum professionals (including successes and failures). In addition, MPMA will track how retirees are responding to the activities that were designed for them to determine if these are successful and if not, what would make them successful. All tracking methods employed by MPMA will be by survey, in a combination of online ones through Constant Contact and by email or phone. Analysis of this tracking will be shared with the broader museum community. Summary information about the project, from development through post-completion, will be shared in a blog, in presentations at MPMA's conferences, state associations, in MPMA's publications and forums (such as Facebook and the MPMA Forum) and to the American Alliance of Museums through the Council of Regional Associations.

Administration: Participants will consist of museum professionals from the MPMA region who have either retired or are about to retire. All are familiar with MPMA's organization; two are past MPMA board presidents; all are or have been museum administrators and represent the variety within museums (exhibit installers and designers, collections, historians as well as science, history and art museums and small to large museums). The project director will direct the grant program by providing assistance to participants throughout the grant period, setting the agenda for all meetings, spearheading all analysis, creating the final whitepaper and disseminating of grant results. This person will also keep MPMA staff and Board abreast of the program through frequent communications (email, conference calls and meetings) and by creating a role for them to participate in meetings – all of which will keep the organization's leadership engaged with the grant through specific opportunities to provide guidance and direction.

Project Resources: MPMA respectfully requests \$19,331 to support the project: *Staying in the Game: Engaging Retired Museum Professionals in Service*. Grant funds would directly underwrite honoraria for MPMA project participants, salary for the project director, and all administrative, travel, hotel and per diem expenses for participants and the project director. All other personnel and related expenses required for the project will be covered by the MPMA's operating funds. Please see *Budget* and *Budget Justification* for a complete description of expenditures.

MPMA Board, Staff and Expertise: As a recognized leader in providing services to museum professionals, MPMA is committed to advancing the museum field through services, training and networking. For over a

Staying in the Game: Engaging Retired Museum Professionals in Service to the Field
Mountain-Plains Museums Association (MPMA)

year, its Board has been focused on a larger institutional initiative in which to serve better the museum professionals in its region through MPMA's *Training, Certification & Leadership Program*. While the Board is still in the brainstorming phase of this initiative, MPMA's current Past-President, Michael Smith (President/CEO of the Nebraska State Historical Society) is leading the charge for an innovative approach to provide the museum community with better ways to train emerging and mid-career museum professionals. Another Past-President, Jay Smith (State Museum Director of the Museum of the South Dakota State Historical Society), is part of this team, looking for a way to sustain the program. MPMA's director is developing a badging certification program. One component of this larger institutional initiative is this proposed program for retired museum professionals which is the focus of MPMA's Sparks! grant application, *Staying in the Game: Engaging Retired Museum Professionals in Service*. This program's approach to utilize retired museum professionals as a new and under-utilized resource aligns with MPMA's institutional goal of leadership and training.

MPMA's Leadership Initiative is expected to become a pillar of MPMA's 2016 Strategic Plan which will be crafted at the Board's 2016 Midwinter Meeting (see Supportingdoc3), for MPMA's most recent Strategic Plan and the prep questionnaire for the plan). Grant participants will take a leadership role by creating and then implementing activities for the project. The grant group consists of museum professionals from the MPMA region who have either retired or are about to retire. All are familiar with MPMA's organization; two are past MPMA Board Presidents; all are or have been museum administrators and represent the variety within the museum field (exhibit installers and designers, collections, historians as well as science, history and art museums and small to large museums), each has been active with their own state association and two have been active the Council of Regional Associations. All have said something similar to what Participant Mike Smith said about this grant: "The program has the appeal of being a win-win situation in which both colleagues and I can gain and benefit." In addition, Rick Stryker wrote this about the grant: "I believe the project will significantly improve awareness of retired museum professionals as a viable resource for the museum community."

The project director will direct the grant program by overseeing project management, all communications and the final report, grant budget, surveys, project goals and deliverables. She will assist participants throughout the grant period, setting the agenda for all meetings and spearheading the final whitepaper and dissemination of grant results. She will monitor the development of the project and ensure all milestones are being met. To keep the organization's leadership engaged with the grant, she will keep the MPMA staff and Board abreast of the program through frequent communications (email, conference calls and meetings) and by creating a role for them in the project. MPMA will contribute the expertise of its Executive Director, Monta Lee Dakin, and President Mark Janzen, Past-Presidents Rick Young and Jay Smith as advisors.

Project Personnel: *Project Director: Pat Cronenberger, Retired, Local Government Liaison, Denver Regional Council of Governments; Mayor of Littleton, CO. Pat Cronenberger has a wealth of experience crafting policy, facilitating discussion groups and organizing community groups and elected officials. She understands how museums work, has attended museum conferences and has been affiliated with museums for many years (her husband is retired from the National Park Service). She is exactly the kind of experienced facilitator and project manager needed to keep the grant process on schedule and to ensure that each participant meets project goals. *Participant, Retired: Rick Stryker, Director, Corpus Christi Museum of Science and History (TX). *Participants, About to Retire: Michael Smith, Director, Nebraska State Historical Society (NE), Past MPMA President; Elisa Phelps, Director of Collections/Library Division, History Colorado (CO); Joseph Schenk, Director, Art Museum of South Texas (TX); Steve Friesen, Director, Buffalo Bill Museum & Grave (CO). (see Supportingdoc1 and 2 for resumes and commitment and support letters).

