Research to Inform the American Latino History and Culture Program: Technical Appendixes

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Appendix A. Authorizing Legislation

The authorizing legislation for the American Latino History and Culture (ALHC) program was the National Museum of the American Latino Act, Public Law No: 116-260, Title II, Section 201. Subsection (f) of that legislation highlights the role of the Institute of Museum and Library Services IMLS and is reproduced below.

Educational and Liaison Programs

1. In General

    a. Programs authorized. The Director of the Museum may carry out educational and liaison programs in support of the goals of the Museum.

    b. Specific activities. In carrying out this subsection, the Director shall

        (i)   carry out educational programs relating to Latino life, art, history, and culture, including—

        (ii) programs using digital, electronic, and interactive technologies; and

        (iii) programs carried out in collaboration with elementary schools, secondary schools, and postsecondary schools; and

        (iv) consult with the Director of the Institute of Museum and Library Services concerning the grant programs carried out under paragraph (2).

2. Grant programs

    a. In general. The Director of the Institute of Museum and Library Services, in consultation with the Board of Trustees and the Director of the Museum, shall establish and carry out

        (i)   a grant program with the purpose of improving operations, care of collections, culturally appropriate public outreach, and development of professional management at American Latino museums;

        (ii) a grant program with the purpose of providing — internship and fellowship opportunities at American Latino museums;

        (iii) a scholarship program—in partnership with Hispanic-serving institutions, minority-serving institutions, historically black colleges and universities, and other institutions of higher education, with the purpose of assisting individuals who are pursuing careers or

carrying out studies in the arts, humanities, and sciences in the study of American Latino life, art, history, and culture;

(iv) In cooperation with other museums, historical societies, and educational institutions, a grant program with the purpose of promoting the understanding of the Latin American diaspora in the United States; and;

(v) a grant program — under which an American Latino museum (including a nonprofit education organization the primary mission of which is to promote the study of the Latin American diaspora in the United States) may use funds provided under the grant to increase an endowment fund established by the museum (or organization) as of October 1, 2020, for the purposes of enhancing educational programming, and maintaining and operating traveling educational exhibits.

b. Clarification of treatment of museum. — In this paragraph, the term "American Latino museum" does not include the Museum.

c. Authorization of appropriations. —There are authorized to be appropriated to the Institute of Museum and Library Services to carry out this paragraph —

(i) $15,000,000 for fiscal year 2021; and

3. such sums as may be necessary for fiscal year 2022 and each succeeding fiscal year.

Appendix B. Research Objectives, Questions, and Data Sources

This appendix lists this project's research objectives, research questions, and the data sources used to address each question. Primary research data involved community listening sessions, semistructured interviews (with IMLS and federal staff, potential applicants/stakeholders, funders, and collaborators), and an online survey. Secondary research data involved a grant review, a review of nonprofit data, and a literature review.

Objective 1: Inform ALHC Program design and structure to reflect American Latino cultural literacy.

- Research question 1A: What are the diverse characteristics of the Latin American diaspora in the US and the American Latino experience?

    - » *Primary research data:* community listening sessions, interviews (all)
    - » *Secondary research data:* literature review

- Research question 1B: How should these characteristics inform understanding of an American Latino museum and an American Latino education organization?

    - » *Primary research data:* community listening sessions, interviews (funders and collaborators)
    - » *Secondary research data:* nonprofit data review, literature review

- Research question 1C: What cultural considerations for American Latino museums and education organizations affect their access to IMLS and federal funding support?

    - » *Primary research data:* community listening sessions, interviews (all), survey
    - » *Secondary research data:* grant review, nonprofit data review, literature review

- Research question 1D: What additional considerations from other culturally specific museums and education organizations can inform the ALHC Program?

    - » *Primary research data:* interviews (IMLS and federal staff, funders, collaborators)
    - » *Secondary research data:* literature review

Objective 2: Identify universe of candidate American Latino museums and education organizations.

- Research question 2A: What criteria best define an American Latino museum and an American Latino education organization for federal policy purposes (i.e., for the ALHC Program)?

  - » *Primary research data:* community listening sessions, interviews (all), survey
  - » *Secondary research data:* grant review, nonprofit data review, literature review

- Research question 2B: What is the universe of ALHC Program candidate American Latino museums and education organizations?

  - » *Primary research data:* community listening sessions, interviews (all), survey
  - » *Secondary research data:* grant review, nonprofit data review, literature review

- Research question 2C: What share of ALHC Program candidates applied previously for IMLS or federal funding, and what factors facilitated (or hindered) their application experiences and award likelihood?

  - » *Primary research data:* community listening sessions, interviews (all), survey
  - » *Secondary research data:* grant review, nonprofit data review, literature review

Objective 3: Develop implementation priorities for the ALHC Program.

- Research question 3A: What is the landscape of existing funding opportunities for ALHC Program candidates?

  - » *Primary research data:* community listening sessions, interviews (all), survey
  - » *Secondary research data:* literature review

- Research question 3B: What features of existing funding opportunities increase (or decrease) accessibility for ALHC Program candidates (e.g., notification, eligibility, competitiveness, application process, performance metrics, reporting obligations)?

  - » *Primary research data:* community listening sessions, interviews (all), survey
  - » *Secondary research data:* literature review

- Research question 3C: What capacity-building assets, resources, and needs of American Latino museums and education organizations can inform the ALHC Program?

  » *Primary research data:* community listening sessions, interviews (all), survey
  » *Secondary research data:* literature review

- Research question 3D: What ALHC Program implementation priorities would best reach, support, and grow the applicant pool, and what are their tradeoffs and benchmarks?

  » *Primary research data:* community listening sessions, interviews (all), survey
  » *Secondary research data:* literature review

Objective 4: Clarify opportunities for IMLS coordination with other federal agencies.

- Research question 4A: How can IMLS capitalize on other federal models, regulatory thresholds, and potential partnerships to support, expand, and sustain the ALHC Program?

  » *Primary research data:* interviews (IMLS and federal staff, funders, collaborators)
  » *Secondary research data:* literature review

Objective 5: Support the ALHC Program's evidence-building, performance measurement, and evaluation preparation.

- Research question 5A: What would the ALHC Program's success look like for the field of American Latino museums and education organizations (specifically, what are the program's long-term goals and intended outcomes)?

  » *Primary research data:* community listening sessions, interviews (all), survey
  » *Secondary research data:* literature review

- Research question 5B: What corresponding, short-term performance metrics, outputs, and outcomes should IMLS collect (and when) from grantees to assess progress toward the ALHC Program's long-term goals?

  » *Primary research data:* community listening sessions, interviews (all), survey

» *Secondary research data:* literature review

- Research question 5C: What training and technical assistance do candidate ALHC Program museums and organizations (and IMLS) need to support the ALHC Program's evidence-building and preparation for future evaluation?

  » *Primary research data:* community listening sessions, interviews (all), survey
  » Secondary research data: literature review

Appendix C. Research Methodology

This appendix details Urban's research methodology, which included a literature review, data mapping of the American Latino museum field, national community listening sessions, interviews, and a survey. First, we discuss how Urban's research and IMLS's contracting of this research were framed to protect the participation of human subjects in interviews, listening sessions, and the survey.

Human Subjects Protections

Prior to Urban's data collection from the public, we sought and received human subjects' protections approval from our Institutional Review Board. Under those terms, Urban made clear to all individuals who participated in the community listening sessions, interviews, and survey that their participation was voluntary and confidential, and was to be done by informed consent. Additionally, we worked with IMLS to facilitate its approval for collection of data from the public under the Paperwork Reduction Act. Toward this end, IMLS submitted application to and received approval from the Office of Management and Budget. The OMB number for this information collection is 3137-0133 and the expiration date is May 31, 2026.

Literature Review

Urban's literature review sought to lay the groundwork for recommendations on the ALHC program's development. Following best practices for evidence gathering (e.g., Evidence Project of the Centers for Disease Control and Prevention), Urban's literature review identified and synthesized information from the following areas, focusing on literature in English, Spanish, or Portuguese and from 2010 onward:

- best available scholarly research, meaning academic and grey literature derived from scientific inquiries about, for example, the American Latino experience

- experiential evidence reflecting field-based expertise of professionals working in, for example, American Latino museums, as well as other leaders in the museum space

- contextual considerations reflecting cultural literacy about the diverse experiences of American Latino communities, museums, and educational organizations

From these literature searches, Urban's team reviewed over 250 pieces of literature in English, Spanish, and Portuguese, many of which are included in the list of references in appendix F. To establish consistency and relevancy with regard to diversity, equity, and inclusion (DEI) evaluation standards, each reference was assessed under the standards in the Urban Institute's internal DEI toolkits, which are aimed at creating respectful and inclusive research.

Urban's literature review examined scholarly, experiential, and contextual evidence reflected in English, Portuguese, and Spanish literature with a focus on that produced in 2010 onward. Most of the materials that emerged from this review came from the experiential evidence of American Latino museum professionals, leaders, and advocates. For example, at the outset Urban's team was aware of the American Alliance of Museums's (AAM's) Latino Network's report, Strategies for Engaging and Representing Latinos in Museums (American Alliance of Museums 2021). During the course of our review, we identified additional experiential literature, including the 2011 National Museum of the American Latino Commission's report to the president and Congress, *To Illuminate the American Story for All*.

Given the compressed timeline of Urban's research, we limited the scope of the literature review to evidence available in English, Portuguese, or Spanish, produced in 2010 or later, that fell within considerations of the Latin American diaspora in the United States, the American Latino experience, and other culturally specific museums. We developed a set of search terms relevant to each research question, as shown in table C.1, and have conducted the following searches:

- formal Boolean searches of Google Scholar and academic databases (in-house to Urban's library), using search strings based on Boolean operators

- formal searches of websites, for example, of national organizations and associations, using key word searches and Boolean search strings

- informal snowball searches using references cited in relevant materials as well as those gathered from conversations with the project's museum professionals and IMLS team, supplemented by materials shared by American Latino museum professionals and collaborators with whom we spoke with during later data-gathering activities

For the qualitative analysis of literature reviewed, Urban adopted several strategies. First, we reviewed literature online as it was identified in searches. Second, we created an Excel spreadsheet to track search results (and a Word document for research question 2A) and summary notes on the most relevant literature. Third, we uploaded the PDFs of the most relevant references to cloud-based Dedoose qualitative analysis software, a program developed by researchers that has historically remained at the cutting-edge of web-based technologies. Within Dedoose, Urban's team members

coded excerpts from reference texts, including important quotations to cite, with relevance to the study's research objectives and questions.

Throughout, Urban researchers consciously applied approaches described in our internal DEI toolkits relevant to researching and writing about Latino people and groups, researching and writing about US immigrants, and research and writing about Indigenous peoples in the US. Each reference was assessed for alignment and reflection of inclusive, meaningful and respectful language that accurately reflects research about Latino populations and experiences.

TABLE C.1

Sources Searched and Search Terms for American Latino Literature Review

Sources searched	Search terms
- Alexandria: The Journal of National and International Library and Information Issues - American Alliance of Museums - American Association of Museums - Artmajeur - Child Trends Hispanic Institute - Columbia University - Contemporanea - Corpos e Dissidências nos Museus e na Museologia - Critical Multilingualism Studies Journal - Culture and Policy - Daedalus - Extraprensa - Google Scholar - Heritage & Museography - Interciencia - International Journal of Voluntary and Nonprofit Organizations - Journal of Latino/Latin American Studies - Journal of Museum Education - Journal of Pragmatics - Journal of Reflective Discourse - Maricopa Partnership for Arts and Culture - Museologia & Interdisciplinaridade - Museum Management and Curatorship - Museums & Social Issues - NBC News - New Criterion - Nonprofit Management & Leadership - NPR Latino USA - Periódico Permanente - Pew Research Center - Political Research Quarterly - Review of Radical Political Economics - Revista de Antropología - Revista de Arqueologia	- access to federal museum funding - afrolatinos en estados unidos - arte brasileira nas coleções latino-americanas nos Estados Unidos - artículos académicos sobre museos de historia latinoamericana/hispana en los estados unidos - Asistencia tecnica indicadores de desempeño de museos - como diseñar un programa de subvenciones - como diseñar un programa de subvenciones para los museos - criteria for accrediting a museum - criteria for accrediting an American Latino history museum - cultural museum performance indicators - culturally specific museum funding - defining an American Latino history museum - experiencias de latinos en museos estadounidenses - funções básicas dos museus latinos nos Estados Unidos - fundações para museus latinos nos EUA - funding and (Latino museums or Latinx museums or Hispanic museums) - funding and culturally specific museums - funding and museums - historia latino estadounidense - indicadores de desempeño de museos - indicadores de desempeño de museos culturales - indicadores de desempeño de museos latinos - institute of museum and library services - Latin American diaspora characteristics - Latin American diaspora identity - Latino culturally specific museum funding - identidad latina/latinoamericana/hispana en estados unidos - Latino diversity in the United States - Latino history museum research papers - Latino identity in the United States and variants: Latine/Latinx/Latina - Latino museum funding

Sources searched	Search terms
■ The International Handbooks of Museum Studies ■ The New York Times ■ UCLA Latino Policy and Politics Institute ■ University of Chicago ■ University of Denver ■ University of Leicester ■ University of Washington ■ Urban Institute Library: TDNet	■ latino museum performance indicators ■ Latino museums policy briefs ■ Latinos and museums ■ latinos indígenas en estados unidos ■ museos culturalmente específicos ■ museos latinos en estados unidos/eeuu ■ museum performance indicators ■ museus latinoamericanos ■ Museus latinos nos Estados Unidos ■ technical assistance museum performance indicators ■ (title:Latino OR title:Hispanic OR title:Latinx OR title:Latine OR title:Latina) AND (title:museum OR title:center OR title:historic OR title:science OR title:technology OR title:STEM OR title:arboretum OR title:(botanical garden) OR title:zoo OR title:zoological OR title:aquarium)

Notes: Table presents two separate lists. Search terms refers to the totality of Urban's searches; not all terms were used for each source searched, but instead, search terms were used where in alignment with the research objective of focus. Literature sources included journals, databases, libraries (including the Urban Institute TDNet library), news and media sources, organizational websites, and other online sources.

Environmental Scan to Map the Latino Museum Field

For this study's second research objective, with questions focused on identifying the universe of candidate American Latino museums, Urban's team built a database of museums and other cultural institutions and their federal grant receipt histories. As part of this work, Urban's team conducted the following tasks:

- Searches of online museum membership lists and directories: online searches of museum directories and museum association membership lists;

- Key term web-based searches: supplemental online searching using key terms, including those with particular symbolic, geographical, or cultural significance to specific groups;

- Review of Internal Revenue Service (IRS)–based nonprofit datasets: review of public information on nonprofit institutions based on IRS reporting, specifically the National Center for Charitable Statistics (NCCS) and the IMLS Museum Data Files, supplemented with information from ProPublica's Nonprofit Explorer;

- Compilation of federal grant information: review grant data reported by the IMLS, the National Endowment for the Arts (NEA), and the National Endowment for the Humanities (NEH)

databases; supplemented with additional online searching for other grant funding for Latino museums; and

- Outreach to collaborators and field experts.

Sections below provide additional detail on the methodology we used for this scan.

From these sources, Urban's team created a spreadsheet with information on the institutions identified across all searches. The dataset includes:

- Institutional information (address, Employer Identification Number (EIN), whether part of a Hispanic-Serving Institution [HSI])

- Institutional type and relation to American Latino museum sphere ("typology" based on Urban's review)

- Mission statements

- Contact information (websites, phone numbers, emails, Facebook presence)

- Financial data (assets, revenues)

- Federal grant data (granting institution, grant year, grant program, project description, award amount)

From these results, Urban's team analyzed the dataset to identify characteristics of museums and as a baseline for subsequent outreach for primary data collection. That analysis is detailed in the research findings described in Urban's final report.

Membership List Searching

To identify museums with a Latino focus, we conducted initial online searches of museum directories. One of the largest online was from a consultancy organization, Museum Environments, which had a list of Latino museums, described as those "that identify themselves as Latinx, Latina/o, and Hispanic.[1] We also included institutions that had a track-record of exhibits and events of Latino content. The team also reviewed online directories from museum association lists and followed links to review content of

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[1] See "The Complete List of Latinx Museums," Museum Environments, accessed online March 31, 2023, https://museumenvironments.com/latino-museums/.

museums in those lists. Not all association lists had their membership lists online, but nonetheless the team conducted reviews of the associations found here:

- Association of Midwest Museums
- Museum Association of New York
- Greater Hudson Heritage Network
- New Jersey Association of Museums
- PA Museums
- Museum Hue
- Museum Council of Greater Philadelphia
- Mountain-Plains Museum Association
- New England Museum Association
- Southeastern Museums Conference
- Alabama Museums Association
- Arkansas Museums Association
- Florida Association of Museums
- Georgia Association of Museums
- Kentucky Museums and Heritage Alliance
- Louisiana Association of Museums
- Mississippi Museums Association
- North Carolina Museums Council
- South Carolina Federation of Museums
- Tennessee Association of Museums
- Virginia Association of Museums
- West Virginia Association of Museums
- Western Museums Association

The team also reviewed Facebook posts from January 2020 to February 2023 in the Latino Network of the American Alliance of Museums group. Given the private nature of this group, one of our researchers requested to be a member and only extracted information of names of museums and organizations that were either institutionally focused or had previously hosted exhibits on issues of Latino history, arts, and culture. This search helped to identify institutions that were not found through the approaches described above.

Web-Based Key Term Searching

Urban's team conducted a series of supplemental searches using key terms. Researchers primarily relied on the search engine Google to yield as many relevant institutions as possible for this project. The key terms used in the search included those related to the groups comprising the larger Latino pan-ethnic category. For example, we searched for Dominican-specific institutions in the United States.

These searchers were done for two reasons: first, to increase the pool of institutions in the museum database to capture smaller, potentially lesser-known institutions; and second, to promote representation among less culturally and demographically dominant groups of Latinos. As mentioned, Urban's supplemental searching mainly involved searching for specific Latino groups. Accordingly, we searched for museums and exhibits in the United States that either centered on that group or had a history of exhibits specifically related to that group. For example, we searched for "Bolivian museum in the US" and "Bolivian exhibits in the US."

In some cases, Urban's team also searched for key terms with a particular symbolic, geographical, or cultural significance to a specific group. For example, we thought it essential to search for "Boricua" and combine this term with the primary search phrasing. We only looked at the first two pages of the search results. Overwhelmingly, many search results still captured museums outside of the United States that did not meet our criteria for inclusion. However, we also found that representation was still more common among the demographically larger groups, such as Mexican Americans and Puerto Ricans, for which we found more relevant results for the database (many already captured).

In total, these supplemental searches yielded 18 additional results identified as relevant. Once duplicates were found and eliminated, 13 new institutions remained. Another institution was identified by searching for Afro-Latino–focused museums. In total, 14 new institutions were added to Urban's current database. Many of these institutions specifically focused on Latino groups; others featured Latino-focused exhibits.

Internal Revenue Service Data Sources

The team used various IRS-based data sources to identify museums and extract relevant characteristics, particularly the NCCS and the IMLS Museum Data Files. The NCCS is the largest and most comprehensive clearinghouse for nonprofit tax data currently available and harvests information from IRS Form 990 files. Urban conducted a key term search (using the methods described above in the web-based approach) to identify relevant museums.

Urban's team also reviewed the National Taxonomy of Exempt Entities (NTEE) Core File sorted by NTEE Code, which classifies nonprofit organizations by time. The NTEE "A" category includes categories specifically for museums, and the project conducted a targeted search of institutions within that "A" code. The team also searched the broader NCCS database to identify institutions with names that included key terms.

In addition, we reviewed IMLS's Museum Data Files database (structured similarly to the NCCS) to identify institutions not previously discovered. From these files, the team reviewed and extracted important tax information from ProPublica's Nonprofit Explorer, which has been updated more recently than the NCCS or IMLS files.[2]

These files, while useful, have a number of limitations. Smaller organizations have fewer IRS reporting requirements so the financial data tend to rely on information reported by larger institutions. More generally, all of these datasets are biased to larger, more formalized, and more resourced institutions. As such, they may miss smaller organizations that IMLS may likely want to incorporate into its planning for the ALHC program grantmaking process. Finally, as both the NCCS and IMLS are (in a sense) historical records, they often include institutions that are no longer active, or that have undergone institutional transformations that can be difficult to track. Urban refined and updated this list throughout the project, removing institutions that clearly were no longer operating.

Federal and Nonfederal Grant Records

The research team has reviewed online IMLS grant data (https://www.imls.gov/grants/awarded-grants) and similar National Endowment for the Arts (NEA) and National Endowment for the Humanities (NEH) grant resources to identify grants to museums identified in our database and to identify other museums that have received grants for exhibits related to American Latino topics. We used several strategies to search for federal and nonfederal grant programs currently or recently available to American Latino museums. First, we reviewed IMLS (https://www.imls.gov/grants/grant-programs), NEA (https://www.arts.gov/grants), and NEH (https://www.neh.gov/grants) grant opportunities already known from searches above to identifying any additional programs of relevance. Second, we reviewed grants received by Latino museums in Urban's evolving dataset. Third, we conducted Google searches for "funding for Latino museums" and "grants for Latino museums," reviewed the first three pages of results, and included any additional relevant grants and programs. Fourth, we identified an online

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[2] See Andrea Suozzo, Alec Glassford, Ash Ngu, and Brandon Roberts, "Nonprofit Explorer," November 30, 2023, https://projects.propublica.org/nonprofits/.

dataset, GallerySystems 2023 Museum Grants and Funding Opportunities (https://www.gallerysystems.com/2023-museum-grants-and-funding-opportunities/), and included opportunities from there that were in the United States. Lastly we included relevant opportunities listed in two additional websites, https://preserveart.org/grants/federal/#NEH and https://museumsoftware.com/grants.html.

The team conducted a key word search (using the methods described in the web-based approach above) of data sources that harvest information from IRS 990 files of nonprofits to identify additional museums and extract relevant characteristics. For this work we used the NCCS and the IMLS Museum Data Files. From these files, the team reviewed and extracted tax information from ProPublica's Nonprofit Explorer, which has been updated more recently than the NCCS or IMLS files.

The research team has reviewed online IMLS grant data and similar NEA and NEH grant resources to identify grants to museums identified in our database and to identify other museums that have received grants for exhibits related to American Latino topics.

As elsewhere, the team undertook key word searches to identify museums (using key words such as "Hispanic," "Latino," "Latinx," etc.).

Listening Sessions

Urban planned and executed two virtual, bilingual (English-language and Spanish-language), national community listening sessions in July 2023. The community listening sessions provided a virtual space for museum experts and collaborators to answer questions regarding the ALHC program. The purpose of the listening sessions was to solicit feedback from museum staff representing different capacity-sized museums and institutions, based on their experience with applying for grants. All participants received a 20-minute introduction to the ALHC program and purpose of the listening sessions, before voluntarily consenting to participate in small breakout groups with confidential discussions. Urban's research team led the sessions and took notes, with a framework of semistructured questions primarily centered on the following:

- Cultural considerations about Latino museums that IMLS should be made aware of

- How IMLS could expand its reach to include more Latino museums/institutions

- How IMLS could better support prospective grantees and provide technical assistance

- Which other funder programs or large foundation approaches offered lessons to IMLS

- What success would look like in the ALHC grant program for the field of institutions promoting Latin American life, art, history, and culture

These sessions helped inform findings in response to Urban's research objectives as participants raised a variety of themes and recommendations for IMLS to consider in its grantmaking process. A total of 49 representatives from 41 museums/institutions attended the listening sessions.

From late May to July 2023, the Urban team worked on planning the sessions by recruiting internal staff to participate as facilitators and/or notetakers, setting up Zoom tech support, promoting the community listening sessions through English and Spanish email outreach to institutions identified through Urban's mapped Latino museum space and via IMLS social media to increase registration numbers, hiring live-translation services, providing a run-of-show and training before the scheduled sessions, and having on-day Zoom support. Each session had multiple breakout rooms to facilitate a two-hour discussion in smaller groups. For the English-language listening session (scheduled on July 11, 2023), 43 participants attended the session, divided into six breakout rooms. For the Spanish-language listening session (scheduled on July 12, 2023), there was a total of 6 attendees, divided into two breakout rooms.

In each breakout room, the notetaker first removed names of participants and then enabled the Zoom-transcript feature (which generated a transcript that was later cleaned and analyzed), wrote descriptive notes, and saved the Zoom chat conversation for analysis purposes. The Urban team reviewed cleaned notes and transcripts, wrote summary notes, and used the qualitative data to elevate high-level themes and recommendations raised by participants throughout the full report.

Interviews

To understand key stakeholders' experiences navigating federal grant processes for Latino-serving institutions, Urban conducted 40 interviews with American Latino community stakeholders, experts, and federal agency staff. Twenty of these interviews were with nonfederal contacts across 19 institutions including museums, cultural centers, and philanthropic foundations; 15 were with affiliates across eight federal agencies. Urban conducted one-hour virtual sessions in both English and Spanish using guided questions and prompts about engagement with and awareness of federal programs for museums and Latino-serving cultural and educational institutions, the state of funding and grant availability for these institutions, and the landscape and needs of Latino institutions across the country.

One nonfederal interview was conducted via email. Interview participation was voluntary and confidential, and Urban did not offer incentives for participation.

Survey

Survey questions were structured following a format similar to prior instruments developed to collect information on the Museum Grants for African American History and Culture (AAHC) program. Additional questions were developed by Urban's team in consultation with IMLS to capture perspectives and experiences with program activities and fundraising by American Latino museums and organizations that promote the study of American Latino life, art, history, and/or culture.

The survey was computerized online using secure Qualtrics software and was made available in English and Spanish. The survey was translated internally and reviewed by culturally competent native language speakers to ensure accuracy. Personalized links were created for each recipient to avoid link-sharing. Recipients were identified based on the list of eligible organizations the team compiled in the environmental scan that mapped the Latino museum space. We also shared a separate anonymous link with IMLS to increase outreach. IMLS shared this link on Twitter and the Urban team shared it to the Latinx Network of Museum Professionals via Facebook.

The survey was administered to over 230 organizations, and 73 organizations completed the survey via email and anonymous link. Emails made up the majority of the distribution, while fewer than 6 respondents used the anonymous link to complete the questionnaire. In a few instances, the survey was shared with multiple staff from the same organization. If more than one response was submitted for a single organization, we removed duplicates based on the IP address, organization's name, email address, physical address, and participant's name.

Appendix D. Research Analysis: Additional Details

This appendix contains additional details about the mixed-methods research analyses that Urban's team conducted. The information in this appendix is not comprehensive of all our findings for these research questions. Rather, they supplement the overarching findings described in our final report.

What Are the Diverse Characteristics of the Latin American Diaspora in the US and the American Latino Experience?

Historically, the US Census has only counted Hispanic or Latino people whose roots trace to Spanish-speaking countries (Adames, Chavez-Dueñas, and Jernigan 2021). On the 2020 Census, however, 70 percent of Brazilians and 41 percent of Belizeans in the US self-identified as Hispanic or Latino (Passel and Krogstad 2023), speaking to the importance of their inclusion if they so choose.[3] Also, Portuguese scholars note that although the term American Latino is considered imprecise, it acknowledges the groups' shared histories in unifying ways (Martinelli 2022).

Currently, the largest American Latino–origin groups in the US include Mexicans, Puerto Ricans, Salvadorans, Dominicans, Cubans, Guatemalans, Colombians, Hondurans, Spaniards, Ecuadorians, Peruvians, Venezuelans, Nicaraguans, Argentines, Panamanians, Chileans, and Costa Ricans (Lopez, Krogstad, and Passel 2023; Moslimani and Noe-Bustamente 2023).

Other social determinants of American Latino health also remain disproportionately lower, most recently evidenced by excess deaths experienced by American Latinos during the COVID-19 pandemic (McCormack 2021). American Latino homeownership, while expected to skyrocket by 2040 with mostly younger new owners, has historically lagged behind non-Latino homeownership and shown greater instability (Goodman and Zhu 2021; Hill, Zinn, and Mehrotra 2023).

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[3] We acknowledge that while Urban's team tried to incorporate the perspectives of Portuguese-speaking Latinos, most participants spoke English or Spanish and most resources reviewed were in English or Spanish. We do anticipate that many high-level findings apply to Latinos who speak Portuguese or are of Portuguese origin, but we respect this limitation of our study.

Given that Latinos represent a "mosaic not a monolith," there are differences in acceptance of the most appropriate, unifying label for these communities. Urban's literature review, community listening sessions, and interviews highlighted the extensive diversity among American Latinos, including differences among how Latinos in the US self-identify and the terms that people prefer to use for those identifications. These differences in identity often vary by US geography, reflective of historic patterns of Latinos' migration to or birth within the US, with some preferring the term Hispanic, others preferring Latino, and most recently younger generations preferring gender-neutral terms such as Latinx or Latine. Some listening-session participants also raised concerns over external interpretations of "Latino" as a racial identity, stating that it must also be triangulated as an ethnic and cultural identity.

Conflicting opinions regarding the most appropriate term to use often center on two key issues. First, there is an inherent desire to recognize and respect individuals' heterogeneous and intersectional, ethnic, racial, and national identities. Second, however, is an equally strong desire to politically empower people with similar or shared backgrounds through unifying labels. As described by Godoy Peñas (2020), the term Latino has historically both enabled a political force and silenced important sectors, such as Afro-Latinos. As we note in our report, we use the terms "Latino" and "American Latino" because those are the terms used in the ALHC program's authorizing legislation. However, our intent with these labels is to encompass all terms used and/or preferred by those in the US with Spanish and/or Latin American origins. Because simplified labels tend to erase important divisions within Latino communities, particularly for nondominant groups, the ALHC program language must clarify inclusion for all diverse types of "American Latino" people and institutions (Garibay, Lannes, and González 2017).

Lastly, we note that in one listening session, participants discussed that to define American Latino culture, it is important to recognize the blended definition of what *Latinidad* means. Latinidad has been used to reference the various attributes shared by Latin American people without reducing those similarities to any single trait, while also recognizing the shared experiences of discriminatory, colonial, and elitist systems (Morais 1997; Nelson and Tienda 2022; Nunn 2007). However, even the term Latinidad has felt exclusionary for nonwhite, nonheterosexual Latinos (Martinez 2019). The takeaway from this dialogue must be one of diversity, inclusion, and empowerment; the ALHC program must recognize Latino diversity, ensure it clarifies inclusion for all to whom the label might apply, and focus on empowerment to elevate those who are growing and contributing to the US while overcoming socially and economically challenging histories.

Median wealth among American Latino people remains a fifth that of their non-Latino counterparts, and other social determinants of American Latino health remain disproportionately lower (Carmona 2023; Goodman and Zhu 2021; Hill, Zinn, and Mehrotra 2023; McCormack 2021; UnidosUS 2022).

American Latinos' native language is often a source of comfort and pride and an especially important part of Indigenous Latino heritage (Hernández Morales and Velasco Ortiz 2015). Yet, according to the American Community Survey, the proportion of Latinos who speak English proficiently had risen to 72 percent as of 2021, with those born in the US driving this growth (among Latino immigrants, only 37 percent spoke proficient English; Krogstad, Passel, and Noe-Bustamente 2022). Despite these changes, over two-thirds of American Latinos speak Spanish at home (and approximately 40 percent of Portuguese-Americans speak Portuguese at home), showing the importance of Latino language to feelings of comfort, inclusion, and access for many Latinos.

Diverse Latino experiences with colonization and slavery include those following Spanish Europeans' arrival and conquest over Indigenous people living in what are now US states and territories. During the same time frame, similar processes of invasion and conquest were happening in what is now Latin America, particularly in South America and the Caribbean. Between 1526 and 1867, millions of captured African people were brought to Spanish and Portuguese colonies in Latin America—nearly 15 times as many African people as were taken to the modern-day US (López and Gonzalez-Barrera 2016). These devastating processes also created space for the genetic diversity seen among American Latinos today, 25 percent of whom self-identify as Afro-Latino (Micheletti et al. 2020).

American Latino history also includes migrants from Asia who sought relief from poverty, political conflict, or colonization. As described by UnidosUS (2021), "countries like Brazil, Peru, and Mexico have some of the largest and most historic Asian populations, but little is known of Asian-Latinos residing in the United States." We do know, however, that Asian-Latinos in the US also include generations of Filipinos, whose islands were colonized by Spain from 1565 to 1898.

"The American Latino 'voice' is a collection of voices that are constantly changing and evolving. These voices vary with ethnicity, gender, region, perspective, art form, discipline, class, and religion. This diversity of voice is exciting, expressive, and enriching, and there should not be any effort to homogenize it." —NMALC (2011, 14)

American Latinos participated in the creation and growth of the US well before its current name. Moreover, Latinos have fought to defend the US in all its wars and battles, even after having their lands, property, and civilizations invaded and conquered. Yet the exclusion and marginalization of Latino

voices has been evident since the times of colonization, and as such, there is a paucity of detailed information about Latino artists and their work (Crubelatti 2022).

Celia Cruz, an Afro-Cubana, received the National Medal of Arts for bringing salsa music to the US and world stage. Helen Rodríguez Trías, a Puerto Rican American, was the first Latina president of the American Public Health Association, pioneering to improve health services to women and low-income communities. Franklin Ramón Chang-Díaz, a Costa-Rican born American, was a NASA astronaut who tied the record for most spaceflights after his seventh US Space Shuttle mission. And recently, Gabriel Acevero, a Trinidadian-American, became the first openly gay Latino elected to the Maryland House of Delegates.

American Latinos who immigrated to the US have had varying experiences depending on the impetus and resources behind their migration, whether they arrived with or without documentation, and whether they joined an established familial network in the US or traveled and arrived all alone (Armet 2022; Stein, Garibay, and Wilson 2008). Whereas some Latino immigrants do not know anyone when they arrive in the US, others benefit from a previously established network of friends and family who already live there. Such networks help Latino immigrants achieve a higher standard of living and adjust to US culture and society more easily (Orozco Vargas 2013).

Furthermore, Latino immigrants from the same country may also differ based on which region of the country they emigrated from or when they emigrated. For example, Cubans who immigrated to the US in the 1970s typically came from Cuba's largely white upper-middle class, whereas those who immigrated in the 1980s tended to be much poorer and were less likely to be white (Retis and Badillo 2015). Undocumented Latino immigrants often experience significantly more stress than their documented counterparts. For undocumented immigrants, the fear of deportation influences nearly every aspect of their and their families' lives (Orozco Vargas 2013).

Similarly, successive generations of Latino people in the US have had differing experiences of racism and discrimination, with younger Latinos benefiting from the social and political movements of their predecessors (Lopez, Gonzalez-Barrera, and Lopez 2017).

How Should These Characteristics Inform IMLS's Understanding of an American Latino Museum?

Latino museums demonstrate culturally authentic or appropriate understandings of the Latino life, art, history, and culture they exhibit and collect. The notion of authenticity has become increasingly central

to the goals of museums (and cultural assets more broadly) in recent decades, as institutions have moved away from solely archival roles as places where artifacts are conserved to ones that more authentically reflect cultural practices and experiences of their visitors and communities at large. As many have written, the search for authenticity is never-ending: the presentation of traditions and artifacts in museums requires simplification of actual cultural practices, and museums balance their roles of catering both to members of a particular cultural group as well as to visitors who are less familiar with whatever is being presented (Chhabra 2008; Lowenthal 2015).

What Criteria Best Define an American Latino Museum for the ALHC Program?

In addition to self-reported mission statements, there have been other precedents designed to classify American Latino museums. Four years after the foundation of Friends of the National Museum of the American Latino, a law was introduced to evaluate the validity of the institution (Toucharte 2020). In 2011, the NMALC concluded that a museum that could center on history, culture, and art of Latin America was essential for US interests. More specifically, the NMALC (2011, 2) report indicated that the National Museum of the American Latino—whose goals will understandably differ from existing Latino cultural centers and institutions so as not to duplicate—should:

- Focus on the collection, study, and establishment of programs relating to American Latino life, art, history, and culture

- Retrieve, record, preserve, and share the multifaceted material, culture, and intellectual capital of this country

- Have a strong education and public program emphasis and serve as a place of ongoing cultural dialogue

- Advance research and scholarship to augment higher learning and, ultimately, benefit the American people

- Collaborate with existing institutions to provide enhanced opportunities in collections, exhibition development, programming, research, and training

- Stimulate an environment of collaboration among American Latino cultural institutions and centers to foster a new cultural ecology that ultimately promotes greater cultural awareness and understanding

- Establish a grant program in consultation with the Institute of Museum and Library Services with the purpose of improving operations, care of collections, and development of professional management at American Latino museums across the nation

To inform their report, the NMALC interviewed "directors, curators, collection managers, and other leaders at 21 institutions that focus exclusively on, or have significant holdings in, American Latino arts and culture" (NMALC 2011, 12). The report also referenced the importance of the National Museum of the American Latino's collaboration with cultural centers, community programs, and museums "that share Latino stories" (NMALC 2011, 13). Additionally, the NMALC (2011, 7) envisioned that the National Museum of the American Latino would focus specifically on Latino contributions, history, popular culture, values, and creative expressions "produced and originating in the United States and its territories," so that it would not "overshadow or duplicate the work of other existing American Latino museums." In this way, the report implied that the American Latino museums eligible for the ALHC program grants could focus *either* on Latino contributions from the United States *or* those from other Latin American countries.

Appendix E. Study Protocols

This appendix provides copies of Urban's study protocols, including the American Latino museum survey instrument, and the questions posed to different types of interviewed professionals—American Latino funders, stakeholders, and collaborators.

Survey Instrument Used to Survey American Latino Museum Representatives

[Start of Block: Consent]

Q1 Thank you for considering participating in this survey.

This survey is part of the Urban Institute's field research to inform development of the new American Latino History and Culture (ALHC) program being funded by the Institute of Museum and Library Services (IMLS). The ALHC program aims to use grantmaking to strengthen the capacity and impact of American Latino museums nationwide.

Your participation is entirely voluntary, and you may choose to stop the survey at any time or skip questions for any reason. Responses will only be reported in aggregate form to protect individual identities. Your decision to participate or not will have no impact on the success of your future applications to the ALHC program or other IMLS programs. The information you provide will be kept private to the extent permitted by law. The Urban Institute will ensure that your information stays stored in a secure encrypted folder. There is little risk associated with you participating because of the care we are taking to keep your answers protected.

The survey is designed to be filled out by someone at your organization familiar with and involved in the organization's mission, management, fundraising, and grantmaking activities. Below we have an option for forwarding this survey to someone else at your organization if they are better-placed to answer these sorts of questions.

This survey is designed to take no more than 15 minutes to complete. Your participation is completely voluntary, meaning that you can choose whether to participate. You can skip questions and do not have to answer any questions you don't want to answer. You are not required to complete the survey in one session, and you can save and return to your progress by clicking on the original survey link provided

Also, as a federal agency, IMLS can only conduct or sponsor (and a person is not required to respond to) a collection of information if it displays a currently valid OMB control number. The OMB number for this information collection is 3137-0133 and the expiration date is 5/31/2026.

If you have any comments about any aspect of this survey, you can send them to Gibran Villalobos of the Institute of Museum and Library Services at gvillalobos@imls.gov.

Q2 Do you consent to participate in this survey?

- Yes (1)

- No (2)

- Not sure; I have questions or concerns (3)

[Skip To: End of Survey If Q2 = 2]

[Display This Question: If Q2 = 1]

Q3 We greatly appreciate your participation in this survey! If you are unable to complete the survey in one session, your answers will be saved and you can return to where you left off by clicking the original link provided. For each question you will be given the option to respond "Not sure" or "Don't know" if needed. You can skip questions and do not have to answer any questions you don't want to answer.

Please complete the survey by July 18. If you have technical difficulties or questions when completing this survey, please contact Jennifer Yahner at the Urban Institute (ALHC@urban.org).

[Display This Question: If Q2 = 3]

Q4 If you have questions or concerns before deciding to participate, please contact Jennifer Yahner at the Urban Institute (ALHC@urban.org).

[Skip To: End of Survey If Q4 Is Displayed]

[End of Block: Consent]

[Start of Block: Block 1]

Q5 Are you knowledgeable about your organization's mission, programming, fundraising, and grant seeking?

- Yes (1)

- No (2)

[Display This Question: If Q5 = 2]

Q6 Based on your answer, it seems that we should contact someone else at your organization.

Could you please provide the contact information for someone familiar with your organization's mission, programming, fundraising, and grant seeking? [Display space for open-ended response here]

[Skip To: End of Survey If Q6 Is Displayed. Skip To: End of Survey.]

Q7 Where is your organization located?

- Address (1) [Display space for open-ended response here]

- City/County (2) [Display space for open-ended response here]

- State (3) [Display space for open-ended response here]

Q8 What is your organization type? *Please select more than one if* your organization fits into more than one category.

- Art museum/center (1)

- History museum/center (2)

- Cultural center (14)

- General multidisciplinary (17)

- Historic house/site (4)

- Natural history/anthropology museum (5)

- Specialized museum (e.g., railroad, music, aviation) (6)

- Science/technology museum/center (includes planetariums) (7)

- Arboretum/botanical garden (8)

- Children's/youth museum (9)

- Zoological park (10)

- Nature center (11)

- Aquarium (12)

- University affiliated museum (15)

- Archive or archival collections (16)

- Other (Please describe) (13) [Display space for open-ended response here]

Q9 How would you describe your organization's annual revenue?

- Less than $50,000 (1)

- $50,000 to $199,999 (2)

- $200,000 to $999,999 (3)

- $1,000,000 to $9,999,999 (4)

- $10,000,000 to $99,999,999 (5)

- $100,000,000 or more (6)

Q10 Would you describe your organization as an "American Latino museum" and/or does your organization promote the study of Latin American life, art, history, or culture?

- Yes (1)

- No (2)

- Not sure (3)

Q11 Who is your organization's primary audience? [Display space for open-ended response here]

Q12 What are your organization's top sources of grant funding? *Please select up to three.*

- Local or state government (1)

- Federal Government (2)

- Philanthropic foundations (3)

- Individual donors (4)

- Corporate donors (5)

- Other (Please describe) (6) [Display space for open-ended response here]

Q13 What are your top considerations when deciding whether to apply for a grant from any source? *Please select up to three.*

- Goals alignment (1)

- Ease of the application process (2)

- Availability of application guidance (3)

- Reporting requirements (4)

- Grants management requirements (5)

- Capacity building (6)

- Other (Please describe) (7) [Display space for open-ended response here]

Q14 Has your organization ever applied for a _federal_ grant?

- Yes (1)

- No (2)

- Not sure (3)

[Display This Question: If Q14 = 2]

Q15 Why hasn't your organization applied for _federal_ grants? [Display space for open-ended response here]

[Display This Question: If Q14 = 1]

Q16 What are your top considerations when deciding which _federal_ grants to apply for? *Please select up to three.*

- Goals alignment (1)

- Ease of the application process (2)

- Availability of application guidance (3)

- Reporting requirements (4)

- Grants management requirements (5)

- Capacity building (6)

- Other (Please describe) (7) [Display space for open-ended response here]

[Page Break]

Q17 Before today, have you heard of the Institute for Museum and Library Services (IMLS)?

- Yes (1)

- No (2)

- Not sure (3)

[Skip To: Q23 If Q17 = 2]

[Skip To: Q23 If Q17 = 3]

Q18 Has your organization ever applied for an IMLS grant?

- Yes (1)

- No (2)

- Not sure (3)

[Skip To: Q20 If Q18 = 2]

[Skip To: Q23 If Q18 = 3]

[Display This Question: If Q18 = 1]

Q19 To the best of your knowledge, in what year(s) did your organization apply for an IMLS grant? [Display space for open-ended response here]

[Skip To: Q21 If Condition: To the best of your knowled... Is Displayed. Skip To: Were you involved in your organizatio....]

Q20 Why hasn't your organization applied for an IMLS grant? *Please select all that apply.*

- Not aware of IMLS's available grant programs (4)

- Organization didn't have time or staff to prepare an application (5)

- Application process was too complicated/difficult (6)

- Cost-share requirement was a barrier (7)

- Reporting requirements were a barrier (8)

- Organization's needs didn't align with the program's goals (9)

- Available funding wasn't adequate for our project's needs (10)

- Funding amounts didn't seem worth the effort required to apply (11)

- Heard that IMLS was difficult to work with (12)

- Negative past experience(s) with IMLS (13)

- Did not want to work with the Federal Government (14)

- Organization didn't meet eligibility requirements (15)

- Other (Please describe) (16) [Display space for open-ended response here]

- None of the above/no difficulties or concerns (17)

Q21 Were you involved in your organization's grant application to IMLS?

- Yes (1)

- No (2)

- Not sure (3)

[Display This Question: If Q21 = 1]

Q22 Which, if any, of the below were a source of difficulty or concern when your organization most recently applied for an IMLS grant? *Please select all that apply.*

- Not aware of IMLS's available grant programs (1)

- Organization didn't have time or staff to prepare an application (2)

- Application process was too complicated/difficult (3)

- Cost-share requirement was a barrier (4)

- Reporting requirements were a barrier (5)

- Organization's needs didn't align with the program's goals (6)

- Available funding wasn't adequate for our project's needs (7)

- Funding amounts didn't seem worth the effort required to apply (8)

- Heard that IMLS was difficult to work with (9)

- Negative past experience(s) with IMLS (10)

- Did not want to work with the Federal Government (11)

- Organization didn't meet eligibility requirements (12)

- Other (Please describe) (13) [Display space for open-ended response here]

- None of the above/no difficulties or concerns (14)

Q23 IMLS's American Latino History and Culture (ALHC) program seeks to nurture museum professionals, build institutional capacity, and increase access to museum and archival collections at Latino History and Culture museums and Hispanic-serving institutions (HSIs) of higher education.

Q24 Are there any activities or projects you want to fund that are consistent with the American Latino History and Culture (ALHC) program goals?

- Yes (1)

- No (2)

- Not sure (3)

25 Are these activities or projects generally considered allowable for grant funding?

- Yes (1)

- No (2)

- Not sure (3)

[Display This Question: If Q25 = 2]

Q26 Please describe why these activities or projects would not generally be considered allowable for grant funding: [Display space for open-ended response here]

Q27 What is the minimum amount of funding the American Latino History and Culture (ALHC) program could offer that would make your organization consider applying? [Display space for open-ended response here]

Q28 How does your organization prioritize the following activities when considering its needs for grants?

	Not a priority at all (1)	Low priority (2)	Medium priority (3)	High priority (4)	Extremely high priority (5)
Increase capacity to manage collections (1)	○	○	○	○	○
Support community partnerships (2)	○	○	○	○	○
Increase capacity for community engagement (3)	○	○	○	○	○
Support exhibits and/or program development (4)	○	○	○	○	○
Support staffing needs (5)	○	○	○	○	○
Support organizational planning (6)	○	○	○	○	○
Support internships/fellowships for those in academic programs (7)	○	○	○	○	○
Increase online presence (8)	○	○	○	○	○

Q29 For what, if any, other kinds of activities do you need grants? [Display space for open-ended response here]

Q30 Does your organization have a formal process for tracking its programs' progress and results? *For the purposes of this question, processes include procedures for collecting and storing data, calculating performance metrics, and/or analyzing and reporting the data, etc.*

- Yes (1)

- No (2)

- Not sure (3)

[Display This Question: If Q30 = 1]

Q31 How effective is your organization's formal process for tracking its programs' progress and results? *For the purposes of this question, processes include procedures for collecting and storing data, calculating performance metrics, and/or analyzing and reporting the data, etc.*

- Very effective (1)

- Effective (2)

- Moderately effective (3)

- Not very effective (4)

- Not effective at all (5)

- Not sure (6)

[Display This Question: If Q30 = 2]

Q32 Does your organization plan to implement a formal process for tracking its programs' progress and results? *For the purposes of this question, processes include procedures for collecting and storing data, calculating performance metrics, and/or analyzing and reporting the data, etc.*

- Yes, within the next year (2)

- Yes, within the next 5 years (3)

- Yes, but not sure when (4)

- No (5)

- Not sure (6)

[Display This Question: If Q32 = 5]

Q33 Why is your organization <u>not</u> planning to implement a formal process for tracking its programs' progress and results? Please select all that apply. *For the purposes of this question, processes include procedures for collecting and storing data, calculating performance metrics, and/or analyzing and reporting the data, etc.*

- Insufficient funding (1)

- Insufficient personnel time or expertise (2)

- Limited interest (3)

- Unclear use or value (4)

- Not as important as other priorities (5)

- Other reason (Please describe) (7)

- Not sure (6)

Q34 Is it challenging for your organization to obtain matching funds when they are required for a grant?

- Yes (please specify) (1) [Display space for open-ended response here]

- No (2)

- Not sure (3)

Q35 What kinds of grants could IMLS offer to best help your organization further its mission? [Display space for open-ended response here]

Q36 Has your organization had to cancel or delay projects or programs because it was unable to obtain grants?

- Yes (1)

- No (2)

- Not sure (3)

[Display This Question: If Q36 = 1]

Q37 Please provide more detail on the kinds of projects or programs your organization needed to cancel or delay because it was unable to obtain grants: [Display space for open-ended response here]

Q38 What, if any, sources have you come across that provide funding to support organizations in the study, promotion, or preservation of American Latino art, culture, and history? [Display space for open-ended response here]

Q39 How can IMLS ensure that its American Latino History and Culture (ALHC) program effectively supports organizations such as yours? [Display space for open-ended response here]

Q40 Would you be willing to provide your contact information in case the research team has follow up questions?

- Yes (1)

- No, thank you. (2)

[Display This Question: If Q40 = 1]

Q41 Please enter your contact information below:

- [Name] (1) [Display space for open-ended response here]

- [Phone number] (2) [Display space for open-ended response here]

- [Email] (3) [Display space for open-ended response here]

- [Organization] (4) [Display space for open-ended response here]

{End of Block: Block 1}

Interview Protocols: ALHC Program "Universe One" Stakeholders (Urban Institute)

Introductory and Consent Language

The following language will precede each interview.

The Institute of Museum and Library Services (IMLS) has asked the Urban Institute (a nonprofit, nonpartisan research organization in Washington, DC) to conduct a study to inform the development of the American Latino History and Culture (ALHC) program. This study is designed to collect information to inform the program's design and development and its role in supporting grantee outcomes. The goal

is to better understand how the ALHC Program could meet its objectives to strengthen the capacity of grantees.

Your feedback is extremely important to the success of this research because as:

- [to Universe One]: an organization that applies for grants, you/your organization has experience navigating the application process and are aware of some of the challenges facing organizations like your own.

This interview is completely voluntary. You may terminate it at any point for any reason and you may decline to answer any question. Your responses will be used to inform the development of the ALHC Program and its role in supporting grantee outcomes, the landscape of Latino museums and collections at Hispanic-serving institutions (HSIs) of higher education, and opportunities for further attention by IMLS and others.

We will be taking notes during this interview and would like to record the interview to help ensure we are accurately capturing the information you provide. The recording will only be accessed by our research team at the Urban Institute – all of whom have signed confidentiality agreements. The information you provide will be reported to IMLS in aggregate/group form only. No personally identifiable individual notes will be reported. We will not quote anything you say unless we receive your expressed, written consent.

Your decision to participate or not will not affect any current or pending grants with IMLS.

We want to be sure that you freely consent to participate in this interview and that you are aware that you are not obligated to answer any questions you do not wish to. Do you consent to participate in the interview?

Do you consent to this interview being recorded [not a requirement to continue]?

Overview Questions: Institutional Information and Previous IMLS Engagement

1. Please tell us your name, title, and background including how long you've been at your organization.

2. What are the primary sources of your organization's funding?

a. What's the relative distribution of these sources for your budget? *[Prompt: for example, what percentage comes from federal vs. state or local government vs. philanthropic grants vs. donations, etc.]*

b. How do you use these different funding sources? *[Prompt: is one designed for capacity building? Another for development?]*

c. To your knowledge, has your organization received funding through any other IMLS grant programs in recent years (since 2014)? *[Prompt: list other IMLS grant programs: Museums for America, National Leadership Grants, Inspire Grants for Small Museums, Collections Assessment for Preservation, Community Catalyst Initiative, Museum Assessment Program, Museums Empowered]*

(i) [If yes]: How would you describe your experience with those programs including their application process and reporting requirements?

(ii) [If no]: Have you applied?

a. [If yes]: Why do you believe you did not receive funding?

i. How did not receiving funding affect your decision to apply for an IMLS grant program in the future?

b. [If no]: Why have you not applied?

Project-Specific Capacity Building

The first set of questions is about how you use grants to contribute to project-specific capacity building.

1. The IMLS's ALHC Program will be designed to enhance grantee capacities, such as leadership & staffing, organizational structures and systems, stewardship of your collection, and the accessibility of your collection. Are there specific capacities in your organization that you believe a grant like this could help enhance?

[The following questions are prompts related to various capacity-building considerations]

LEADERSHIP & STAFFING

2. How do you use grants to address current needs or future plans in hiring, training, retaining staff?

3. What funding resources do you currently/plan to use in this work?

4. What are existing challenges in using grants for these efforts?

ORGANIZATIONAL STRUCTURES AND SYSTEMS

5. How do you use grants to improve operations? [probe: new equipment, software, other infrastructure]

6. What funding resources do you currently/plan to use in this work?

7. What are existing challenges in using grants for these efforts?

STEWARDSHIP OF COLLECTION

8. How do you use grants to invest in cataloging frameworks, the development/refinement of acquisitions policy or other processes to help ensure the stewardship and quality of the collection?

9. What funding resources do you currently/plan to use in this work?

10. What are existing challenges in using grants for these efforts?

ACCESSIBILITY OF COLLECTION

11. How do you use grants to invest in new software or processes to manage museum collections (e.g., cataloging a collection, digitization of a collection, providing access to a collection using digital tools)?

12. What funding resources do you currently/plan to use in this work?

13. What are existing challenges in using grants for these efforts?

COMMUNITY PARTNERSHIPS

14. What funding do you allocate to development of community partnerships or to community engagement and collaboration?

General Capacity Building

Next, I'd like to ask you about developing new partnerships or joining professional associations or initiatives.

1. Why do museums pursue funding from IMLS and what other related training do they receive?

2. How important is capacity building for museums and HSIs (e.g., improving professional capacity, improving systems, improving collections)?

3. What are the key benefits of capacity building for museum staff and leadership?

SOCIAL CAPITAL CAPACITIES

4. Are you interested/involved in using grants to establish new partnerships or strengthen existing partnerships?

    a. Probes: professional membership and service organization such as the Latino Network of the American Alliance of Museums (AAM)?

        (i)   Pursuing or achieving accreditation with the AAM?

        (ii) Engaging in other museum professionalization efforts to help develop your organization's capacity?

5. What funding resources do you currently/plan to use in partnership work?

6. What are existing challenges in using grants for these efforts?

FINANCIAL HEALTH AND STABILITY

Next, we'd like to learn a little bit more about how you may use grants to contribute to your organization's financial health and stability.

7. How, and to what extent, do you use grants to leverage additional funding (e.g., new grant dollars, one-time contributions, responding to requests/applications to other federal grant programs). Can you point to specific examples, programs, or initiatives?

8. What is your experience with grants requiring cost shares or matching?

9. What funding resources do you currently/plan to use in this work?

10. What are existing challenges in using grants for these efforts?

EVALUATIVE AND REPORTING CAPACITIES

11. Do you currently use grants to build internal evaluative work?

12. Do other grants have evaluative requirements?

    a. Probe for examples

13. What reporting requirements do you find in your existing grant relationships?

    a. Which ones are most/least useful for your own needs?
    b. Which ones are most challenging to compile?

COMMUNICATIONS AND OUTREACH CAPACITIES

IMLS wants to make sure that its grantees have the support they need to advance exhibits and public programs, and their visibility and recognition. These next questions speak to that.

14. What is your organization's interest in using grants to plan or install new exhibitions, undertake new outreach and/or public programs, or address collections?

15. What is your organization's interest in publishing new scholarly publications, exhibition brochures or catalogues that may later be used to promote your organization or institution?

    a. Interest in disseminating these materials?

16. What is your organization's interest in building website and social media presence?

17. What is your organization's interest in developing partnerships or community collaborations?

18. What is your organization's interest in tracking outreach, community participation, web-based downloads/traffic?

    a. What would you need to improve or expand these efforts?

IMLS Application Process (for previously successful grantees)

1. What challenges, if any, have you experience in the IMLS grant application process?

    a. What components are the most straight-forward to handle?
    b. What components provide the biggest barriers to successful applications?

2. What recommendations would you suggest to the IMLS as the agency develops the management structure of the ALHC Program to help ensure a positive grantee experience?

3. Are there grant award timing considerations IMLS should account for when developing the program (e.g., month of award notification, date of payments, grant cycle) to align with the needs of your organization?

ALHC's Role in Outreach and Engagement with American Latino Museums and Understanding the Universe of Prospective Applicants

IMLS is interested in learning more about how to effectively structure its outreach and wants to gain more insight into the broader universe of American Latino museums, in part, to understand both

opportunities and potential barriers that might otherwise prevent organizations and institutions from applying to this new ALHC Program.

1. How did you learn about the IMLS and its grant programs?

    a. Based on your knowledge of IMLS programs, how could IMLS staff expand and/or strengthen its existing outreach approach to best promote the new ALHC Program?

2. What strategies would you recommend to IMLS staff to tap a broader network of HSI community-based organizations, museums, and/or educational institutions to attract applicants?

3. What barriers do you perceive current or prospective applicants face in applying to this kind of funding opportunity?

4. In what ways do you consider grant application processes to be equitable and inclusive?

5. Do you know of any other funders, public or private, that support the kinds of institutions noted above? *[Prompt: Funding sources like NEA or NEH grants, for example?]*

    a. Have you ever applied to one of their programs?
    b. What was your experience like?

Concluding

1. Is there anything you would like to add that we didn't cover already?

    a. *[Prompt: Any final thoughts or reflections?]*

Thank you for taking the time to speak with us and offer your thoughts and perspectives on the American Latino History and Culture program and how it might relate to your work. As we explained earlier, your contribution will help inform IMLS's efforts to develop this program.

The study findings will be published after a final draft is shared with IMLS in the summer. We will email you a copy of the final report once it is posted to our website. Please do not hesitate to reach out if you have questions after this call, about the interview or the broader research, or to provide additional information that may be relevant.

Thank you again for your time!

Interview Protocols: ALHC Program "Universe Two" Funders, IMLS Staff, and Other Collaborators (Urban Institute)

INTRODUCTORY AND CONSENT LANGUAGE

The following language will precede each interview.

The Institute of Museum and Library Services (IMLS) has asked the Urban Institute (a nonprofit, nonpartisan research organization in Washington, DC) to conduct a study to inform the development of the American Latino History and Culture (ALHC) program. This study is designed to collect information to inform the program's design and development and its role in supporting grantee outcomes. The goal is to better understand how the ALHC Program could meet its objectives to strengthen the capacity of grantees.

Your feedback is extremely important to the success of this research because as:

- [to Universe Two, Funders] a **funder** in this space, you/your organization are knowledgeable about many of the eligible organizations in this space, the challenges that they face, and how targeted grants may best support them.

- [to Universe Two, Collaborators] a key **collaborator**, you/your organization are knowledgeable about many of the eligible organizations in this space, the challenges that they face, and the potential for programs like the ALHC to help.

- [to Universe Two, IMLS staff] an **IMLS staff member**, you have experience navigating and shaping IMLS programs and operations that inform the selection and success of the grantees and their project goals.

This interview is completely voluntary. You may terminate it at any point for any reason and you may decline to answer any question. Your responses will be used to inform the development of the ALHC Program and its role in supporting grantee outcomes, the landscape of Latino museums and collections at Hispanic-serving institutions (HSIs) of higher education, and opportunities for further attention by IMLS and others.

We will be taking notes during this interview and would like to record the interview to help ensure we are accurately capturing the information you provide. The recording will only be accessed by our research team at the Urban Institute – all of whom have signed confidentiality agreements. The information you provide will be reported to IMLS in aggregate/group form only. No personally identifiable individual notes will be reported. We will not quote anything you say unless we receive your expressed, written consent.

Your decision to participate or not will not affect any current or pending grants with IMLS.

We want to be sure that you freely consent to participate in this interview and that you are aware that you are not obligated to answer any questions you do not wish to. Do you consent to participate in the interview?

Do you consent to this interview being recorded [not a requirement to continue]?

QUESTIONS FOR FUNDERS

[These questions are semistructured and tailored to the respondent and the flow of the interview. Not all questions will be asked of all respondents.]

1. Please tell us your name, title, and background including how long you've been at your organization.

2. What are your organization's overall funding objectives and approaches to funding?

    a. *[Prompt: Does your organization focus primarily on the same organizations who might qualify for the ALHC Program, (which will support museums and educational organizations in the study of American Latino art, culture, and history)? Do you provide multi-year grants? Is it through a competitive process? Is it for specific projects or general operational support?]*

    b. How much funding do you have available/have you provided for these entitites annually? What is your typical grant size? *[Prompt: Estimates/ranges are fine]*

    c. How many organizations have you provided funding to?

3. What are your priorities vis-à-vis Latino history and culture?

    a. What kinds of proposals or applications does your program or organization seek to fund (e.g., specific focus area of project work or organization, type of art/collection, focus)?

    b. What are the main eligibility criteria that you rely on when narrowing your applicant pool? *[Prompt: Do you require a cost share? Do you require organizations to have a budget over a certain amount or have a at least one paid staff member?]*

    c. What is your grant application like (e.g., required length, two-stage application)? *[Prompt: Are there any distinguishing factors about the type of procedure your organization goes through in selecting projects to fund?]*

    d. In what ways do you ask grantees to report on outcomes in this space?

        (i) What other requirements are part of your grant report structure?

4. What challenges do you see Latino history and culture museums and archival collections encounter in their operations?

    a. *[Prompt if does not emerge in response: Are there challenges related to staff capacity, limited access to capital, and/or fiscal sustainability?]*

    b. How does your funding help address these challenges?

5. How would you characterize the availability of funding to support Latino museums and Hispanic-serving institutions (HSIs) of higher education? *[Prompt for HSIs: We're interested in support for museums, historic collections, archives and libraries, and training students for museum, archives, or library careers].*

    a. What are some of the significant funding sources exist for these organizations?

    b. Are there any trends that you are aware of for funding in this space? *[Prompt: For example, trends like supporting paid internship programs has become more popular amongst funders in this space.]*

        (i) If so, what's driving these trends?

    c. Are there any blindspots or funding gaps for operations or programs that need additional financial support?

6. What's your awareness of IMLS's funding for these organizations?

    a. How do you see your funding in relation to that provided by IMLS?

7. Are you aware of IMLS's in-development American Latino History and Culture program? *[If no, interviewer skip question below.]*

    a. How would you describe the ALHC Program's goals, its future role in the space, and the outcomes that it should support?

8. *[Prompt if needed: The ALHC Program will support museums and educational organizations in the study of American Latino art, culture, and history.]* Are you aware of any weaknesses or areas for growth this program should consider in its development?

    a. *[Prompt: What are some lessons learned from your experience funding in this space that might apply to the ALHC Program staff?]*

    b. Have your grantees blended or strategically sequenced funding from your organization and programs similar to the ALHC Program, to your knowledge?

Concluding

1. Is there anything you would like to add that we didn't cover already?

    a. *[Prompt: Any final thoughts or reflections?]*

Thank you for taking the time to speak with us and offer your thoughts and perspectives on the American Latino History and Culture program and how it might relate to your work. As we explained earlier, your much appreciated contribution will help inform our broader research on this program's development and support IMLS's efforts to implement the program with effective contributions to the field.

The study findings will be published after a final draft is shared with IMLS in the summer. If you would like, we can email you a copy of the final report once it is posted to our website. Please do not hesitate to reach out if you have questions after this call, about the interview or the broader research, or to provide additional information that may be relevant.

Thank you again for your time!

Questions for IMLS Staff

[These questions are semistructured and tailored to the respondent and the flow of the interview. Not all questions will be asked of all respondents.]

INTRODUCTION/LANDSCAPE

1. How long have you been at IMLS?

    a. What is your background prior to joining IMLS?

2. How long have you been involved with the ALHC grant program development and in what capacity?

3. How would you describe the landscape of Latino museums and collections at Hispanic-serving institutions (HSIs) of higher education?

    a. What are the main challenges that they face and how does this differ from other, non-Latino focused, organizations?

4. What other funders exist in this space?

DESCRIBING ALHC AND POTENTIAL APPLICANTS

5. How would you describe the ALHC grant program's development to a layperson?

6. How do you envision the ALHC grant program interacting with other IMLS programs?

7. In your ideal vision, what will the ALHC's role and impact be for the field of Latino museums and Hispanic-serving educational institutions?

8. What types of potential applicants to the ALHC grant program do you believe should apply and get funded?

   a. [Prompt: beyond measures like size and geography, are there other, more subjective factors and characteristics that you believe are important?]
   b. What diversity of ALHC projects and capacities do you believe should get funded?

      (i) Are there types of Latino museum and educational organization capacities that are important but are rarely or never funded through programs like the ALHC?

9. Are the constraints on the program – including ones that may have been placed on it by the legislation or by IMLS's policies and procedures – that you wish could be revised?

10. What types of questions do you believe prospective ALHC grant program grantees might have before applying?

11. What are the most common weaknesses in applications to similar IMLS programs that you've seen that might apply to the ALHC grant program's future applications?

   a. Strengths?

12. If you were to estimate, about how many hours do you think the ALHC grant program application process should take to complete?

   a. Should this process vary by the size of award?

OUTCOMES

13. How prominent should measurement and evaluation be within the ALHC grant program?

   a. Should it be clearly prioritized to grantees/applicants?
   b. What efforts has IMLS made internally to document impact for comparative programs?

14. What outcomes do grantees for comparative programs track and report on? Do these outcomes align with the legislative goals outlined for the ALHC grant program as well?

   a. What tools, resources, or advice can IMLS provide to help grantees measure and document outcomes of ALHC-funded programs?

15. Is there anything you would like to add that we didn't cover already?

    a. *[Prompt: Any final thoughts or reflections?]*

Thank you for taking the time to speak with us and offer your thoughts and perspectives on the American Latino History and Culture grant program and how it relates to your work. As we explained earlier, your much appreciated, contribution will help inform our broader research on this program's development and support IMLS's efforts to implement the program with effective contributions to the field.

The research findings will be published after a final draft is shared with IMLS in the summer. Please do not hesitate to reach out if you have questions after this call, about the interview or the broader research, or to provide additional information that may be relevant.

Thank you again for your time!

Questions for Other Collaborators

[These questions are semistructured. Collaborators are identified as experts and leaders in this field who are not being interviewed as potential grantees, funders, or applicants. The list will be identified jointly between Urban and IMLS.]

INTRODUCTION

1. Please tell us your title, organization, how long you've been there and your background prior?

2. From your perspective, what are the main challenges faced by Latino museums and Hispanic-serving institutions (HSIs) of higher education?

    a. What capacity constraints have you seen and observed?
    b. In what ways is finding funding a challenge?

3. What are the main funding sources?

    a. What types of funding do they need?

4. What more can be done to strengthen and expand the influence of Latino historical and cultural institutions?

5. How would you segment these organizations? What are distinguishing organizational characteristics in this space? *[Prompt: by size, geographic focus, age, accreditation status, etc.?]*

6. Are there specific types of organizations that you feel have been overlooked by federal/IMLS grant program or funders in this space more generally?

ALHC GRANT PROGRAM

7. Do you have any past experience with IMLS?

   a. Please describe your knowledge of or past experience with IMLS grant programs.
   b. What would you say are the IMLS's institutional strengths?
   c. Weaknesses?

8. Are you aware of IMLS's in-development American Latino History and Culture program? *[If no, interviewer prompt: The ALHC Program will support museums and educational organizations in the study of American Latino art, culture, and history.]*

   a. How would you describe the impact of this award on Latino museums and the field broadly?
   b. How might the ALHC Program develop a broad applicant pool, including hard-to-reach applicants?
   c. What are some barriers that might prevent applicants from applying to the ALHC Program?
   d. How can IMLS support grantees in terms of training, technical support, and tracking performance outcomes?

CONCLUDING

9. Is there anything you would like to add that we didn't cover already?

   a. *[Prompt: Any final thoughts or reflections?]*

Thank you for taking the time to speak with us and offer your thoughts and perspectives on the American Latino History and Culture program and how it might relate to your work. As we explained earlier, your much appreciated contribution will help inform our broader research on this program's development and support IMLS's efforts to implement the program effectively contributions to the field.

The research findings will be published after a final draft is shared with IMLS in the summer. Please do not hesitate to reach out if you have questions after this call, about the interview or the broader research, or to provide additional information that may be relevant.

Thank you again for your time!

Appendix F. References Cited in Technical Appendix

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Acknowledgments

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The Urban Institute is a nonprofit research organization that provides data and evidence to help advance upward mobility and equity. We are a trusted source for changemakers who seek to strengthen decisionmaking, create inclusive economic growth, and improve the well-being of families and communities. For more than 50 years, Urban has delivered facts that inspire solutions—and this remains our charge today.