



## Museums Empowered

Sample Application ME-245365-OMS-20  
Project Category: Organizational Management

### Ohio Historical Society

|                         |           |
|-------------------------|-----------|
| Amount awarded by IMLS: | \$249,920 |
| Amount of cost share:   | \$264,646 |

The project description can be viewed in the IMLS Awarded Grants Search:  
<https://www.ims.gov/grants/awarded/me-245365-oms-20>

Attached are the following components excerpted from the original application.

- Narrative
- Schedule of Completion

Please note that the instructions for preparing applications for the FY2021 Museums Empowered grant program differ from those that guided the preparation of FY2020 applications. Be sure to use the instructions in the Notice of Funding Opportunity for the grant program and project category to which you are applying.

## Project Justification

The proposed project, Empowering Stewardship and Leadership, addresses **the goals of the Museums Empowered initiative** by strengthening the Ohio History Connection's (OHC) ability to serve Ohioans by **building capacity in organizational management** for OHC's statewide network of museums. We will do so by providing online professional development (PD) for the staff of OHC's statewide network of historic sites and museums. The overall goal of the project is to assure that OHC sites will be more resilient, better managed, and better able to serve their public.

The Ohio History Connection maintains a network of historic sites and museums around the state that are managed by local site-management partners (see map in Appendix C for site/museum locations). These partner organizations, their boards, and their staff have a widely varying levels of knowledge of organizational management and best practices in the museum field. While OHC retains ownership of the physical aspects of the sites and collections; and provides support in collections care, interpretation, and other museum operations, these site partners are responsible for day-to-day operation of the sites. We have included sample site partnership agreements in Appendix D. These sites face many of the challenges of small museums, as identified in IMLS's 2014 Heritage Health Information Survey (accessible at [www.imls.gov/hhis](http://www.imls.gov/hhis)), along with issues specifically related to the partner relationship.

The OHC model of local management partners having responsibility for day-to-day management of OHC sites has resulted in a variety of benefits, including increasing local support for sites. However, over the ten years during which sites have been managed on this model, it has become increasingly clear that there are also **needs, problems, and challenges** created by this approach.

With 42 site management partners across the state, there is a variety of expertise and skill sets among site operators. Some site management operators are longstanding institutions that are leaders in their fields, with professional management and staff (such as the Dennison Railroad Depot Museum). Others were incorporated specifically to manage a site, and are composed of deeply dedicated individuals who are topic experts (such as the Friends of the Museums, who manage the Campus Martius and Ohio River Museums in Marietta). Some site management operators have full-time paid staff, while others are volunteer organizations. Other site management operators don't fit into a particular bucket—there are two universities that manage sites for the Ohio History Connection. Two sites are managed by the villages they are located in. Several of our natural sites are managed by local divisions of the Ohio Division of Natural Resources. One site is managed by the local county commissioners. While all of our site managers are experts in their field, they are often do not have experience in the museum field.

Because of these disparate types of experience and knowledge among site operators, each requires different types of support and guidance from OHC. For sites that are part of other non-profit organizations, the challenge may be balancing their obligations as part of OHC with the institutional culture of their parent organization. Their greatest need will be for PD in the specifics of interacting

with OHC. For the smaller organizations, some of which were formed specifically to run OHC sites, the greatest challenge may be a board and staff whose expertise is primarily from outside the museum field. The greatest need for these sites will be PD in museum standards and practices. We seek to provide high quality museum professional development based on a variable model that “meets site staff where they are” and results in a common base of knowledge that will put all of our site managers on an even plane.

OHC seeks funding from IMLS to enable us to provide professional development (PD) for site leadership to meet these variable needs by building a base of knowledge of museum best practices and the responsibilities of sites that are part of the Ohio History Connection. A key part of OHC’s current **strategic plan** is “empowering Ohio History Connection sites, partner organizations and communities as stewards of their own stories.” The PD funded by this grant will advance this goal by providing site management staff with the knowledge and tools they need to provide stewardship of their collections and buildings and leadership in telling their stories. The systemic change we plan to generate in our museum system will be a more consistent and professional experience for the public served by OHC’s statewide museum network by building the capacity of each site.

In conceptualizing the project, we reviewed and incorporated the best practices of a **variety of programs that address the needs** of small museums for a grounding in museum best practices. These included the American Association for State and Local History’s StEPs program, the American Alliance of Museum’s (AAM) Continuum of Excellence program, the ISL Framework, and the International Coalition of Sites of Conscience training program. Ultimately, none of the programs fully met the unique needs of the OHC statewide network of museums and historic sites, as described above.

The proposed PD program will draw from these existing models to create PD in organizational management crafted to address the needs, challenges, and problems identified by site staff, boards, and management along with staff in the Historic Sites department at OHC. This department works directly with local managers of OHC sites and all divisions within OHC to improve communication and coordinate projects. Their work requires them to have an ongoing knowledge of the needs and qualifications of OHC’s various site management staff.

The content of the proposed PD will be based around the concept of Empowering Stewardship and Leadership at sites, drawing from the four model programs specified above, most notably the AAM Continuum of Excellence. Specific topics to be covered will be determined based on initial feedback from site staff, but are anticipated to include board development, collections handling, OHC’s mission and core values, engaging with local communities, and essential museum knowledge for boards/directors/staff/volunteers from outside the museum field. Training will be developed based on AAM’s Core Standards and Sites of Conscience training and include information specific to the relationship between OHC and site management partners. This training will allow each site to progress along the American Alliance of Museum’s (AAM) Continuum of Excellence so that each site develops according to the best of its capacity.

As all sites progress along AAM's Continuum of Excellence, they will increase their ability to serve their public and build OHC's overall relevance around the state. Empowering sites in Stewardship and Leadership makes OHC a more resilient organization and supports the long-term sustainability of our organization's statewide presence at over 50 sites by ensuring that each site is better able to care for its collections and property and engage its community.

## Project Work Plan

The PD described in the Project Justification will be delivered via online training modules that will include video presentations, readings, and knowledge assessments, along with concluding evaluation materials that will demonstrate staff mastery of the module. These modules will be organized according to various level of responsibility such as: Executive Director, Staff/Volunteer, Board Member, and AAM Accreditation.

The modules will be hosted on a platform originally developed for OHC's online textbook for 4<sup>th</sup>-grade social studies students. The original platform developer (thePLAN) will develop new functionality for the existing *Ohio as America* website that aligns more closely with adult learning and professional development. This approach maximizes grant funds by modifying an existing online learning management system rather than building a new system from scratch. See thePLAN's proposal in Appendix E.

We have chosen an online format to deliver training for several reasons. First, OHC's site network is statewide. Site staff have a travel time of up to 3 hours each way to get to Columbus, making an on-site training system impractical to implement. The online system will also allow site staff to complete PD session on their own schedule, whereas with in-person training it would be impossible to ensure that staff from all sites are able to attend on the same day, due to varying site open hours, staffing levels, and other constraints. One potential **risk** involved in using an online training system is that some of OHC's sites are so remote that internet service is not reliable. However, the majority of site staff do have access to the internet at their homes or at nearby libraries. Users will be able to download the videos and readings to complete these portions of the training at their leisure, returning to the online system for end-of-module assessments and evaluations. Some flexibility will need to be provided in site staff's work day to enable working from home or a library with internet connectivity to access this training.

During the course of the project, we intended to progress through various **maturity levels**, beginning with piloting the materials with a select group of sites, and then mainstreaming the materials to the entire site network and beyond to local historical societies in Ohio. The project activities, as detailed in the Schedule of Completion, will occur in the following **sequence**: in the first year, we will consult with site staff to determine their needs and the content of the PD, build the platform, and begin to create and upload modules while gathering feedback on these sample modules. In the second year, we will continue to create content and pilot the online PD modules with a select group of sites staff, gather evaluation data from these sites, and use that feedback to improve and finalize materials. In the 3<sup>rd</sup>

grant year, we will roll out the online PD to all OHC sites and internal staff while beginning to mentor the pilot sites in their activities leading to AAM accreditation.

The **specific activities** to be carried out as part of the Empowering Stewardship and Leadership project will begin with a **front-end evaluation** with the site managing partners to better understand their prior knowledge and skills, as well as identify gaps. The site management partners will come together in a facilitated meeting to discuss their needs. These discussions will be captured in real-time by a graphic note taker (see Resumes). These visual notes assure (and allow confirmation by the site partners) that all the important information is captured before they leave the meeting. The visual notes will continue to be used during the development process, as we create professional development materials for OHC site management personnel. During this initial period of the grant (September-February of year one) thePLAN will build the platform on which the modules will be hosted.

We will pilot the online PD in two phases: during phase one (March through August of year one) we will create 2-3 sample modules, load them into the platform, and test these with a selected group of sites (listed in Appendix B). This allows testing for both the delivery format(s) of the information and for the functionality of the platform. During this pilot period we will measure site partners' response to the sample modules and make changes based on this feedback. This formative **evaluation** will be repeated until the users are satisfied with the materials. This information will be used to make changes to improve the design of the modules and the materials for the full pilot in year two.

During year two of the grant, we will create the remaining modules (not fewer than 8 additional modules to be created between September and February); load these modules into an online content management system; pilot the PD with the selected group of sites (listed in Appendix B); continue to collect evaluation data from the pilot group; and make improvements based on these evaluations. In the final year of the grant, we'll make the online PD available to all OHC sites; and mentoring selected sites toward AAM accreditation. See the Schedule of Completion for a more detailed work plan.

The project will be **planned, implemented, and managed** by a team of OHC staff that will include a Project Director and a Project Coordinator, advised by the head of the Cultural Resources Division and the department manager of Local History Services. Content will be created by internal OHC staff (as identified in the List of Key Project Staff and Consultants) and external experts (to be identified after module topics are determined) in the topics to be covered in each online module. The Project Director will provide overall vision for the project, and be the first point of contact for external Content Creators.

Maggie Marconi, Manager of the Historic Sites Department at the Ohio History Connection, will serve as Project Director. Maggie's experience with the needs of local historic site staff was developed during her tenure on the board of the Ohio Local History Alliance, her tenure culminating in serving as President. Since 2006, she has served on several committees for the American Association for State and Local History, including the Professional Development Committee, the Virtual Home for History Committee, the Small Museums Committee, for which she served as a committee member and later Chair, and the Standards and Ethics Committee. She served on the statewide Ohio Connecting to

Collections planning and implementation grants. She piloted AASLH's Project Management Program, and the AASLH StEPS program. Prior to her role at the Ohio History Connection, Maggie served as the Museum Administrator of the Follett House Museum in Sandusky, and the Education Coordinator of Historic Charlton Park in Hastings, Michigan (see resume in Resumes).

The Project Coordinator will be a new staff position created for this grant. They will provide oversight and overall direction on the content materials created for the project by Content Creators. The Project Coordinator will also provide administrative support for the project, such as finalizing contracts and scheduling travel for Content Creators, ensuring compliance with copyright for all materials used in the modules, etc.

The Content Creators will be responsible for developing reading lists for the modules, providing or recommending video materials, and developing end-of-module assessments. In order to ensure that the project **benefits from diverse perspectives, shared networks, and best practices**, we will identify a variety of Content Creators. Some will be OHC staff, including our on-staff experts in Collections care, community engagement, and the specifics of the site relationships. We will supplement these creators with recognized experts and thought leaders in the museum field. These experts will be asked to provide presentations that can be turned into videos for the online modules. We will leverage grant funding to build the capacity of OHC's internal staff through in-person presentations by these experts.

We will ensure that this **collaboration is equitable and mutually beneficial** by providing external Content Creators payment for their services as detailed in the budget and budget narrative. Content Creators who are OHC staff or OHC site staff will also benefit from access to all of the PD materials.

In some cases, the Content Creators may identify a need for video materials that do not yet exist, such as a presentation by a noted expert in the field. In these cases, we will invite the experts to give an on-site presentation at the Ohio History Center in Columbus, which will be recorded for inclusion in the relevant module. The filming and video production will be handled by Jamie Marsh of OHC's Multimedia department. Jamie has extensive experience in video production. Samples of his work can be seen at <https://www.youtube.com/user/ohiohistory>

The online training will be supplemented and reinforced with sessions at the scheduled site manager's meetings, held twice each year in Columbus. At these meetings, OHC Historic Sites department staff will monitor each site's progress through the training modules, providing social accountability to site staff for completing the asynchronous training.

Site manager's meetings will also allow for supplements to the online training with in-person training in a peer-to-peer training format. Sites who have an excellent track record at one or more of the training topics will be asked to present on their experience. Peer-to-peer training offers many benefits, including greater credibility of presenters to their audience. We will maximize these benefits by asking some of our more advanced site management partners to serve as Content Creators for modules where they have relevant expertise, such as those who have gone through Sites of Conscience training designed to train-the-trainers.

In addition to site manager’s meetings other strategies will be implemented to **track progress toward achieving our intended results**. The online PD platform will allow the Project Director to track which site staff have completed assigned training modules in real time through a user-friendly dashboard originally designed for the *Ohio as America* online textbook, allowing teachers to track students work.

## Project Results

As mentioned in the Project Justification, OHC site staff have widely varying backgrounds and levels of knowledge of museum best practices. The Empowering Stewardship and Leadership project is intended to address and close this gap in knowledge through the online PD modules and peer-to-peer training provided.

Specifically, the **intended results** for the project, as described in the appended Logic Model, are that:

- Staff primarily responsible for OHC site management will share a basic knowledge of museum standards, best practices, and ethics.
- OHC sites will be more resilient, better managed, and better able to serve their public.
- Selected OHC sites (listed in Appendix B) will receive or renew AAM accreditation by November 1, 2024 (the due date of OHC’s reaccreditation Self-Study).

The overall grant goal is to **build the capacity** of staff in the OHC site network to improve the well-being of their communities.

All sites will be introduced to AAM’s Pledge of Excellence and the Continuum of Excellence. All sites will begin to work on creating or reviewing/revising their core documents as defined by AAM: Mission Statement; Institutional Code of Ethics; Strategic Institutional Plan; Disaster Preparedness and Emergency Response Plan; and Collections Management Policy. Selected sites will progress through AAM’s Core Document’s Verification Policy. Support for these activities will be available through the online PD platform, and via programs that OHC’s Local History Services department offers to local historical societies.

Independent of this grant, one of OHC’s goals is to increase the number of sites holding AAM accreditation. At this time, while the Ohio History Connection holds AAM accreditation, only 8 of our sites are independently accredited by AAM. The currently accredited sites are the Ohio History Center, Ohio Village, Adena Museum and Gardens, Armstrong Air & Space Museum, Johnston Farm and Indian Agency, Fort Ancient Earthworks and Nature Preserve, Fort Meigs Historic Site, and Campus Martius Museum. As part of our overall goal to empower sites to be stewards of their own stories, OHC is committed to increasing the number of sites independently accredited by AAM. Accredited sites will help strengthen the entire site network by providing leadership and models for other sites.

The online system for delivering PD to sites allows us to easily survey the participants and collect **evaluation data** to assist in refining the program for the third year rollout to all sites, as well as create reports for IMLS. The data we propose to collect is based on the Performance Measure Statements for the IMLS Agency Level Goal: Build Capacity, as identified in the FY19 Museums Empowered Notice of

Funding Opportunity. We will ask participants to answer the following questions using a scale of 1-5, with 1 being strongly agree and 5 being strongly disagree. The questions that will be asked are:

- My understanding has increased as a result of this training
- My interest in this subject has increased as a result of this training
- I am confident I can apply what I learned in this training
- My organization is better prepared to provide a program or service that addresses community needs
- My organization is better able to engage my community
- My organization is better prepared to develop and maintain on-going relationships with community partners
- My organization is better prepared to share knowledge and other resources as an active contributor to problem solving in the community

This approach will provide data on both the overall effectiveness of the project and on the usefulness of each component/module of the program in contributing to the overall goals of the project. This feedback will also allow us to improve modules prior to the rollout to all sites. Overall reporting will consist of both the results of the concluding survey and the averaged results of the module-level assessments. We will also report on the responses to the performance measure statements for each module.

The **knowledge, skills, behaviors, and/or attitudes** of OHC site staff will be significantly improved by their participation in the PD offered through this project. As mentioned above, the key expected outcome of this project is that OHC site management staff will increase their knowledge of museum standards, best practices, and ethics. Armed with this knowledge, they will be able to develop the skills and attitudes that will ensure that their museums are professionally managed and are following museum standards and practices. The resulting professionalization and standardization of skill sets across OHC sites will result in systemic change for OHC as sites become better able to provide a more consistent and on-brand experience for the public who visits OHC sites across the state.

The **tangible products** of the Empowering Stewardship and Leadership project will be the online PD modules, creation and/or revision of AAM core documents by 75 % of sites, and progress toward AAM accreditation by the selected sites (listed in Appendix B). The chief tangible product will be improved operations at all the sites, bringing the site system to a more uniform level of excellence, increasing long-term sustainability and resiliency of the site system as a whole.

An additional benefit of the online PD model is that it will allow OHC to **sustain the benefits of the program beyond the grant period**. The modules will remain accessible and can be added to and improved after the grant period so that incoming site staff can continue to be educated and remaining site staff can refresh knowledge on their own schedule. After the grant period, we also hope to be able to offer the online PD modules to local historical societies throughout Ohio at a modest fee. The continuing income from this offering will allow us to maintain the platform and continue to strengthen the ability of all of Ohio's historic sites to serve their public.



# Schedule of Completion—Ohio History Connection

## Year One

| Activity  | Staff Responsible   | Month 2020 |    |    |    | Month 2021 |   |   |   |   |   |   |   |   |
|---|---|------------|----|----|----|------------|---|---|---|---|---|---|---|---|
|   |   | 9          | 10 | 11 | 12 | 1          | 2 | 3 | 4 | 5 | 6 | 7 | 8 |   |
| <b>Front-end evaluation, build platform, create and get feedback on sample modules; update/revise modules as needed</b>           |   |            |    |    |    |            |   |   |   |   |   |   |   |   |
| Inform site staff (of pilot sites) of the grant and their responsibilities  | Project Director  | X          | X  |    |    |            |   |   |   |   |   |   |   |   |
| Hiring of Project Coordinator   | Project Director  | X          | X  |    |    |            |   |   |   |   |   |   |   |   |
| Front-End Evaluation  |   |            |    |    |    |            |   |   |   |   |   |   |   |   |
| Develop formative evaluation questions and activities for modified World Café   | Project Director/<br>Evaluation Consultants                                 | X          |    |    |    |            |   |   |   |   |   |   |   |   |
| Host modified World Café with pilot sites and share graphic recording that will guide content and methodology creation            | Project Director/Evaluation<br>Consultants/Facilitator/<br>Graphic Recorder |            | X  |    |    |            |   |   |   |   |   |   |   |   |
| Decide module topics and module creation schedule, especially which will be created first as sample modules                       | Project Director  |            | X  | X  |    |            |   |   |   |   |   |   |   |   |
| Platform Development  |   |            |    |    |    |            |   |   |   |   |   |   |   |   |
| Notify platform developer of grant & development timeline   | Project Director  | X          |    |    |    |            |   |   |   |   |   |   |   |   |
| Wireframes for new features/functionality created, reviewed & approved  | thePLAN   |            | X  | X  |    |            |   |   |   |   |   |   |   |   |
| Development, unit testing & bug fixes   | thePLAN   |            |    |    | X  | X          | X |   |   |   |   |   |   |   |
| User acceptance testing & deployment of new features  | thePLAN/Project Coordinator   |            |    |    |    |            |   | X | X | X |   |   |   |   |
| Content loading for pilot modules   | Project Coordinator   |            |    |    | X  | X          | X |   |   |   |   |   |   |   |
| Sample Module Creation and Formative Evaluation   |   |            |    |    |    |            |   |   |   |   |   |   |   |   |
| Identify/Contact Content Creators for sample modules & finalize contracts as needed   | Project Director/Project<br>Coordinator                                     |            | X  | X  | X  |            |   |   |   |   |   |   |   |   |
| Develop reading lists for sample module (required and suggested additional readings) & communicate to Content Coordinator         | Content Creators  |            |    | X  | X  |            |   |   |   |   |   |   |   |   |
| Contact authors & video rights-holders for permissions to include full-text readings & videos within sample modules               | Project Coordinator   |            |    |    | X  | X          |   |   |   |   |   |   |   |   |
| Identify existing videos and desired presentations to be filmed to include in sample modules & communicate to Content Coordinator | Content Creators  |            |    | X  | X  |            |   |   |   |   |   |   |   |   |
| Coordinate In-Person Presentations at OHC and filming for sample modules  | Project Coordinator   |            |    |    | X  | X          | X |   |   |   |   |   |   |   |
| Create videos based on in-person presentations  | OHC Multimedia Department   |            |    |    |    | X          | X | X |   |   |   |   |   |   |
| Develop end-of-module assessments and evaluations for sample modules  | Content Creators/Project<br>Coordinator                                     |            |    |    | X  | X          | X |   |   |   |   |   |   |   |
| Consult with pilot site staff (attendees of World Café) as they work through the sample modules and incorporate feedback          | Content Creators/Project<br>Coordinator                                     |            |    |    |    |            |   | X | X | X | X | X | X | X |



