Minnesota Historical and Cultural Heritage (Legacy) Grant Program: LSA Survey Results and Recommendations

Minnesota Alliance of Local History Museums Annual Conference
April 26, 2018

Session Outline

- Introduction to:
  - Legacy Strategic Agenda (LSA) and LSA Collaborative
  - Grants Priority Action Team (PAT)
- Legacy Grants Program Survey
  - Development and Implementation of Survey
  - Survey Results
- Recommendations from Grants PAT based on survey results
- Your Turn - Group Feedback
- Next Steps

Purpose of Session

- Understand the survey development, results and recommendations made by the Grants PAT

- Have a conversation about the impact of the Grants PAT recommendations on local history and how you could support their implementation

Legacy Strategic Agenda (LSA)

- The 2016-2020 LSA promotes innovation and growth of history and cultural heritage in Minnesota This strategic plan invests in the future of our communities. More people of all ages will engage in our state's history and cultural heritage. We'll find creative ways to partner with new cultures and communities. We'll become more connected with each other.

- More information:
  - http://legacy.mnhs.org/lsa
  - LSA@mnhs.com (Pat Koppa, LSA Coordinator)

LSA Collaborative

- The LSA Collaborative charge is to ACT ON the LSA. The 15 Collaborative members represent various disciplines, cultures and parts of the state. Their leadership is supported with Legacy funding and guided by a partnership with the Minnesota Alliance of History Museums and the Minnesota Historical Society.
- The Collaborative supports dynamic action teams to take on the LSA strategic priorities. These three priority action teams will help make Minnesota history more visible and accessible. Teams will uncover challenges and opportunities on the path to creating solutions and models for Minnesota communities.
- Three PATs: Education, PAT X Stories, Grants

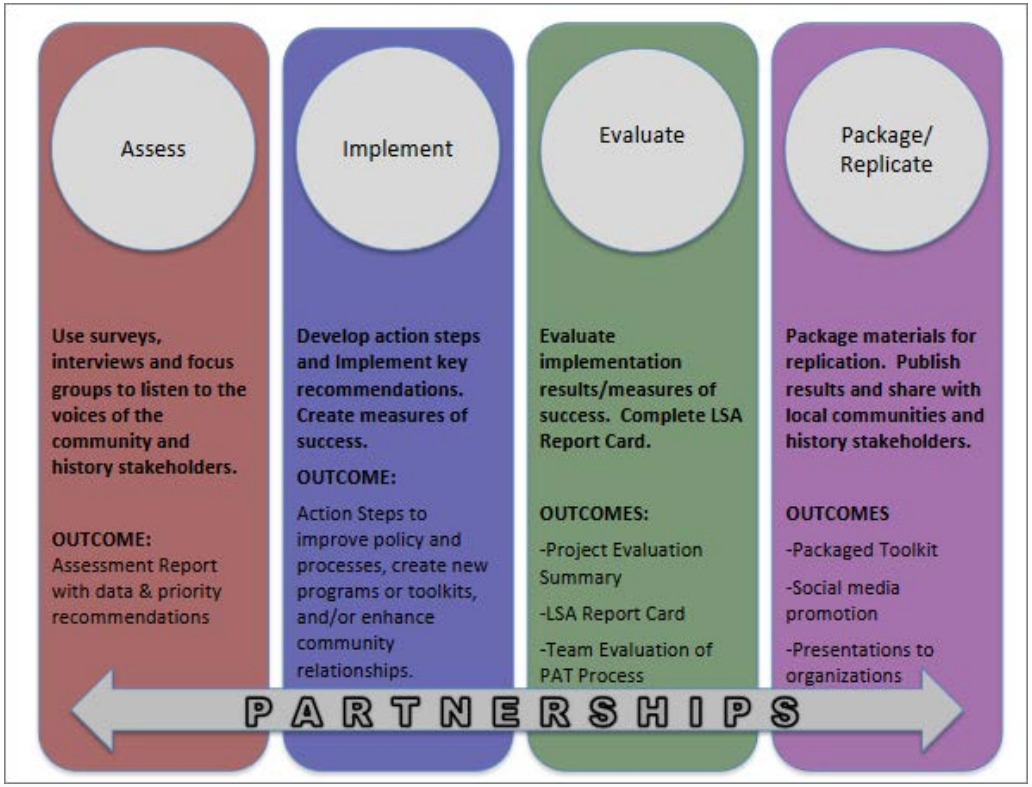
Grants Priority Action Team (PAT)

Work with the history community to enhance the infrastructure for Legacy grant programs to ensure continued overall transparency, operational excellence, and enduring value.

Members:

- Carolyn Veeser-Egbide, Grants Manager, Minnesota Historical Society
- Melinda Hutchinson, Grants Specialist, Minnesota Historical Society
- Michael Lansing, Associate Professor, Department of History, Augsburg University
- Sherry Stirling, Retired former Executive Director, Chisago County Historical Society
- Sheila Brommel, Evaluation Manager, Minnesota Historical Society
- Daardi Sizemore, University Archivist, Minnesota State University, Mankato

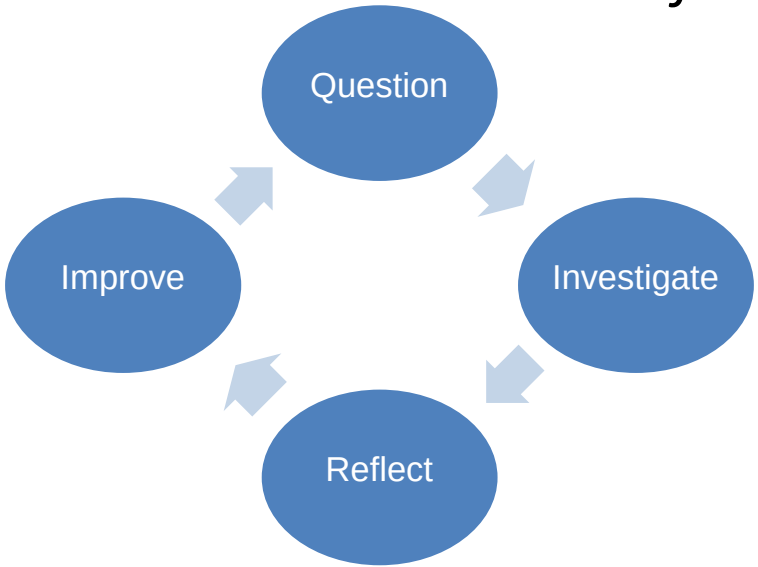
Priority Action Team - Four Project Phases



Our Process

Team-Based Inquiry

An approach to empowering professionals to get the data they need, when they need it, in order to improve their products and practices and create successful educational experiences



- Systematic
- Led by non-evaluation professionals
- Collaborative and team based
- Small scale and focused
- Embedded in work

Question Themes

1. Users/Non-users
2. Knowledge/Assumptions/ Understanding
3. Marketing/Communication /Appeal/Testimonials
4. Usefulness
5. Perception/Value
6. Motivation
7. Process/evaluation

Critical TBI question (Example: who is our audience?, Are they engaged with and see value in this program?)	**Why is this question important to your team?**	**What changes might you be able to make if you answered this question?**	**What types of information would you need to answer this question and what is the best method to collect it?**	**How high of a priority is this question? H=high, M=medium, L=low**
1.Who are the users/nonusers? What are they using/why are they using it?	To understand who the non-applicants are, and what they were applying to. To know if we are serving our purpose; are we serving MN's history and heritage community? (communities drive the projects)	We can increase the number of applicants and awardees, and ensure diversity among applicants and awardees	Grants office adm records tell current/past applicants and awardees Survey of non-applicants/applicants/awardees: size of org, type of org, location, grantwriting capacity **(can we even survey non-applicants?)** Focus group of potential and actual applicants	H
2. What do potential and actual applicants know, assume, understand (interpret) about the grants program?	To know the gap between perception and reality To know how they interpret the guidelines or process	So we can address the disconnect: do we need more education, or do we need to change something in communication or process	Survey of non-applicants/applicants/awardees Usability study of website Focus group of potential and actual applicants	H
3. How do applicants hear about the program? How do we communicate with stakeholders? How do testimonials	So we know how to best get the grants program information out.	So we can effectively reach and communicate with a broad, diverse audience	Survey of applicants Survey or interview or focus group of stakeholders	M

Data Collection

Data Collection

Group:	Invites:	Responses:
Consultants	174	10
Independents	70	14
T-CART	102	8
Grant Applicants	860	211
MALHM	144	35
Local History News	3300	9
Total:	**4650**	**287**

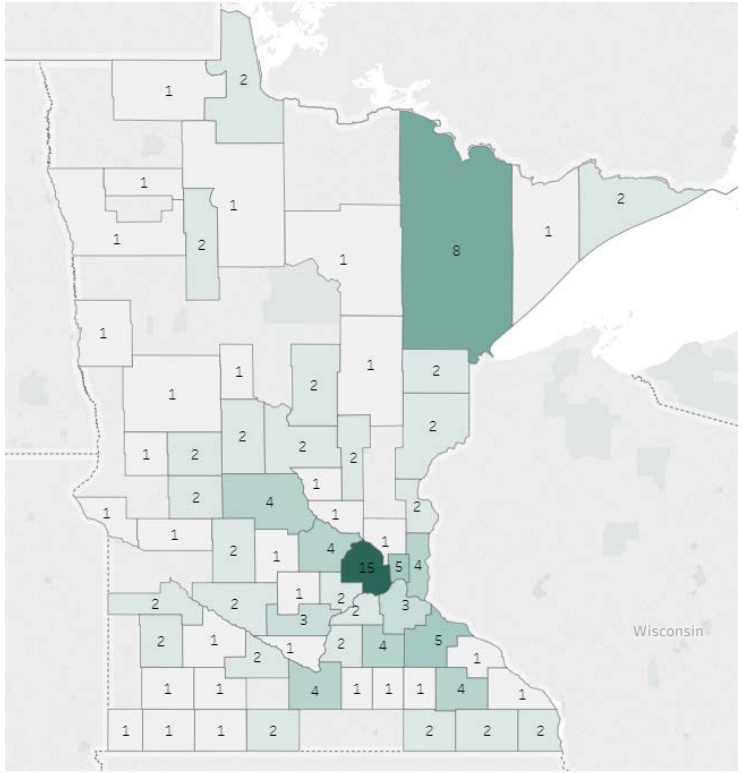
Respondent Demographics

Survey Respondents:

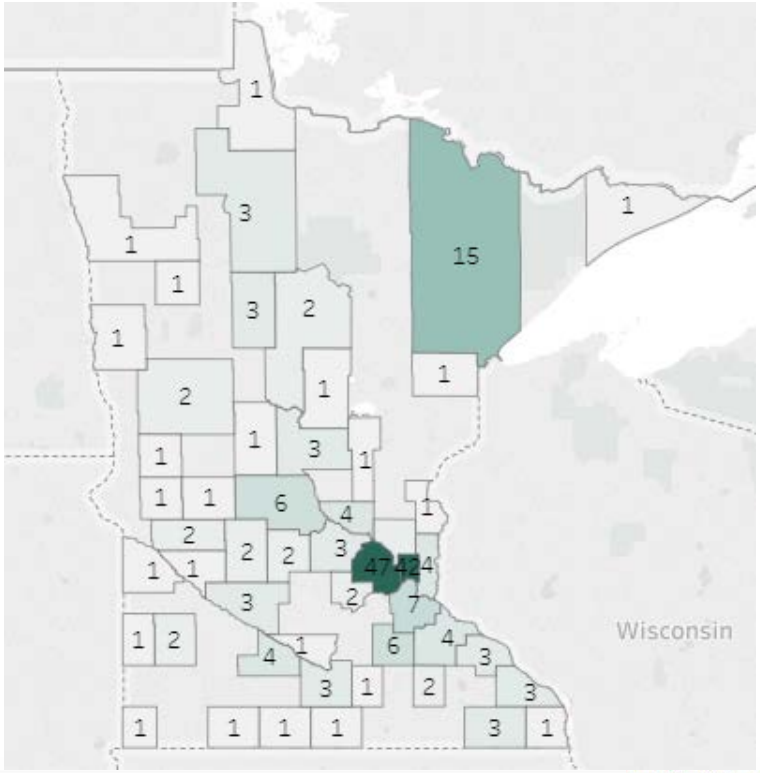
- Most had applied for a grant and either been awarded (41%), or both awarded and denied (39%).
  - 31% had never applied for a grant was because they didn't have a project that would qualify.
- 86% had applied for small grants.
- 40% of the organizations had budgets under $100,000.
- 49% of organizations had 501(c)(3) status.
- 52% were from the Twin Cities Metro Area.

Geographic Representation

MALHM Membership



Survey Respondents



Survey Respondents

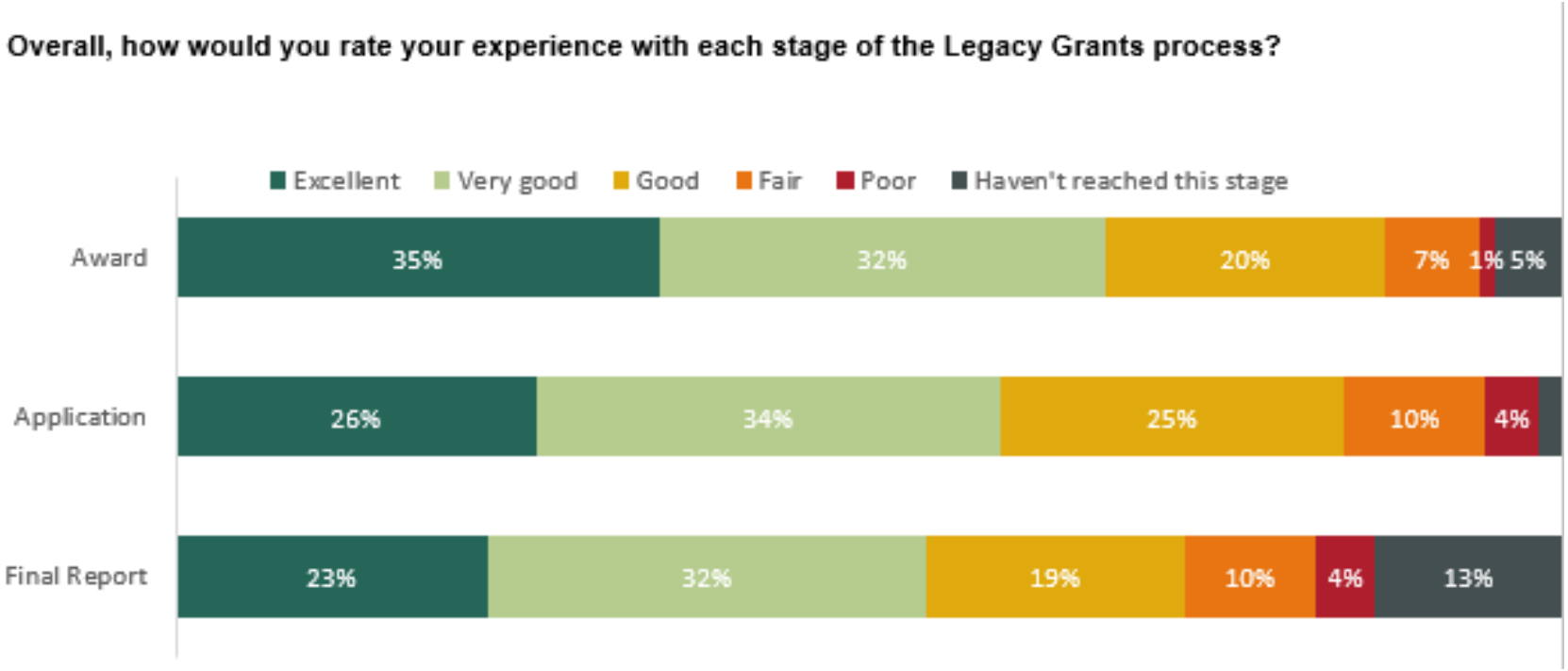
- 92% were motivated to apply because their project was important to the organization and/or community.
- 38% had applied for grants for Collections Care and Management.
- 72% didn’t know they could ask for funding to promote or market their project(s).
- 57% heard about the Legacy Grant Program from colleagues.
- 36% prefer to learn about the grant process from the Legacy Grant website.

Survey Respondents

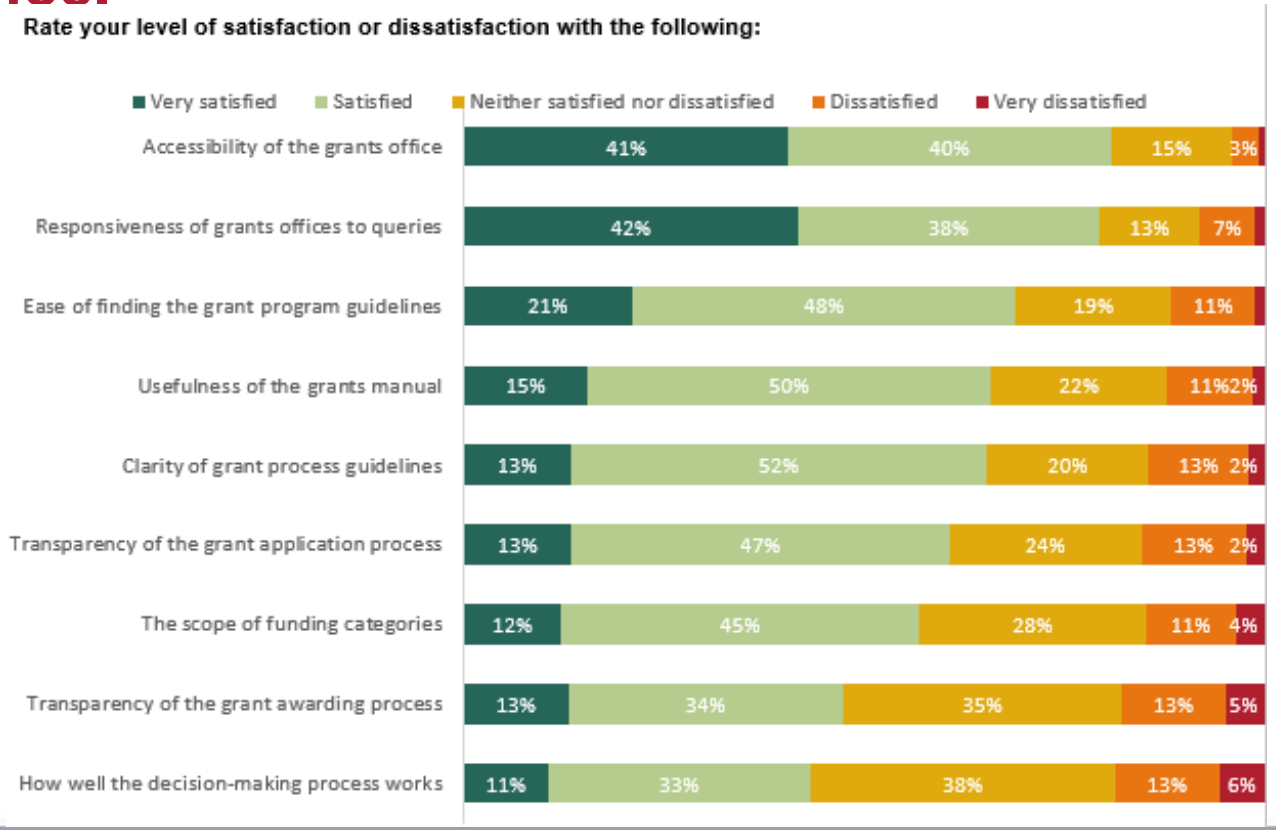
- 47% rated their organization's grant writing capacity as excellent or very good.
  - Of those with fair or poor grant writing capacity, 61% of comments indicated it was due to limited staff capability.
- 80% seek donations as a source of funding for projects.
- 96% access Legacy funding for history and cultural heritage through MNHS Legacy Grants Program.

Survey Results

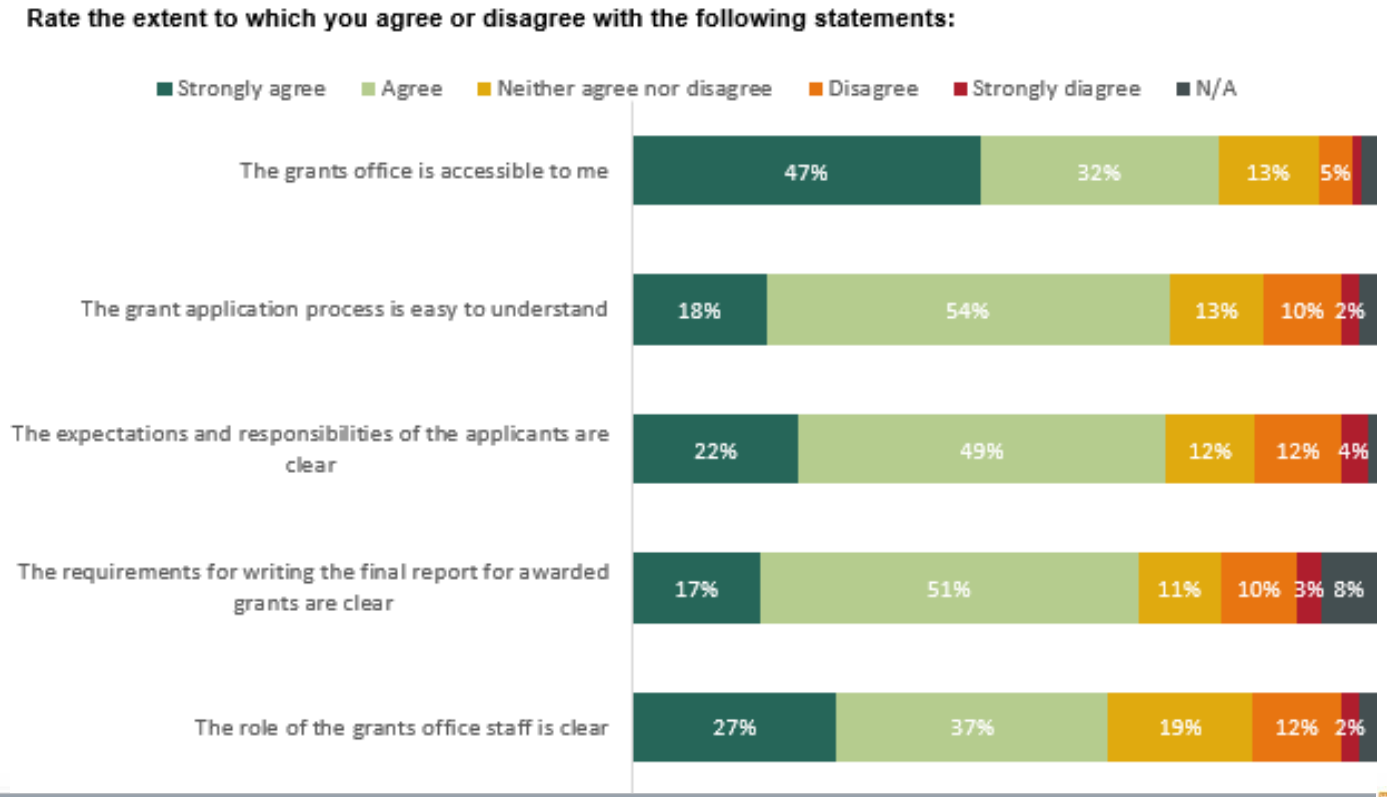
67% had an excellent or very good experience with the award process.



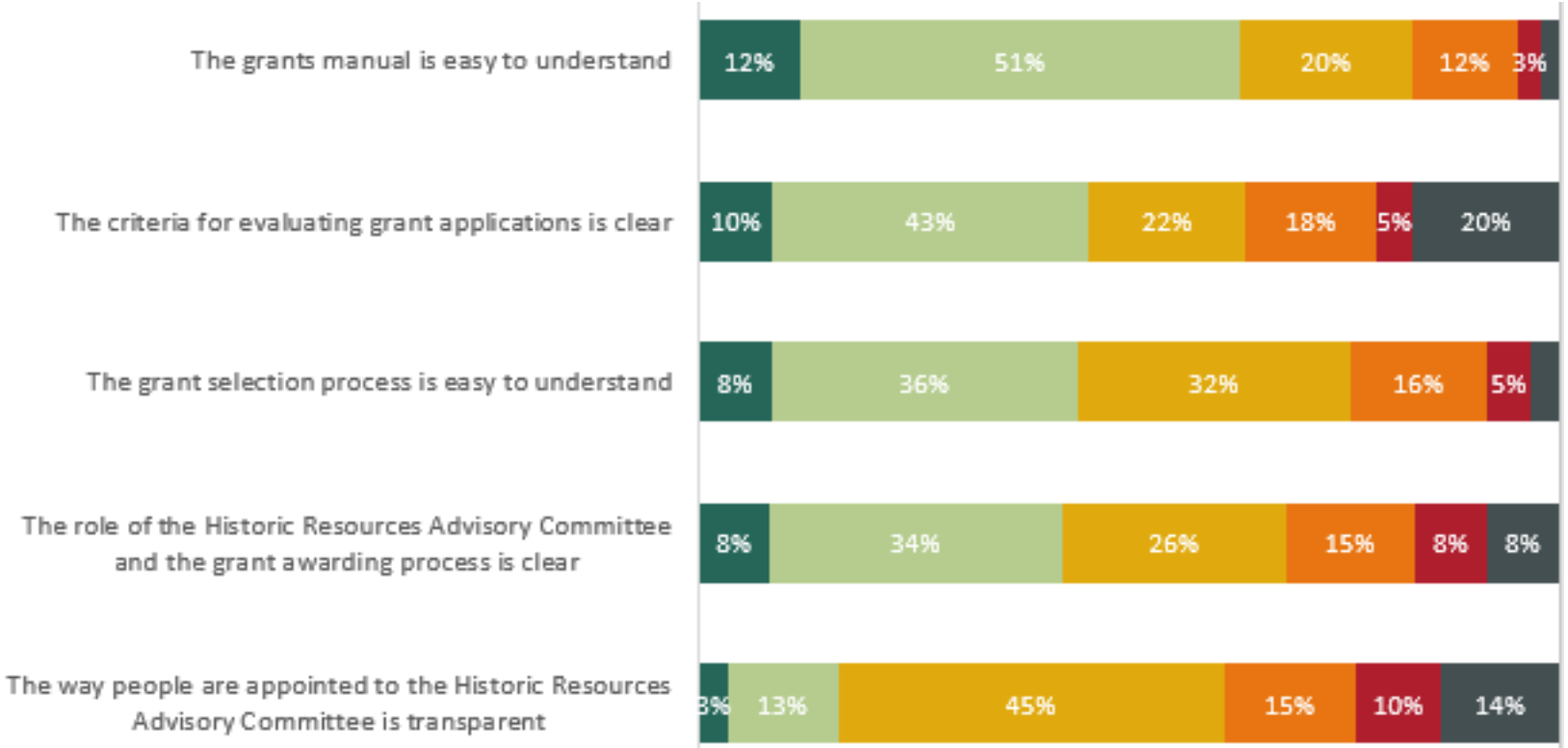
81% are very satisfied or satisfied with the accessibly of the grants office.



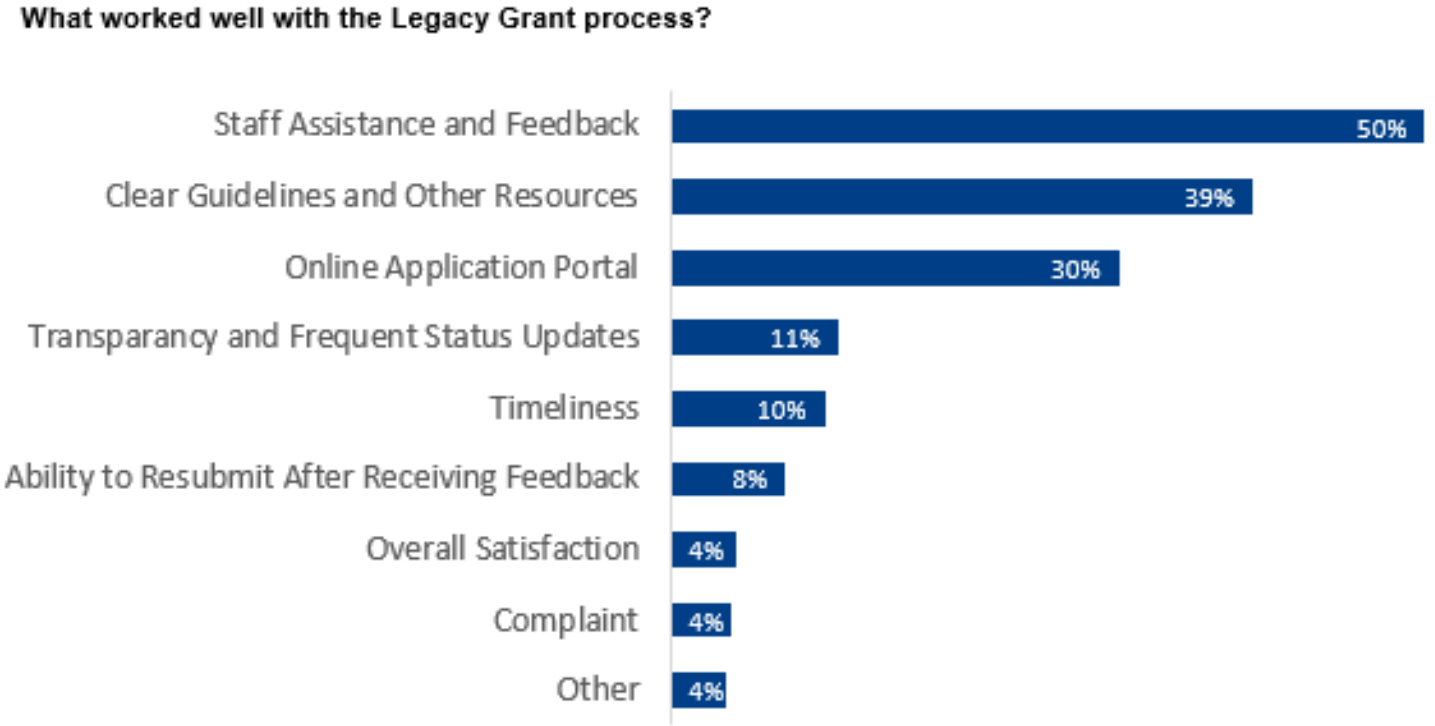
79% strongly agree or agree that the grants office is accessible.



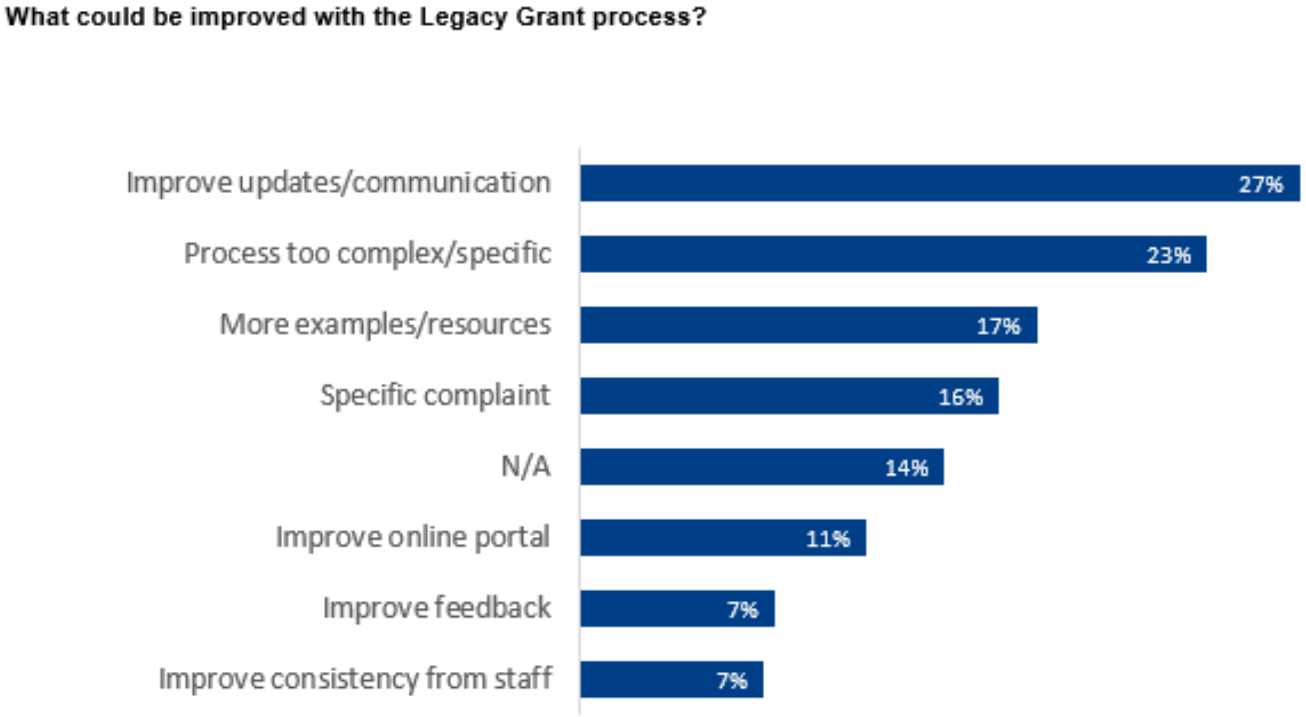
63% strongly agree or agree the grants manual is easy to understand.



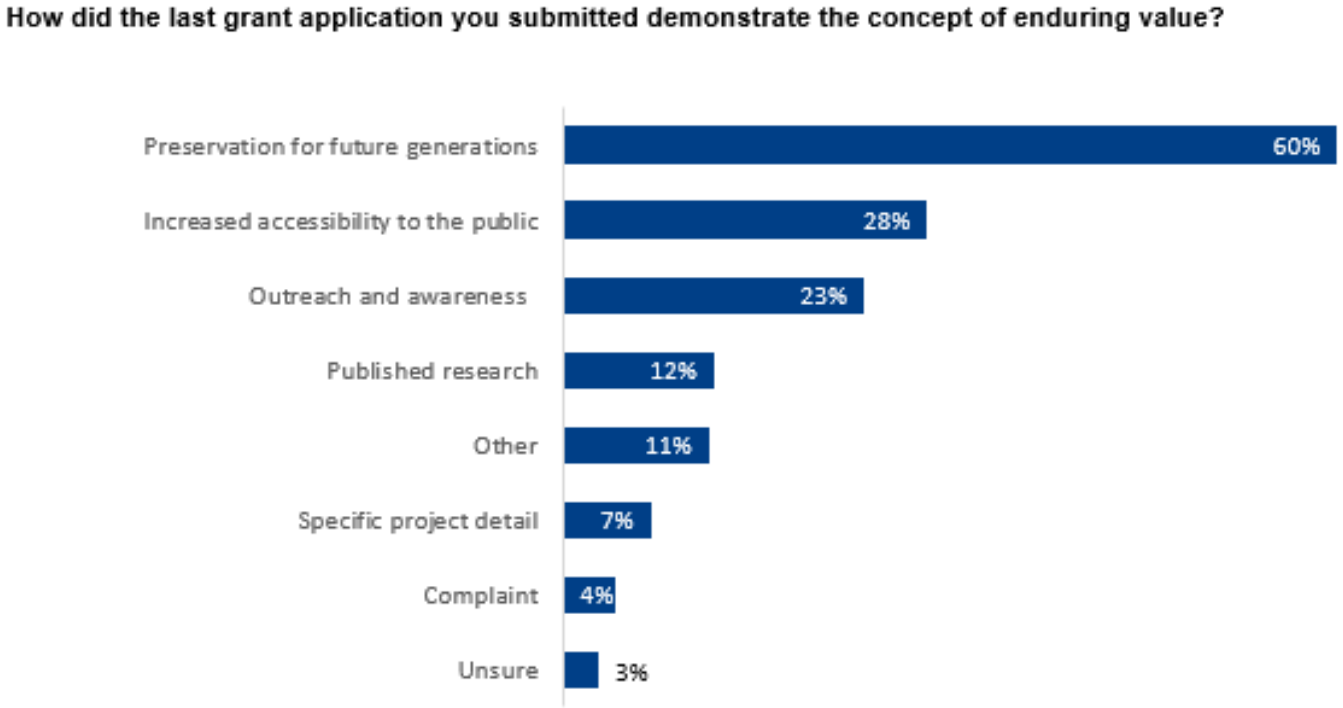
50% commented that staff assistance and feedback worked well.



27% commented that updates/communication could be improved



60% mentioned “preservation for future generations” as a way to demonstrate “enduring value”.



Recommendations

Recommendations from Grants PAT

Process for developing recommendations

- TBI - Reflect and Improve Phase
  - Identified strengths and what is working well
  - Identified possible areas for improvement
  - Brainstormed ideas for improvement by theme
  - Drafted recommendations

- LSA Collaborative reviewed and recommended revisions

Transparency

- Create rubrics to show grant application requirements.
- Require HRAC to provide substantive feedback on grant application to document a consistent and transparent review process.
- Explain State of Minnesota rules that affect grant decision-making.

Transparency

- Provide a more detailed process timeline for the large grant selection process to applicants.
- Make a major effort to create more transparency around the appointment of people to HRAC, as well as their duties.
- Make the final grants reporting process for all recipients more clear and transparent.
- Educate prospective applicants regarding the multiple forms of historical enterprise supported by the Legacy Grants program.

Operational Excellence

- Create a Frequently Asked Questions Page on the Grants website.
- Document grants manual changes in an easily found “cover sheet/page” that notes changes to the manual and the dates those changes were made
- Explore best practices for intellectual property rights with the MNHS Press and the Office of Grants Management.
- Examine closely other time-tested, transparent, and accountable grant-making processes in history and cultural heritage.
- Review the feasibility of inclusion of administrative and/or operation costs in grant budgets with the MNHS Finance team

Enduring Value

- Actively promote the MHCH Grant program as an opportunity to build community in the history and cultural heritage field in Minnesota.

- Create a marketing strategy for the Grants office, one that clearly communicates both opportunities and requirements for the wide range of grant-making available through the Grants office.

- Enhance and highlight the definition of “enduring value” in Legacy projects.

- Clarify in the Grants Manual what, exactly, constitutes promotion and marketing for grant products. It should also revise the media packet on the Legacy Grants website.

Infrastructure

- Hire a Grants Outreach staff person to support proactive communication with prospective applicants, applicants, and grant recipients. Additional staff in the grants office will support consistent and repetitive messaging which is important for the Grants program.

- Add additional staff and resources to enhance turnaround time and many other concerns raised in these recommendations.

Your turn: Feedback

On your note card, please write down:

1. The three most important recommendations for your organization. How will these three benefit your organization more than other recommendations?

1. How could you, as a MALHM member, support the implementation of these recommendations—be as specific as possible.

Next Steps

Next Steps

- Report on Phase 1 (Assess) of Grants PAT
  - Identify actionability of recommendations over the next 3 years.
  - Identify action steps, timelines, and measures of success
    - Review and incorporate MALHM session feedback
    - Review and incorporate LSA Collaborative feedback

- Begin Phase 2 (Implementation)

Thank You

https://link.mnsu.edu/grants2018