

Sample Capacity Building Grant Application

Project Title: Strategic Planning – Charting the Fairfield Museum’s Next Decade of Success

Organization: Fairfield Museum and History Center

Project Description and Background:

Explain how this project came about, why it is necessary to do this work at this time, and how it will strengthen your organization. Describe the process you will use and the roles of the major project participants (staff, board members, consultants).

In 2009, soon after opening its new 13,000 sf. museum, library and educational facility, the Fairfield Museum and History Center (FMHC) completed a comprehensive strategic plan that reinvigorated the organization’s mission and vision, and established seven strategic goals that have since guided the Museum’s successful growth. Generously funded in part by CT Humanities, and completed with the guidance of museum planning consultant Laura Roberts, those seven strategic frameworks set out program and operational benchmarks that have since been met or surpassed. FMHC is now seeking \$9,980 in CT Humanities support toward completion of a new \$39,870 strategic planning effort that will help chart the Museum’s next decade of growth and success.

Over the last nine years, FMHC’s strategic plan has helped us achieve careful and well-managed growth and an extraordinary expansion in audience engagement. The Museum is now a vibrant nexus of community life that welcomes more than 35,000 visitors annually (a fourfold increase from 2009). Our broadened, community-focused mission has guided our success in becoming a focal point of civic pride, a prominent regional center for the humanities, and an award-winning institution of statewide renown. In just the last five years, Museum attendance has more than doubled, and the participation in our school programs has grown by 15-20% annually. Today, FMHC welcomes more than 3,500 students and teachers each year from 65 schools throughout southwestern CT for high-quality educational programs, and we raise significant private funding to support underserved students from Bridgeport and Norwalk schools, who visit free of charge.

The success and audience growth of our exhibitions and public programs, however, have brought new strategic challenges as FMHC grapples with how much to expand its staff, how to strengthen our Board governance, what new investments will be needed to expand our facility, how best to broaden access to our collections and research, and what skills and resources will be needed to support the Museum’s future program and audience growth. At this crucial inflection point in the organization’s history, it’s time for FMHC to embark on the next stage of planning to further strengthen our community-focused mission and remain at the forefront of our field, using the arts and humanities to inspire civic engagement and community understanding.

Cultivating a culture of self-assessment in order to drive innovation and adaptability has been a key element of FMHC’s success. Museum staff regularly survey and communicate with more than 800 regional teachers and parents whose feedback and guidance help to improve the effectiveness of our

programs and broaden the Museum's educational reach. FMHC utilizes several means of ongoing evaluation to measure impact. Those evaluation tools were developed with the guidance of trained Results-Based Accountability consultants and in collaboration with Fairfield County's Community Foundation, and they are regularly benchmarked against our regional and national peers. Those metrics indicate that over the last two years 97% of teachers strongly agree that the content of Museum programming helps improve their student learning and that students gained important new knowledge about their community and their role as citizens. The data that has been collected from those surveys and focus groups will play a vital role in guiding and benchmarking our next strategic plan.

Public programs for adults and families are also regularly evaluated using online surveys, audience interviews, focus groups and intercept surveys to ensure that they meet community expectations and achieve learning goals. The Museum has worked closely with Karen Wizevich, PhD, Senior Lecturer in the Johns Hopkins University Museum Studies program and a consultant on museum visitor evaluations, to develop and interpret a range of audience assessments that help identify the effectiveness of our outreach as well as any barriers to participation.

FMHC hosts a regular calendar of free, interactive family experiences including workshops, storytelling, exhibit and walking tours, and more. The Museum has also become a destination for inter-generational community-building activities such as on Memorial Day, when families participate in games that explore the Museum's exhibitions, or on the Sunday before Halloween for a festive, safe Halloween on the Green, when we welcome thousands of costume-clad children and adults.

In 2017 FMHC led the revitalization of Fairfield's adjoining Town Green, expanding its learning campus to include three recently-restored historic properties on a landscape dating back to the early 17th century. That ambitious creative place-making initiative--the planning for which was generously funded by a grant from CT Humanities and historic restoration supported with a CT DECD "Good to Great" grant--expanded the Museum's program and education capacity, and catalyzed greater collaboration with regional cultural organizations. This past summer, FMHC presented its first season of free, outdoor programs, including theatrical performances and music concerts that attracted broader audiences of multiple ages and backgrounds, further reinforcing FMHC as a valued destination for diverse cultural activity. Now, with a larger physical footprint and both indoor and outdoor programming, we need to better define our partnership with the Town of Fairfield which owns those properties, and determine the right balance of private and municipal investment that can advance Fairfield's cultural development.

FMHC has become a statewide leader in providing public access to our historic and cultural resources for the general public. Our library collection is now accessible through an online catalog shared with Fairfield's libraries, and our object and archival collections are being shared through the Connecticut Collections statewide consortium, which we piloted and helped develop. In 2016 FMHC acquired a comprehensive and unparalleled collection of Connecticut history books donated by former State Historian Dr. Christopher Collier which made the Museum's library an important center for research in Connecticut history. The new strategic plan will help us determine what investments will need to be made to further expand access to our collections.

FMHC has been proud to achieve all of its 2009 strategic goals, but that growth has presented the Museum with new challenges and opportunities (see Project Goals below). The planning process will

be informed by a diverse and comprehensive database of audience feedback that will help ensure that FMHC's next plan remains audience-focused and sustainable.

The Strategic Planning Process

Since the adoption of our 2009 Strategic Plan, FMHC staff and Board have met annually to review our progress toward the plan's goals, evaluate new challenges and opportunities, and focus priorities and resources for the coming year. That process has created a strong organizational culture of planning and evaluation that will help guide the new 2019 Strategic Planning process. A Board and staff Strategic Planning Committee was formed in September 2018 and has defined the scope and schedule of the planning process.

FMHC's 2019 Strategic Plan will be conducted in two phases. Phase I will begin mid-November, 2018 and run through January, 2019 (CTH funds are not being requested for Phase 1). FMHC has contracted with museum evaluation consultant Karen Wizevich to analyze and summarize the audience evaluation data that has been gathered over the last several years. Wizevich will collaborate in that analysis with some of her graduate students at Johns Hopkins University which will make the project more cost effective and help teach the next generation of museum professionals. Wizevich will also be working with FMHC staff to create two additional online surveys: one specifically designed for our members, to help understand the strengths and weaknesses and value proposition of our membership program, and a second survey of all program participants, to fill in any missing audience data not previously captured. Wizevich will then draft a summary report of her findings that will inform staff and Board planning in Phase 2. Wizevich has designed and studied audience evaluations for more than 30 museums, and is uniquely qualified to review and summarize FMHC's data (please see Wizevich's proposal attached).

Also in Phase 1, FMHC will engage museum education consultant Elizabeth Nevins of Seed Education Consulting to conduct a series of site visits to evaluate FMHC's on-site and outreach school programs, as well as our professional development programs for teachers. With the rapid growth in FMHC's educational programming over the last several years, it is crucial for our planning that we obtain an independent evaluation of our program effectiveness, and understand how those programs benchmark against our peers. Nevins will create a report on her findings that will help inform staff and Board discussions during Phase 2 of the Strategic Planning process. As a museum educator who lectures and publishes widely on the subject, Nevins is particularly suited to provide the informed independent perspective we seek (please see Nevins' proposal attached).

Project Description and Background (continued):

Use this text area if you need additional space to finish explaining your Project Description and Background. (OPTIONAL)

Funding is being requested from CTH to support the second and most important phase of FMHC's Strategic Planning process. Both Wizevich and Nevins will be hired again in Phase 2 to work closely with our planning consultant, Laura Roberts, to create more detailed reports on their findings, and to collaborate in drafting the final Strategic Plan.

Based on the findings of her work in Phase 1, Wizevich will also work with FMHC to design a new evaluation plan that will help monitor the progress of the new Strategic Plan. She will develop 2-3 evaluation tools for ongoing program and audience evaluation that complement existing survey methods. Nevins will return for additional site visits in Phase 2 to observe FMHC's spring programs and to conduct focus group interviews with teachers and parents. The bulk of FMHC's school programming occurs in March-May, so additional site visits will be necessary to develop a complete analysis. Nevins will collaborate with FMHC education staff in refining assessment strategies and tools, and will draft a final report on her findings that will include specific actionable recommendations for program enhancement and growth.

After interviewing several planning consultants, FMHC's Strategic Planning Committee decided to engage Laura Roberts as our lead planning consultant for Phase 2. Roberts worked closely with FMHC staff and Board to draft our 2009 Strategic Plan, and she is familiar with FMHC's particular issues and history. Her familiarity with the Museum and its staff will allow her to come up to speed quickly on our current challenges and opportunities. Roberts is an experienced and creative planning consultant who has worked with dozens of museums and cultural organizations to develop clear and actionable strategic plans. She is currently on the faculty of both Harvard University Extension School, where she teaches graduate students in "Managing the 21st Century Museum," and at Northeastern University, where she teaches in the public history program (please see Roberts' proposal attached).

Drawing on the reports created by Nevins and Wizevich in Phase 1, and working closely with FMHC executive director Michael Jehle and the Strategic Planning Committee, Roberts will

- review the last decade of FMHC's operations and program development;
- conduct an initial meeting with FMHC senior staff to review the findings of Phase 1 and outcomes from staff planning meetings, and to outline the major questions to be addressed in the new plan;
- lead a day-long Board retreat in March to review the mission, core principles; gather feedback on the issues facing FMHC and the central questions of the plan; and identify perspectives that should be included in the planning process;
- conduct one or two follow up meetings with the Strategic Planning Committee to review the Board retreat outcomes and further refine the plan;
- conduct meetings (on the same day) with key stakeholders and partners in the community to get their feedback on the draft plan;
- study and benchmark FMHC with comparable organizations that have faced similar issues and developed creative solutions;
- lead a follow up meeting with the Strategic Planning Committee to review research, make decisions on the plan's goals, scope and objectives and set priorities; and
- present a Strategic Plan Draft to the Board and create a final plan document based on their feedback in June, 2019.

Roberts will make 5-6 site visits to accomplish the above. FMHC's Strategic Planning Committee will meet multiple times as needed to monitor the plan's progress and review outcomes. Roberts' final meeting with Board and staff will inform the development of new metrics to monitor the Strategic Plan's progress in consultation with Wizevich and Nevins. Both Wizevich and Nevins will coordinate

their individual reports with Roberts to ensure that their combined work creates a cohesive, rational and actionable Strategic Plan.

Project Goals and Impact:

Describe specific goals for this project and the impact they will have on your organization if these goals are achieved.

The proposed strategic planning process will allow FMHC to work closely with some of the leading museum consultants to evaluate its accomplishments, set priorities for future resource investment, and establish a series of strategic frameworks to guide the next decade of FMHC's growth and success.

The new, 2019 FMHC Strategic Plan will address a series of critical questions now facing the Museum:

- The successful expansion of our exhibits, programs and community collaborations have strained our dedicated but small staff (8 full-time, 2 part-time). What will be FMHC's priority staffing needs be and what additional skills will be needed for our next phase of growth?
- The growth and expansion of FMHC's programs has also caused shifting roles and responsibilities for staff and Board. How can those roles be better defined for future success?
- The first year of arts and humanities programming on the newly-revitalized Museum Commons was widely applauded by the community. How can those free community programs be sustained and how can our partnership with the Town of Fairfield (which owns the Museum Commons) be expanded and improved?
- As FMHC has grown over the past decade, its membership has remained flat. What is the future role and structure of our membership program? How can it better support the Museum? How can the Museum better serve its members?
- Community collaborations are a central element of FMHC's exhibitions. What are the priority areas of collaboration and important community issues that we should be addressing?
- How can FMHC continue to position itself as a safe, neutral third space where multiple perspectives on topical issues are welcomed, and where the community can explore ways to build consensus around the future?

- New Board members have brought new skills, energy, and diversity to FMHC, but there has been a loss of historic context and an abdication of authority to the executive director. How can the Board be educated

and empowered to lead, and what kind of succession planning should be put in place to ensure consistency?

- FMHC's facility, which opened in 2006, has effectively supported the expansion of our programs and audience, however as we extend our programs to the outdoor Museum Commons, new facilities and

infrastructure may be needed to support those activities. What role should FMHC play in funding and managing those facilities and how should our partnership with the Town of Fairfield evolve to facilitate that?

Support for the Humanities:

How does your organization currently bring the humanities to the public? How will this project establish, improve, or expand your ability to do so?

FMHC believes that sharing diverse stories about our past, celebrating the individual's role in catalyzing social change, and promoting the value of humanities helps create an informed and engaged citizenry and empowers students and their families to become active lifelong learners. For the past decade, our vision has been to use history to strengthen our regional community and help shape its future. To accomplish our humanities-focused mission, FMHC creates experiences that: make history personal, engaging and meaningful; make full use of the Museum's collections, archives and historic resources; strengthen people's connection to the world around them with an appreciation for the influences of the past; present varied viewpoints that cultivate a sense of community identity; and encourage broader civic participation.

FMHC's exhibitions and related programming are created through close collaboration with community organizations and use the humanities to foster discussion about relevant critical issues such as racial justice, climate change, education, immigration, and more. Changing exhibitions and community programs delve deeply into the history and context behind important issues of our time, explore those issues through multiple perspectives and inspire informed discussion about the future of our community and nation.

FMHC has received several recent state and national awards for its humanities programming, including two CLHO Awards of Merit, three AASLH Leadership in History awards and the distinguished Bruce Fraser Social Studies Award presented by the CT Council for Social Studies.

The proposed strategic planning process will provide important guidance in establishing priorities and allocating resources for FMHC to further reinforce and focus its commitment to expanding humanities programming and to broadening its reach to wider audiences, particularly those constituencies that have not historically been involved with the museum.

Schedule:

Describe the major tasks to complete the project, specific dates for both the beginning and completion, and the team member(s) responsible for each. Include ONLY tasks during the requested grant period.

Please use the following format:

1 Start & End Date; Task; Team Member(s)

2 Start & End Date; Task; Team Member(s)

etc

Prior to the grant period, FMHC will be working with Wizevich to analyze and summarize existing audience data, and conduct additional surveys of FMHC membership and stakeholders. Nevins will be conducting initial site visits. Below are tasks that will occur during the grant period. Please see attached consultant proposals for more details on specific tasks.

1.	February, 2019	FMHC staff meet to review outcomes From Phase 1 and outline plan goals. FMHC staff to create SWOT.	FMHC staff
		Organizational meeting with planning consultant, FMHC Strategic Planning Committee, and senior staff.	Roberts FMHC staff
2.	March, 2019	FMHC Board / staff planning retreat.	Roberts FMHC Board and staff
3.	April, 2019	Site visits to observe ed. programs and professional development programs. Develop future program assessment procedures.	Nevins & FMHC staff
4.	May, 2019	Nevins and Wizevich to draft their parts of the plan document in consultation with FMHC staff and Roberts.	Wizevich and Nevins
		Wizevich prepares 2-3 evaluation tools to monitor ongoing progress toward Plan goals	Wizevich and FMHC staff
		Preliminary Strategic Plan presented to FMHC Strategic Planning Committee.	Roberts
		Plan review with community focus groups.	Roberts and FMHC staff
		Plan review by FMHC staff and Strategic Planning Committee.	FMHC Plan Committee
5.	June, 2019	Final Strategic Plan presented to FMHC.	Roberts

Project Team:

Please list your project's major participants including presenters, consultants, scholars, staff, etc.; indicate if they will be paid with CTH grant funding; and list their major project responsibilities.

Make sure you include ALL participants for whom you are requesting CTH funding in this section.

Please attach resumes or bios for all listed in the Project Team in the next question.

Please use the following format:

Team Member 1 Name

Team Member 1 Title

Team Member 1 Organization

Paid with CTH grant funds

Major Responsibilities

Karen Wizevich
Museum Evaluation Consultant
Partially paid with CTH grant funds

- Wizevich and her graduate student assistant will review and summarize key findings from FMHC's existing audience evaluation data. She will draft two additional online surveys: one for FMHC members and the other for general audiences to fill in any missing data. Those finding will be put into a summary report to help guide planning discussions. Wizevich will also participate in the drafting of the final Strategic Plan and help develop new evaluations metrics to monitor the plan's progress.

Elizabeth Nevins
Principal, Seed Education Consulting
Partially paid with CTH grant funds

- Nevins will conduct a series of site visits to observe and evaluate FMHC's educational and professional development programs, and write a summary of her initial findings to help guide planning discussions. She will return in Phase 2 to conduct additional site visits, participate in the drafting and review of the Strategic Plan, and draft a final report on her recommendations for program improvement.

Laura Roberts
Museum Planning Consultant
Paid with CTH grant funds

- As the principal planning consultant, Roberts will organize and facilitate a series of planning meetings with FMHC staff, Strategic Planning committee and FMHC's full Board. She will compile and organize the outcomes from those planning sessions and, in consultation with Wizevich and Nevins, as well as Jehle, draft the final Strategic Plan.

Michael Jehle
Executive Director, FMHC
Not paid with CTH grant funds

- As FMHC's chief executive, Jehle will be leading all aspects of the strategic planning process; working closely with the planning consultants to manage their schedule and review their outcomes, oversee the work of the Strategic Planning Committee, and work closely with the Board and Roberts to ensure that all key opportunities and challenges facing the organization will be addressed during the planning process.

Strategic Planning Committee:

Elizabeth Rose, FMHC Library Director
Laurie Lamarre, FMHC Curator
Shana Wiswell, FMHC Development Director
Christine Jewell, FMHC Education Director
Tom Mindrum, FMHC Board member
Sharon Lauer, FMHC Board member
Pete Penczer, FMHC Board member
Rose Thomas, FMHC Board member
Tom Walsh, FMHC Board member
John Donovan, FMHC Board member
Joyce Hergenhan, FMHC Board member

- FMHC's Board and staff Strategic Planning Committee will work closely with executive director Jehle and planning consultant Roberts to ensure that all key issues facing the Museum are identified and fully explored, that the planning process remains on schedule, and that the final outcomes meet FMHC's specific needs.

Project Team Resumes and Bios:

Please attach a CV or resume of up to 3 pages for all consultants participating in the project that demonstrates appropriate skills to carry out the project as well as for each person for whom CTH grant funding is being sought that demonstrates appropriate skills and/or scholarship to carry out their role in the project.

Short (one- or two-paragraph) bios of vital team members NOT paid through CTH funds may also be included.

Note: Only 1 attachment can be uploaded in this space. If you have multiple resumes to share, please combine into 1 document before uploading.

[NOTE: Sample Model Grants do not share this upload]

Budget: [See the appendix for this upload]

Budget Notes and Justification:

FMHC is requesting \$9,980 in CTH funding toward a \$39,870 strategic planning process. CTH funds will be used to support the Phase 2 (February – June, 2019) work of consultants Karen Wizevich and Elizabeth Nevins, as well as \$6,000 of planning consultant Laura Roberts' fee. Phase 1 expenses for Wizevich and Nevins, all travel and printing costs, and \$1,800 of Roberts' fee will be paid for by an anticipated grant from the Newman's Own Foundation. All consultant fees are detailed in their respective proposals and represent competitive rates for those services.

In addition to the attachments required in previous sections, applications must also include:

- **A proposal or invoice, prepared by the selected consultant, that defines the scope of work the consultant would perform and lists professional fees to be charged.**

File Upload

Please attach one (1) document containing all of the materials required as outlined above, based on the project type(s) for which you are requesting funding, to help us evaluate the quality and humanities content of your project.

Note: Only 1 attachment can be uploaded in this space. If you have multiple documents to share, please combine into 1 file before uploading.

[\[See the appendix for this upload\]](#)

Appendix

While Project Team Resumes and Bios are required for this application, this upload is not included with this sample model grant application.

This sample model grant includes the following documents:

1. Budget
2. Required File Upload

SALARIES & WAGES: Total amount of Salaries & Wages requested in CTHF Funds may not exceed 25% of the total grant request.

Note: Quick Grants cannot fund Salaries & Wages, but it can be used as Matching Funds (Applicant Cash Contributions).

There is no cap on Salaries & Wages used as Applicant Cash Contributions.

NOTE: The total of each item detail must match the total of each source of funds. X indicates a problem.

Item Detail				
	Name/Position	Rate	#	Total
1	Michael Jehle, Executive Director			\$12,750
2	Shana Wiswell, Development Director			\$3,600
3	Jessica Wilson, Bookkeeper			\$300
4	Lauie Lamaree, Curator			\$700
5	Elizabeth Rose, Library Director			\$860
6	Christine Jewell			\$740
7	FMHC Board, [REDACTED]			\$7,200
8				\$0
9				\$0
10				\$0
11				\$0
12				\$0
13				\$0
14				\$0
15				\$0
			Total	\$26,150

CTHF Funds Requested and Matching Funds (Source of Funds)				
CTHF Funds	External Cash Contributions	Applicant Cash Contributions	In-Kind Contributions	Total
	\$1,260.00	\$11,490.00		\$12,750
		\$3,600.00		\$3,600
		\$300.00		\$300
		\$700.00		\$700
		\$860.00		\$860
		\$740.00		\$740
			\$7,200.00	\$7,200
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
\$0	\$1,260	\$17,690	\$7,200	\$26,150

HONORARIA & CONSULTING

NOTE: The total of each item detail must match the total of each source of funds. X indicates a problem.

Item Detail				
	Name/Position	Rate	#	Total
1	Laura Roberts - Planning Consultant	\$7,800.00	1	\$7,800
2	Elizabeth Nevins - Program Evaluator	\$2,500.00	1	\$2,500
3	Karen Wizevich - Survey Data Consultant	\$1,480.00	1	\$1,480
4				\$0
5				\$0
6				\$0
7				\$0
8				\$0
9				\$0
10				\$0
11				\$0
12				\$0
13				\$0
14				\$0
15				\$0
Total				\$11,780

CTHF Funds Requested and Matching Funds (Source of Funds)				
CTHF Funds	External Cash Contributions	Applicant Cash Contributions	In-Kind Contributions	Total
\$6,000.00	\$1,800.00			\$7,800
\$2,500.00				\$2,500
\$1,480.00				\$1,480
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
\$9,980	\$1,800	\$0	\$0	\$11,780

TECHNICAL DESIGN SERVICES

NOTE: The total of each item detail must match the total of each source of funds. X indicates a problem.

Item Detail				
	Name/Position	Rate	#	Total
1				\$0
2				\$0
3				\$0
4				\$0
5				\$0
6				\$0
7				\$0
8				\$0
9				\$0
10				\$0
			Total	\$0

CTHF Funds Requested and Matching Funds (Source of Funds)				
CTHF Funds	External Cash Contributions	Applicant Cash Contributions	In-Kind Contributions	Total
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
\$0	\$0	\$0	\$0	\$0

TRAVEL: CTH may cover mileage up to .545 per mile. Enter rate and number of miles below.

Total travel expenses may not exceed 20% of total grant request.

NOTE: The total of each item detail must match the total of each source of funds. X indicates a problem.

Item Detail				
	Name/Position	Rate	#	Total
1	L. Roberts: 7 x 310 m x \$.55 + tolls	\$1,225.00	1	\$1,225
2	E. Nevins: 3 x 300 m x \$.55 + tolls	\$515.00	1	\$515
3				\$0
4				\$0
5				\$0
6				\$0
7				\$0
8				\$0
9				\$0
10				\$0
11				\$0
12				\$0
13				\$0
14				\$0
15				\$0
Total				\$1,740

CTHF Funds Requested and Matching Funds (Source of Funds)				
CTHF Funds	External Cash Contributions	Applicant Cash Contributions	In-Kind Contributions	Total
	\$1,225.00			\$1,225
	\$515.00			\$515
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
\$0	\$1,740	\$0	\$0	\$1,740

EQUIPMENT AND ROOM RENTAL OR PURCHASE: Total Equipment expenses may not exceed 40% of total grant request.

NOTE: The total of each item detail must match the total of each source of funds. X indicates a problem.

Item Detail				
	Description	Rate	#	Total
1				\$0
2				\$0
3				\$0
4				\$0
5				\$0
6				\$0
7				\$0
8				\$0
9				\$0
10				\$0
Total				\$0

CTHF Funds Requested and Matching Funds (Source of Funds)				
CTHF Funds	External Cash Contributions	Applicant Cash Contributions	In-Kind Contributions	Total
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
\$0	\$0	\$0	\$0	\$0

PROMOTION

NOTE: The total of each item detail must match the total of each source of funds. X indicates a problem.

Item Detail				
	Description	Rate	#	Total
1				\$0
2				\$0
3				\$0
4				\$0
5				\$0
6				\$0
7				\$0
8				\$0
9				\$0
10				\$0
			Total	\$0

CTHF Funds Requested and Matching Funds (Source of Funds)				
CTHF Funds	External Cash Contributions	Applicant Cash Contributions	In-Kind Contributions	Total
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
\$0	\$0	\$0	\$0	\$0

EVALUATION

NOTE: The total of each item detail must match the total of each source of funds. X indicates a problem.

Item Detail				
	Description	Rate	#	Total
1				\$0
2				\$0
3				\$0
4				\$0
5				\$0
Total				\$0

CTHF Funds Requested and Matching Funds (Source of Funds)				
CTHF Funds	External Cash Contributions	Applicant Cash Contributions	In-Kind Contributions	Total
				\$0
				\$0
				\$0
				\$0
				\$0
\$0	\$0	\$0	\$0	\$0

BUDGET SUMMARY: Values fill automatically from the detail pages.

Budget Summary	Source of Funds Summary				
	CTH Funds	External Cash Contributions	Applicant Cash Contributions	In-Kind Contributions	Total
Salaries & Wages	\$0.00	\$1,260.00	\$17,690.00	\$7,200.00	\$26,150
Honoraria	\$9,980.00	\$1,800.00	\$0.00	\$0.00	\$11,780
Technical Design Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0
Travel	\$0.00	\$1,740.00	\$0.00	\$0.00	\$1,740
Printing, Copying and Supplies	\$0.00	\$200.00	\$0.00	\$0.00	\$200
Equipment and Room Rental or Purchase	\$0.00	\$0.00	\$0.00	\$0.00	\$0
Promotion	\$0.00	\$0.00	\$0.00	\$0.00	\$0
Evaluation	\$0.00	\$0.00	\$0.00	\$0.00	\$0
Total	\$9,980	\$5,000	\$17,690	\$7,200	\$39,870

**Visitor Research Proposal
Fairfield Museum and History Center
October 4, 2018**

Karen Wizevich, Ph.D.

October 5, 2018

Phase One

A. Review existing visitor evaluation methods and data

Objectives:

- To review and understand the existing methods and tools by which Fairfield Museum (FMHC) has already collected data about visitor use of, and reaction to, any aspect of the site, programs, marketing outreach, etc.
- To review and evaluate the existing data that has been produced from these prior methods and tools.
- To summarize prior methods and results.
- To identify aspects of the museum's programs that seem to be performing well and those performing less well.
- To recommend a forward-looking set of questions that feed into new methods and tools, see Part B.

Tasks:

FMHC will send all relevant survey forms and data, most in summary form.
Karen Wizevich (KW) will review all summary data and evaluate methods/tools.

Deliverable:

Summary paper, reviewing previous data collection methods/tools/data, with recommendations for a new evaluation strategy.

Estimated Time:

KW @ 2.5 days	KW @ \$650/day =	\$1,625
Graduate student @ 12 hours	@ \$15 hr=	\$180

Timeframe: October – November 2018

B. Develop and implement two online surveys

Objectives:

- To prepare two online surveys that will be designed to fill in any missing audience data not previously recorded, and to gauge the value of Museum membership. Surveys to be disseminated during late Fall 2018 via email to two groups:
 - FMHC members
 - i. Reaction to all aspects of FMHC (“how is FMHC doing?”)
 - ii. Motivation for becoming & maintaining membership
 - iii. Benefits they most and least value
 - iv. Types of programming they most and least value
 - FMHC entire audience email list
 - i. Reaction to all aspects of FMHC (“how is FMHC doing?”)
 - ii. How they could be convinced to become members
 - iii. Membership benefits they would most value
 - iv. Types of programming they most and least value

Estimated Time:

KW @ 2 days KW @ \$650/day = \$1,300
Graduate student @ 12 hours @ \$15 hr= \$180

Timeframe for developing surveys: November 2018

Timeframe for implementing surveys: December 2018 / January 2019

Timeframe for working with FMHC staff on analysis: February, 2019

Phase Two

A. Develop new, comprehensive evaluation plan and instruments

Objectives:

- To review and reflect upon all prior steps outlined in Phase One, including:
 - i. review of existing methods/data
 - ii. data from the two new online surveys.
- To prepare a holistic, forward looking evaluation plan, including a set of methods and 2 to 3 evaluation tools that can be used by FMHC for ongoing program and audience evaluation.

Estimated Time:

KW @ 2 days KW @ \$650/day = \$1,300
Graduate student @ 12 hours @ \$15 hr= \$180

Timeframe: March 2019

ELISABETH NEVINS
principal
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Fairfield Museum and History Center

Education Program Evaluation

September 18, 2018

Project Overview

In preparation for an institution-wide strategic planning process starting in January 2019, the Fairfield Museum and History Center will engage an outside consultant to conduct an evaluation of its current educational programs. In recent years the museum's education staff has focused on expanding and improving their programming for school-age children and their teachers. To better inform their strategic priorities for educational programming over the next five years, the evaluator and staff will assess the progress that has been made in developing school programs and building relationships with local educators to ensure continued growth in program quality and nurturing of community partnerships.

Project Activities

Elisabeth Nevins of Seed/Ed will provide the following program evaluation services for the Fairfield Museum and History Center:

Phase One | *Information Gathering and Project Refinement* | October 2018–February 2019

- Review information from Fairfield Museum staff on current on-site, outreach, and professional development educational offerings, including education program content, existing program evaluation tools, and recently collected evaluation data.
- Schedule site visit to Fairfield Museum to meet with education staff members and observe school program (tentatively scheduled for Thursday, October 4).
- Submit preliminary report on findings highlighting general impressions of school programming at Fairfield Museum as it relates to current trends in history and museum education.

Phase Two | *Program Evaluation Implementation & Reporting* | February–May 2019

- Collaborate with education staff in refining program assessment goals, outlining a schedule of assessment activities for Spring 2019, and developing assessment strategies including but not limited to: program observations, interviews/focus groups with stakeholder groups, surveys, etc.
- Oversee information collection process: schedule and conduct interviews (with support from education staff), observe additional education programs (ideally one on-site, one outreach, and one professional development session), and assess program content and feedback in relation to new state curriculum standards and best practices/current trends in history museum education.
- Review information collected with project team on an ongoing basis to ensure assessment goals are being met and to adjust process accordingly.

- Share findings and discuss educational framework goals for strategic plan with Laura Roberts, the museum's planning consultant.
- Evaluate information collected and submit report on findings with specific and actionable recommendations for program enhancement and growth that can inform the setting of strategic goals for coming years.

Compensation

The fee for the services outlined above is \$3,500 based on an estimated time commitment of seven days of work over the eight-month period outlined in the schedule of project activities—\$1,000/two days for Phase One and \$2,500/five days for Phase Two. If the scope of the project changes extensively or the time required significantly exceeds the days allotted, Seed/Ed reserves the right to renegotiate the terms of compensation.

Fairfield Museum will also reimburse Seed/Ed for out-of-pocket expenses, including travel expenses for meetings and observations in Fairfield; printing, advertising, design, or mailing costs associated with the services outlined above; and costs associated with purchase of materials necessary for the completion of these services, provided, however, that the museum has given prior approval to the expense.

Seed Education Consulting

Elisabeth Nevins is a museum education, interpretation, and evaluation consultant based in Boston, Massachusetts. She collaborates with leaders at museums and historic sites throughout the Northeast to create empowering and engaging learning experiences with their visitors. She is particularly intrigued by the possibilities of placemaking and place-based learning.

Recent projects include facilitating the formative evaluation process for the Cape Ann Museum's maritime exhibit reinterpretation, leading a comprehensive evaluation of the Frederick Law Olmsted National Historic Site's Good Neighbors school program, co-directing a NEH Landmarks in American History and Culture teacher workshop on contact and conflict in 17th century New England with the Leventhal Map Center at Boston Public Library, and conducting an audience needs assessment for the Massachusetts Historical Society's new Center for the Teaching of History.

Her past staff jobs include positions at the Lower East Side Tenement Museum, Connecticut Historical Society, Gilder Lehrman Institute of American History, and Historic New England. As director of education and interpretation for Boston's Old North Church historic site, she managed the development of the *Tories, Timid, or True Blue?* website—winner of an American Association of State and Local History *Leadership in History Award of Merit*. She serves as co-chair of the New England Museum Association education professional affinity group (EdPAG) and supports the publication of the *Journal of Museum Education* in her role as publications strategist and as a peer reviewer.

Nevins holds a B.A. in history from Yale University and an M.S.Ed. in museum education and early adolescent education from Bank Street Graduate School of Education. She speaks regularly on issues in the field for Boston-area museum studies and public history programs.

Proposal to the Fairfield Museum and History Center

Strategic Planning

August 14, 2018

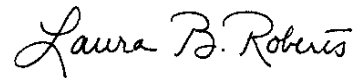
Roberts Consulting

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Proposal to the Fairfield Museum and History Center

Thank you for inviting Roberts Consulting to prepare a proposal for facilitating strategic planning for the Fairfield Museum and History Center. It was a pleasure to work with the Museum in 2009 and 2010 and it is exciting to see how far you have come! In this proposal please find a summary of the approach I take to planning, my understanding of the issues and questions facing the Museum, and a proposed plan of work and fee.

Please let me know if I can provide any other materials. You will find a resume, complete client list and examples of my work at lauraroberts.com.



Laura B. Roberts, Principal

My Approach to Strategic Planning

Strategic thinking and planning are critical to the health of nonprofit organizations of any size. Few nonprofits can afford to pursue a random path into the future, allocating scarce resources on the basis of whim, ancient decisions or personal interest. All nonprofits are faced with the challenge to demonstrate that they make some difference in their communities to justify their tax-exempt status, to make a case for financial support, and to develop community loyalty. *To be strategic means deciding what you are trying to accomplish and selecting the best route to that goal.* Organizations are rarely short on good ideas; planning identifies the ideas that will best help an organization achieve its vision and helps everyone align their individual goals and work plans with that larger vision.

While unplanned, spontaneous change is unavoidable, an organization can guide its growth and development through thoughtful, regular planning. Periodic evaluation of programs and services, discussion of changes in the organization's environment, and an energetic debate about the future ensures that it will stay vibrant and responsive.

Before there is a final document, there is the planning process, which requires the wholehearted and enthusiastic participation of the organization's leadership. No consultant can eyeball an organization from a distant vantage point, conduct interviews and focus groups, do some contextual research, and present a viable plan. *An organic approach, grounded in the history of the organization, the strengths and weaknesses identified by its leadership and constituents, and the resources it has at its disposal, is far more likely to be relevant and useable.*

Every consultant approaches this task differently, using different models, discussion tools, and formats. Just as no two organizations are alike, I find that no two planning processes are alike. I tailor the specifics of the planning process to each organization, board, and community. I do, however, utilize three fundamental approaches, developed in the course of my practice.

One is that planning is best done from a pan-institutional perspective. While everyone involved has particular responsibilities and interests, I urge planners to set aside their individual passions and commitments and think about what is best for the organization as a whole.

Proposal to the Fairfield Museum and History Center

Second, while I feel strongly that assessing and developing plans is the responsibility of the board of directors, current and potential constituents must be actively involved in the planning process to ensure that the plan is grounded in reality and reflective of all relevant points of view. To keep the process moving efficiently, I advise that planning be assigned to a small ad hoc committee, with others brought in as needed.

Finally, while some of the issues confronting an organization may seem clear at the outset, planning raises new questions, requiring flexibility and creativity on the part of everyone involved. This will be the time to bring to the table the issues and ideas that a board rarely has time to adequately address. So if there are surprises and disagreements along the way, we will treat them as opportunities for new, creative thinking. Our goal is a document that has benefited from lively thought and debate.

Strategy at the Fairfield Museum and History Center

The museum's 2010 plan includes this restatement of the organization's mission:

The Fairfield Museum and History Center believes in the power of history to inspire the imagination, stimulate thought and transform society. We connect people around the complex history of Fairfield and neighboring communities so that together we may shape a more informed future

That statement and the strategic framework of the plan have served the museum well. Critical capital projects have been completed, exhibitions and programming have grown in new and exciting directions, and the community has responded positively.

The questions facing the Museum in 2018 are largely how to best build on these achievements. How might the origination best utilize the campus of historic structures and the Ogden House? How can the successful educational programs be refreshed and made more relevant to regional schools? How might the museum continue to build partnerships with local arts and cultural organizations? What might be the next major project or initiative?

To inform these deliberations, the museum has engaged Karen Wizevich to review all of the data already available to the staff regarding the museum's impact and success and suggest strategies for developing new metrics. The assessment of performance will be invaluable to the planning team as they consider options for the future.

The expectation is that this planning effort will produce a framework of goals, initiatives and objectives and that staff and committees will further develop action items, calendars, and budgets. This is a sound approach, which makes good use of the resources available to the museum and the expertise of the staff, board, and consultants.

Proposal to the Fairfield Museum and History Center

Organizing Planning

How to structure planning, who to include, and how to use an outside facilitator are decisions to be made by the organization depending on its resources (financial and human), challenges, and time available. After discussion with Mike Jehle, the museum's executive director, I propose the following plan of work. While these steps are, in part, sequential, some pieces can be completed simultaneously.

- Review of the organization's operations and relevant materials developed in the recent past.
- An initial meeting with Mike Jehle to further define the major questions to be addressed and decide how staff, board and stakeholders should participate in the process.
- A follow up meeting the same day (or series of one on one meetings) with senior staff to further develop the key questions and issues.
- A kick off meeting with the full board (and optionally senior staff) to review the mission statement, core principles, and any other statements that frame the museum's work; gather feedback on the central questions; and identify perspectives that should be included in the planning process.
- One or two meetings of a planning team (composition to be determined), assessing the status of the museum's services and programs and exploring the relevant issues and questions.
- One or two meetings (on the same day) with key stakeholders and partners, such as educators in the area, museum volunteers, or leaders of partner organizations. One on one interview, conducted by me or by museum staff, may augment these meetings.
- Benchmarking comparable organizations facing similar issues and/or situations through online research and interviews. For example, planners might want to investigate exemplary educational programming in historical organizations or models for making use of a campus of historic structures and landscape.
- A follow up meeting of the planning team to review research, make decisions on goals and objectives and set priorities.
- Drafting the plan, presenting to the board and editing the final planning document based on their feedback. That board meeting would also include a discussion of metrics, implementation and monitoring progress.

I would prepare the plan itself in a format to be determined, with two drafts prior to submitting the final document to be certain that the observations, conclusions, and language are all appropriate. My understanding is that Fairfield Museum's preference is for a short, readily communicated summary (what I refer to as a Strategic Framework). Staff generally draft or provide basic content for background sections of the plan and will take the framework and fill in the details, including financial projections.

The specifics of the meeting schedule, agendas and sequence of work would be developed in consultation with Fairfield Museum's leadership. The fee proposal is based on three meetings of the planning group, a meeting with the full board at the start and end of the process, one day of meetings with staff, and one day of meetings with constituents. There is additional time budgeted for work from my office in Cambridge: interviews with stakeholders, benchmarking research, writing and editing.

Proposal to the Fairfield Museum and History Center

Laura B. Roberts, Principal, Roberts Consulting

I am an experienced museum professional, consultant, and nonprofit manager. Generally I work independently, occasionally subcontracting specialized or administrative work. The client approves all subcontracts in advance.

I have participated in many planning efforts for nonprofit organizations as a staff member, board member, and consultant. I have completed strategic plans with a few large organizations but I mainly work with mid-sized or smaller museums, historical societies and community arts organizations. As executive director of the New England Museum Association, I initiated a comprehensive long range planning effort for that organization. I also led a planning effort during my tenure as executive director of the Boston Center for Adult Education and as a board member chaired the long range planning committees of the Tufts University Art Gallery, Oral History Center in Cambridge, Massachusetts and First Night Boston.

I chair the board of Central Square Theater in Cambridge and its resident companies. I have recently completed service as chair of the advisory board of the Tufts University Art Gallery and the advisory board of the Mary Baker Eddy Library. I am on the editorial board of the *Journal of Museum Education* and the American Association for State and Local History. I serve on the program committee of the Cambridge Historical Society.

Currently, I balance my consulting with teaching in graduate programs at Harvard University, Northeastern University, and Bank Street College of Education.

At the start of my career, I was the director of education at three New England history museums.

Fee Proposal

My billing rate is \$150 per hour plus expenses, which are billed at cost. My preference is to develop a clear scope of work and a mutually-acceptable fixed fee based on that scope of work. I propose to complete this project for \$7,800 plus expenses, which I anticipate would be limited to travel between Cambridge and Fairfield (\$175 per trip using the 2018 IRS rate; rental cars may be cheaper). Rather than bill for travel time, all work in Fairfield has been budgeted for a minimum of four hours; I encourage clients to make full use of my time onsite.

2 board meetings and 3 planning team meetings (5 x 4 hours at \$150)	\$3,000
Meeting with leadership and staff (6 hours at \$150)	900
Meeting with constituents and/or interviews (6 hours at \$150)	900
Offsite work (20 hours at \$150)	3,000
<i>Reviewing materials; phone calls; benchmarking, interviews and other research; writing and editing</i>	
<hr/>	
Total	\$7,800
Travel: 7 trips (310 miles @ .545 + \$6.10 tolls)	\$1,225