

# Sample Capacity Building Grant Application

**Project Title:** Visitor Research and Analysis for Project Planning

**Organization:** Keeler Tavern Museum

## **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).*

### **ABOUT KEELER TAVERN MUSEUM & HISTORY CENTER**

Listed on the National Register of Historic Places, Keeler Tavern Museum & History Center (KTM&C) uses its historic 4+-acre campus primarily for education in American history. The site features a circa 1713 tavern building, which was attacked by the British in 1777; a British cannonball resides in a corner post of the tavern to this day. The property stayed in the family of Revolutionary War patriot Timothy Keeler until 1907, when it was purchased by Cass Gilbert, architect of the U.S. Supreme Court, New York's Woolworth Building, and many other municipal and public buildings throughout the Northeast and Midwest. During the Gilberts' ownership, the site was graced with additional distinctive buildings that the famous architect designed: a neoclassical garden house overlooking a brick-walled garden, inspired by those of Charleston, SC; and a two-story carriage barn. The Gilberts' chauffeur--and later, the family's many visiting guests—were accommodated in a mid 19th-century building, today occupied by KTM&HC's caretaker.

Shortly after Cass Gilbert's death in 1934, his widow Julia Finch Gilbert and their son Cass Gilbert, an architect, worked to design a memorial library, intended for Cass Gilbert Sr.'s business papers. The neoclassical brick structure had all the features of a space designed for public use: high ceilings, double front door, central reception room. It was dedicated in 1937 with great fanfare (Connecticut's governor attended the opening), but having been found inadequate for Gilbert's voluminous archives, it was soon converted to residential use and ultimately partitioned off as a separate property. In 1957, the Gilbert family sold the Keeler Tavern property to a family that made few changes to the buildings and landscape; in the mid-1960s, when offered again for sale, the Keeler Tavern property (which included the garden house, garden and carriage barn but not the memorial library) was purchased by a group of preservationists who established it as a nonprofit museum and opened it on July 4, 1966.

### **THE VISITOR EXPERIENCE AT KTM&HC TODAY**

Today KTM&HC is managed by a small professional staff and 200+ volunteers, touching nearly 10,000 people yearly who come to the site for a variety of reasons—to take a tour, attend a commemorative family-friendly event, hear a scholarly lecture, enjoy an art show, participate in a private social event, or simply walk the grounds. Depending on their level of engagement, they become familiar with the site's stories, which speak to national events as well as local history. Young visitors—nearly 2,500 in the year ended June 30, 2018—take tours with their families, attend summer camp, or spend the day

here in immersive, standards-based school programs. From events to restoration work to staff employment, the seven-day-a-week activity here pours several million dollars into the local economy yearly (and does so without any government support for operations).

Like many institutions of its type and size, KTM&HC conveys humanities themes/topics by drawing on the life experiences of its site's past residents to make connections to significant events or developments in U.S. history. Notable past residents include Revolutionary War patriot and innkeeper Timothy Keeler; Civil War chronicler Anna Marie Resseguie; Phillis Dubois, who was born enslaved; and early 20th-century architect Cass Gilbert and his family. KTM&HC draws their stories and on its physical and intellectual assets to provide:

Docent-led tours of the interior of the historic Keeler Tavern only, currently offered three days a week (approx. 900 visitors in 2017; paper survey available for completion)

Large-scale family-friendly educational events utilizing KTM&HC's indoor and outdoor spaces (attracting 400-1500 visitors, depending on event; two to four per year; online survey offered occasionally)

Lectures and exhibitions focused on a particular theme (redware, textile industry in a small New England town) or major national milestone/event (Civil War, 19th Amendment to the U.S. Constitution) (50-100 attendees, depending on subject; three to four per year; audiences complete a basic paper survey at some programs' end)

Online access to our collections database, PastPerfect; Google analytics available but not studied

Articles and news in print and online media (in our 4x/year newsletter, in local papers and on Facebook, Twitter and Instagram; infrequently visited though available 24x7)

School programs for students in grades k-12 (approx. 2,300 students in the 2017-2018 academic year; developed with teacher input to conform to standards and curricula; written teacher comments are solicited after each program)

With the exception of the school programs, many of these offerings have grown in variety and purpose without benefit of consistent data gathering from the relevant constituencies. The proposed audience research project will address this need.

#### PROJECT BACKGROUND

This audience research project is the direct result of KTM&HC's strategic plan review, held yearly. Most recently, the board of directors recognized the need for visitor/audience research to inform decisions after having purchased, in early 2016, the 1.2-acre property to its immediate north, at 152 Main Street. This purchase of the parcel featuring the Cass Gilbert Jr.-designed memorial library was a once-in-a-generation opportunity to reunite the Keeler Tavern site with property from which it was separated 60 years ago and restore it to its Gilbert-era configuration. The purchase is supported by a capital campaign, now in its second year, which has an initial goal to raise \$1.5 million. The campaign is funding not only the purchase but also the renovation of the memorial library building and reconfiguration (and ultimately, reinterpretation) of the parcels now re-united. The acquisition has already produced benefits--20 additional parking spaces and a first-ever welcoming space for visitors.

The acquisition propelled KTM&HC into examining and rethinking the visitor experience, especially in light of its strategic plan goal to transform from an historic house museum to a regional history center. KTM&HC aims for its visitors' experience to have contemporary relevance: The site's curated life stories, events and collections should open a window not only on national events of the past but also on contemporary issues of civic engagement and culture, and race, gender, opportunity and privilege. KTM&HC also wants to explore whether and how visitors' experience could be made more participatory and multisensory.

KTM&HC's board recognizes that its transformation cannot be done effectively without the right tools and methods for gaining a full understanding of current visitors' motivations, expectations, and experiences. The Museum's current visitor survey instrument, developed in house, is inconsistently administered and its data rarely analyzed. Aggregated data from similar institutions provides only partial information and is insufficient to guide KTM&HC to a new strategic plan and set an associated prioritized list of action steps.

KTM&HC is fortunate to have in-house capabilities for strategic planning exercises. In 2013 and again in 2015-2016 as KTM&HC prepared to purchase 152 Main Street, board member Rhonda Hill led the board of directors through intensive work sessions compiling visitor and stakeholder information, peer organization profiles, and possibilities and priorities for site and visitor experience improvement. The strategic plan was updated in a board retreat in November 2017 and is currently under review now, aided by board- and staff-populated subcommittees focusing on Development, Visitor Center/Museum Experience, and Strategic/Business Plan.

KTM&HC's current strategic plan is built on the base developed in 2013 and incorporates priorities identified by the board for completing the 2016 acquisition: launching and managing the capital campaign; continuing to develop programming for our largest constituency, area schools; and—now that the initial purchase and renovation projects are largely complete--preparing to undertake a site reinterpretation, for which the proposed audience research project is a first step. It is poised, now, to undertake another comprehensive strategic plan for 2020-2023 to maximize the benefits to the public of its physical expansion. To accomplish this, KTM&HC needs new information, specifically about 21st-century audiences.

#### FUNDING REQUEST: CAPACITY-BUILDING AUDIENCE RESEARCH

KTM&HC requests CT Humanities funding for a consultant-led initiative to conduct audience research (to gain a snapshot in time) and obtain the internal capacity to conduct audience research going forward (to evaluate results of changes and to track trends over time). This project will enable KTM&HC's board to use its strategic planning process to undertake next steps toward its transformation:

1. Prioritize among the many programmatic possibilities created by the property expansion: Examples here include further exploring humanities themes (e.g., race, gender, civic engagement) and storylines (freed slave and site resident Phillis Dubois, Cass Gilbert's legacy) and conduct the relevant scholarly research; considering thematic/time-specific tours; exploring options for docent led v. self-guided tours; and using digitally delivered content to complement/supplement the docent experience.

2. Make informed, visitor-centric decisions about space usage and further physical improvements to the site: Examples here include expanding visitor hours (going from 10 to 20 hours/week); parking and way finding around the campus; the museum shop experience; addressing the results of the Collections Assessment for Preservation report due November 2018; evaluating the use of buildings for mission-driven, public museum events versus private social, revenue-generating events.  
(continued)

**Project Description and Background (continued):**

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

3. Continually improve operations and offerings based on methodically collected, current visitor feedback: KTM&HC will use new in-house skills and knowledge to prioritize and implement appropriate methods and tools for gathering input from constituencies—members, donors, visitors, school program participants, lecture/event attendees. This will enable it to identify visitors’ satisfaction with its current and new offerings and the expanded campus, identify unmet visitor needs/preferences, and track trends.

Central to all three of these objectives is the need to manage growth and scale operations for long-term sustainability. KTM&HC determined that to tackle this, it needed outside, objective expertise to conduct audience research and gain the internal capacity to conduct (or at least knowledgeably plan) it going forward. It solicited suggestions from CT Humanities and from peer historic sites for consulting organizations and individuals with the requisite experience and qualifications as well as demonstrated success with similar engagements. Of the eight organizations identified, five were contacted. Three were unavailable due to workload; the remaining two, highly qualified entities had exceptional references, whom we interviewed, and equally strong capabilities. KTM&HC ultimately chose Aurora Consulting because its principals have complementary, strong skills and numerous client success stories in both capacity building/training and in research.

**CONSULTANT COLLABORATOR**

Aurora Consulting’s proposal set it apart, with an upfront statement of the firm’s collaborative model, focused on clients’ success through an integrated approach to strategic planning, training and evaluation. It gives equal weight to KTM&HC’s two needs—capacity building/training and obtaining a research-valid snapshot of visitors’ expectations and satisfaction. Three site visits, plus the capability to “meet” virtually, assure us that the principals, who will be on the project throughout, will quickly gain an understanding of our site and its mission and culture and stay engaged throughout the year-long research process. The firm’s experience with similar organizations across the country (e.g., Mid-Hudson Children’s Museum, Minnesota Historical Society, Peabody Essex Museum, to name but a few) suggests that their approach will be open-minded, substantive, and work with our visitors, who come from all over the U.S. as well as many foreign countries.

Aurora Consulting’s four-step team-based inquiry approach, explicitly defined and explained in its proposal, will lay the groundwork for its work with KTM&HC’s leadership, staff and, ultimately, implementing the chosen research method(s). Starting with a kickoff workshop with key project

team members and stakeholders, Aurora Consulting will guide the development of an audience research plan to meet KTM&HC's highest priority information needs: Focus groups, for example, may be a better method than a paper/online survey instrument, depending on the type of visitor experiences to study (tour and/or major event attendee). Aurora Consulting will then develop the data collection protocol and instruments and provide on-site training, if needed. Its principals will analyze the resulting data and facilitate a concluding workshop with the project team and key stakeholders to review the research findings, discuss implications and suggested next action steps.

With Aurora Consulting's help in 2019, funded in part by CT Humanities, KTM&HC will:

- Create organization-wide understanding of and buy-in for audience research
- Focus its 2019 audience research on the highest priority areas/topics
- Deploy the best instruments and methods to yield useful information on those areas/topics
- Obtain a written report of the research findings that it can use to inform decision making
- Gain the internal skills and knowledge to continue audience research beyond 2019

### **Project Goals and Impact:**

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

KTM&HC's primary goal is to support its strategic planning with a better understanding of its visiting public. We will understand who our visitors are, what brought them here, and what they thought about their time here. The project deliverables will be not only written reports providing a snapshot of visitor experiences in 2019, but also the knowledge and tools to continue capturing similar information using proven effective methods.

As explained in the previous section, KTM&HC's choices of themes/stories/programs/tours have relied more on materials in KTM&HC's collections and their link to an historic date (Anna Marie Resseguie's 1851-1867 diaries during the 150th anniversary of the Civil War, Julia Finch Gilbert's notes about World War I during this year's commemoration of the end of that conflict) than on a comprehensive understanding of what visitors most want to experience or learn. This project will enable KTM&HC to make informed choices about its humanities offerings based not only on historic resources and events, but also on audience interests and behaviors.

Specific examples follow:

Three centuries: For its entire 52-year existence, the Museum's interpretive plan has focused on the historic Keeler Tavern, which is furnished primarily to depict its Colonial/Revolutionary War/New Nation history. Visitor feedback will help KTM&HC to consider whether and how to widen the interpretive plan to encompass three centuries of history—and do so in a way that effectively leverages all benefits of the reunified, expanded campus for visitor engagement. For example, the site's five historic buildings have distinct architectural styles and stories that could be the subject of permanent or temporary exhibitions or tours. Regardless of the output (topical tour or exhibition), the outcome should encompass our mission—to explore the contemporary relevance of our site residents' individual actions and first-hand experience.

Cass Gilbert: Anecdotal comments from donors, members, and visiting scholars suggest that the 1907-1957 presence of Cass Gilbert and his family could be a draw/source of new programming. Gilbert left the biggest physical mark on the campus, yet his story receives disproportionately small treatment, told now in a one-room exhibit space in the addition that he built at the tavern's rear. Visitor input may help us to know whether there is unmet interest in the Gilberts and their story(ies) and, if so, point to ways that interest could be addressed.

Race/gender/privilege: In spring 2018, KTM&HC piloted a new play, "Sisters," about two women-- one black, one white—who together ran the Keeler Tavern/Resseguie Hotel before, during and after the Civil War. The follow-up online survey we developed, and invited attendees to complete, yielded few responses. Further development of the "Sisters" program will benefit from the capacity-building aspects of the audience assessment project, because KTM&HC will know how to more effectively solicit and use feedback.

Suffrage: KTM&HC has agreed in concept to work with the Ridgefield League of Women Voters to develop programming to commemorate the 100th anniversary of the passage of the 19th Amendment to the Constitution. KTM&HC indeed has, in the persons of its past residents, stories of strong women. Visitor reactions to our current tours, exhibits and 2019 programming may help inform choices about how to address suffrage and related women's history topics in exhibits during that commemorative year.

### **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?*

As previously detailed, KTM&HC currently delivers humanities programming through multiple vehicles. KTM&HC will use the 2019 audience research to identify 21st-century visitors' interests and consider ways to modify its humanities programming accordingly.

Through this project, KTM&HC hopes to gain insight into visitors' appetite for historic perspective on humanities topics that are suggested by past residents' life stories and are of contemporary relevance: citizenship and civic culture, and the American struggle with issues of race, gender, opportunity and privilege.

By obtaining the 2019 visitor experience snapshot and the capacity to continue gathering and analyzing information, KTM&HC will be able to use quantitative and qualitative information to:

- Inform its strategic plan for 2020-2023
- Prioritize among current potential humanities topics based on visitor interest and feedback
- Begin to shape the direction, and needed scholarship, for a new interpretive plan
- Identify programming that is likely to attract both new and repeat visitors
- Measure the impact of institutional, operational, and programmatic changes on visitors' experience

These resulting feedback loop should enable KTM&HC to:

- Engage members, donors (both general and Capital Campaign) and key outside stakeholders (e.g., town officials) in meaningful conversations about how their support facilitates our success, as reflected in visitor numbers and satisfaction
- More effectively deploy its resources—money, staff, volunteers, buildings, collections—to more fully engage visitors
- Grow its number of visitors by developing and offering unique programs/experiences that visitors want
- Better deliver humanities content that educates audiences about how individual actions and first-hand experiences reflect—and affect—the course of a nation’s development, even today

**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*

1. Late February 2019: Initial project team full-day workshop, providing common understanding of audience research purpose, possible methodologies, and intended outcomes (facilitated by Aurora Consulting and attended by KTM&HC project team, board members, staff, key donors/members, scholar advisor, and volunteers with visitor interface responsibilities)
2. March 2019: Develop audience research plan and identify corresponding assessment tools (Aurora Consulting and KTM&HC project team)
3. April 2019: Prepare draft assessment tools and review/revise (Aurora Consulting and KTM&HC project team)
4. Late April 2019: Conduct workshop/training for assessment implementation (Aurora Consulting, KTM&HC project team, and, if necessary, volunteers with visitor interface responsibilities who will administer the assessments)
5. May-December 2019: Data collection (KTM&HC assessment implementation team and/or Aurora Consulting [e.g., if focus groups are the chosen tool, Aurora Consulting could facilitate them])
6. December 2019-January 2020: Data analysis (Aurora Consulting)
7. January-February 2020: Project team full-day workshop to review findings, interpret them, and begin formulating next-step action plans (facilitated by Aurora Consulting and attended by KTM&HC project team, board members, staff, key donors/members, scholar advisor, and volunteers with visitor interface responsibilities)

**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*

Team Member 1 Hildegard Grob

Team Member 1 Title: Executive Director

Team Member 1 Organization: Keeler Tavern Museum & History Center (KTM&HC)

Not paid with CTH grant funds

Major Responsibilities: Manage project planning with the consultant and oversee internal meetings, training, and assessment implementation

Team Member 2: Sarah Cohn

Team Member 2 Title: Principal

Team Member 2 Organization: Aurora Consulting

Paid with CTH grant funds

Major Responsibilities: Conduct initial meeting with key stakeholders to establish common understanding of project objectives, parameters, timeline, resource needs, and deliverables. Develop assessment instruments and educate/train KTM&HC staff/volunteers in their proper use, as required; aggregate and analyze raw data; provide analysis in a final report that includes next-step recommendations for using the findings.

Team Member 3: Al Onkka

Team Member 3 Title: Principal

Team Member 3 Organization: Aurora Consulting

Paid with CTH grant funds

Major Responsibilities: Conduct initial meeting with key stakeholders to establish common understanding of project objectives, parameters, timeline, resource needs, and deliverables. Develop assessment instruments and educate/train KTM&HC staff/volunteers in their proper use, as required; aggregate and analyze raw data; provide analysis in a final report that includes next-step recommendations for using the findings.

Team Member 4: Angela Liptack

Team Member 4 Title: Associate Director

Team Member 4 Organization: KTM&HC

Not paid with CTH grant funds

Major responsibilities: Collaborate on project milestone planning and implementation of key events (team meetings, training sessions, assessment tool production/set-up).

Team Member 5: Leslie Lindenauer



Team Member 5 Title: Professor, History and Non-Western Cultures

Team Member 5 Organization: Western Connecticut State University

Paid with CTH grant funds

Major responsibilities: Provide scholar perspective on audience research priorities, avenues of inquiry, participating in two team meetings

Team Member 6: Rhonda Hill

Team Member 4 Title: 1st Vice President

Team Member 4 Organization: KTM&HC Board of Directors

Not paid with CTH grant funds

Major responsibilities: Lead KTM&HC strategic planning process, participating in audience research project team meetings to ensure the usefulness of the resulting data for organizational decision making

Team Member 7: Melissa Houston

Title: Director of Education

Organization: KTM&HC

Not paid with CTH grant funds

Major responsibilities: Offer perspective on how audience research methodology and outcomes may relate to/inform KTM&HC's work with its largest single constituency, K-12 school populations

#### **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.*

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**Budget: [NOTE: This Sample Model Grant does not include this upload]**

#### **Budget Notes and Justification:**

KTM&HC will be funding its portion of the cost of the audience research through its capital campaign account, a restricted account.

**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.*

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