

# Legacy Grants: Assessment, Feedback, & Action

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# Session Outline



- Background
  - Who we are:
    - Legacy Strategic Agenda (LSA) and LSA Collaborative
    - Grants Priority Action Team (PAT)
  - Legacy Grants Program Survey – 2017-2018 – Recap
    - Recommendations
    - MALHM 2018 Feedback – impact on next steps
- Progress Updates
  - Short Term Goals
  - Long Term Goals
  - Implementation Grid
- Your Turn: Group Feedback

# Session Objectives



- Better understanding:
  - Legacy Grant program assessment
  - Impact of feedback

# Legacy Strategic Agenda (LSA)



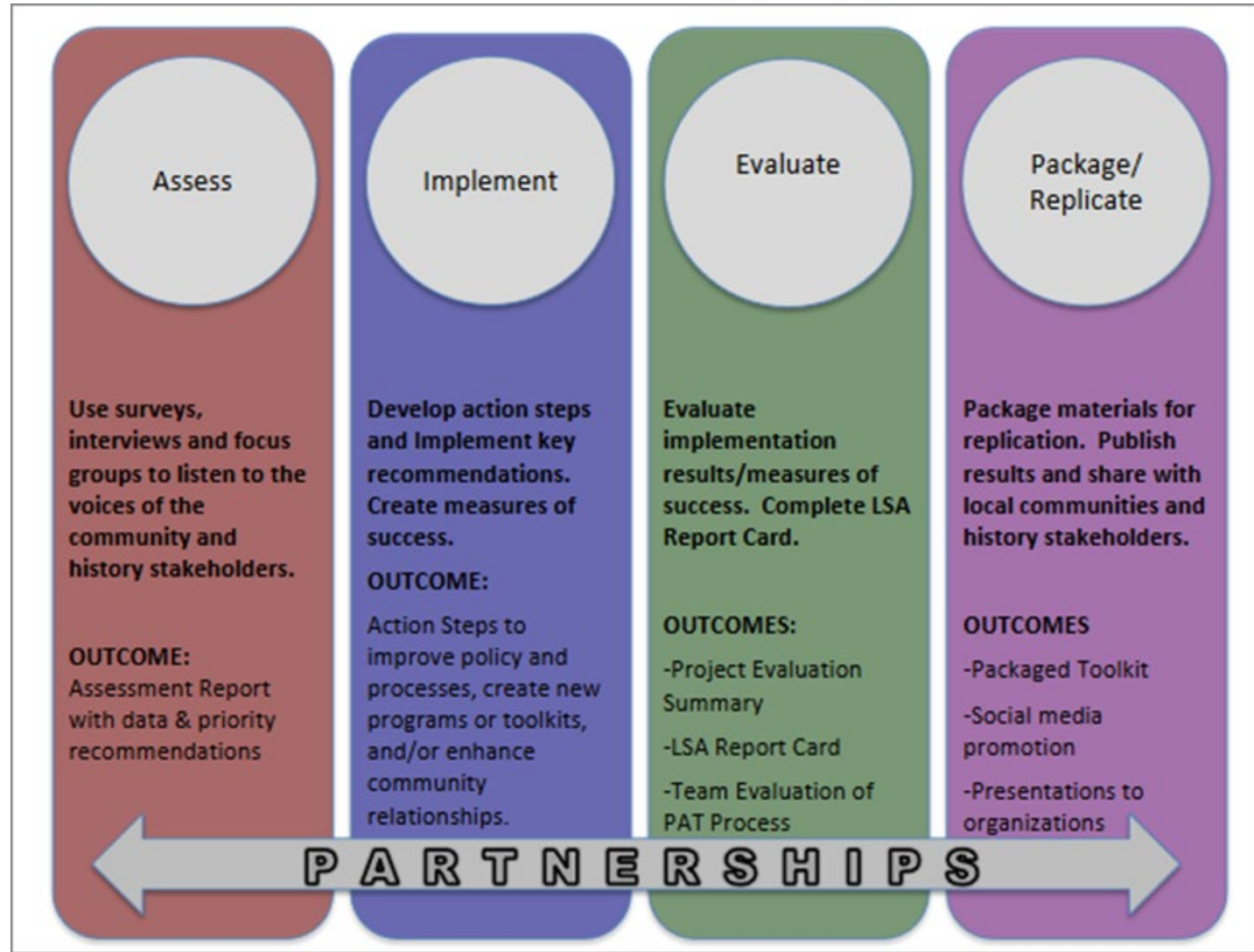
- The 2016-2020 Legacy Strategic Agenda (LSA) is a collaborative partnership between the Minnesota Alliance of Local History Museums (MAHLM) and the Minnesota Historical Society. The LSA fosters innovation and growth of history and cultural heritage in communities across the state. Action on the LSA invests in the future of our communities by finding new ways to partner with diverse cultures and groups. We use the LSA to help make Minnesota History more visible and accessible. Not only have we become more engaged with one another, we are also creating real-world models for local history organizations and other states. <http://www.mnhs.org/legacy/strategicagenda>
  - 2017-2019 PATs – Education, X Stories, and Grants
  - 2020-2021 Priority Strategies – In progress
- More information:
  - <http://legacy.mnhs.org/lsa>
  - [LSA@mnhs.com](mailto:LSA@mnhs.com) (Pat Koppa, LSA Coordinator)


# 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.

# Priority Action Team: Four Project Phases





## 2017-2019 Assessment Phase

## Survey Development



- Developed a survey:
  - Assessed – infrastructure, overall transparency, operational excellence, and enduring value
  - Utilized Team Based Inquiry (TBI)
  - Question Themes:
    - Users/Non-users
    - Knowledge/assumptions/understanding
    - Marketing/communication/appeal/testimonials
    - Usefulness
    - Perception/value
    - Motivation
    - Process/evaluation

2017-2019

# Survey Respondents



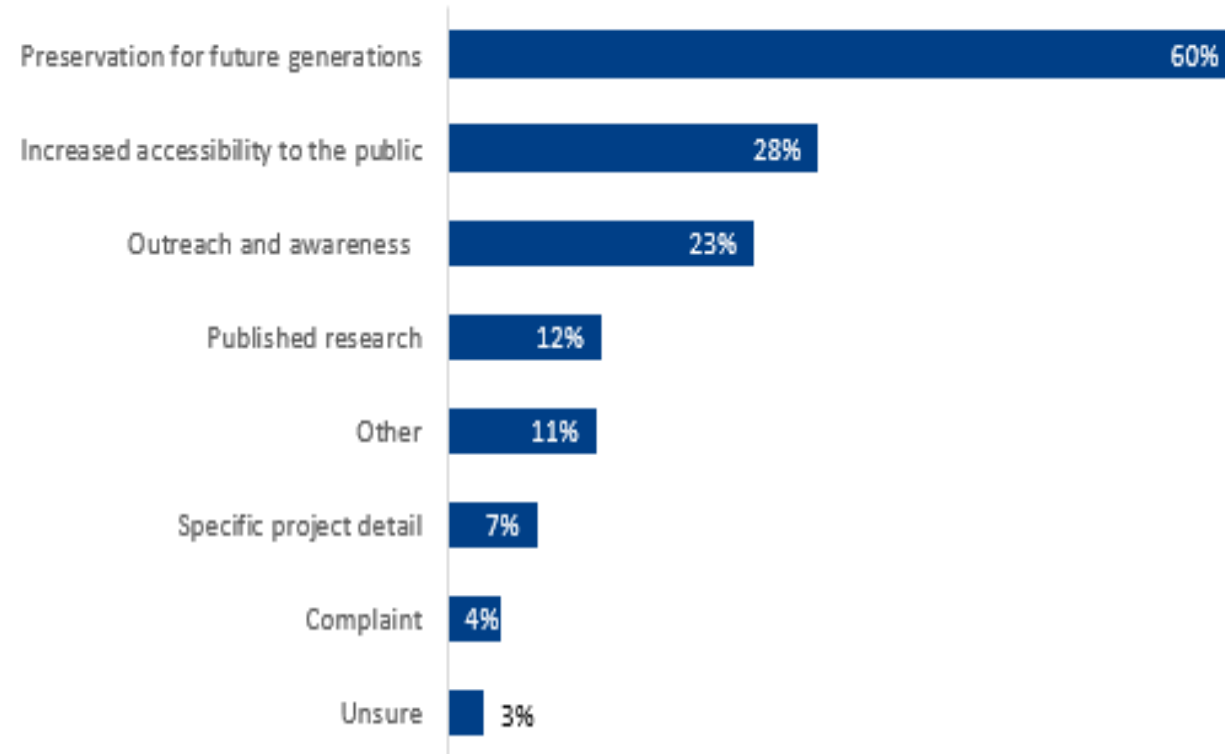
<b>Group:</b>	<b>Members:</b>	<b>Responses:</b>
Consultants		10
Independents		14
T-CART	102	8
Grant Applicants	600	211
MALHM		35
Local History News	3000	9
<b>Total:</b>		<b>287</b>





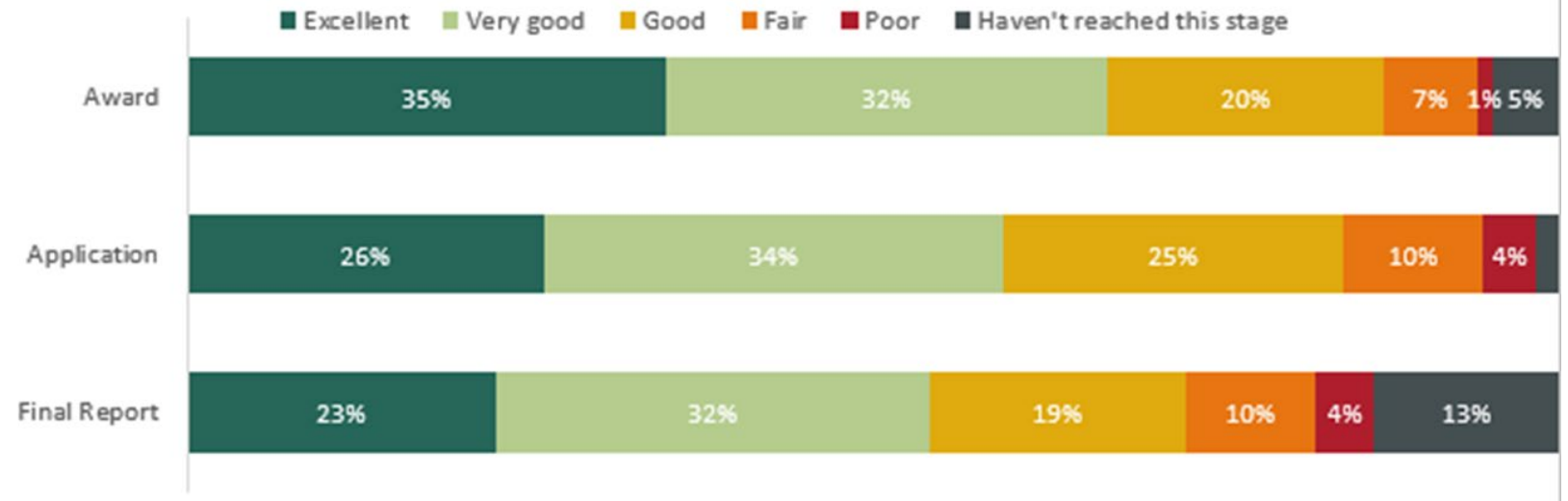
**60%**  
mentioned  
“preservation  
for future  
generations”  
as a way to  
demonstrate  
“enduring  
value”.

How did the last grant application you submitted demonstrate the concept of enduring value?



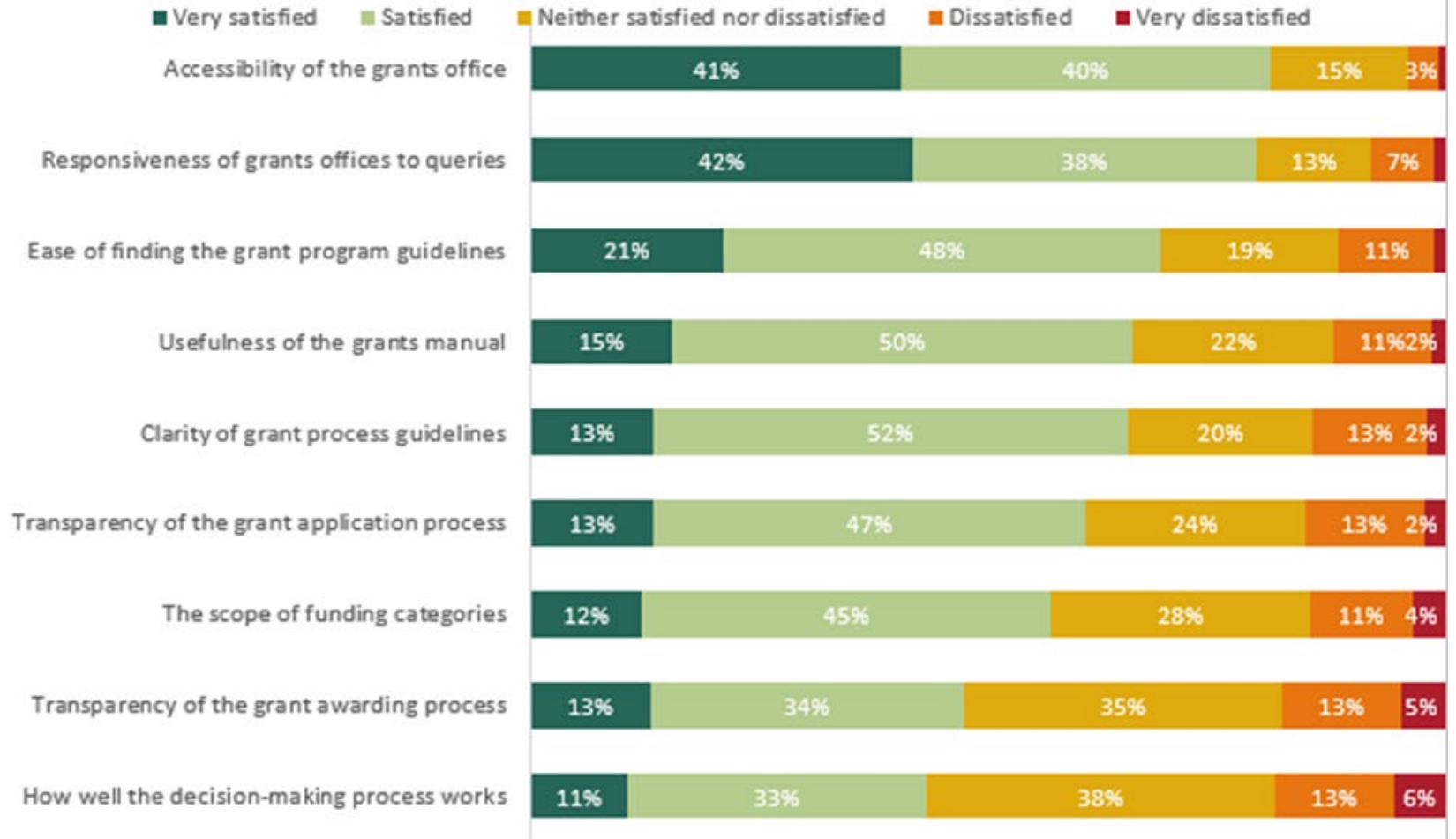
67% had an excellent or very good experience with the award process.

Overall, how would you rate your experience with each stage of the Legacy Grants process?



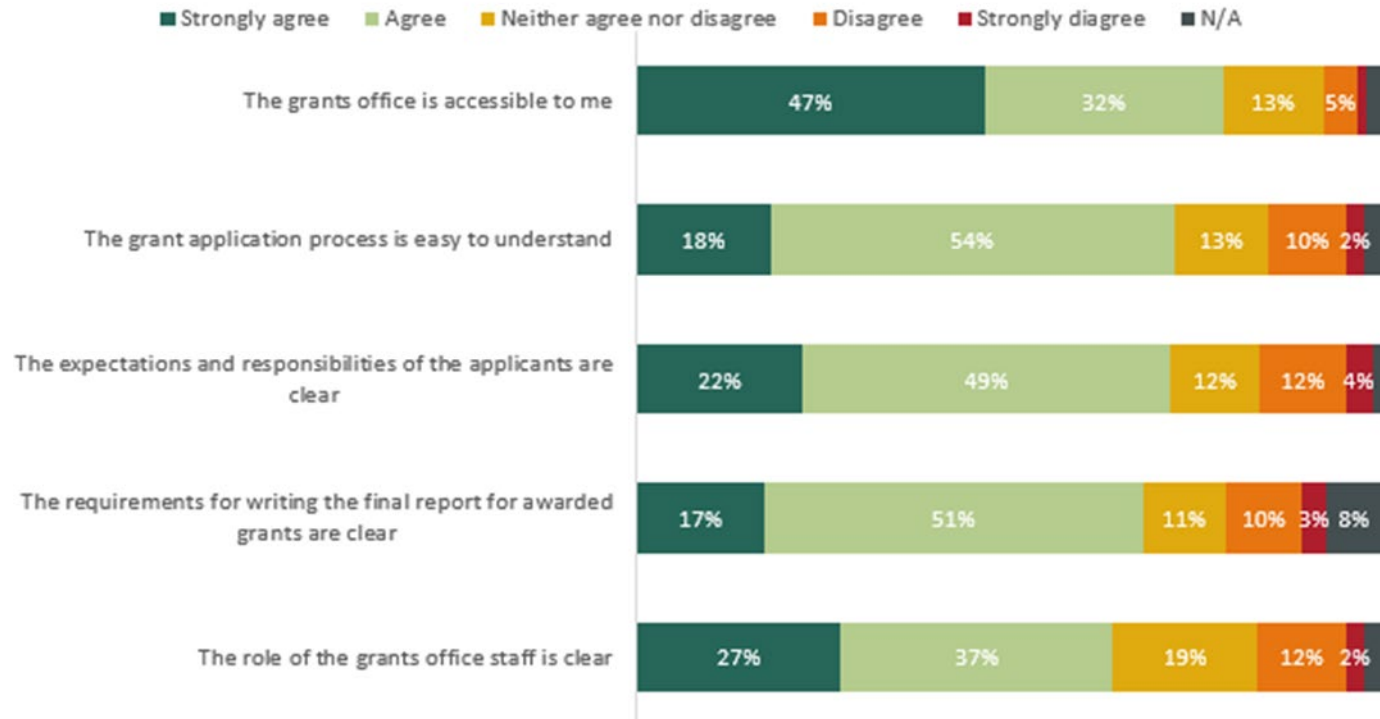
81% are very satisfied or satisfied with the accessibility of the Grants Office.

Rate your level of satisfaction or dissatisfaction with the following:

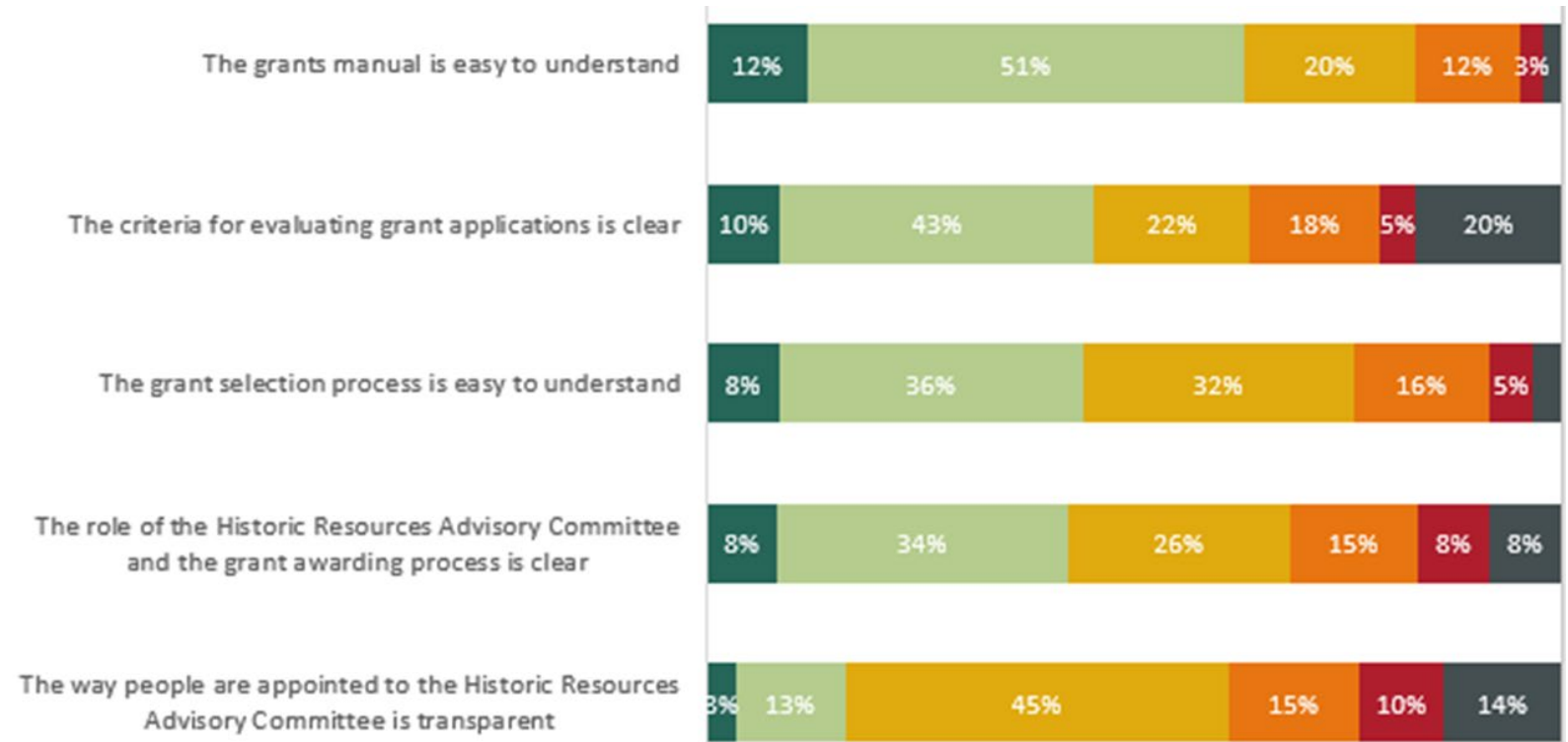


**79% strongly agree or agree that the Grants Office is accessible.**

Rate the extent to which you agree or disagree with the following statements:

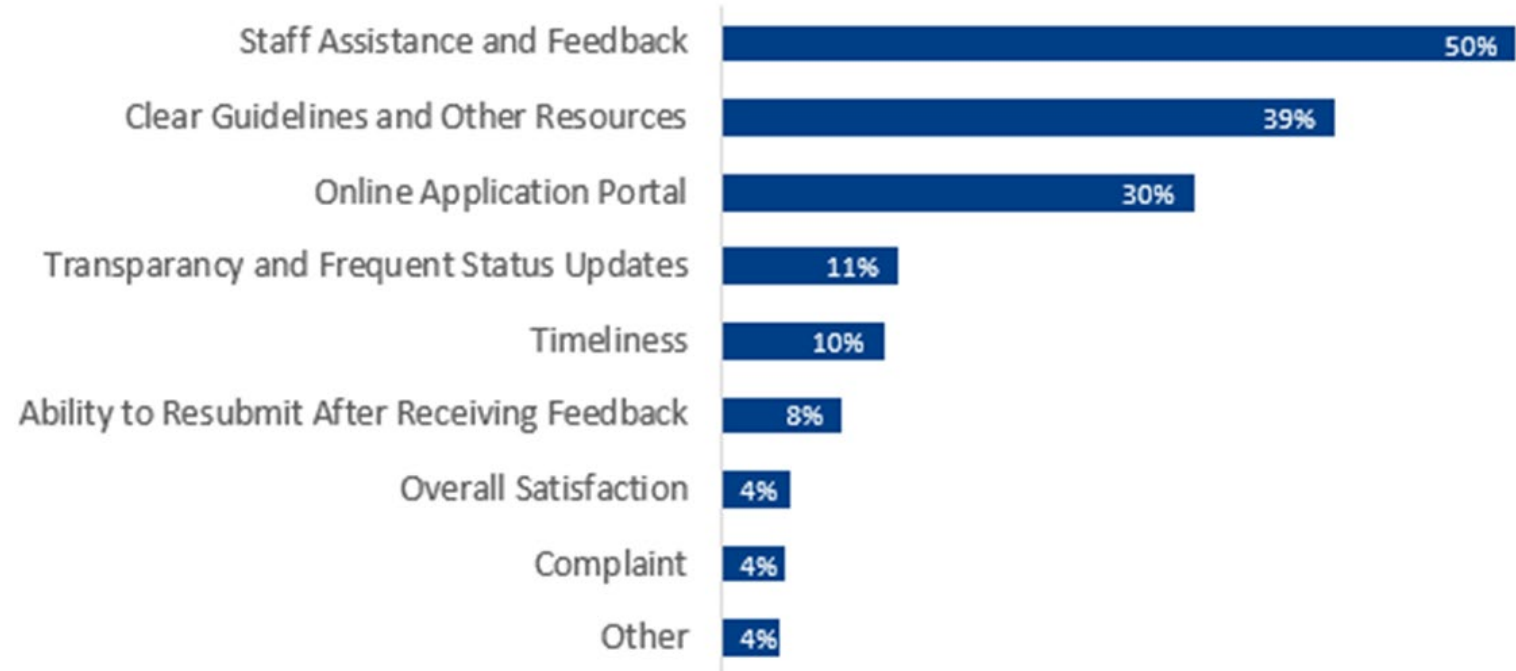


**63% strongly agree or agree the grants manual is easy to understand.**



50%  
commented  
that **staff  
assistance  
and feedback**  
worked well.

**What worked well with the Legacy Grant process?**



27%  
commented  
that updates/  
communication  
could be  
improved

What could be improved with the Legacy Grant process?







# Analyze the Data



- Developed recommendations with focus on:
  - Transparency
  - Operational Effectiveness
  - Enduring Value
  - Infrastructure



# Recommendations from Grants PAT



## Transparency (T)

- 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.



# Recommendations from Grants PAT



## Operational Excellence (O)

- 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.



# Recommendations from Grants PAT



## Enduring Value (E)

- 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.



# Recommendations from Grants PAT



## Infrastructure (I)

- 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.



# MALHM 2018 Conference



- Presented much of the information we just reviewed.
- Asked Session Attendees the following questions:
  - The three most important recommendations for your organization. How will these three benefit your organization more than other recommendations?
  - How could you, as a MALHM member, support the implementation of these recommendations—be as specific as possible.



# MALHM 2018 Feedback



- Revised wording of several recommendations.
- Identified high priority recommendations.

# Implementation Grid



#	Recommendation	Action Steps (how we know our progress)	Time Frame	Timeline	Progress
T-5	Make a major effort to create more transparency around the appointment of people to HRAC, as well as their duties.	<p>Improve the links between the various HRAC webpages.</p> <p>Adding a little more information about the nomination process and how people are chosen.</p>	Short Term	June 2019	<ul style="list-style-type: none"> <li>website in-progress is in collaboration with MNHS I/T department</li> <li>in conversation about how best to do this</li> </ul>
T-6	Make the final grants reporting process for all recipients more clear and transparent.	<p>Create a more detailed timeline/explanation of process.</p> <p>Send an email reminding of upcoming final report deadlines</p> <p>Offer conference call or webinar on final report process to answer questions.</p>	Short Term	June 2019	<ul style="list-style-type: none"> <li>manual in-progress</li> <li>website in-progress is in collaboration with MNHS I/T department</li> <li>A conference call is offered monthly on the 1st Wednesday of each month.</li> <li>Starting in Dec 2018, the grant portal sends an auto-generated email to grantees that have final reports due in 3 to 4 months inviting them to participate in a conference call about the requirements for submitted their final report.</li> <li>3/18/19: Between November 2018 and March 2019, the alert was sent to 213 people</li> </ul>



# Short Term Goals



- Short Term Goals – Summer 2019 Timeline
  - **T-3 - Explain State of Minnesota rules that affect grant decision-making.**
  - T-4 - Provide a more detailed process timeline for the large grant selection process to applicants.
  - T-5 - Make a major effort to create more transparency around the appointment of people to HRAC, as well as their duties.
  - T-6 - Make the final grants reporting process for all recipients more clear and transparent.
    - **O-1 - Create a Frequently Asked Questions Page on the Legacy Grants website.**
    - O-2 - Document grants manual changes in an easily found “cover sheet/page” that notes changes to the manual and the dates those changes were made.
    - **O-5 - Review the feasibility of inclusion of administrative and/or operation costs in grant budgets with the MNHS Finance team.**
    - E-4 - Clarify in the Grants Manual what, exactly, constitutes promotion and marketing for grant products.



# Short Term Goals Progress



## Legacy Grants Website Update

### Minnesota Historical and Cultural Heritage Grants

Supporting the preservation of Minnesota's history and culture since 2008

The Minnesota Historical and Cultural Heritage Grants program is a competitive process created to provide financial support to local history organizations. This state-funded program is made possible by the Legacy Amendment's Arts and Cultural Heritage Fund, created through the vote of Minnesotans on Nov. 4, 2008.

[About the Grants program >](#)



#### How do I apply for a grant?

Find out if your organization or project is eligible and how the application process works.

[Apply for a grant >](#)



#### How do I manage my grant?

Learn the ins and outs of the grant you've received.

[Manage your grant >](#)

#### Events and deadlines

[May - Grants Open House](#)  
Thursday, May 2, 2019 - 2:00pm to 3:30pm

[June - Grants Open House](#)  
Thursday, June 6, 2019 - 2:00pm to 3:30pm

[July 2019 - Small Grant Applications Deadline](#)  
Friday, July 12, 2019 (All day)

[Large Grant FY20 Pre-applications Deadline](#)  
Friday, July 26, 2019 (All day)

[August - Grants Open House](#)  
Thursday, August 1, 2019 - 2:00pm to 3:30pm

[All events and deadlines >](#)

# Long Term Goals



- T-1: Clarify rating/review criteria to show grant application requirements and to ensure consistency in evaluation.
  - T-2: Require HRAC to provide substantive feedback on grant application
  - T-7: Educate prospective applicants regarding the multiple forms of historical enterprise supported by the Legacy Grants program.
- O-3: Explore best practices for intellectual property rights with the MNHS Press and the Office of Grants Management.
- O-4: Examine closely other time-tested, transparent, and accountable (large grant) grant-making processes in history and cultural heritage. Implement changes to the process as appropriate.
  - E-1: Actively promote the MNHS Grant program as an opportunity to build community in the history and cultural heritage field in Minnesota. (MALHM)
- E-2: 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.
- E-3: Enhance and highlight the definition of “enduring value” in Legacy projects.
- I-1: Hire a Grants Outreach staff person to support proactive communication with prospective applicants, applicants, and grant recipients.
- I-2: Add staff and other resources to the Grants Office to enhance turnaround time and many other concerns raised in these recommendations.

# Long Term Goal Progress



- Coming Soon....
  - Review in June 2019 to finalize action steps
  - Completion timeline is June 2021

# Group Activity



- World Café Style – Lightning Round Style
  - 4 Questions – 2 sets of each
  - Move to a question station
  - Brainstorm answers to the question
    - Scribe
      - Use tally marks to indicate your group also had that idea.
      - Add stars to indicate it's a priority.
    - Leader
  - 7 minutes per question

# Questions

- E-1 - How could history peers work together to assist each other with grant writing?
- T-7 - What are the best ways for the local history community to more fully comprehend the possibilities that the grant program can offer? AND/OR What are the best ways that the organizations outside of the traditional applicants (history-driven missions) can learn about what the grant program can accomplish for them and why doing that is valuable to their goals and missions?
- T-2 - What's the most meaningful feedback you can get on a non-funded (returned) application?
- O-1 - The new website highlights applying and managing a grant. What are FAQ questions that should be included in these sections?

# Next Steps for the Grants PAT



- Grants Office will continue to work on the short term and long term goals with guidance from the Grants PAT members.
- MALHM will work on its long term goal.

# Questions & Wrap Up



- Learn more about the LSA at <http://www.mnhs.org/legacy/strategicagenda>
- Questions about LSA to [lsa@mnhs.org](mailto:lsa@mnhs.org)
  
- This presentation is available online at: <https://link.mnsu.edu/grants2019>
  - (Currently goes to last year's presentation. Which BTW has been downloaded 37 times since last year.)