BUILDING RESPONSIVE MUSEUMS

A Discussion Framework

The LEARNiNG COALiTiON

Building Responsive Museums
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Produced by

The Learning Coalition

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The Learning Coalition gratefully acknowledges
the financial support of the
Department of Canadian Heritage.

Building Responsive Museums: A Discussion Framework
is an initiative of The Learning Coalition.
It is a self-assessment tool for museums
to examine their current relationship
with their communities and plan for their future.

Acknowledgments

First of all, The Learning Coalition would like to acknowledge the contribution of the American Association of Museums and, in particular, the work of their members, who developed the two publications that became such an integral part of this project: *A Museum and Community Toolkit*, American Association of Museums, Washington, DC, 2002; and *Museum Assessment Program: Public Dimension Assessment: Self-study workbook*, American Association of Museums; Washington DC, 2004. We thank them for permission to share their thinking with you.

As this publication evolved, we recognized the already existing insights of colleagues and felt that their work should be incorporated and shared. Therefore, we thank Candace Tangorra Matelic for her work on change in historical organizations and Henry Senko and Marilyn Herasymowych for permission to share some of their work on critical thinking and action learning. Glenn C. Sutter of the Royal Saskatchewan Museum and a member of The Working Group on Museums and Sustainable Communities was very helpful in meeting with us to explore a number of systems theories as we struggled to get a handle on how to organize the information needed for such a complex topic (museums and their community relationships)...we abandoned one “journey” as a result and began on the one you see here. We are also indebted to The Working Group for permitting us to include their series of assessment questions for developing programs/exhibitions with the goal of engaging communities and moving towards sustainability.

Vic Huard, who at the time of embarking on this project was President and CEO of the RCMP Heritage Centre in Regina, and lecturer in marketing and branding at the University of Regina, shared his expertise and materials on branding.

We are grateful to the Museums Association of Saskatchewan for supporting one of the face-to-face meetings through funding from a Canadian Arts and Heritage Sustainability Program. We also acknowledge the work of the MAS Transformation Working Group and Wendy Fitch, a staff member, for helping us identify meaningful “symptoms” that could lead an institution to reassess its community relationships.

Thanks also to Irene Chalmers and to Carol J. Anderson for their editing, proofreading and layout contributions. You are all the beneficiaries of their skills as you work through the process. We are grateful for the contribution and dedication of the museum and gallery staff and boards who have “field tested” this document and shared their experiences with us all.

Finally, we want to thank our provincial museum associations (FNSH, OMA, MAS and AMA) for believing, along with The Learning Coalition, that the finished product would be a great benefit to our members and museums beyond our provinces.

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Introduction: How to Use the *Discussion Framework*

What is it?

Building Responsive Museums: A Discussion Framework is a tool for self-assessment. It is intended to provide your museum with a process to deepen your understanding of what community involvement means, and to examine and evaluate your current relationship with your communities.

The *Discussion Framework*, although structured as a series of questions, is not a test—there are no right and wrong answers and no one is judging. Museums are encouraged to set some time aside to work through the questions (board, staff and volunteers together), thinking honestly and critically about where you are in your journey as an organization towards becoming a thriving and active member of a healthy community.

Don’t forget to take time in your discussions to celebrate the things you are doing well. The goal here is to build on those strengths and improve your weaknesses. You are already demonstrating organizational maturity by coming together and thinking about what you do and why you do it. Bravo!

Who is it for?

The *Discussion Framework* is useful at any stage in a museum’s development, whether you are considering starting a new museum in your community or your museum has been open to the public for many, many years. The *Discussion Framework* can help staff (paid and volunteer), boards (including advisory boards) and communities to examine their perceptions, their involvement and their experience with the museum.

Building a relationship with and in our communities has become a high priority for museums. Operating in the public trust means almost every function undertaken by museums has relevance to the communities we serve. There is increasing pressure on museums from the public, from community stakeholders and from funders to develop a closer, more meaningful relationship within the community.

It is important to work through the material as a group in order to develop group understanding and commitment. This will not only result in a wider scope of perspectives, increased knowledge, and reveal further opportunities, but will ease your progress when it comes time to translate your ideas into actions, priorities and successful change for your institution, the people who work there and the community in which you work.

Why use it?

Using the *Discussion Framework* will result in the following outcomes:

1. Your museum will be able to review and revise its mandate (mission) to reflect its desired relationship with your community.
2. Museum staff and board will be able to articulate the museum's relevance and worth within the community.
3. Museum staff and board will be able to improve the museum's strategic plans, leading to programs and services that have meaning and value within your community.
4. Museum staff and board will be better informed about the museum's role in your community.

How to use it

The *Discussion Framework* can be used in a variety of ways, but there are a few strategies that will increase your chances of success:

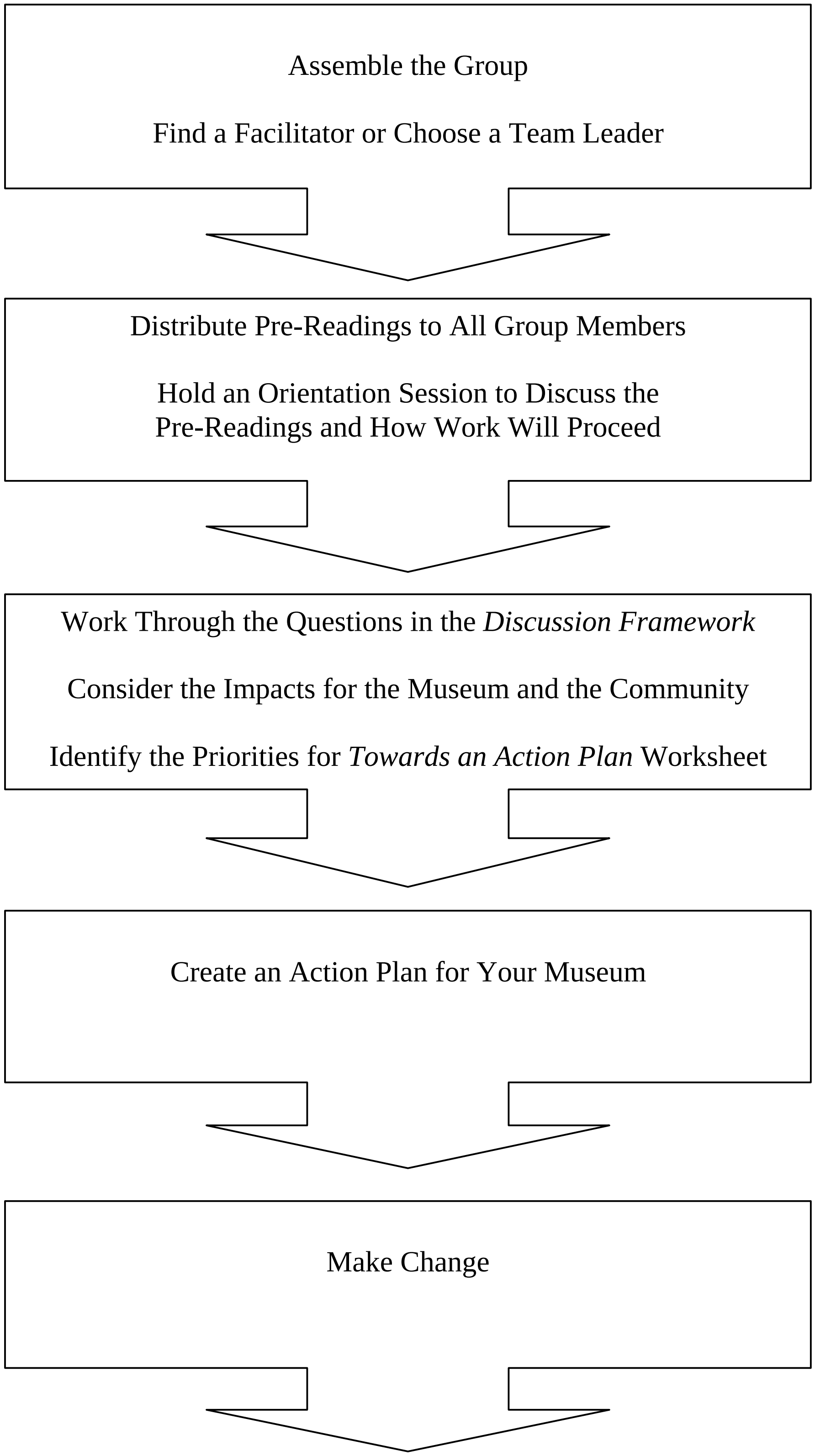
1. **Involve community members in the discussion.**
   In order to make the most of this process, it is important to invite key community members. Your board members can represent the community but the longer they have been involved with your museum, the harder it may be for them to bring outside perspectives to the discussion, and this process offers a great opportunity to build new community relationships. Consider what community leaders you haven't involved in past projects, such as neighbourhood associations, social service organizations, libraries, small businesses, tourism association, community development organizations, regional planners, etc.
2. **Involve everyone on staff (paid and volunteer) and board in the conversation**.
   Long-lasting results from the *Discussion Framework* are achieved when everyone feels they have contributed to the new vision.
3. **Bring in a facilitator (i.e., facilitated self-assessment) or choose a team leader.**
   A neutral facilitator, who understands the facilitator's role, can ensure that your ideas and action items are documented and help your group stay focused on the discussion and results, rather than getting bogged down on the process. If you have underlying disagreements or "baggage," or personality challenges, a skilled facilitator is worth his or her weight in gold for a productive discussion. There are many sources for a skilled facilitator (see Appendix 2 for suggestions, including contacting your provincial museum association).

If you are unable to bring in a facilitator, choose someone within your museum to lead the group through the *Discussion Framework*. This individual should be committed to being the champion for the self-assessment process and ensuring that the whole group participates from the beginning to the end. This individual should also have the ability to lead group processes, and be a good listener and clear thinker, especially when the group gets bogged down. One of the first responsibilities of the team leader is to review the questions in the *Discussion Framework* and assemble any written documentation that may assist in informing the discussions as the group works through the questions.

4. **Organize an orientation session.**
   It will be essential to hold an orientation session for the group. Here is a list of points to include that will help you in preparing the orientation session:

   - Explain what the *Discussion Framework* is.
   - Explain why the museum has decided to embark on this self-assessment process—what triggered the decision?
   - Introduce the various parts or sections of the *Framework*, helping the group to understand how all of the parts fit together.
   - Through questions and answers, discuss the Pre-Readings with the group. (Make sure all group members have read the Pre-Readings prior to the orientation session.) It is important that the whole group understands the Pre-Readings included in this publication. This will ensure a level playing field when you begin working through the *Discussion Framework.*
   - Explain how the group will proceed to work through the *Discussion Framework.*
   - Address any questions or concerns that group members may have.

Building Responsive Museums: A Discussion Framework



Symptoms or Triggers: Why/When a Museum Might Decide to Use the *Discussion Framework*

Review the two lists below. What is motivating your museum to use the *Discussion Framework*? The following symptoms or triggers suggest some possible motivators.

Internal Symptoms or Triggers

- ❑ Decline in visitation
- ❑ Decline in volunteer support
- ❑ Loss or unexpected gain of financial support or sources
- ❑ Decline in memberships to the museum
- ❑ Increasingly difficult to recruit qualified staff
- ❑ New or additional technology available to or acquired by the museum
- ❑ Moving to a new location or facility
- ❑ Major repairs needed to current facility
- ❑ Significant change in the collection, e.g., anticipation of the donation of a major collection, de-accessioning of a collection, receiving a major loan, etc.
- ❑ Plan or requirement to address the cultural and/or spiritual needs of a particular collection
- ❑ Loss of governance support
- ❑ Difficulty in recruiting board members
- ❑ Physical loss, e.g., building
- ❑ Major staffing changes, e.g., new positions created, job descriptions redesigned, loss of staff through resignations or retirement, etc.
- ❑ Staff morale problems
- ❑ Inability to articulate the museum's value to the community
- ❑ Programs underutilized or unsuccessful
- ❑ Lack of vision
- ❑ Little or no consultation with and/or representation from the audience for which a program or service is intended
- ❑ Lack of or decline in investment in human resources (e.g., no recruiting to fill vacant positions, no salary or cost-of-living increases, no funds or time allocated for professional development, etc.)

- ❑ Mandate or statement of purpose for the museum has not been evaluated or changed since the inception of the museum
- ❑ Negative feedback from evaluations (programs, general)
- ❑ Lack of evaluation of programs and services
- ❑ A community group/organization/business has approached the museum about a project
- ❑ A school class is interested in partnering with the museum for the year
- ❑ A new board has been elected
- ❑ Museum needs a new strategic plan to set a new direction for the museum
- ❑ Planning to revise the museum's policies
- ❑ Rising maintenance costs for the current facility

External Symptoms or Triggers

- ❑ Demographic changes (e.g., people leaving the community, people moving into the community, aging population such as an increase in seniors, increase in one or more cultural groups, widening gap between the rich and poor, etc.)
- ❑ Number of businesses in the community have increased/decreased
- ❑ Essential services in the community have been reduced/increased
- ❑ A new tourist attraction has recently opened within a 30-minute drive of the community
- ❑ There are now more major events that attract tourists within a 30-minute drive of the community
- ❑ Number of students in schools have increased/decreased
- ❑ School closures
- ❑ Higher cost of living
- ❑ Higher utilities costs, insurance rates
- ❑ Competition from other leisure activities, facilities
- ❑ Competition from the Internet
- ❑ Election of a new government—municipal, provincial, federal
- ❑ Negative information about the museum has come to light in the community, i.e., negative publicity

Creating a Vision for Community Involvement

"The mission statement is the centerpiece for an institution: it explains the museum's purpose and is the guidepost for institutional planning, development, and positioning for the future."[1]

Before you begin, it is important that your museum has a mission statement, statement of purpose and/or a vision, to function as a guidepost or touchstone for the discussions you undertake. A well-crafted mission statement is a fundamental component of museum readiness as you undertake these conversations about the museum's role with its communities. A clearly stated mission will be understood and supported by all stakeholders. This shared understanding will be particularly useful to all who participate in identifying and prioritizing the actions that your museum and its community will take to help move you towards your goals which then come full circle to the achievement (or perhaps revision) of your mission.

Your mission statement should go beyond what your museum does, its activities. It identifies what is important or distinctive about the museum and the value of its activities to the community and the audiences it serves, its purpose. It will be a guide to action and provide a means to measure success both internally (for the institution) and externally (for the community). As part of your preparation for the discussions to follow, review your existing mission statement and ensure that it can answer the question "so what?". If it goes beyond a "collect, preserve, educate, research, exhibit" list of activities then, post it prominently in the room where the discussions will take place, draw everyone's attention to it and you are ready to begin. If your mission statement needs tweaking, this is the time to make a start on it...**before** you bring everyone to the table to work through the *Discussion Framework*. A smoother and more satisfying journey will be the result.

Just a quick comment about the process of developing mission statements. It seems that many museums, whether focused on the larger organization or just a part of it, tend to articulate their mission in terms of what they do. I would like to see examples of museum mission statements that tackle the much more difficult task of stating the "to what end?" of their work. For example, in what ways does the museum want to have a meaningful impact on the cultural well-being of individuals and communities? I am especially interested in statements that help create the framework for solid assessments of whether public program strategies will engage individuals and collectives and have meaningful impacts on the experiences, perspectives, social dynamics, and activities of the populace.

[1] Anderson, Gail, editor, Museum Mission Statements: Building a Distinct Identity (Washington, D.C., American Association of Museums, Technical Information Service, 2000), p. 1

It is a tall order, but I think that mission statements can and do help museums to be reflective organizations.

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LEAD Fellow (Leadership for Environment and Development)
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As someone who has recently been involved in surveying vision and mission statements, I am surprised at how few vision statements are really useful and meaningful. It is true that most planning books define vision as a projection of where you want to be in 5 or 10 years, or how you envision what success will look like. Today, that is a disservice to organizations. To be successful today, museums need to add value to their community. Rather than being an internal and fairly meaningless statement, such as "to be the best museum in the nation," not an uncommon statement, vision statements should be an outwardly focused, public inspirational statement about how you will add value to your community. Vision and mission have been hijacked for marketing tag lines and self-serving goal statements, which are more appropriate for strategic goals or marketing and business goals, not your driving vision or mission. The best thinking about museums today suggests that we need to be outward looking and integrated into our communities, working in partnerships and serving our visitors in deeper, more personal ways.

Thomas A. Woods, Ph.D.
President, Making Sense of Place, Inc

Pre-Reading 1

Critical Thinking for Effective Self-Assessment*

Any kind of honest, worthwhile self-assessment requires an individual or an organization to reflect and think critically about one's behaviours, actions and attitudes. This is how we learn about ourselves and how we grow as individuals and as organizations. This *Discussion Framework* asks you to take time to reflect on your behaviours, actions and attitudes as an organization with respect to your community and is designed to aid and develop your ability to think critically.

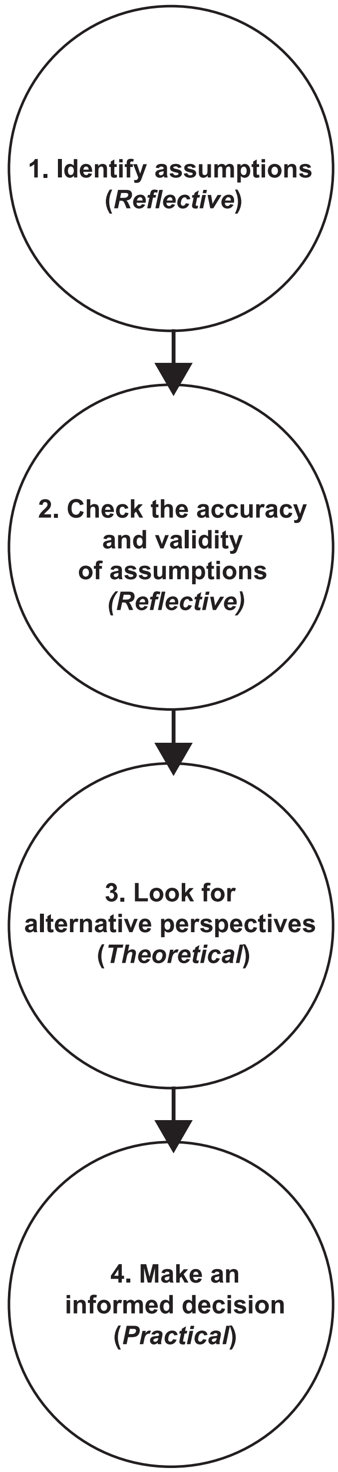
According to Stephen Brookfield, author of *Developing Critical Thinkers,* critical thinking requires us to:

- Use reflection to gather adequate information
- Use critical questioning techniques that are non-judgmental to determine what assumptions are being used to make decisions, and whether or not these assumptions are accurate and valid
- Use envisioning techniques to determine alternative perspectives

As a culture, we tend to operate from an *action* perspective most of the time. We make decisions based on the information we have at hand, and the assumptions we have about the situation. This usually results in frenzied activities that drive us to action with little or no reflection.

As a result, many daily decisions are based on assumptions that are neither accurate nor valid. For example, imagine that you come into the office to find your usually friendly supervisor barely answering your questions, and walking away whenever you approach. If you are like most people, you may *assume* that it must be something you did that is causing your supervisor's apparent distress. In reality, your supervisor's behaviour could be caused by a number of things, such as a personal problem at home, a bout with the flu, an unpleasant phone call, or a lack of sleep. As well, if you are like most people, you may not even ask your supervisor what might be causing him or her to act in such a manner. Instead, you may operate from your initial assumption, which may not be accurate or valid. This example illustrates how easily we get caught up in our assumptions.

To be critical thinkers, we need to reflect on what assumptions we are making, and whether or not these assumptions are accurate and valid. Then, we need to think about alternative perspectives to our situation, so that we can make the best decision. You can think about critical thinking as having four key steps:



Critical thinking seems hard to do because it takes time. In our culture of *go, go, go,* it seems that, if we slow down, we will accomplish less. However, when we do not spend the time required to think critically, we can easily make decisions based on inaccurate and invalid data, leading to actions that can produce the wrong results or create more problems.

When people say they have *no time* to reflect on their decisions, they are right; if they continue to operate from an action perspective, they continue to have *no time* to reflect. In this case, they need to change their assumption from one of action to one of *reflection* that *leads to action*.

Even one minute of critical thinking can yield a more informed decision. To make better decisions, you must build in time to reflect critically. The result is more time in the long term because our decisions have not caused other crises. To deal effectively with the turbulent environment, we need to make informed decisions, which means using critical thinking to understand the long-term impact of decisions. As a result, we make our decisions by knowing the assumptions under which we operate, how accurate and valid these assumptions are, and what other perspectives are possible. *Critical thinking* is the reflective tool that helps us to make informed decisions.

As you begin working through the *Discussion Framework*, some people in your group will find the process too slow or cumbersome. They may naturally be action-oriented and therefore more frustrated with the process at the beginning. They will feel edgy and want to move along at a quicker pace. Time spent on reflective discussion will seem too long and they may be eager to jump to solutions.

People in your group who find the process too fast are likely to be naturally reflective-oriented and, consequently, will be more frustrated at the end. They may want to continue discussion and explore all points and perspectives, and may feel that something important will be missed if there is not sufficient time for discussion.

If your group has both action-oriented and reflective-oriented members, don't be discouraged – this is a strength. Avoid the potential for hostility and recognize that these differences are important for working successfully through the *Framework*. Reflective-oriented individuals should keep in mind that the discussion must lead to action within an appropriate amount of time. Those who are action-oriented need to remember that the reflective discussion time is not wasted time, but integral to effective self-assessment.

Everything takes longer in a group setting. However, the benefits of the *Framework* are much greater when undertaken by a group rather than one or two individuals completing it on behalf of the whole museum. **The same principles that create meaningful relationships with the community create strong groups that are able to accomplish their goals effectively.** Your group will reap the benefits at the end of the process by working together.

*Adapted from *Solving Real Problems in Real Time Action Learning Guide* (Second Edition) by M. Herasymowych and H. Senko (2008).

Pre-Reading 2

Toward an Action Plan

Once you have discussed where you are and what changes you might like to make, it is time to develop an action plan in which you decide where you want to go and how you are going to get there.

Once your group has worked through the *Discussion Framework*, you may use these steps to guide you in developing an action plan:

1. Describe clearly the desired end state or result. Determine what the future relationship between the museum and its community or communities will look like and how it will work.
2. Prioritize the opportunities and challenges you wish to address.
3. Brainstorm alternatives to resolving each problem or seizing each opportunity. Determine the amount of risk associated with each alternative, and then select an approach to accomplish it.
4. Plan the implementation of the best alternative(s)—this will form your action plan.

When it is complete, your action plan should answer the following questions:

- What steps should be taken to implement the best alternatives?
- Which systems or processes in our organization should be changed (e.g., policies, procedures)?
- How will we determine if the steps are being followed (i.e., what are the indicators of success)?
- What resources will we need (people, money, facilities)?
- How much time will we need to reach the desired state? Remember that your schedule needs to

Seven Generations Analysis

An approach to making decisions that has guided many First Peoples is to consider the impact of the proposed change over seven generations—i.e., to meet the needs of the present without compromising future generations. While our museums tend to focus specifically on strategic or action plans of one to five years in scope, when considering relationships with our communities, it is also worthwhile to look up and out. How will our short-term decisions affect our successes in the long term? What will be the impact of these decisions on future generations and how can they make the museum and its community thrive in the modern world? A seven-generations approach puts “thinking and action in a dynamic relation to one another.”

include start and stop times and when you expect to see each indicator of success.

- Who has primary responsibility for ensuring implementation of our plan? Who will be responsible for each of its components?

Make sure to share the action plan with everyone involved, both internally and externally.

Pre-Reading 3

Group Decision-Making: The Better Way

There are many ways for groups to come to a decision but, when working collaboratively with your community most of these may not be effective. The following article will provide your group with the tools to analyze how decisions are usually made in your organization and then, guidance on how to achieve true consensus.

Group Decision-Making

By Andrew E. Schwartz

Abstract: Many managers like to believe that they are accomplished in such group decision-making processes as action planning, goal setting and problem-solving. However, their ability to implement such techniques effectively is often hindered by their lack of understanding of the dynamics of these group decision-making processes. As a result, these managers often end up perpetuating problems that they themselves create through their insensitivity to the needs of other group members. Hence, instead of achieving a consensus, such managers only serve their own interests by leading the group to situations such as decision-making by lack of response or by authority role. Sometimes, they lead the group toward decision-making by minority rule or by majority role, as the case might be. The better way to achieve consensus would be for them to track how decisions are made and ensure that they are achieved by true consultation.

Decision by Lack of Response (The "Plop" Method)

The most common—and perhaps least visible—group decision-making method is that in which someone suggests an idea and, before anyone else has said anything about it, someone else suggests another idea, until the group eventually finds one it will act on. This results in shooting down the original idea before it has really been considered. All the ideas that are bypassed have, in a sense, been rejected by the group. But because the "rejections" have been simply a common decision not to support the idea, the proposers feel that their suggestions have "plopped." The floors of most conference rooms are littered with "plops."

Decision by Authority Rule

Many groups start out with—or quickly set up—a power structure that makes it clear that the chairman (or someone else in authority) will make the ultimate decision. The group can generate ideas and hold free discussion, but at any time the chairman may say that, having heard the discussion, he or she has decided upon a given plan. Whether this method is effective depends a great deal upon whether the chairman is a sufficiently good listener to have culled the right information on which to make the decision. Furthermore, if the group must also implement the decision, then the authority-rule method produces a bare minimum of involvement by the group (basically, they will do it because they have to, not necessarily because they want to). Hence it undermines the potential quality of implementation.

Decision by Minority Rule

One of the most-often-heard complaints of group members is that they feel “railroaded” into some decision. Usually, this feeling results from one, two, or three people employing tactics that produce action—and therefore must be considered decisions—but which are taken without the consent of the majority.

A single person can “enforce” a decision, particularly if he or she is in some kind of chairmanship role, by not giving opposition an opportunity to build up. For example, the manager might consult a few members on even the most seemingly insignificant step and may get either a negative or positive reaction. The others have remained silent. If asked how they concluded there was agreement, chances are they will say, “Silence means consent, doesn’t it? Everyone has a chance to voice opposition.” If the group members are interviewed later, however, it sometimes is discovered that an actual majority was against a given idea, but that each one hesitated to speak up because she thought that all the other silent ones were for it. They too were trapped by “silence means consent.”

Finally, a common form of minority rule is for two or more members to come to a quick and powerful agreement on a course of action, then challenge the group with a quick, “Does anyone object?” and, if no one raises their voice within two seconds, they proceed with “Let’s go ahead then.” Again the trap is the assumption that silence means consent.

Decision by Majority Rule (Voting and Polling)

More familiar decision-making procedures are often taken for granted as applying to any group situation because they reflect our political system. One simple version is to poll everyone’s opinion following some period of discussion. If the majority of participants feels the same way, it is often assumed that is the decision. The other method is the more formal one of stating a clear alternative and asking for votes in favor of it, votes against it, and abstentions.

On the surface, this method seems completely sound, but surprisingly often it turns out that decisions made by this method are not well implemented, even by the group that made the decision. What is wrong? Typically, it turns out that two kinds of psychological barriers exist:

First, the minority members often feel there was an insufficient period of discussion for them to really get their point of view across; hence they feel misunderstood and sometimes resentful.

Second, the minority members often feel that the voting has created two camps within the group and that these camps are now in a win-lose competition: The minority feels that their camp lost the first round, but that it is just a matter of time until it can regroup, pick up some support and win the next time a vote comes up.

In other words, voting creates coalitions, and the preoccupation of the losing coalition is not how to implement what the majority wants, but how to win the next battle. If voting is to be used, the group must be sure that it has created a climate in which members feel they have had their day in court—and where all members feel obligated to go along with the majority decision.

The Better Way

Because there are time constraints in coming to a group decision and because there is no perfect system, a decision by consensus is one of the most effective methods. Unfortunately, it is one of the most time-consuming techniques for group decision-making. It is also quite important to understand that consensus is not the same thing as unanimity. Rather, it is a state of affairs where communications have been sufficiently open (and the group climate has been sufficiently supportive) to make everyone in the group feel that they have had their fair chance to influence the decision. Someone then tests for the “sense of the meeting,” carefully avoiding formal procedures like voting. If there is a clear alternative to which most members subscribe and if those who oppose it feel they have had their chance to influence, then a consensus exists. Operationally, it would be defined by the fact that those members who would not take the majority alternative nevertheless understand it clearly and are prepared to support it in deference to any others that are probably about as good.

In order to achieve such a condition, time must be allowed by the group for all members to state their opposition—and to state it fully enough to get the feeling that others really do understand them. This condition is essential if they are later to free themselves of the preoccupation that they could have gotten their point of view across if others had understood what they really had in mind. Only by careful listening to the opposition can such feelings be forestalled, thereby allowing effective group decisions to be reached.

Of course, recognizing the several types of group decision-making is only part of the process. Managers must be specific in their approach to the one that is best in their own situation.

What Are the Actual Steps in a Decision Made By a Group?

1. Identify the Problem. Tell specifically what the problem is and how you experience it. Cite specific examples.

“Own” the problem as yours—and solicit the help of others in solving it, rather than implying that it's someone else's problem that they ought to solve. Keep in mind that if it were someone else's problem, they would be bringing it up for discussion.

In the identification phase of problem-solving, avoid references to solutions. This can trigger disagreement too early in the process and prevent the group from ever making meaningful progress.

Once there seems to be a fairly clear understanding of what the problem is, this definition should be written in very precise language. If a group is involved, it should be displayed on a flip chart or chalkboard.

2. Clarify the Problem. This step is most important when working with a group of people. If the problem is not adequately clarified so that everyone views it the same, the result will be that people will offer solutions to different problems. To clarify the problem, ask someone in the group to paraphrase the problem as they understand it. Then ask the other group members if they see it essentially the same way. Any differences must be resolved before going any further.

In clarifying the problem, ask the group the following questions: Who is involved with the problem? Who is likely to be affected? Can we get them involved in solving the problem? Who legitimately or logically should be included in the decision? Are there others who need to be consulted prior to a decision?

These questions assume that commitment from those involved (and affected by the problem) is desirable in implementing any changes or solutions. The best way to get this commitment is to include those involved and affected by the problem in determining solutions.

3. Analyze the Cause. Any deviation from what should be is produced by a cause or interaction of causes. In order to change “what is” to “what is wanted,” it is usually necessary to remove or neutralize the cause in some way. This calls for precise isolation of the most central or basic cause (or causes) of the problem and requires close analysis of the problem to clearly separate the influencing from the non-influencing factors.

This is probably an easier process to follow when dealing with problems involving physical things rather than with interpersonal or social issues. Typically, interpersonal and social problems are more likely to spring from a dynamic constellation of causes that will be more difficult to solve if the causes are only tackled one at a time. Still, whether dealing with physical or social problems, it is important to seek those causes that are most fundamental in producing the problem. Don’t waste energy on causes that have only a tangential effect.

4. Solicit Alternative Solutions to the Problem. This step calls for identifying as many solutions to the problem as possible before discussing the specific advantages and disadvantages of each. What happens frequently in problem-solving is that the first two or three suggested solutions are debated and discussed for the full time allowed for the entire problem-solving session. As a result, many worthwhile ideas are never identified or considered. By identifying many solutions, a superior idea often surfaces that reduces or even eliminates the need for discussing details of more debatable issues. These solutions may be logical attacks at the cause or they may be creative solutions that need not be rational. Therefore, it is important at this step to limit the time spent discussing any one solution and to concentrate instead on announcing as many as possible.

5. Selecting One or More Alternatives for Action. Before selecting specific alternatives for action, it is advisable to identify criteria the desired solution must meet. This can eliminate unnecessary discussion and help focus the group toward the solution (or solutions) that will most likely work.

At this point, it becomes necessary to look for and discuss the advantages and disadvantages of options that appear viable. The task is for the group members to come to a mutual agreement on which solutions to actually put into action. It is desirable for positive comments to be encouraged (and negative comments to be ignored or even discouraged) about any of the solutions. One solution should be the best, of course, but none should be labeled as a “bad idea.”

6. Plan for Implementation. This requires looking at the details that must be performed by someone for a solution to be effectively activated. Once the required steps are identified, it means assigning these to someone for action: it also means setting a time for completion.

Not to be forgotten when developing the implementation plan: Who needs to be informed of this action?

7. Clarify the Contract. This is to insure that everyone clearly understands what the agreement is that people will do to implement a solution. It is a summation and restatement of what people have agreed to do and when it is expected they will have it done. It rules out possible misinterpretation of expectations.

8. The Action Plan. Plans are only intellectual exercises unless they are transformed into action. This calls for people assigned responsibility for any part of the plan to carry out their assignments according to the agreed upon contract. This is the phase of problem-solving that calls for people to do what they have said they would do.

9. Provide for Evaluation and Accountability. After the plan has been implemented and sufficient time has elapsed for it to have an effect, the group should reconvene and discuss evaluation and accountability. Have the agreed upon actions been carried out? Have people done what they said they would do?

If they have not accomplished their assignments, it is possible that they ran into trouble that must be considered. Or it may be that they simply need to be reminded or held accountable for not having lived up to their end of the contract. Once the actions have been completed, it is necessary to assess their effectiveness. Did the solution work? If not, can a revision make it work? What actions are necessary to implement changes?

Other Considerations

Keeping adequate records of all steps completed (especially brainstorming) can allow energy to be "recycled." Falling back on thinking that was previously done makes it unnecessary to "plow the same ground twice."

When entering into problem-solving, remember that it is unlikely that the best solution will be found on the first attempt. Good problem-solving can be viewed as working like a guidance system: The awareness of the problem is an indication of being "off course," requiring a correction in direction. The exact form the correction is to take is what problem-solving is aimed at deciding. But once the correction (the implemented solution) is made, it is possible that, after evaluation, it will prove to be erroneous—perhaps even throwing you farther off course than in the beginning.

If this happens, the task becomes to immediately compute what new course will be effective. Several course corrections may be necessary before getting back on track to where you want to go. Still, once the desired course is attained, careful monitoring is required to avoid drifting off course again unknowingly. Viewing problem-solving in this realistic manner can save a lot of the frustration that comes from expecting it to always produce the right answers.

Pre-Reading 4

Making Change

Your museum has worked through the *Discussion Framework* and you have identified your priorities and created an action plan. This action plan is the guidebook or road map that will assist your institution in reaching its goal of improving your museum's involvement with and relevance to your local community. The collaborative process you have just gone through should really pay off at this stage of your institutional journey.

If, as a result of the self-assessment discussions and planning process, you decide to make one or more changes within your museum, be assured that you are not alone. Candace Tangorra Matelic, a museum consultant and the author of the article on making change (see Appendix 1), writes:

> *Increasing numbers of history organizations—ranging from all volunteer staff to million-dollar operations—are undergoing major change and transformation. The reasons range from economic survival to a fundamental redefinition in purpose, based on the belief that our field is embarking on an era in which the traditional activities of collecting, preserving, research, and exhibiting are simply no longer adequate. Museums and history organizations worldwide have been challenged to justify their existence by the public value, and positive contribution that they make to their communities.*

From past experience, you know there may be resistance to the proposed changes the action plan will involve. How can you communicate your vision so that everyone will buy-in? This is where the field of change management can offer some strategies to overcome this resistance. A recently published article, reproduced in Appendix One with permission of the author, Candace Tangorra Matelic, is very timely. Until recently, most of the literature on change—and there is a lot of it—has focused primarily on the for-profit sector. There was less community focus and no recognition of the many stakeholders that heritage organizations must include in their plans to make change.

In "Understanding Change and Transformation in History Organizations," Candace Tangorra Matelic shares some ground rules and key understandings that she found when she looked at the experiences and accomplishments of seven American historical organizations that had undergone organization change and transformation. She also includes a useful checklist, "Facilitating and Inhibiting Conditions for Organizational Change in History Organizations," that identifies obstacles that you may encounter in your own change efforts.

Dr. Matelic identified seven key understandings about change in history organizations:

1. Organizational change and transformation are inherently complex and difficult.
2. Deep organizational change requires human reflection and interaction at the level of heart and soul.
3. Change agents in history organizations play important roles in change and matter a lot during change, and transformational leadership is a particularly effective strategy and approach.
4. Leadership matters a lot during change, and transformational leadership is a particularly effective strategy and approach.
5. The quality of stakeholders' participation in change and transformation processes affects the outcome (and here is one way you are starting out in a position of strength, since, through your group participation in the *Discussion Framework*, you have already developed strong buy-in from many of your stakeholders).
6. Organizational learning is a generative strategy and process that helps to build organizational capacity (again, you have already strengthened your institution's capacity to learn and work together through your participation in the *Discussion Framework*).
7. Organizational change and transformation are inherently paradoxical, as history organizations balance their uniqueness and connectedness.

Her final key understanding looks at the challenges that specifically face history organizations.

This article does not sugarcoat the challenges that lie ahead—"Undertaking major organizational change is not for the faint-of-heart. It takes courage, perseverance, and passion." But knowing that others have undergone successful transformations and learning from their challenges in between will help you maintain course on your own organizational journey because the resulting transformation will be worth it. The author has included her own recommendations for further reading. In the Framework's annotated bibliography that follows, two other resources are suggested. The Learning Coalition's *Human Resources Planning for Successful Museums*, designed to foster people planning and support during the strategic planning process, is a good model for providing staff (paid and volunteer) support during the change process when human fears and emotions can take over. Also published in 2006, *Transitions: the Art of Implementing Positive Change*, shares recent case studies and strategies from the non-profit sector.

Before You Begin

It is important to keep in mind as you progress through the steps in the *Discussion Framework* that this is a self-assessment process. Although you are likely to change or create plans at the end of the process, this is a time for examining, reflecting, delving into and understanding what you are currently doing and how that helps or hinders developing a closer relationship with your community.

So don't hurry the process. Whether you choose to work through the whole framework or parts of the framework, either in one session or multiple sessions, think of this as a time to take stock and re-energize the museum and the people in the museum.

Equally as important is involving members of the community in your discussions, especially in Sections 3, 4 and 5. Consider inviting people in your community who you do not normally think of as stakeholders, in addition to those you would normally invite. Encourage people to participate based on their own experience and understanding, and not based on what they believe the museum's position or perspective is on a particular area.

The self-assessment questions of the *Discussion Framework* are grouped into five sections. In each section you are asked to critically think about a particular area of your museum's operation:

Section 1 **– Museum's Audiences and Community** focuses on getting an understanding of the museum's target audiences, the community in which the museum lives and its relationship to that community.

Section 2 **– Mandate and Planning** asks questions about the museum's mission within the community.

Section 3 **– Public Perception** focuses on how the museum keeps in touch with the community and how the community responds to the museum.

Section 4 **– Public Involvement** examines the museum's interaction with the community through partnerships, volunteerism, staffing, board membership and financial planning.

Section 5 **– Public Experience** is all about the community's interactions with and responses to the museum through exhibitions, programming, research and services.

The following example shows you how to work through the framework discussing the questions and applying critical thinking.

Example:

Section 2 – Mandate and Planning

Step 1: For each question, critically think about and discuss what your museum currently does, not what your museum would like to do or should be doing. Write your responses in the space provided.

Discussion Framework
1. According to your mandate, what is the museum's responsibility to or relationship with your community?

As a group, discuss this question. You may have to refer to your museum's mandate to refresh your memory. Write your response in the box on the facing page.

Think critically. • Discuss honestly. • Write down what your museum's responsibility or relationship is right now, not what you hope it will be or should be.

Step 2: Review your responses to the questions above. For each question, decide as a group, if you believe your response indicates that the museum is doing well in addressing that question. **Remember, your decision should come from the perspective of strengthening your relationship with the community and achieving your museum's vision.**

In this step, review what you wrote in the box. As a group, are you generally pleased or satisfied with what you have described as the museum's current responsibilities or relationship with your community? If as a group, you can say yes, then go to Step 3. On the other hand, if as a group, you say no, then go to Step 4.

Step 2 can be done when you have responded to all of the questions in the Discussion Framework in Step 1.

Step 3: In the space provided below, write down those responses that indicate your museum is doing well in addressing the question, and give evidence to support your belief.

This question asks you to support your belief. In other words, provide evidence, give reasons, identify information, results of surveys, testimonials, etc. that justify or support why you are pleased/satisfied with your museum's current responsibilities or relationship with your community.

This is an important step because it asks 'why' and gets you to think deeper. You may discover that you have a better relationship with your community than you originally believed or you may find that you have nothing to support your belief.

Question/Response	**Evidence**

Space is provided to record your discussion.

Step 4: For those responses that you believe indicate your museum is not doing well or would like to improve, describe the impact on your museum and on your community if you do not address these.

If as a group, you said no, you are not pleased or satisfied with the museum's current responsibilities or relationship with your community, and believe there is room for growth, change or improvement, don't neglect this step and jump into finding solutions.

It's normal to want to immediately generate solutions/actions. However, this is a critical step in the self-assessment process that will lead to more focused and effective solutions/actions.

Question/Response	**Impact on Museum**	**Impact on Community**

Take time and critically think about what difference it will make to your museum, and to your community if you are unable to (in this example) grow, change or improve your museum's responsibilities or relationship with your community.

Space is provided to record your discussion.

Step 5: Priorities

List in order of priority the questions/responses you believe your museum must address based on the degree of impact on your museum and/or community.

At this step you now know what you will need to focus on in formulating goals and objectives, although effective solutions/actions will probably require further research.

1.

2.

3.

4.

Etc.

Section 1—Museum's Audiences and Community

Step 1: For each question, critically think about and discuss what your museum currently does, not what your museum would like to do or should be doing. Write your answers in the space provided.

Discussion Framework
1. How does the museum define its community?
2. Who is the museum's current audience (people or groups who actually use the museum's services)?
3. Who is the museum's potential audience (people or groups who could but are not yet using the museum's services)?
4. Who are the museum's current target audience or audiences (people or groups that the museum wants to be its primary users)?
5. How does your museum keep informed about who is visiting/using the museum – visitor studies, surveys, program/exhibit evaluations, guest book, observation, etc?
6. How does your museum keep informed about the community – its demographics, changes, what's happening, needs/issues?
7. How would you describe the museum's relationship with the community? Here are three different models of museum community relationships to consider in addressing this question: (i) Consumer/Marketing or Community-Oriented Model – The museum markets its "products/services" to the community, who are viewed as consumers or clients (ii) Volunteer/Management Model – Certain members of the community, for various reasons, volunteer their services to the museum and become part of the museum for short or long time periods (iii) Community-Based/Collaboration Model – The museum views itself as part of the total community and actively works and shares power with a comprehensive cross-section of the community

Record outcomes of discussions, ideas or decisions here.

Step 2: Review your responses to the questions above. For each question, decide as a group, if you believe your response indicates that the museum is doing well in addressing that question. **Remember, your decision should come from the perspective of strengthening your relationship with the community and achieving your museum's vision.**

Step 3: In the space provided below, write down those responses that indicate your museum is doing well in addressing the question, and give evidence to support your belief.

Question/Response **Evidence**

Step 4: For those responses that you believe indicate your museum is not doing well or would like to improve, describe the impact on your museum <u>and</u> on your community if you do not address these.

Question/Response	**Impact on Museum**	**Impact on Community**

Step 5: Priorities

<u>List in order of priority</u> the questions/ responses you believe your museum must address based on the degree of impact on your museum and/or community.

1.

2.

3.

4.

Etc.

Section 2 – Mandate and Planning

Step 1: For each question, critically think about and discuss what your museum currently does, not what your museum would like to do or should be doing. Write your answers in the space provided.

Discussion Framework
1. Does your museum have a written and formally adopted mandate? If yes, what is it? If no, describe the museum's purpose, its reason for existence, and a description of who it serves.
2. Has the mandate of your museum changed since it was founded? If yes, describe how and why the mandate has changed and why it was changed. If no, why not?
3. How often does the museum review its mandate, and what triggers this?
4. According to your mandate, what is the museum's responsibility to or relationship with your community?
5. According to your mandate, what is the museum's responsibility to or relationship with your audiences?
6. Does your museum offer any programs/services, or participate in public activities that are not a part of your museum's mandate? If yes, describe their purpose and how the museum and/or your community benefit from these activities?
7. Does the museum's mandate connect in a meaningful way to what you understand are the needs and wants of your community? Please describe.
8. Does your museum have a written plan (short- and/or long-term)? What and who was involved in developing your plan?
9. How and from what sources did you gather information for developing your plan?
10. How does your museum evaluate if it is accomplishing the plan?
11. How often does your museum evaluate/review and update its plan?
12. How does your museum distinguish between your outputs (productivity) and your outcomes (benefits or impacts of the productivity)?
13. If you do not have an institutional plan, how do you measure whether the museum is fulfilling its mandate?  See *Think Deeper: Organizational Capacity* on page 61.

Record outcomes of discussions, ideas or decisions here.

Step 2: Review your responses to the questions above. For each question, decide as a group, if you believe your response indicates that the museum is doing well in addressing that question. **Remember, your decision should come from the perspective of strengthening your relationship with the community and achieving your museum's vision.**

Step 3: In the space provided below, write down those responses that indicate your museum is doing well in addressing the question, and give evidence to support your belief.

Question/Response	**Evidence**

Step 4: For those responses that you believe indicate your museum is not doing well or would like to improve, describe the impact on your museum and on your community if you do not address these.

Question/Response	Impact on Museum	Impact on Community

Step 5: Priorities

List in order of priority the questions/ responses you believe your museum must address based on the degree of impact on your museum and/or community.

1.

2.

3.

4.

Etc.

Section 3 – Public Perception

Step 1: For each question, critically think about and discuss what your museum <u>currently does</u>, not what your museum would like to do or should be doing. Write your answers in the space provided.

Discussion Framework
1. How does the museum communicate the mandate to your audiences/visitors?
2. How does the museum communicate the mandate to your community?
3. Describe in detail your museum's community.
4. What criteria does the museum use to determine the success of an exhibit, program, event or activity?
5. How has your community changed within the past five years? Describe in detail.
6. Given changes in your community, what do you expect to happen to museum attendance over the next 3 to 5 years if your museum remains the same?
7. What do you want to happen to your attendance in the next three to five years? How will this benefit your museum? How will this benefit your community?
8. What are your plans to make this happen?
9. Do you plan programs, exhibits or other public activities for the purpose of reaching a particular target audience (new or existing)? If yes, what do you do to identify the target audience and to discover their needs and wants?
10. What signage informs the public about how to get to your museum?
11. What obstacles or barriers prevent visitors from reaching and/or visiting your museum?
12. What methods do you use to ask your audiences and the community what they think of your museum?
13. Do you feel that your museum has a clear understanding of how the public perceives the museum and its programs? If yes, how do you know this? If no, what could you do to get a better understanding of how the public perceives the museum?
14. Volunteers act as ambassadors for the museum. How do the museum's volunteers influence the community's perception of your museum?

Record outcomes of discussions, ideas or decisions here.

Discussion Framework
15. Is your museum successful in attracting volunteers? If yes, why? If no, what has been tried?
16. How do you think the community's perception of your museum influences the museum's success in attracting volunteers?
17. Can members of the public picture themselves volunteering for your museum? How do you know?
18. Do members of the public believe they will be making a contribution to the community by volunteering for your museum? How do you know?
19. What do the museum's community and audiences say they value about the museum other than the museum's exhibits and programs? In other words, what do the museum's community and audiences say are the museums greatest assets and strengths?
20. How does the museum communicate its worth or value to the community?
21. What does the museum think are the community's greatest assets and strengths?
22. How does the museum think its greatest assets and strengths and the greatest assets and strengths of the community are connected?
23. Do the board and staff of the museum understand the most pressing issues and needs in your community? If yes, what are they? See *Think Deeper: Museums and Sustainable Communities* on page 64.
24. How are the museum's assets and resources used to address these issues and needs?
25. What other ways exist to influence or contribute to addressing the needs of the community that you are not currently doing? Does the museum take a leadership role in addressing any of the community's needs?
26. What other organizations in your community are similar to you in mandate and services?
27. What other organizations, events, and/or activities do your audiences, community members and donors choose to spend their time and money on? List the local and regional ones.

Record outcomes of discussions, ideas or decisions here.

Discussion Framework
28. Does your museum treat these organizations as competitors or potential collaborators? Please explain.
29. How do you promote your museum and how often?
30. Does your museum have an up-to-date marketing plan?
31. Do you feel your promotional materials communicate a consistent institutional identity? If yes, explain.
32. How do you evaluate the effectiveness of marketing/promotional efforts?
33. What are the strengths of your museum regarding the image you present to your audiences and community?
34. What are the weaknesses regarding the image you present to your audiences and community?  See *Think Deeper: Branding* on page 66.

Record outcomes of discussions, ideas or decisions here.

Step 2: Review your responses to the questions above. For each question, decide as a group, if you believe your response indicates that the museum is doing well in addressing that question. **Remember, your decision should come from the perspective of strengthening your relationship with the community and achieving your museum's vision.**

Step 3: In the space provided below, write down those responses that indicate your museum is doing well in addressing the question, and give evidence to support your belief.

Question/Response **Evidence**

Step 4: For those responses that you believe indicate your museum is not doing well or would like to improve, describe the impact on your museum and on your community if you do not address these.

Question/Response	**Impact on Museum**	**Impact on Community**

Step 5: Priorities

List in order of priority the questions/ responses you believe your museum must address based on the degree of impact on your museum and/or community.

1.

2.

3.

4.

Etc.

Section 4 – Public Involvement

Step 1: For each question, critically think about and discuss what your museum currently does, not what your museum would like to do or should be doing. Write your answers in the space provided.

Discussion Framework
1. How are the following members of the public currently involved with your museum besides being visitors? Are they: • Volunteers • Board members • Committee members • Financial sponsors • In-kind service providers • Cultural advisors • Focus group participants • Other (please describe)
2. Do you see any additional opportunities for involving the public? If yes, what are they?
3. What might prevent or limit public involvement with your museum?
4. Describe any ways that your museum has to maintain a two-way communication with your community.
5. If there are currently no processes/events in place to have two-way communication with your community, what could you develop in the future?
6. Describe the museum's relationship with your municipal government.
7. Do the people working in the municipal government know the museum and its staff/volunteers? How is/could this be accomplished?
8. Does the museum play a role in community issues? If yes, how?
9. If the museum plays a role in the community, does the municipal government recognize that community involvement? If yes, how is that recognition expressed?

Record outcomes of discussions, ideas or decisions here.

10. Does the museum collaborate with other organizations or groups in your community? If yes, describe the collaborations. If not, why not?
11. What interferes with current or potential collaborations?
12. What new collaborations, if any, would you like to initiate? Why? See *Think Deeper: Collaboration* on page 68.

Record outcomes of discussions, ideas or decisions here.

Human Resources
1. Do the demographics of your board (age, gender, race/ethnicity, economic status, etc.) reflect the surrounding region and the particular nature of your institution’s work? Which perspectives are represented, and which are not?
2. How does the museum identify, recruit and evaluate qualified members of the board who are knowledgeable of and reflect the interests, needs and diversity of the community? If your governing authority is appointed by another body not directly affiliated with the museum (or out of the museum’s control), how do you inform the decision, if at all?
3. Describe the roles of the board and committees with regard to public involvement with the museum.
4. What opportunities do board members have to interact with the community in order to inform their decision-making?
5. Does your museum have an advisory group or committee? If yes, describe its purpose and the demographics of its members.
6. Does your museum have a friends group? If yes, describe its purpose and the demographics of its members.
7. Do the demographics of the museum’s staff (paid and unpaid) reflect the surrounding region and the particular nature of your institution’s work?
8. How might the demographics of your staff (paid and unpaid) affect your community’s perception of your organization?
9. How does your museum identify, recruit and evaluate qualified paid staff who are knowledgeable of and reflect the diversity, interests and needs of the community?
10. How does your museum identify, recruit and evaluate volunteers who reflect the diversity, interests and needs of the community?
11. What training and development opportunities does your museum provide for board members and staff to improve their knowledge and understanding about the public/community?
12. Do you feel the museum’s volunteer support is high, adequate, or low given the demographics and giving ability of your community?

Record outcomes of discussions, ideas or decisions here.

Financial Resources
1. Describe the sources of your museum’s annual income and indicate which ones are stable and which ones are not.
2. In what areas do you see the potential for the most financial growth? Please explain.
3. Describe how this growth will help or hinder the museum’s ability to perform its core mandate-related functions. What are the benefits and pitfalls?
4. Do you receive non-cash contributions from your community? If yes, describe.
5. Does your museum charge an admission fee? If yes, do you offer discounted or special rates for different types of visitors/groups?
6. Are there any provisions for free or reduced admissions or programs at any time? If yes, explain.
7. List the museum’s top funding needs in order of priority.
8. Are these needs reflected in your institutional planning documents?
9. How will the museum meet these funding needs while keeping the community’s needs and the museum’s mandate in mind?
10. Does your museum charge an admission fee? If yes, do you offer discounted or special rates for different types of visitors/groups?
11. Are there any provisions for free or reduced admissions or programs at any time? If yes, explain.
12. List the museum’s top funding needs in order of priority.

Record outcomes of discussions, ideas or decisions here.

Step 2: Review your responses to the questions above. For each question, decide as a group, if you believe your response indicates that the museum is doing well in addressing that question. **Remember, your decision should come from the perspective of strengthening your relationship with the community and achieving your museum's vision.**

Step 3: In the space provided below, write down those responses that indicate your museum is doing well in addressing the question, and give evidence to support your belief.

Question/Response **Evidence**

Step 4: For those responses that you believe indicate your museum is not doing well or would like to improve, describe the impact on your museum and on your community if you do not address these.

Question/Response	Impact on Museum	Impact on Community

Step 5: Priorities

List in order of priority the questions/ responses you believe your museum must address based on the degree of impact on your museum and/or community.

1.

2.

3.

4.

Etc.

Section 5 – Public Experience

Step 1: For each question, critically think about and discuss what your museum <u>currently does</u>, not what your museum would like to do or should be doing. Write your answers in the space provided.

Discussion Framework
1. What ideas, concepts and experiences does your museum offer the visitor?
2. Aside from exhibits, programs and special events, describe any other activities for the community to interact with the museum.
3. When you develop exhibits and programs, what sources and methods do you use to ensure the best possible design?
4. When you develop exhibits and programs, what sources and methods do you use to ensure that the content is correct?
5. What visitor services (e.g., washrooms, gift shop, parking, picnic tables, etc.) does your museum provide?
6. What resources does your museum provide to visitors with special needs?
7. What concerns do you have about the limitations to your visitor experience created by your museum's facilities?
8. How and where is your visitor informed of services, programs, exhibits and other experiences when they arrive at your site?
9. Is any information available to visitors prior to their visit?
10. What training do paid staff and/or volunteers receive on interacting with the public and orienting them to the museum?
11. What training do paid staff and/or volunteers receive on interacting with people with special needs?
12. What training do paid staff and/or volunteers receive on interacting with people from different racial and cultural backgrounds?

Record outcomes of discussions, ideas or decisions here.

Discussion Framework
13. How does the composition and needs of the museum's audiences and community influence exhibition topics and design?
14. How do you engage the public in the planning process when the museum decides to create new or rearrange its public spaces?
15. How does the museum use the information that you gather?
16. Do you gather information from visitors on the quality of their general experience while visiting? If yes, how do you gather the information and how often?
17. What type of evaluation does your museum use when developing exhibits and programs? • Front-end evaluation—topic testing, data collection from potential audience members prior to exhibit or program creation • Formative evaluation – testing carried out during development, including building a prototype/scale model, testing label copy, et. • Summative evaluation – analysis of impact and effectiveness of a completed exhibition or program
18. How does the museum plan exhibits and programs; what process is followed and how are decisions about content and design made?
19. How are universal access and multiple learning styles considered in the exhibition-planning process?
20. How do your exhibits/programs incorporate a variety of viewpoints?
21. Does the museum use the appropriate language in the exhibit or program for the target audience (other languages than English, colloquial English, etc.)?
22. Describe your museum's approach to the role and preservation of collections.
23. Does your museum conduct or support original research using its collections?
24. How does the museum communicate to the public that it supports research?

Record outcomes of discussions, ideas or decisions here.

Step 2: Review your responses to the questions above. For each question, decide as a group, if you believe your response indicates that the museum is doing well in addressing that question. **Remember, your decision should come from the perspective of strengthening your relationship with the community.**

Step 3: In the space provided below, write down those responses that indicate your museum is doing well in addressing the question, and give evidence to support your belief.

Question/Response	**Evidence**

Step 4: For those responses that you believe indicate your museum is not doing well or would like to improve, describe the impact on your museum <u>and</u> on your community if you do not address these.

Question/Response	**Impact on Museum**	**Impact on Community**

Step 5: Priorities

<u>List in order of priority</u> the questions/ responses you believe your museum must address based on the degree of impact on your museum and/or community.

1.

2.

3.

4.

Etc.

Toward an Action Plan

Review and discuss your priorities at the end of each section, especially the top priority. Then choose the priorities that your museum must address, and write goals for these priorities, followed by an action plan to achieve the goals. You may choose to focus on one section or a priority from each section. Whatever your decision, keep in mind the impact on your museum and on your community.

Section	**Priorities**	**Goals**

Conclusion

The goal of this self-assessment process was to give you a path to follow enabling your museum to thoughtfully examine and evaluate your current relationship with your community. Increasingly, organizations are being asked to think beyond their own needs and take into consideration the needs of the community as well. Whether you worked through one section or the whole *Framework*, hopefully you now feel confident about:

- reviewing or revising your museum's mission/vision to reflect the desired relationship with your community, or
- articulating the museum's relevance and worth within the community, or
- improve strategic plans, leading programs and services that have meaning and value within your community, or
- having an accurate understanding of the museum's role in your community, or
- moving forward on or making a change other than the first four points.

Your confidence comes from knowing that you:

- ✓ Have worked through the *Framework* as group so that everyone had the opportunity to contribute to the museum's vision
- ✓ Stakeholders and members of the community have participated in the process
- ✓ Have used critical thinking when discussing the questions
- ✓ Have sought out and identified the evidence to support your beliefs
- ✓ Have taken the time to consider the impacts on your museum and on your community
- ✓ Have not jumped to solutions before fully discussing the questions in each step of the process
- ✓ Have identified the sections or questions that require further discussion

Everyone who has contributed to producing the *Discussion Framework* believes that museums can play a proactive and integral role in the health and well-being of our communities. There are many resources in the museum field and in your community to help you in this important work.

Think Deeper: Organizational Capacity

The questions below ask you to think about the characteristics of a mature organization and whether they apply to your museum, since this is the state that all non-profit organizations strive to achieve. Keep in mind that your museum may be in a different stage of its lifecycle, and your capacity for adaptation in leadership, management and technical abilities may be at different levels.

These questions are not intended to guide you in a comprehensive or in-depth self-assessment of where your museum is in its organizational lifecycle or the capacity model. Rather, they are intended to encourage you to begin thinking about the health and well-being of your museum as an organization that has accepted the responsibility of serving the public trust and achieving a specific mandate.

The ideas and models presented here are taken from the work of Paul M. Connolly in *Navigating the Organizational Lifecycle: A Capacity-Building Guide for Nonprofit Leaders*, BoardSource, 2006. "To stay relevant, a mature organization continually assesses itself; evaluates its programs; scans the outside environment; and broadens and deepens connections with community leaders, funders, and constituents." (Connolly, p. 29)

"The ability to adapt becomes the most important capacity for a mature organization—it is impossible for an organization to avoid stagnation if it cannot adapt to change. To avoid stagnation, a mature organization continually monitors and evaluates its work, and stays in tune with the needs and perceptions of the outside environment. The organization's leaders should constantly be aware of internal and external shifts in order to keep the organization adept and its mission needed." (Connolly, p. 30)

All organizations, including non-profit organizations, have a life cycle that encompasses five stages: start-up; adolescent; mature; stagnant; and defunct.

As the organization grows and develops, so does its capacity, which will affect its ability to evolve into a mature organization. The capacity—capabilities, knowledge, resources—of an organization directly influences its ability to adapt to change. "**Adaptation and capacity-development are the hallmarks of successful non-profit organizations that deliver quality programs and fulfill the needs of society**." (Connolly, p. 4)

In the Capacity Model described by Connolly, there are four core capacities of an organization:

1. Adaptive Capacity—the ability to monitor, assess, respond to, and stimulate internal and external changes

2. Leadership Capacity—the ability of staff and board leaders to inspire, prioritize, make decisions, provide direction and innovate
3. Management Capacity—the ability to ensure the effective and efficient use of organizational resources
4. Technical Capacity—the ability to implement all of the key organizational functions and deliver programs and services

These capacities will undergo transformations as the organization progresses through its life cycle. When an organization achieves the mature stage, it has established credible programs and developed efficient operating systems. It has diversified its revenue streams, conducted an ongoing strategic planning process and adapted quickly to external changes in its environment. In other words, the organization has achieved the full potential of all four capacities. “Any group that aims to deliver successfully on its mission must attain the mature stage—and sustain itself there.” (Connolly, p. 3)

It is important to remember that the capacities of an organization are influenced by the organization’s culture (the unique history, values, beliefs, traditions, etc), resources (people, funds, equipment/capital) and external environment (economy, government, social trends, community needs and expectations, etc).

Use the following questions to help your group discuss whether your museum is a mature organization, working to effectively use all of your capacities to achieve your mandate.

Adaptive Capacity

1. Does your museum forge strategic alliances with other non-profits to provide services and programs?

2. Does the museum develop sustainable resources for long-term program and service delivery through diversity of revenue sources?

3. Does the museum engage with community-level decision-making bodies that make and/or influence policies affecting program and service resource allocation?

4. Do strategic planning decisions about programs and services incorporate assessments of audience/community needs and program evaluations?

5. Are there evaluation processes/practices in place to assess and monitor inputs, program quantity, program quality and outcomes?

6. Do all program decisions include a discussion of evaluation findings?

Leadership Capacity

1. Do the leaders (board, senior staff) of the museum prioritize how and where to get and develop the resources necessary for delivering high-quality programs based on "lessons learned"?

2. Do the leaders of the museum decide on the ways to change programs and services to better meet the community's needs?

Management Capacity

1. Do museum staff receive training and development based on "lessons learned"?

2. Does the museum have formal tools and processes for providing feedback to museum staff?

3. Does the museum conduct regular assessments of program staff resource needs?

4. Does the museum develop formal strategies for recruiting strong museum staff in the future?

Technical Capacity

1. Does the museum have the skills to increase the breadth and depth of program and service delivery with respect to the numbers served, quantity of programs and services offered, and the quality of programs and services?

Milestones to maintain the mature state

1. Do program staff and volunteers consistently improve the quantity and quality of service delivery based on formal learning processes?

2. Does the museum have resources to deliver better program quantity and quality every time to those being served?

3. Is the museum achieving community impact through programs as well as partnerships and alliances?

Think Deeper: Museums and Sustainable Communities

The Working Group on Museums and Sustainable Communities has developed a series of assessment questions that are useful for any museum that is developing programs/exhibits with the goal of engaging communities and working towards sustainability. Three lenses are used to examine the relationship of a museum program/exhibit to its community: the individual, the community and the museum.

When developing new programs/exhibits/initiatives or evaluating current ones, your museum should consider the following series of questions. How would your museum rate itself?

Individual Level (From the Perspective of a Member of the Community)

Will the program/exhibit/initiative:

- Contribute and/or generate new insights?
- Capture the imagination?
- Stimulate curiosity?
- Encourage personal reflection?
- Enhance my ability to think critically and creatively?
- Provide an opportunity to examine and clarify values?
- Affirm, challenge or deepen identity?
- Help develop a sense of place?
- Help deal with complexity and uncertainty?
- Increase responsible action?
- Stimulate intrinsic motivation?

Community Level

Will the program/exhibit/initiative:

- Address vital and relevant needs, issues or opportunities within the community?
- Generate information and connection at the personal, community, provincial/territorial, national or global level?
- Engage a diverse public?
- Provide a voice for diverse groups?

- Encourage social interactions and debate?
- Act as a catalyst for action?
- Stimulate intergenerational interactions?
- Link existing community groups to one another?
- Initiate or enhance long-term collaborative relationships?
- Result in partnerships that empower community groups?
- Enhance the credibility of all involved?
- Result in products and processes that have a tangible impact in the community?
- Generate information applicable to museum and community decision-making?

Museum Level

Will the program/exhibit/initiative:

- Challenge personal and institutional assumptions?
- Be guided by clearly articulated goals, objectives and outcomes?
- Use the most effective vehicle for achieving goals?
- Identify and value staff/volunteer skills and resources?
- Empower, transform and affect all who are involved?
- Create a community of learning within the staff/volunteers?
- Engage key players/champions/detractors early in the process (external and internal)?
- Include multiple perspectives?
- Engage different learning styles?
- Integrate different dimensions of sustainability?
- Integrate scientific, local and traditional knowledge?
- Act as a catalyst for partnering community organizations with one another?

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Think Deeper: Branding

What is a Brand and Why is it Important to the Museum?

A brand is a product, service or organization (the museum) that has established a relationship with an individual—the customer (in this case the visitor, members of the community, stakeholders, etc.). It is a recognition and personal connection that forms in the hearts and minds of people through their experience with your brand at every point of contact.

A brand is all the information and ideas associated with a product or service that create a distinct experience and relationship over time. The information and ideas can be:

- Real and perceived
- Rational and emotional
- Physical and sensory
- Thought and felt
- Form and function
- Planned and unplanned

A brand is the emotional shortcut between an organization and its customer. A brand creates a set of promises and expectations that:

- Establishes a relationship with the audience
- Creates expectations about what the customer (visitor/public) will experience in any interaction with the museum.

A successful brand that establishes a bond between itself and the customer is more likely to win the customer's long-term commitment and loyalty. For a brand to be successful, the audience must know who the organization really is and how it is unique or different from other organizations. An organization must understand itself, its audiences and its programs and services in order to develop a strategy to create and implement a brand. This begins with a clear mission statement (statement of purpose).

Branding should be woven throughout the organization through personal interactions, the organizational culture, communications, and programs and services. It should reflect and inform decision-making and guide all contact points with the visitor, public, etc. To be effective, the brand must be championed by the governing authority and embodied by the museum's volunteers, staff, programs and services, and communications at all times. Good branding is a team effort and should be viewed as an organization-wide priority.

Where Did This Branding Concept Come From?

At its most fundamental level, branding is driven by the human need to distinguish one thing from another. Think about all those old Western movies in which cows wandered onto some other rancher's range, causing all kinds of trouble. It was the rancher's brand that protected his herd and his livelihood.

On a more abstract, organizational level, the brand promotes the identity and underlying values of a unique culture by communicating the messages, products, and services created by that culture. For the purposes of our discussion, brand strategy is a plan that employs a unique set of design tools—logo, palette, typefaces, formats, images and language—created for that organization alone, and applied in each and every vehicle that helps communicate the brand: the annual report, letterhead, business cards, packaging, website, and so on.

Brands are therefore not just about logos (a typical misconception), even though the logo is often a key element in any branding program. Brands are about going beyond tangible design elements to creating something more abstract. As an expression of the core values of your organization, your brand creates expectations and makes promises to your audiences—whether they're already captive (staff, volunteers, board members) or people you wish to attract (visitors, funders, opinion-shapers).

If executed well, a brand strategy delivers on those promises in a clear, understandable way that satisfies a need. In turn, brand loyalty—one of the keys to organizational sustainability—is engendered by the consistent presentation of your brand and everything it implies (see DK Holland, "What's That Branding Buzz I Hear?", Nonprofits By Design, Philanthropy News Digest, June 2003).

Ask yourselves the following questions about branding and your museum:

- Does your museum have a brand?
- What promise(s) to visitors/the public does your brand represent, and are those promises based in reality?
- What are the core values of your brand?
- Are these values conveyed to visitors/the public through all the people who work or volunteer with your museum, through all of the museum's methods of communications, and through the direct experiences that visitors/the public have with your museum?
- Are you guilty of making empty promises?

Think Deeper: Collaboration

There are over 17 different terms that can be used to describe “joint activity” between groups or organizations, including advisory committee, alliance, coalition, consortium, coordination, cooperation, federation, network, partnership, task force, etc. Although these words have different technical meanings, you can find them being used almost interchangeably. In the non-profit sector, the word “partnership” is currently being used everywhere to refer to many different types of relationships between groups and organizations.

For the purposes of this *Discussion Framework*, we will use the following terms, which describe models that reflect different levels of relationship between organizations, and which your museum may be using. The models are co-operation, co-ordination and collaboration. Some approaches break down the relationships further into five different models, beginning with networking, which is the first type of relationship model in which organizations are normally involved.

Networking

- Purpose is to dialogue and have a common understanding and exchange of information, and provide a base of support
- The relationship is non-hierarchical, with flexible links; roles are loosely defined, and community action is the primary link between the museum and the other organization(s)/group(s)
- There is low-key leadership, minimal decision-making, little conflict and informal communication

Does your museum have networking relationships with other groups or organizations in the community? Please describe.

Cooperation

- Informal relationships between individuals, e.g., a staff person from the museum and a staff person from the other organization interact as necessary
- No common mission, structure or plan has been created
- Information is shared as needed
- Power and authority are retained by each organization
- The risk is low

Is your museum involved in cooperation relationships? Please describe.

Coordination

- More formalized relationships with some organizational involvement
- Both organizations have identified compatible missions/mandates and together you do some joint planning and have a division of roles
- Communication channels are established
- Authority still rests with the individual organizations but some power is shared
- There is some sharing of resources and rewards
- The risk is medium

Is your museum involved in coordination relationships? Please describe.

Collaboration

- Formalized relationships between organizations/groups, often with written agreements or protocols
- A common mission is created with a structure and comprehensive plan for the project
- Multi-layered communication channels
- Authority and power are shared
- Resources and rewards are shared
- Risks are high

Like the term "partnership," the word "collaboration" is used to describe a range of relationships. The collaboration relationship model is the most difficult and challenging relationship, but it also has the potential to achieve the best and most beneficial results.

In "Building for Success," Lynette Harper defines collaboration as an interactive process involving independent stakeholders who use shared rules, norms and structures to act or decide on a common concern. The critical defining characteristic of collaboration is a commitment to the deliberate and appropriate sharing of power.

The Collaboration Handbook: Creating, Sustaining and Enjoying the Journey, by Michael Winer and Karen Ray, defines collaboration as a mutually beneficial and well-defined relationship entered into by two or more organizations/groups to achieve common goals.

Use the following questions to examine what the collaborative relationships you believe you have with other organizations or groups to decide whether your museum is involved in a true collaborative relationship.

1. Do you have or enter into formalized relationships with other organizations evidenced by written agreements or protocols?
2. Is everyone in your museum—board/staff/volunteers—committed to the collaboration?
3. When collaborating, do you think more about larger results and strategies than about activities, programs and services?
4. Do you focus on achieving long-term results?

In these relationships:

1. Have your museum and the organization/group you are collaborating with created a common, shared vision and goals for the project? If yes, describe the mission.
2. Have you and the collaborating organization/group created a new organizational structure, such as a joint committee, with clearly defined roles and timelines?
3. Do you and the collaborating organization/group have a comprehensive plan and formalized evaluation to measure success in terms of the impact of the project?
4. Do you and the collaborating organization/group have multi-layered communication channels established?
5. Do you and the collaborating organization/group share authority and power?
6. Do you and the collaborating organization/group share resources, rewards and responsibilities?
7. Are you willing to accept the risks?
8. Is consensus used to make decisions?
9. Is there a high level of trust between you and the organization/group you are collaborating with? How do you know this?

Annotated Bibliography

Alberta Museums Association. ***Standard Practices Handbook for Museums, Second Edition.*** Edmonton: Museums Alberta, 2001.

A good and basic starting point for your discussions is "Unit 1: Museums and Society," which contains brief outlines on museum purpose, museums and public trust, museums and public service, cultural diversity, communication and communities.

Anderson, Gail, editor, ***Museum Mission Statements: Building a Distinct Identity*** (Washington, D.C., American Association of Museums, Technical Information Service, 2000)

Recommended if you are looking for one great resource to guide your development or revision of a museum mission statement. This is a very useful book with lots of real examples from all types and sizes of museums as well as guidelines for the process of writing or revising your own.

Bruce, Karen. ***Transitions: the Art of Implementing Positive Change.*** Edmonton: The Muttart Foundation 2006. Available at http://www.muttart.org/publicationsfellows.htm.

Information on purchasing a hard copy is available on the Foundation's website. The author undertook research into the management of major organizational change within a charitable agency. She focused on mergers between organizations, and presents several case studies.

Connolly, Paul M. ***Navigating the Organizational Lifecycle, A Capacity-Building Guide for Nonprofit Leaders***. BoardSource, 2006.

This book discusses, for both senior staff and board members, a theory of the evolutionary development of a non-profit organization, and provides a very useful road map to the life patterns of non-profit organizations. Although the book presents a theory, it also has some very practical and concrete applications. The theory merges and examines two models of the evolution of non-profits—the lifecycle model and the organizational capacity model. The book explains how managers and boards can use these models together to recognize their organization's own circumstances and strengthen its performance.

Durel, John. "A Museum Disconnect: Program and Board Development." Available at http://www.qm2.org/mbriefs/83.html.

A brief article that addresses the issue of what happens if the leaders of change leave before changes have been incorporated throughout the entire organization.

Falk, John H. & Sheppard, Beverly K. ***Thriving in the Knowledge Age: New Business Models for Museums & Other Cultural Institutions***. Altamira Press, 2006.

An inspirational yet practical book for anyone who is looking for direction in the "why" and the "how" of making change in the way their museum does business; highly recommended.

Harper, Lynette. "From Temple to Battlefield: Conflicting Ideologies in the Museum," ***Muse***, Fall 1993, pp. 20-21.

This article discusses the struggle of museums to move from a traditional functionalist orthodoxy towards a humanist ideology, thus becoming institutions that truly collaborate with community.

Harris, Robert L. ***Change Leadership Inform, Involve, Ignite!*** Canadian Society of Association Executives, Toronto: 2007.

This book does an excellent job of outlining the "Polarity Model" of change management with plenty of real-life examples, many of which are Canadian. It also brings to light the idea of leading a change rather than just managing the way through change. It's easy to read, packed full of relevant and practical information.

Herasymowych, M. and Senko, H. ***Solving Real Problems in Real Time Action Learning Guide,*** **Second Edition**. Calgary: MHA Institute Inc., 2008.

This article discusses, in more detail, the critical thinking approach that formed the basis of the Critical Thinking section in this *Discussion Framework*.

Holland, DK. "What's That Branding Buzz I Hear?" ***Nonprofits By Design, Philanthropy News Digest***, June 2003

This article briefly outlines where the idea of branding came from and why it is integral to an organization.

Irvine, Lois. "Taking on the World: Museums, Contemporary Issues, New Skills." ***ICOM 10 International Committee for the Training of Personnel,*** Belgium, ICOM/ICTOP 2002.

A good, concise article encouraging museums to "address these contemporary issues in practical ways, within the mandate of the museum, and to make the connection between museums and issues which are relevant to our societies and communities...” and explores the knowledge and skills needed to achieve this.

The Learning Coalition. ***Human Resource Planning Tool,* 2006.** Available at http://www.workinculture.ca/information/documents/HRPlanningToolrev.pdf

Designed to foster people planning and support during the strategic planning process, this publication provides a useful model for providing staff (paid and volunteer) support during the change process when human fears and emotions can take over.

Oakley, Ed. **“Leading Change without Authority: Part 1.”** Available at http://materialhandlingmgmt.texterity.com/materialhandlingmgmt/200705.

Ed Oakley focuses on the ideas of what people resist about change, looking at those who have not been given the directive to make the change happen. If you’re interested in more insights in leadership and change management, it would be worthwhile visiting his website: http://leadershipmadesimple.com/journal.

Parker, Sandra et. al. ***Neighbourhood Renewal and Social Inclusion, The Role of Museums, Libraries and Archives*.** Resource, January 2002. Available at http://www.ymlac.org.uk/policy/Inclusion/MLA_Activity_on_Social_Inclusion.

This is a fairly heavy-duty research report (128 pages) that was commissioned in the UK to “complement previous studies by focusing on the ways in which the sector’s view of its contribution is perceived by other agencies and organisations involved in neighbourhood renewal and social inclusion projects.” It includes examples of museum-community collaborations and a good summary of key findings.

Suchy, Sherene. ***Leading with Passion: Change Management in the 21st-Century Museum***. Walnutcreek, CA: Altamira Press, 2004.

This book is based on research done throughout the museum community. It focuses mostly on larger-sized art galleries and art museums throughout Australia, the U.S. and Canada. It is quite detailed and has much information worth perusing. Its focus is on how museum directors will lead or have led a museum through the process.

Weil, Stephen E. “Training for Tomorrow’s Museums.” ***ICOM 10 International Committee for the Training of Personnel,*** Belgium, ICOM/ICTOP 2002.

Like the Irvine article above, this is a well-considered discussion of the skill sets museum personnel will need “to successfully work with the various communities that the museum hopes to serve.”

Winer, Michael & Karen Ray. ***Collaboration Handbook: Creating, Sustaining, and Enjoying the Journey***. Amherst H. Wilder Foundation, 2000.

This book presents collaboration as a concept that brings people together to resolve problems in today's highly inter-related global society. It describes collaboration as a journey. To help the reader understand the journey, the book is divided into three parts. The first part tells a story, so that the reader can see a collaboration move through the various stages and challenges. The next part defines collaboration and provides a framework for the rest of the book. The third part explains the four stages of collaboration; this is the part that provides the step-by-step "how to" of the collaborative journey. A final part contains appendices with resources and forms.

Wing Luke Asian Museum. **Community Process Model.** Available at http://www.wingluke.org/process.htm.

After hiring a new director, this museum changed its institutional direction and put community stories "at the forefront of its mission." Its website includes the sharing of its community process and community-based exhibition model—inspirational and practical too.

Working Group on Museums and Sustainable Communities. **The Critical Assessment Framework, Museum Projects and Initiatives, April 2004**. Available at http://www.geocities.com/wgmsc.

The Working Group on Museums and Sustainable Communities has done a lot of thinking, writing and presenting: "focusing its efforts on engaging the museum community in Canada in a process of awareness, reflection, learning, sharing of knowledge and experience, capacity-building and action related to their role in creating a culture of sustainability." Their assessment framework, and the document that accompanies it, is an excellent beginning for institutions who identify that they want their institution to "think deeper" in the areas of social responsibility and/or sustainability.

Appendix One

Understanding Change and Transformation in History Organizations[1]

By Candace Tangorra Matelic

Introduction

Increasing numbers of history organizations— ranging from all-volunteer staff to million-dollar operations—are undergoing major change and transformation. The reasons range from economic survival to a fundamental redefinition in purpose, based on the belief that our field is embarking on an era in which the traditional activities of collecting, preserving, researching, and exhibiting are simply no longer adequate. Museums and history organizations worldwide have been challenged to justify their existence by the public value, and positive contribution that they make to their communities. Many history organizations are engaging their communities to discover what they care about, redefining their missions and visions, and evolving into places that facilitate important civic conversations. They are utilizing interpretation as a transformative process to establish deep and personal connections with new audiences, neighbors, and stakeholders, and embracing innovative public programming as an organizational priority rather than a departmental function. Partnering with diverse community organizations, they are discovering shared goals, visions, plans, and outcome, and pursuing more activist agendas to improve their communities.[2]

It is important for history organizations to understand the changes that are occurring. The processes of civic engagement and partnerships require that history organizations fundamentally transform the way they do business. History organizations are learning that organizational development is more than increased funding or new facilities—it includes developing the capacity of people and transforming organizational identity. Many are using teams to redefine work processes, involving stakeholders in making important decisions, and incorporating organizational development into their strategic planning and implementation. Boards are becoming more active and effective as they work with staff and community groups to build capacity, strategize for long-term sustainability, undertake partnerships and collaborations, develop new streams of mission-related enterprise, and plan for leadership succession.

While the terms change and transformation are often used interchangeably, researchers have attempted to distinguish between organizational change that is episodic or infrequent, and that which is constant and evolving. Transformation is described as frame-breaking, large-scale, major, and revolutionary—the type of change that challenges strategy, culture, assumptions, values, and current operating premises of organizations and their members. For organizational transformation to be meaningful, it must be “deep change,” major in scope, discontinuous with the past, and generally irreversible.

Transformation is a big step, with potentially big rewards, and for some history organizations, it may be necessary in order to survive. But regardless of scope, the process starts on a personal level by examining and perhaps altering fundamental assumptions, values, and knowledge, and then developing new theories about ourselves, our relationships, and our organizations. This rate of change will speed up as we move through this century, as organizational survival often depends on it.[3]

This article is based on two decades of research and practice focused on organizational change and transformation. Rather than a series of case studies, my research looked for patterns, idiosyncrasies, similarities, and differences across organizations, and compared the experiences and perspectives of multiple stakeholders, including directors, trustees, staff, volunteers, community representatives, and former directors. My research approach gathered richly descriptive and thoughtful, albeit sometimes very painful, accounts of organizational change processes. The change experiences of these museums are representative of many history organizations. They faced budget deficits and downsizing, built new facilities, developed external-focused missions, reprioritized activities, reorganized and diversified boards and staff, and integrated new technologies into programs, exhibits and operations. Some smaller organizations are more flexible and less bureaucratic, with fewer entrenched behavior norms and expectations and may find it less daunting to start the transformation process if the board is community based. This article offers a few tips or “ground rules” for learning about organizational change, and seven “key understandings” that incorporate findings from my research and experience with change in history organizations.[4]

Three Ground Rules for Learning about Change and Transformation

1. Go Outside the Field for Relevant Research and Theory

There has been very little empirical research on organizational change in museums and history organizations. Broader organizational research provides models, theories, metaphors, and concepts used in describing, predicting, and analyzing change processes and leadership. The majority of academic models conceptualize change as processes of initiating, articulating, and implementing change, as well as solidifying the results in the culture of an organization.[5]

2. Context and History are Important

Studying organizational change requires taking a long view rather than an episodic “slice of life.” Change cannot be understood through studying just a few case studies, or through looking at a single change effort at a given time period. Like the discipline of history, we must understand an organization’s past and the external context in which change occurs. Even if change is undertaken with an entirely new board and staff, institutional history and memory can become a powerful force of resistance when trying to establish momentum to propel change.

Field-wide mandates, initiatives, and trends also impact organizations. During the last quarter century, there have been numerous calls for change from the museum field, for example, to increase diversity and to engage communities. Influential trends, initiatives, and movements have also served as catalysts for change. These trends included new content scholarship; growing research on audiences and learning; focus on interpretation and the public dimension; changing roles for curators, educators, and directors; and focus on improving governance. History organizations have responded to these calls and trends by looking both inward and outward, reexamining their mission, institutional history, resources and practices, and learning more about their communities.

3. Look at Multiple Perspectives, Advocacies, and Roles

To comprehend the nature of change, we need to understand how various stakeholders perceive and respond to organizational change. It is not enough to hear only what directors have to say. It is also useful to pay attention to what people hold allegiance to, and deeply care about, during change processes. This is more important than functional position. For example, a director has responsibility for an overall organization, but may care most about collections and research. On the other hand, a curator may be deeply concerned about visitors and learning. Therefore, functional titles or positions can be deceiving. The comparison of different advocacy groups, such as the overall organization, community, research/collections, and audiences/programs, can provide insight into how people feel about and respond to change.

Organizational researchers Rosabeth Moss Kanter, Barry A. Stein, and Todd D. Jick offered a “Big Three Model of Change.” This model is useful for capturing the dynamics of change processes, and for articulating three change roles for stakeholders: 1) Strategists, 2) Implementors, or 3) Recipients. It is not unusual for individuals to take on more than one role, for example, one could strategize change, and then be responsible for implementing it. These connections between stakeholders’ advocacy and their change roles can help us understand important dimensions of change and transformation and illustrate who serves to initiate and guide change.[6]

Key Understandings about Change in History Organizations

Key Understanding One: Organizational change and transformation are inherently complex and difficult.

Undertaking major organizational change is not for the faint-of-heart. It takes courage, perseverance, and passion. Change is very rewarding, but it is often difficult, chaotic, and complex. Change does not necessarily follow a sequence of planned steps and stages. It is usually a multifaceted unfolding of decisions, events, role changes, and redefinitions. Particularly in naturally conservative and risk-aversive places like history organizations, change processes are inherently traumatic because they challenge deeply embedded traditions and the status quo.

In my research, history museums bucked longstanding and inwardly focused traditions and professional standards as they transformed their organizations to focus outward, and serve communities in more meaningful ways. The new direction was inspirational and uplifting. However, they faced tough challenges along the way, sometimes at the level of brute survival. Changing functional roles was extremely difficult, especially if stakeholders did not understand their contribution in a new role, or felt that their existing power, stature, and voice were threatened. A big challenge was helping stakeholders understand why history organizations should change at all, even when their organizations were in crisis. People anguished over change processes, particularly the “terrible toll” that it took on many stakeholders. Even those who were the strongest champions of change expressed this sentiment. However, stakeholders reiterated that organizational change and transformation was worth the effort because it positioned history organizations to provide more meaningful service to their communities with increased public accountability and value.

Facilitating and Inhibiting Conditions for Organizational Change in History Organizations	
Opportunities: Conditions Facilitating Change	**Constraints: Conditions Inhibiting Change**
Relatively unstable environment, crisis	Relatively stable environment
Dramatic shifts and/or decline in attendance, financial support	Gradual increase in attendance, financial support
Support for new and/or experimental programs, exhibits, events, with focus on visitor experiences, external input	Modest changes and/or revisions in programs, exhibits, events, with focus on scholarship, internal expertise/input
Major expansion of collections and/or facilities	Slight growth in collections and/or facilities
Staff salaries/benefits stable/declining, but HR (human resources) viewed as important organizational investment	Small but steady increases in staff/benefits, but HR (human resources) viewed as significant organizational cost

Strong support for new direction/initiatives, e.g., new grants, new legislation, community engagement initiatives	Strong resistance to change from internal stakeholders, e.g., board members, professional staff, volunteers w/ long tenure
Director/CEO: new, with mandate and support for change and transformation	Director/CEO: long tenure, support for status quo, established control systems
Support for risk and shared power—decentralized structures	Fear of risk, loss of power and control—centralized structures
Changing community, new expectations, lack of awareness or support for organization	Relatively stable community support, traditional expectations and awareness of the organization
Support for new professional initiatives, trends, and mandates	Insulation from professional initiatives, trends, and mandates
Culture of learning, new mindset of museums as community driven organizations (continually transforming themselves)	Culture of preserving tradition and norms, conservative mindset ("museums don't change")
Effectiveness paradigm: long-term outcomes, value placed on qualitative measures, e.g., learning, systems thinking, group processes, new partnerships	Efficiency paradigm: short-term focus, value placed on quantitative measures, e.g., attendance figures, bottom line, balancing budget, productivity from tasks

Key Understanding Two: Deep organizational change requires human reflection and interaction at the level of heart and soul.

Recent research suggests that the classic approach to leading change—seeking first to implement goals, organizational charts, structures, job descriptions, and control systems and dealing with "people problems" later—is doomed to failure. This inevitable failure is due to management's view that they are separate from the people and systems to be changed, that staff are a problem to be fixed. Instead, researchers suggest focusing on developing the qualities that help every person become a change leader, or feel empowered to initiate change and take responsibility for its implementation. To change organizations, we must start by changing ourselves and our relationships, examining and perhaps altering fundamental assumptions, values, knowledge, and rules. We must listen to our inner voices, and learn to honor the uncertainties and interconnectivity of the workplace. The qualities that we associate with soul— meaning, memory, beauty, divinity, and union—are fundamental aids for navigating the future and understanding the underlying patterns of human behavior.[7]

History museum stakeholders' experiences matched the research about heart and soul in organizations. People were passionate about pursuing a big vision and doing something that mattered in their communities. They commiserated about how "staff bore the brunt" of change, particularly during excessive reorganization. They tried to invest in people more than ideas, build trust, be honest, and recognize accomplishments along the way. Organizational change was very personal in these history museums; it affected individuals at all levels, often touching heart and soul. Their response to change ranged from individual transformation and growth to hardened cynicism and life-altering pain.

Key Understanding Three: Change agents in history organizations play important roles in change and transformation processes.

Change agents are those individuals who champion organizational change, reinforce why it is important, and guide the process. Change agents in history museums consciously attempted to shift their organizations towards a more dominant external focus, often challenging the existing museum culture and standards (resistance to this shift did not come from communities or external stakeholders). They used visioning processes, articulating shared values, and established teams to serve as guiding coalitions. Teamwork changed roles, work patterns, decision making, power structures, and longstanding relationships—helping some people, while threatening others. Some change agents structurally reorganized their institutions to increase effectiveness and efficiency. Stakeholders wanted change agents to guide them through change processes, listen and respond to their concerns, and treat them with respect and dignity.

The change agents in these history museums were primarily the strategists. They existed at all levels and in all functional areas, as well as in communities and external environments. The largest groups of strategists were those people who advocated for the overall organization, for community (including board members), and for audiences and programs. Many people took on multiple roles, serving as change agents, but then also working to implement the changes in organizational structure, policy, activities, and culture.

Key Understanding Four: Leadership matters a lot during change, and transformational leadership is a particularly effective strategy and approach.

Effective change leaders utilize visioning to mobilize energy and support for change and demonstrate behaviors focused on people and tasks. Transformational leadership is effective in a variety of situations and engenders trust and respect for leaders from their followers. Rather than offering rewards (salaries or authority) to get performance from followers, transformational leaders appeal to followers' higher values to build commitment to an inspirational purpose for the organization. They empower others to share the leadership role and their actions are more “serving and supporting” than “commanding and controlling.” As stakeholders become engaged in a shared vision, their enthusiasm and motivation grows, and they transform themselves and the organization. This leadership approach takes integrity and the courage to do what is right for the organization, regardless of personal ambition.[8]

True transformational leaders are rare, but a few leaders demonstrated distinguishing characteristics of transformational leadership, including seeking inspirational organizational purposes even when facing survival concerns. This empowered leaders at all levels to build commitment, and demonstrate integrity and credibility. To make decisions, they relied on intuition, as well as knowledge and experience, and encouraged innovation, experimentation, and learning. They used nontraditional approaches when faced with formidable challenges. Instead of cutting operational expenses to address a multi-million dollar deficit, they spent money to invest in new programs and products. This approach led to increased major foundation support.

There were other important findings about change leadership. Leaders often struggled to balance internal and external focus. Persistence, patience, perseverance, and resilience, as well as being comfortable with uncertainty and ambiguity, were useful traits for leading change. Boards needed to model the transformation they desired by becoming change agents, building support for change, building organizational capacity, and becoming more effective governing bodies. The traditional strict boundaries—board focusing on fundraising and setting policy while staff focus on operations and implementation—were not useful during the chaos of change. Instead, boards partnered with directors and staff to drive transformation forward. Leaders noted that it would have been very difficult, without strong board support and involvement, to shift their priorities toward providing more relevant community service.

Key Understanding Five: The quality of stakeholders’ participation in change and transformation processes affects the outcome.

Meaningful participation helped stakeholders understand the reasons for change, build buy-in, and change attitudes and behaviors. The reverse was also true. History organizations used strategic planning processes and structural changes, particularly cross-functional teams, to facilitate and strengthen the quality of participation. Teamwork and project management changed stakeholder roles, as well as decision-making and work patterns. Teamwork also changed longstanding relationships and power structures, breaking them open for some people, while threatening others. People relied on longstanding relationships with others to get work done, sometimes in spite of their administrators, and sometimes consciously bucking a newly established reorganization that they felt did not work. Leaders built external support for change through sharing authority and giving the community a voice in organizational planning.

Stakeholder reactions to change ranged from enthusiastic commitment through outward resistance. Change supporters expressed joy about coming to work, being involved in something important, and the positive responses from their communities. Alternatively, many resisted change because of deeply held beliefs and assumptions, and fear of losing control, power, competency, resources, or status. Stakeholders' most critical concern was whether people were treated well or poorly during change, and this determined whether they overtly or covertly supported or resisted new organizational policies and processes. Stakeholders learned to take care of each other during change processes, especially when colleagues felt lost, not supported, or unappreciated. Their network of established relationships served as a safety net.

Leaders and change agents needed to spend significant time helping people understand the process of change and stakeholders needed more time to figure out how to implement change, particularly how it would affect existing roles, relationships, and responsibilities. Stakeholders recommended identifying the informal leaders at all levels of organizations, enlisting them as champions for change processes and empowering them to help others understand and cope with change.

Key Understanding Six: Organizational learning is a generative strategy and process that helps to build organizational capacity.

Organizational learning goes beyond maintaining the status quo, and focuses on enhancing the capacity to create, grow, and evolve. Components include building capacity, valuing human resources, facilitating meaningful stakeholder participation in change, utilizing systems thinking, and embracing learning as a valued organizational outcome. Measures focus on organizational (rather than individual) outcomes—new behaviors or action patterns. The acquisition of new knowledge, tools, understandings, or values is not enough on its own. Organizational learning shifts focus away from short-term efficiency models and towards long-term effectiveness.[9]

History organizations built capacity by investing in staff and the board through cross-functional training (courses, workshops, and sessions), study travel, reading groups, teamwork, recognition, mentoring, and improved communication. History organizations changed the way that they set priorities and did business after learning from and about communities and audiences. Community members joined with board members and management to serve as strategists and change agents.

In terms of systems thinking, organizational transformations occurred as these organizations became aware of internal systems, sought external input, built partnerships, and saw themselves as part of larger community systems. Stakeholders accepted teamwork as a new work pattern, but struggled with the complexities of implementing teams within existing structures. Changing structure was easy, they argued, compared to altering the complex systems of working relationships and friendships. Implementing systemic change required relentless attention because, inevitably, the old systems fought back. Leaders had to work diligently to keep old patterns and habits from reappearing, and push to achieve real change. In extreme situations, entire organizations can retrench back to old patterns of authority and control (they actually retrench deeper) if there is a change in leadership, and shared and/or participatory management threatens the new leaders.

Key Understanding Seven: Organizational change and transformation are inherently paradoxical, as history organizations balance their uniqueness and connectedness.

History organizations face some unique paradoxes in attempting to undertake and implement major change. Some examples include:

The tyranny of tradition or conservative mindset paradox posits that history organizations are traditionally conservative places that are not expected to change. This paradox relates to the collecting and preserving mandate that spills over to organizational norms and practices, entrenching the status quo as if it was part of the collection. This mindset constrains new thinking about organizational structures, processes, and outcomes.[10]

The mission-driven survival paradox suggests that history organizations seek higher purposes or altruistic goals and develop visionary plans while often struggling to survive.

The organizational learning paradox describes how history organizations focus on the learning of visitors but often do not value the learning of stakeholders and the organization.

The paradox of effective governance describes the challenges of developing productive governance partnerships, especially while overseeing organizational change.

These four paradoxes resonated, and each deserves a deeper explanation and discussion. The presence of the tyranny of tradition may contribute or lead to survival challenges. Also, during change, history organizations struggle to balance their uniqueness with their connectedness to the larger field, which promotes mandates for change and the underlying values of nonprofit or public organizations.

Summary

The best things in life, the things that really matter, whether in our personal or work lives, are worth the trouble required to achieve them. Transforming history organizations into places that address what people really care about is a noble and worthy quest. History organizations often bemoaned the "personal hell" that people went through to achieve deep change. But more importantly, they expressed a deep satisfaction about doing the right thing, as they redirected resources and energy toward increasing public service and addressing the enduring needs in their communities. They recounted the benefits of their transformation journeys—strengthened governance, new facilities, increased financial support, deeper connections with audiences, new community relationships and partnerships, deeper respect and caring for their colleagues, and more relevant and vibrant organizations.

The ground rules and key understandings in this article provide insight and perspective for people who are leading or experiencing organizational change, as well as for those who study and teach about change and transformation processes. My hope is that they touch hearts and souls, and help us to find the courage to envision and undertake change and transformation to shape more effective and relevant history organizations.

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The seven history museums in the study were: Henry Ford Museum & Greenfield Village (now The Henry Ford), Dearborn, Michigan; Detroit Historical Museum, Detroit, Michigan; Minnesota Historical Society, St. Paul, Minnesota; Missouri Historical Society, St. Louis, Missouri; The Strong Museum (now the Strong National Museum of Play), Rochester, New York; Historical Society of Washington, DC (now the City Museum of Washington, DC); and the National Museum of American History, Smithsonian Institution, Washington, DC.

1 This article has benefited from thoughtful comments and observations from a number of colleagues, including Donna Braden, Alice Dommert, Barbara Franco, George McDaniel, Laura Roberts, Barbara Silberman, and Kent Whitworth.

2 See Harold K. Skramstad, "An Agenda for American Museums in the Twenty-First Century," in Daedalus (Cambridge, MA: American Academy of Arts and Sciences, Summer 1999), 109-128; Stephen E. Weil, "From Being about Something to Being for Somebody" and "Transformed from a Cemetery of Bric-a-brac," in Making Museums Matter (Washington DC: Smithsonian Institution Press, 2002), 28-52 and 81-90.

3 See David Quinn, Deep Change: Discovering the Leader Within (San Francisco: Jossey-Bass Publishers, 1996).

4 This dissertation, "Organizational Change in History Museums," was completed for a doctorate in Organizational Studies, School of Business, The University at Albany, SUNY, 2007. Data were collected through long interviews in fall 1999 and produced 1,700 pages of transcripts.

5 A notable exception is Sherene Suchy, Leading with Passion: Change Management in the 21st-Century Museum (Walnut Creek, CA: AltaMira Press,2004). However, Suchy offers only the perspective of directors.

6 See Rosabeth Moss Kanter, Barry A. Stein, and Todd D. Jick, The Challenge of Organizational Change: How Companies Experience It and Leaders Guide It (New York, NY: Free Press, 1992).

7 My favorite books about heart and soul include: Alan Briskin, The Stirring of Soul in the Workplace (San Francisco, CA: Jossey-Bass Publishers, 1996); John P. Kotter and Dan S. Cohen, The Heart of Change: Real-Life Stories of How People Change Their Organizations (Boston, MA: Harvard

Business School Press, 2002); and Richard L. Daft and Robert H. Lengel, Fusion Leadership: Unlocking the Subtle Forces That Change People and Organizations (San Francisco, CA: Berrett-Koehler Publishers, 2000).

8 Gary Yukl, Leadership in Organizations, fourth edition (Upper Saddle River, NJ: Prentice-Hall, 1998) and James M. Kouzes and Barry Z. Posner, The Leadership Challenge: How to Get Extraordinary Things Done in Organizations, second edition (San Francisco, CA: Jossey-Bass, 1995) provide good overviews of transformational leadership. Yukl notes that charismatic leaders are often not transformational because their focus is on themselves rather than the entire organization. The seminal treatises from the 1970s and 1980s are by James M. Burns and Bernard M. Bass.

9 This literature is growing rapidly. Start with Peter M. Senge, The Fifth Discipline: The Art and Practice of the Learning Organization (New York, NY: Doubleday, 1990) and Chris Argyris and Donald Schön, Organizational Learning II: Theory, Method, and Practice (Reading, MA: Addison-Wesley Publishers, 1996).

10 See Robert R. Janes, Museums and the Paradox of Change: A Study in Urgent Adaptation (Calgary, Alberta, Canada: Glenbow Museum, 1995).

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Appendix Two

Where to Find a Facilitator

United Way (to connect to the United Way office in your area)
http://www.unitedway.ca

ICA Associates Inc. ("Facilitating a culture of participation")
www.ica-associates.ca

Canadian Council of Human Resource Associations (to connect to your provincial human resource association)
http://www.cchra.ca

Cultural Human Resource Council (CHRC)
http://www.culturalhrc.ca/index-e.asp

Alberta Community Services Branch
http://www.municipalaffairs.gov.ab.ca/ms/mediation

Appendix Three

Colleagues' Comments

The following comments are shared from a facilitated pilot of the *Discussion Framework* held at Brant Museum & Archives in March 2009.

From the museum director
While we distributed the pre-readings prior to the day of the discussion, we decided not to provide copies of the *Discussion Framework* in advance so that participants would not write their "answers" before discussion. People tend to "defend" what they have written/decided <u>before</u> discussion or other information can be shared thus defeating the purpose of the discussion framework approach.

On the other hand, I should have reviewed the Framework myself well ahead to identify and prepare any information that would be needed by the group during the discussion e.g. sources of visitor feedback, our marketing plan, sources of museum income, board roles i.e. evidence of what we are doing currently.

In hindsight I wish we had planned for board and staff follow-up and momentum. This wasn't included in the board meeting schedule and neither staff nor board had an opportunity to "debrief" either the approach or actions.

I will take copies of the *Discussion Framework* to the board for their current strategic planning process so they can review the sections of the discussion framework that we didn't have time to address during the one-day pilot. We will establish a core team from those who were particularly engaged in the day to have a meeting to move recorded outcomes forward. This team will include a community member.

From the board chair
We want this [facilitated discussion] to be a "transferable process" so we can take the approach and apply it to our future planning.

From community participants

- I was flattered to be asked to participate (staff of local library)
- Everyone was speaking the same language. It was exciting. (staff member from Brantford YMCA Immigrant Settlement Services)

From the facilitator
I used an Appreciative Inquiry approach for facilitating this workshop and we began the day with some exercises designed to move the participants towards identifying their vision for community involvement. It was beneficial to the process that the historical society board and their museum director had just worked through the development of a mission statement that placed community front and centre.

We noticed group energy really rose around questions such as “what do we want to create” and energy declined when questions focussed on “weaknesses”

Glossary

Advisory Board – An advisory board exists under the legal authority of a parent body and exercises only those functions granted to it by the parent body, the parent body defines the limits of authority and responsibility for the tasks it assigns to it advisory board. Unlike the members of a governing board who serve as fiduciaries and policy-makers, the members of an advisory board are not typically authorized to act as decision-makers.

Audience – are defined groups of people whom you would like to visit or support the museum, primarily as visitors, potential visitors or stakeholders. They may be segments from within the museum’s communities or from outside of its communities (e.g. tourists, partners or funders) which the museum targets for a particular purpose (marketing, program development, fundraising, etc.)

Community – commonly refers to people living in the same physical location. A broader interpretation encompasses various forms of association that bond people into a distinctive social entity, including geographic location, language, profession, interests, religion, tradition, economy, and ways of living.

Collaboration – Collaboration is a mutually beneficial and well-defined relationship entered into by two or more organizations to achieve common goals. The collaborative relationship includes a commitment to:

- a definition of a mutual relationship and goals
- a jointly developed structure and shared responsibility
- mutual authority (shared power) and accountability for success
- and a sharing of resources and rewards.

Community – A group of people with a common characteristic or interest living together within a larger society. To understand community, one needs to understand the individuals who make up the community, the nature of the group and the culture. Communities are complex and multilayered.

First Peoples – A term used to include First Nations, Metis and Inuit peoples

Models of Museum Community Relationships

1. Consumer/Marketing or Community-Oriented Model
2. Volunteer/Management Model

3. Community-Based/Collaboration Model

Models 1 and 2 are considered community-oriented models. Museums that are community-oriented work *for* the community. Their work is based on visitor studies and their own interpretations of community needs. A museum that is community-based (model 3) works *with* the community, sharing the power and decision-making with people outside the institution. A community-based or collaborative museum is committed to the deliberate and appropriated sharing of power with the community.

Examples of the Community-Oriented Model:

Example One

The Swift Current Museum mounted an exhibit about the Lebanese community's contribution to the historical development of the area. The idea originated with the Curator, whose wife is of Lebanese descent. On behalf of the museum, the Curator conducted the research, determined the content and designed the exhibit and programming.

The Curator conducted several interviews with various people he knew and/or met through the process of developing the project. As the Curator, he maintained control of the project and made all the significant decisions about what should or should not be included. He determined the themes of the exhibit as well as how the information should be organized and presented to the general public.

The Lebanese community cooperated with the Curator, granting interviews and loaning artifacts for the exhibit. Some members of the community also facilitated various programs such as demonstrations and ethnic baking for receptions, etc.

Example Two

The Regina Plains Museum launched a series of multicultural programs related to the theme of Christmas. The "Spirit of Christmas Past" series was the idea of the Curator, who invited various members of the multicultural community to participate in the program, providing a general format for each group to follow. Each program was to have a storytelling or entertainment component, a craft component, and ethnic refreshments. Given this format each group was encouraged to organize the afternoon as they wished.

The groups contacted were determined between the Curator and the Executive Director of the Regina Multicultural Council. Among those suggested were the Chinese community and the Indian community; both communities that are not traditionally Christian. Nevertheless, the Curator contacted everyone on the list provided by the Multicultural Council. The Chinese community, as anticipated, declined to participate. The Indian group, however, were very happy to participate in the name of community spirit and involvement. This concerned the Curator somewhat as she had indicated that each group was responsible for developing their own program and she had no idea what the Indian group was planning.

As it turned out there was nothing to worry about at all. Each group came to the museum and entertained school age children with stories, goodies, presents and the joy and wonder of Christmas. The Indian group brought a gorgeous nativity set carved of wood and told the entire story of Christ's birth and his life. The magical moment came when a young "white" girl interrupted the story, to exclaim, "just like us mommy, just like us!" The girl understood that despite the women's exotic appearance in their shimmering saris and dark skin, they were in fact, not as different from her as she had thought.

Some groups were not comfortable with developing a craft component and in such cases the museum conducted this part of the program. The craft was intended to be a Christmas tree decoration; a traditional craft that could be scaled up or down to decorate the large multicultural Christmas tree in the centre space of the museum's main gallery. The tree was truly a wonderful sight by the end of the six to eight programs in the series.

<u>Example of the Community-Based/Collaboration Model:</u>

The Chilliwack Museum and Historical Society is a small, professionally run organization in a rural community. It is community-based and actively involves community members in setting priorities. Director Ron Denman thinks about strengthening ties with the community in every aspect of his operation, whether planning programs, hiring staff or scheduling staff time. Staff are vocal in their appreciation of the flexibility and creativity they have in their daily work. Power is shared among the staff as well as with community collaborators through consensus decision-making.

Chilliwack Museum staff members initiate and maintain contacts with key groups in their community and take part in a variety of local organizations. When an opportunity to collaborate appears, they know who has relevant information, who has a legitimate stake and how to involve them in the project. Not only are they visible in their community, they build and maintain trust by promptly responding to requests and by sharing information openly and honestly. Museum staff do more than open the door to collaboration: they actively walk out into the community and listen to what is going on.

Shared interests form the basis for the strongest collaborative relationships. In Chilliwack, when community members become concerned about an issue that also relates to the museum, Director Ron Denman proposes a collaboration. Since everyone has a stake in the issue, there is a strong sense of ownership in the projects – indeed, sometimes both community and museum leaders claim to have started them. Participants on the periphery of the projects may have less at stake, but their various personal motives overlap and strengthen the common vision.

Not everyone brings the same skills to a collaboration, so differences in skills and expertise must be recognized and accommodated. In successful projects, the appropriate "experts" set the standards for implementation. For example, at one Chilliwack special event, the best cooks and model-makers in the community were in charge of those areas; when it came to acquisitions, exhibits and program design, museum standards prevailed. The rigour of the standards was negotiated during planning meetings, but it was a point on which the museum champions did not capitulate. They drew firm boundaries that met with the tacit approval of community participants.

How does a museum decide who to collaborate with? What interests should receive the highest priority? In Chilliwack, the issue is to look beyond the historical society that founded the museum and provide service to the whole community. (Excerpt from Harper, Lynette, *Building for Success: Collaborating with Our Communities*, Muse, Vol. XIV/2, 1996)

Self-assessment – An organized and systematic process by which an organization regularly re-examines its goals and objectives, structure, processes, and collective and individual performance. The self-assessment is a process that above all is intended to be constructive, a process of discovery that is positive and useful.

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