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Engaging your Community: A Toolkit for Museums

2015

TAMARACK
An Institute for Community Engagement
www.tamarackcommunity.ca

Adapted from:

Building Responsive Museums:
A Discussion Framework

The LEARNING COALITION

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

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Engaging your Community: A Toolkit for Museums (2015)

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Overview

The Ontario Museum Association (OMA) believes that museums are a critical and necessary element in a healthy society, as one key vehicle through which an appreciation and understanding of our connections to natural and cultural history are formed.[1]

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.

What is *Engaging your Community: A Toolkit for Museums*?

Engaging your Community: A Toolkit for Museums is a process through which individual museums can work with their communities to assess their relevance and create a plan to deepen their relationship with the community, in turn increasing the sustainability of the museum.

It is intended to:

- Provide your museum with a process to deepen your understanding of what community engagement means to you;
- Examine, evaluate, and articulate your current relationship with and role in your community;
- Explore how community engagement can be part of planning and delivery, at all levels and in all aspects of the museum.

Engaging your Community: A Toolkit for Museums is not a strategic planning process; it is a community engagement and self-assessment process. It is a process that can inform the creation of a new strategic plan or the implementation of a current one.

Who is it for?

Engaging your Community Museums 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 years. The *Engaging your Community* toolkit can help staff (paid and volunteer), boards, advisory boards, and communities to examine their perceptions, their involvement and their experience with the museum.

In addition to having a dedicated team at the museum to champion this process and commit to following through with the identified priorities, it is important to bring a diversity of participants into this process. 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.

[1] Ontario Museum Association. *Reinforcing Relevance: The Strategic Plan of the OMA, 2010-2015. Summary Version*. Ontario Museum Association website. PDF file.

Why use *Engaging your Community: A Toolkit for Museums*?

Because:

- Community engagement is an objective in your strategic plan and you need help to translate that into action;
- You are starting a strategic planning process and you need to bring your museum's goals into alignment with the community's goals;
- You are experiencing one of the common triggers on the Possible Triggers for undertaking *Engaging your Community: A Toolkit for Museums* (p. 44)
- You believe that it is important for your museum to build sustainable, long term relationships with stakeholders and groups in your community;
- You want your museum to be connected and relevant;
- You believe that your museum should identify the needs of your community, and that ongoing community engagement should be embedded in the infrastructure of your organization;
- You want to be better able to assess your museum's impact on the community you serve;
- You want to achieve outcomes for your museum such as:
    - Museum staff and board are better informed about the museum's current role in your community.
    - Museum staff and board are able to articulate the museum's desired relevance and worth within the community.
    - Museum staff and board, together with community members, share goals and priorities, leading to programs and services that have meaning and value within your community.

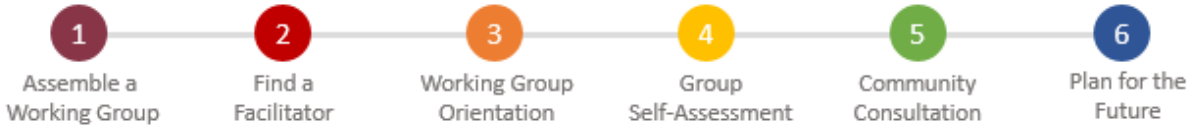
Are you ready?

From participants, the program requires:

- Board and staff leaders committed to being involved
- Commitment to community building across the organization (financial and operational)
- Time dedicated to think, discuss and plan
- Commitment from everyone involved to think critically about what the museum does and an open mind to see opportunities and new ways of operating

This process will stimulate discussion for your museum to explore how you define your community, how you currently engage with your community and how you can increase that engagement to benefit your 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 strengths and improve your weaknesses. Undertaking this process already demonstrates organizational maturity by coming together and thinking about what you do and why you do it. Bravo!

The Process



Engaging your Community: A Toolkit for Museums follows a 6-step process that typically takes between 4-9 months to complete:

1 **Assemble a Working Group**

Create a Working Group to lead and champion this process in your museum. Form a small group that represents several kinds of people involved in the museum, including staff, board members, and volunteers. See page 8.

2 **Find a Facilitator or Choose a Team Leader**

The facilitator plays a vital role in this process by ensuring equal participation, helping your group stay focused to allow for productive discussion, ensuring action items are documented, and providing clarity to the process and next steps. See page 9.

3 **Working Group Orientation**

Orient your Working Group to the purpose in undertaking the process. What do you hope to discover or do through this process and how will it inform your work? Schedule your Self-Assessment, Community Consultation and other meetings. See page 10.

4 **Group Self-Assessment**

Organize an internal self-assessment session for your Working Group as well as other staff, board, and volunteers. This session will help you to find a starting point of shared information and will include discussion on Mission and Planning, Audience and Community, Community Perception, Community Experience, and Community Involvement. See page 11.

5 **Community Consultation**

You have already gathered the impressions and feedback of the staff, board, and volunteers of your museum, and now it's time to hear from the community. The community consultation session is a time for aligning the museum's mission, programs and services with the community's objectives to achieve mutual goals. There are three different facilitation options available based on the number of participants, facilitator experience and community considerations. See page 19.

6 **Plan for the Future**

Compile the results of the community session and share them with internal and external stakeholders, and the community. Devise an action plan for moving the ideas forward to become reality. See page 39.

1

Step 1: Assemble a Working Group

Form a small group that represents several kinds of people involved in the museum, including staff, board members, and volunteers. The goal of the Working Group is to help steer the museum through the *Engaging your Community* process.

Size:	5-10 people
Composition:	Staff, Board, Volunteers. Diversity is important so ensure there is a representative balance between staff, board members and volunteers. Ensure someone in the group has the authority to approve decisions as they are made by the group.
Criteria:	Working Group members need to have an interest in deepening the relationship between the museum and the community and must be available for the duration of the project.

Helpful resources:

Sample terms of Reference (p. 46)

2

Step 2: Find a Facilitator or choose a Team Leader

A skilled facilitator ensures that your ideas and action items are documented and helps your group stay focused on the discussion and results, rather than getting bogged down by 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.

If you are unable to bring in an external facilitator, choose someone within your museum to lead the group through the *Engaging your Community* process. This individual should have the ability to lead group processes, and be a good listener and clear thinker, especially when the group gets bogged down. They need to be unbiased and neutral throughout the process.

Role of the Facilitator/Team Leader[2]:

- Understands the complete process
- Is a neutral servant of the group
- Coordinates pre and post meeting logistics
- Prepares session materials
- Facilitates discussions in groups of up to 60 people
    - Clearly defines their role
    - Encourages participation
    - Does not evaluate or contribute ideas
    - Focuses the energy of the group on a common task
    - Protects individuals and their ideas from attack
    - Helps the group find win-win solutions
    - Suggests alternative methods and procedures
- Documents discussion outcomes
- Shares notes, decisions and next steps back to the group

Helpful Resources:

How to Find a Facilitator (p. 47)

[2] Adapted from Terri Potter, et al. *Basic Facilitation Skills*. Government of Alberta, Alberta Culture and Communication Spirit, Community Development Branch. 2010. Print.

3 Step 3: Working Group Orientation

Orient your Working Group to the purpose in undertaking the *Engaging your Community* process, discuss the goals of the group and get aligned, and schedule the sessions and meetings for the duration of the project.

Orientation Agenda:

1. Welcome and introduction
2. Review the *Engaging your Community: A Toolkit for Museums* Overview
3. Discussion: What do you hope to discover or do through this process and how will it inform your work?
4. Discussion: What internal or external triggers are relevant to your museum? (Use the Possible Triggers list)
5. Discussion: The state of Community Engagement (See the Community Engagement Resource)
    - Are there organizations in your community demonstrating exceptional leadership in community engagement?
    - What are the success stories and what does success look like?
6. Schedule tasks, sessions and meetings:
    - Group Self-Assessment
        - Task: Gather Background Information (1 team member, approx. 3 hours)
        - Meeting: Group Self-Assessment (working group, 3 hour meeting)
    - Community Consultation
        - Task: One meeting to schedule the consultation sessions, firm up logistics and invite participants (Working Group)
        - Session: Facilitate Community Consultation sessions – One ¾ day session or three 2-hour sessions (working group, community participants)
        - Meeting: Working Group debrief and follow up (2 hour meeting)
    - Plan for the Future
        - Meeting: Planning meeting (2-3 hour meeting)
7. Develop the Terms of Reference for your Working Group (optional)

Helpful resources:

Possible Triggers for undertaking the *Engaging your Community: A Toolkit for Museums* process (p. 44)
Community Engagement Resource (p. 48)
Sample Terms of Reference (p. 46)

4

Step 4: Group Self-Assessment

The self-assessment phase 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. It is a time to take stock, celebrate successes, and re-energize to build capacity for future opportunities.

STEPS – OVERVIEW

1) Gather background information (one team member)
2) Group Self-Assessment (Working Group) (p. 49)
    a. Share Information
    b. Group Self-Assessment
    c. Identify opportunities

SNAPSHOT

Timeframe

Team member gathering information: 3 hours

Working Group: 3 hour meeting

Participants

Working Group

Facilitator

Materials

Post-it notes

Blank wall or whiteboard

Markers or tape

---

1) Gather Background Information

Who: One Working Group team member

Time: 3-5 hours

Appoint a team leader or staff member to be responsible for gathering the information listed below. This person can enlist the help of other team members if desired. This information will be shared at the start of the group self-assessment to provide background information so that all participants have the same contextual information as a base.

Questions:

1) According to your mission statement or strategic plan, who is the museum's current target audience (people or groups that the museum wants to be its primary users)?

2) According to your mission statement or strategic plan, what is the museum's responsibility to or relationship with your community?

3) How is your strategic plan measured or evaluated? Describe any known outcomes/outputs of the museum's work as it relates to the community over the past 3 years. If you do not have a strategic plan, how do you measure whether the museum is fulfilling its mission?

4) Does your museum have a way to keep informed about the community – its demographics, changes, what's happening, needs/issues? What are these sources and are they sufficient?

5) Describe in detail your museum's community:

    a. Geography

    b. Demographics

    c. Economics

    d. Politics

    e. History

    f. Strengths

    g. Challenges

    h. Important current issues

6) Describe the museum's sources of income. What amount or percentage comes from key community supporters?

7) 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 prototype/scale model, testing label copy, etc.
    - Summative evaluation – analysis of impact and effectiveness of a completed exhibition or program

2) Group Self-Assessment

Who: Working group + facilitator

Time: One meeting (3-4 hours)

Process:

a) Share Information

b) Group Self-Assessment

c) Identify opportunities

a) Share Information

The team member who gathered the background information should share the findings with all participants. This can be presented verbally, through a presentation, or handout that participants review together. This will allow all group members to be grounded in the same contextual information before starting the self-assessment. *(30 mins)*

If there are key documents that should be reviewed by participants (such as a strategic plan) these can be shared in advance of the session.

b) Group Self-Assessment

The group self-assessment is led by the facilitator with all Working Group members participating. This exercise takes stock of the current activities, programs and initiatives of the museum, and draws attention to the areas of opportunity for deepening the museum's relationship with the community.

For the first part of this exercise, complete Step 1 and Step 2 for a category, then move on to the next category.

5 mins setup
15 mins per category (Step 1 – 10 mins, Step 2 –5 mins)

STEP 1

The facilitator asks participants to individually write down the programs, activities, services and strategies that the museum carries out within each of the following five categories. Each example/activity should be written on a separate post-it note.

Facilitator tips:

- *If there are more than 8 participants, this can be done in small groups of 2-3 rather than individually*
- *Ring a bell to signal each 10 minute interval and prompt participants to move to Step 2*
- *This is a brain-dump exercise, so encourage participants to write down whatever comes to mind*
- *Print the* Group Self-Assessment *question handout for participants to reference* (p. 49)

Category 1: Mission & Planning

Mission and Planning asks questions about the museum's mission and strategic plan and how it relates to the community.

On individual post-it notes, write down:

- Ways the museum's mission statement or strategic plan is communicated/shared with the community
- Ways the museum's mission statement or strategic plan serves the community
- Ways the strategic plan prioritizes deepening the museum's relationship with the community

Category 2: Audience & Community

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.

On individual post-it notes, write down:

- Ways the museum has defined its target audience
- Ways the museum has a clear understanding of the community and its needs
- The programs and services being run that reflect the community's needs
- The programs, activities and services that are intended for specific target audiences
- The programs, activities and services that integrate audiences that normally would not interact

Category 3: Community Perception

Community Perception focuses on how the museum keeps in touch with the community and how the community responds to the museum.

On individual post-it notes, write down:

- Ways in which the museum markets its programs/exhibits to the community
- The ways in which the museum gets an understanding of how the public perceives the museum and its programs
- Ways that the museum changes and adapts according to the community's needs
- Ways that museum staff, volunteers and board members act as ambassadors for the museum
- How the museum is portrayed in the media

Category 4: Community Experience

Community Experience is all about the community's interactions with, and responses to, the museum through exhibitions, programming, research and services.

On individual post-it notes, write down:

- What the community enjoys about your museum (key assets and strengths) and how you know it
- Ways the community is welcomed into the museum
- Activities that the museum offers outside of 'the norm' (regularly scheduled exhibits and programs) for the community to interact with the museum
- Ways that the museum gains information from the community to shape future programs, services and exhibits

Category 5: Community Involvement

Community Involvement examines the museum's interaction with the community through partnerships, volunteerism, staffing, board membership and financial planning.

On individual post-it notes, write down:

- Ways the museum profiles local community members or community groups
- Ways in which members of the community are involved in the museum in a deeper capacity than being a visitor
- Ways in which volunteers are recruited
- Ways the museum is involved in community events and programs organized by others
- Partnerships the museum has with community groups
- Ways in which the museum collaborates with the community
- The degree to which the demographics of the staff, volunteers, and board reflect the make-up of the community
- Ways that staff and board members interact with the community to inform their decision-making
- Any advisory committees or Friends groups that exist
- Training and development opportunities for staff, volunteers and the board to improve their knowledge and understanding about the community

STEP 2

In advance of the session, the facilitator should create a large version (5'x7') of the grid below. This could be done by drawing the grid onto a large whiteboard or taping it out on a wall or floor – get creative!

The facilitator asks each person to bring their individual post-its to the grid and place each one in the appropriate category on the 1-5 scale. *(5 mins)*

Facilitator tips:

- *Encourage participants to ask another team member for their opinion if they're stuck on where to put it along the scale*
- *When all categories are complete, take a photo/document the final grid as this serves as a synopsis of community-related activities that the museum is involved in*

	1	2	3	4	5
	Early stage	**Developing**	**Moderately Developed**	**Well-Developed**	**Exemplary**
Definition:	*Have developed a plan but have not yet implemented it*	*Implemented X within the past year*	*Have been doing X for more than a year*	*Have been doing X for a number of years, it's going well and we are evaluating it*	*Have been doing X for a number of years, have evaluated it, and incorporated feedback*
Mission & Planning					
Audience & Community					
Community Perception					
Public Experience					
Public Involvement					

View Group Self-Assessment Step 2 (p. 51)

STEP 3

Do a walk-though so that all participants can read other responses. Ask participants to remove or pile the duplicate responses. If there are any discrepancies (for example, the same program is placed at both Moderately Developed and Exemplary) discuss this as a group and together determine where it best fits.

Stand back and observe *(30 mins):*

- Where are there clusters of post-its? What does that indicate?
- Which categories are more advanced?
- Which categories are in an early stage?
- Are there a lot of similar responses (e.g. Programs that really shine)?
- What are specific areas for improvement?

Facilitator tips:

- *Encourage the group members to make observations. Don't feel you need to do this all yourself!*
- *Invite the group to stand close to the grid rather than returning to their seats. This way they can interact, gesture, and get up close to read the post-its as needed.*

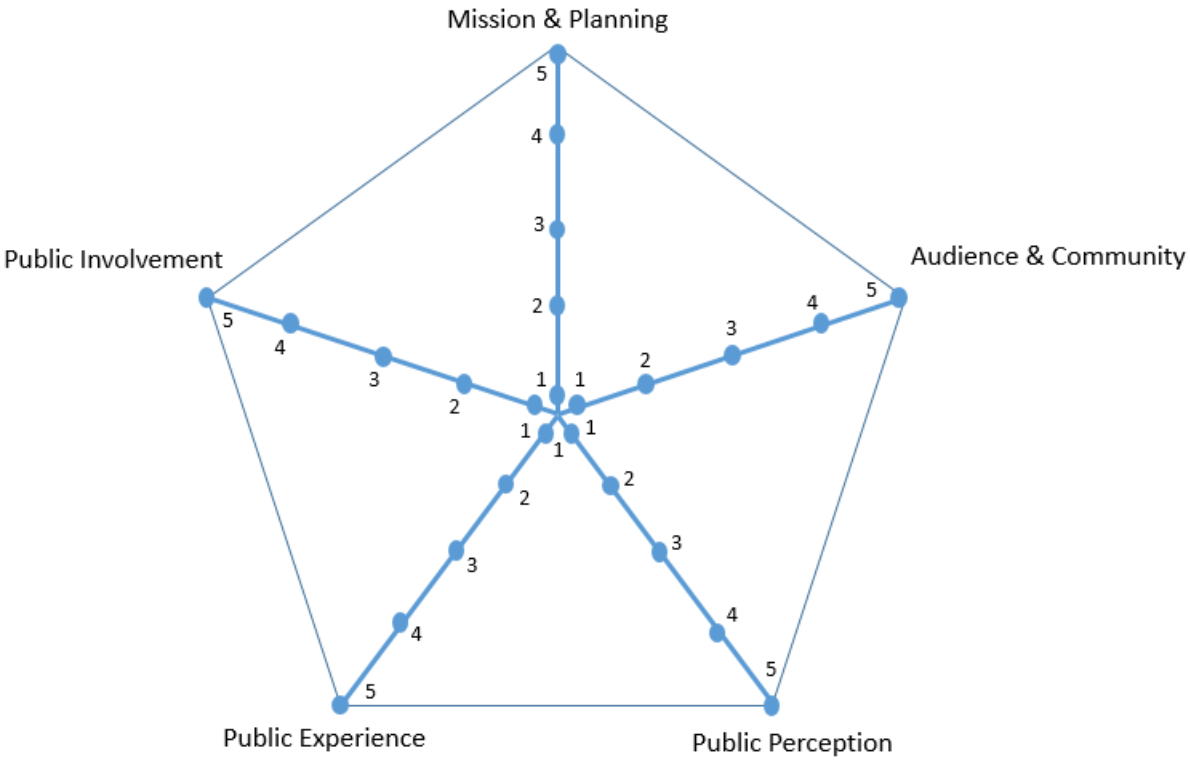
STEP 4

In advance of the session, the facilitator should create a large version of the diagram below. This could be done by drawing the spider diagram onto a large whiteboard or taping it out on a wall or floor.

As a group, decide where along the spectrum your museum would be in that category based on the observations and discussion.

- One way to determine where along the spectrum the museum should sit in each category is to count the number of post-its in each box. Then discuss whether this accurately represents the observations of the group.
- Another way is to do a good ol' show of hands voting system for each category. E.g. Raise your hand if you think we're a 1,2,3…

Plot each category on the spider diagram below by circling the dot and number. *(10 mins)*



View Spider Diagram (p. 52)

Draw lines between each circle. This accentuates the categories that the museum is doing well in and shows the areas where more work needs to be done.

c) Identify Opportunities

List any ideas and opportunities that came out of the observation stage or plotting stage. Highlight the ideas that generate a lot of excitement from the group. Identify any quick wins vs. longer term initiatives. *(30 mins)*

This list will be kept and referenced following the community consultation. Together the insights and ideas will be prioritized based on the community and museum's needs.

5

Step 5: Community Consultation

The community consultation is a time for aligning the museum's mission, programs and services with the community's objectives to achieve mutual goals. Museums should serve and be responsive to their community, and by strengthening the relationship between the museum and the community, the museum is more likely to be relevant, ensure ongoing support, and be sustainable in the long term.

Goals of community consultation:

- Understand the museum's relevance and worth within the community and establish a desire to strengthen the relationship with the community
- Identify the assets within the community and opportunities for partnerships
- Generate ideas for programs and services that have meaning within your community
- Prioritize the ideas for programs and services to understand which are most important to the community
- Gauge interest in participation and leadership

SNAPSHOT

Timeframe

Scheduling and inviting: 2 months' notice

Community Consultation: 1 day session, or three two hour sessions

Working Group debrief: 2 hour meeting

Participants

Working Group

Community Members

Facilitator

Materials

Listed by facilitation plan

STEPS

1) Schedule the consultation sessions and Invite participants (Working Group)
2) Facilitate Community Consultation sessions (Facilitator, Working Group, Community participants)
3) Follow up with the participants with notes and next steps

---

1) Schedule and Invite

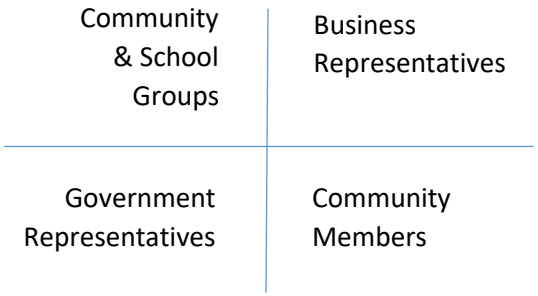
Use a Working Group meeting to work through the tasks associated with scheduling the community consultation sessions and inviting community participants.

Schedule the community consultation sessions

1. Determine whether one ¾ day session or three 2-hour sessions would be most desirable to the community.
2. Schedule dates and book a facility to host up to 60 people. If there is interest from more people, consider running the community consultation twice.

Who to invite

In order to gain rich and representative insight, it is important to invite key community groups, business representatives, government representatives, and community members to be involved. When creating the invite list, be sure to get representation from people in all four quadrants:



Determining who to invite:

- Use the Generating Ideas for Who to Invite to the Table list to generate ideas for who to invite (p. 53)
- Write down the list of names or organizations and next to each write down who on the Working Group has the closest relationship with that person (Inviting People to the Table) (p. 54)
- Also consider an open invitation to the community. Have this invitation link to a sign up form so that you know how many people to expect. In the sign up form include a field for the individual to select their affiliation – Government Representative; Local Business Representative; Community Group Representative; Community Member. (There are many free form tools including Eventbrite, Google forms, and Survey Monkey)
- You are looking for 30-60 people in total and want equal representation across the four categories

How to invite:

- Invite participants to participate personally. Divide and conquer the list within the Working Group and each invite the people with whom you have a relationship
- Explain to each person why they are being invited, what their role will be, and what the outcomes of the process will be. (Use the Invitation Template for guidance, p. 55)
- Explain the time commitment and set clear expectations
- Generate excitement! They can directly influence future ideas and programs and enrich their community
- Track RSVPs as they come in and prepare a list of participants with complete contact information
- Confirm attendance for the workshop at least 3 days prior with directions and parking information

2) Community Consultation

The community consultation session is a rich time for connection and brainstorming to dream up the future of the museum and its relationship to the community.

Opening:

The opening can be led by the facilitator together with a museum representative and include the following items:

- Why the museum is undergoing this process (what triggered the museum, key issues, etc.)
- Describe successes to date in forming a relationship with the community. In this process we're allowed to re-think and improve upon these ideas too!
- Why they were invited (i.e. critical to collaborate with the community in developing ideas; representation from diverse groups)
- Overview of the *Engaging your Community* process and this session
- Getting in the right mindset (open-mindedness, creative thinking, critical thinking)
    - Share creative possibilities (LatimerNow, p.56 ; Re:Make, p. 58)
- Icebreaker
    - Suggestion: Speed Dating. Have three rounds of pairing up with someone you don't know really well.
        - Round 1: What's your favourite thing about this community?
        - Round 2: What do you like to do for fun?
        - Round 3: Why is it important that you are here today?

Facilitation options:

There are three different facilitation options for the community consultation ranging in style. Select the style that is the best fit for the museum and the participants.

Facilitation Option	Number of participants	Amount of facilitation	Community considerations	Page
A. Community Conversations	20 – 60 people	Less facilitation required	Accessible for any type of community	23
B. Serious Play	10 – 50 people	Some experience with facilitation needed	Requires more creativity and abstract thinking	28
C. Visioning Change	10 – 50 people	Experienced facilitator required	Helpful if some momentum has already been built around Community Engagement	33

FACILITATION OPTION A:
COMMUNITY CONVERSATIONS

Community Conversations Orientation

Community Conversations are a series of conversations between people to explore an issue. Through talking with each other we build connections and relationships, learn from one another, and stay connected with each other.

The process of a Community Conversation is to:

1. Get people talking and sharing their experiences with each other.
2. Co-generate learning between people by capturing insights, patterns and inspiring stories.
3. Create recommendations that will increase the capacity of the museum to build and strengthen their relationship with the community and to better handle the issues they face.

MATERIALS

Room set up in circles

Timer

Post-it notes

Markers

Printed worksheets

Tape or sticky tack

Star stickers

Community Conversation Facilitation

Divide the participants into groups of 6-10 and have them sit in a circle either at tables or simply by moving their chairs. Ensure Working Group members are present in each circle.

For each round of conversation, each circle should appoint a conversation leader and a note-taker.

- The role of the conversation leader is to a) ensure everyone gets a chance to speak, and b) help the group stay on topic.
- The role of the note-taker is to capture key insights on individual post-it notes.
- These roles can change each round so that the responsibility is shared.

Within each round of conversations, address the questions one at a time. Allow participants to share stories and experiences. Be welcoming and inquisitive.

Towards the end of the allotted time for that round, remind the group to capture key insights on the post-it notes (top 3 per question).

The session facilitator can collect these post-its and cluster them into themes as they are stuck onto a wall (there is plenty of time to do this as the groups participate in the next round of conversation).

ROUND 1

Understand the museum's relevance and worth within the community and establish a need to strengthen the relationship with the community

Q1. How would you describe the values and goals of this community?

Q2. What does the museum mean to you? How do you think your feelings are the same or different to the wider community?

Q3. Do you think this museum is connected with the community? Why is a connection with the community important?

(30 mins)

Remind the group to capture key insights on the post-it notes (top 3 per question) and hand them in to the facilitator.

ROUND 2

Identify the assets and opportunities within the community

Q1. When you think of this community, which organizations, institutions, groups, places and people (leaders, 'celebrities', do-ers, change-makers) come to mind as representing the community?

Q2. What barriers to participation exist within your community? Do they affect specific groups that you can identify?

Q3. Of all the groups, places, opportunities and barriers named, which do you think the museum could play a role in forming/strengthening a relationship with and why? (Select a max. of 5 per table)

(30 mins)

Remind the group to capture key insights on the post-it notes (top 3 per question) and hand them in to the facilitator.

ROUND 3

Generation of ideas for programs and services that would have meaning within your community

Q1. Think of ideas for ways the museum could go beyond its walls and into the community through these groups/places/people identified above (stretch the mind, there are no bad ideas!)

Q2. Think of ideas for ways these groups/places/people could come into the museum (think – programs, services, roles, responsibilities, access, events, etc.).

Q3. Of the ideas generated so far, which are standing out as having some potential (select 3 - 5)? How could each idea be improved? Write each idea on the front of an Idea Worksheet (p. 61) with overview information.

(45 mins)

Share back to the large group

1. Have each circle share their top ideas (2 mins per idea).
2. Paste the idea worksheets on the walls around the room.

(30 mins)

Dotmocracy

1. Remind everyone of the goal (of establishing a deeper, more sustainable relationship between the museum and the community), then ask everyone to walk around the room and put a star next to their top three ideas.
2. Count all the stars each idea has and write the number next to the title.
3. Gather the top 5-10 ideas (depending on group size) with the most stars together in a space everyone can see.

(10 mins)

ROUND 4

Expanding the promising ideas. Place each of the 5-10 top idea worksheets at a different table. Ask each person to go to the table of the idea that most interests them for this last round.

With your group, discuss the following questions and document on the back of the Idea Worksheet (p.61):

1. What problem is this idea solving?
2. Who could benefit from this idea?
3. Where will this idea be used?
4. When can this idea be used?
5. How can we make this idea better?
6. What do you need to make it real?

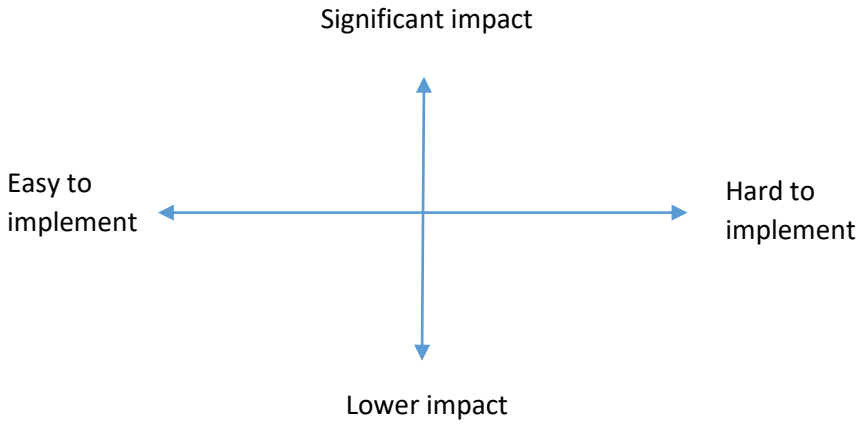
(30 mins)

Share back with the full group by having each table present their idea.

(10 mins)

Draw the following grid on a whiteboard or flipchart paper at the front of the room. To complete each share back, ask the table where they would plot the idea on the grid. Validate this placement with entire room as you write the name of the idea in the appropriate place on the grid. If there are differing perspectives, take a few minutes to discuss and together arrive at where to place it on the grid.

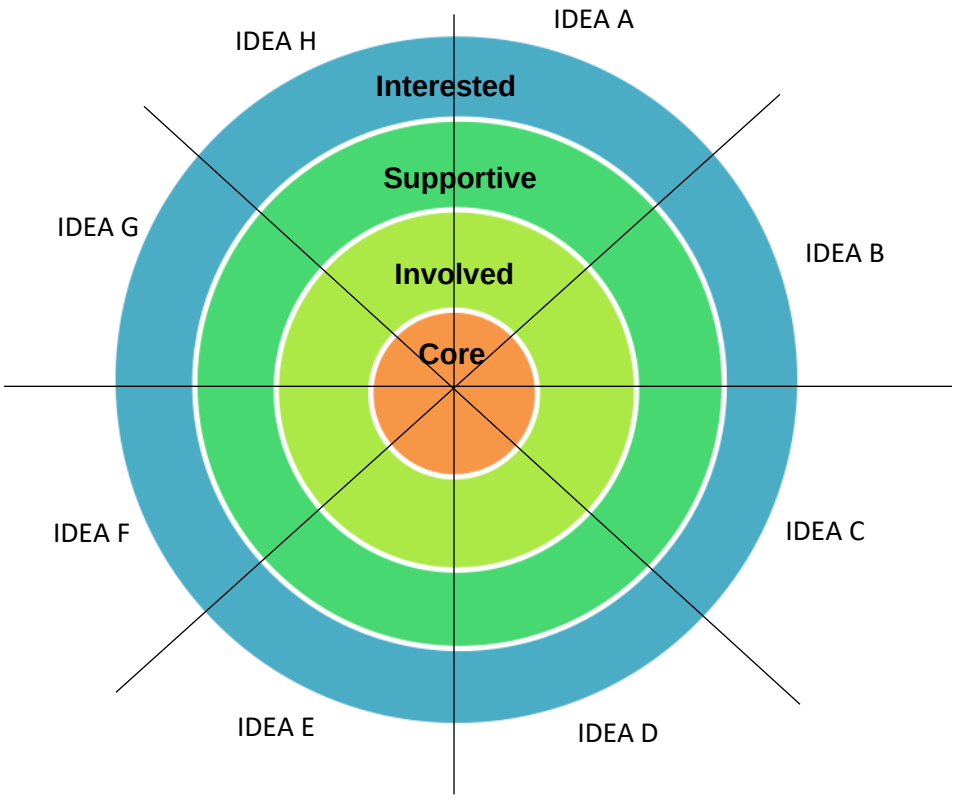
The facilitator should collect each group's idea worksheet once they are finished presenting.



Closing exercise:

Use the Wheel of Engagement Worksheet (p. 62) to gauge interest in participation and leadership

- Take a few moments to summarize at a high-level how each level is defined:
  - **Core** - interested in being actively involved in the functioning and development of the idea
  - **Involved** - want to be frequently consulted and given opportunities to provide in-depth feedback. (i.e. attending topic specific/community specific/age specific discussions or workshops)
  - **Supportive** – want to provide some form of support and input (i.e. attending future community forums, answering surveys and providing input online)
  - **Interested** – want to be kept informed of the progress of the initiative, but not be directly involved in the work (i.e. newsletter, informed about opportunities to participate in events)
- Read out the top 5-10 ideas and ask participants to write them around the wheel
- Ask people to place a dot (or dots) to indicate the level of involvement they would like to have for each idea in putting the ideas explored today into action
- Hand these in to the facilitator



(10 mins)

Closing comments

The Facilitator/Working Group representative should thank the group for their participation and close the session by discussing the following items:

- Next steps in the process
- How we will share outcomes etc.
- Accountability back to you, the community
- Timeline

FACILITATION OPTION B:
SERIOUS PLAY

Serious Play Orientation

Community Consultations can be fun! Serious Play uses creative exercises and games to arrive at rich insights.

The process of Serious Play is:

1. Draw your Community
2. Community Scattegories
3. There's no such thing as a bad idea
4. Prioritize Ideas
5. Grow the Ideas

MATERIALS

Room set up in circles

Paper and drawing/craft supplies

Timer

Markers

Printed worksheets

Tape or sticky tack

Star stickers

Community Conversation Facilitation

Throughout the session, participants will work individually, in small groups of 3-5, in large groups of 8-10, and as a full group. The ideal room arrangement is a setup of large round tables.

---

1. DRAW YOUR COMMUNITY

Individually, draw a picture of your community. Use the craft supplies provided and get creative! Start with whatever comes to mind when you think of your community. Add in the places and events that stand out. Add in the groups or people who connect others. Add in non-physical things too to describe the value that different places hold. Your picture doesn't need to be a geographical representation or to scale.

(15 mins)

Share your picture with your table group. Go around the circle and present.

(10 mins)

As a group, discuss:

1. What are the commonalities in these pictures?
2. What are the differences in these pictures?
3. Is anything missing from these pictures?
4. What opportunities do they signify within your community?
5. What barriers exist within your community?
6. How was the museum included/or not included in these pictures? How connected is the museum to the community?

(15 mins)

To close this activity, the facilitator should ask the whole group for any insights from the discussion.

(5 mins)

2. COMMUNITY SCATTEGORIES

At each table group, play a game of scattegories! You have 1 minute to write down as many things as you can think of for each assigned category using the Scattegories Worksheet (p. 63).

Use the following categories one at a time:

1. Events in your community
2. Community and education groups
3. Local or community-minded businesses
4. Places in your community
5. Well-known people/change makers in your community

After the minute is up, go around the circle naming the things generated for that category. If you have the same thing written down as someone else, cross it off your list. The winner for that round is the person who has the most unique responses. (Use the blank Scattegories Worksheet to scribe your table's list as you go so that you have a full list of all things generated.)

Repeat for the remaining 4 categories.

(30 minutes)

At the end of this game you will have generated a robust inventory of community assets.

3. THERE'S NO SUCH THING AS A BAD IDEA

This exercise is designed to stretch our minds to think about the far-out ideas.

Before starting this activity, have each person individually reflect on:

- Their hopes when they think about the future of this community
- The goal of establishing a deeper, more sustainable relationship between the museum and the community

(3 mins)

Ask participants to form into groups of 3-5. Take turns selecting two items from your table's scattegories list at random. Together, brainstorm ways that the museum could work with those two people/places/events/groups/events. Have fun and remember that there's no such thing as a bad idea. Often it's the crazy ideas that prompt a brilliant idea. Try to keep in mind your individual reflection from the beginning of this exercise so that the ideas generated are relevant. Write down each idea.

(20 mins)

Filtering out the great ideas:

With your small group, review your list of ideas and select your favourite five.

(5 mins)

With your larger table group, share your favourite ideas. Together, select the top 5 and write each one on the front of an Idea Worksheet (p. 61).

(10 mins)

Each table should present their top ideas to the larger group (5 mins per table). Post the idea worksheets around the room.

4. PRIORITIZE IDEAS

Through dotmocracy, it's time to prioritize the ideas. Ask everyone to walk around the room and put a star next to their two favourite ideas on each grid sheet.

Count all the stars each idea has and write the number next to the title. Identify the top 5-10 ideas (depending on group size) with the most stars together in a space everyone can see.

(10 mins)

5. GROW THE IDEAS

Assign each of the 5-10 top ideas to a different table. Ask each participant to go to the table of the idea that most interests them.

With the people at the table, discuss the following questions:

1. What problem is this idea solving?
2. Who could benefit from this idea?
3. Where will this idea be used?
4. When can this idea be used?
5. How can we make this idea better?
6. What do you need to make it real?

Take notes on the back of the Idea Worksheet (p. 61).

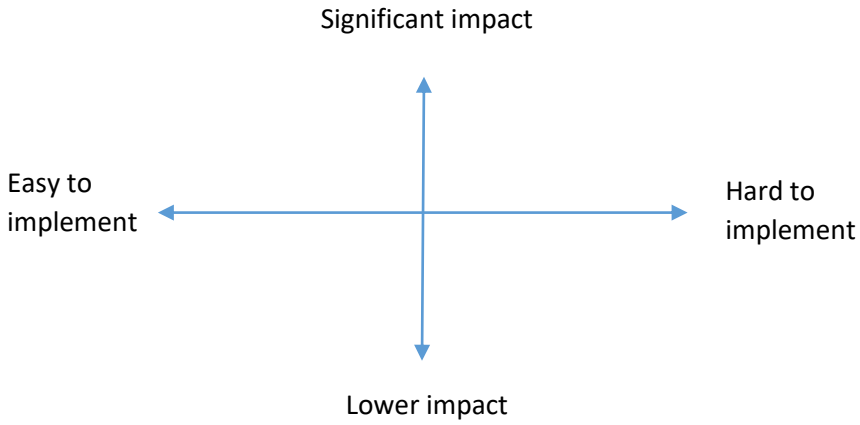
(30 mins)

Share back with the full group by having each table present their idea.

(10 mins)

Draw the following grid on a whiteboard or flipchart paper at the front of the room. To complete each share-back, ask the table where they would plot the idea on the grid. Validate this placement with the entire room as you write the name of the idea in the appropriate place on the grid. If there are differing perspectives, take a few minutes to discuss and together arrive at where to place it on the grid.

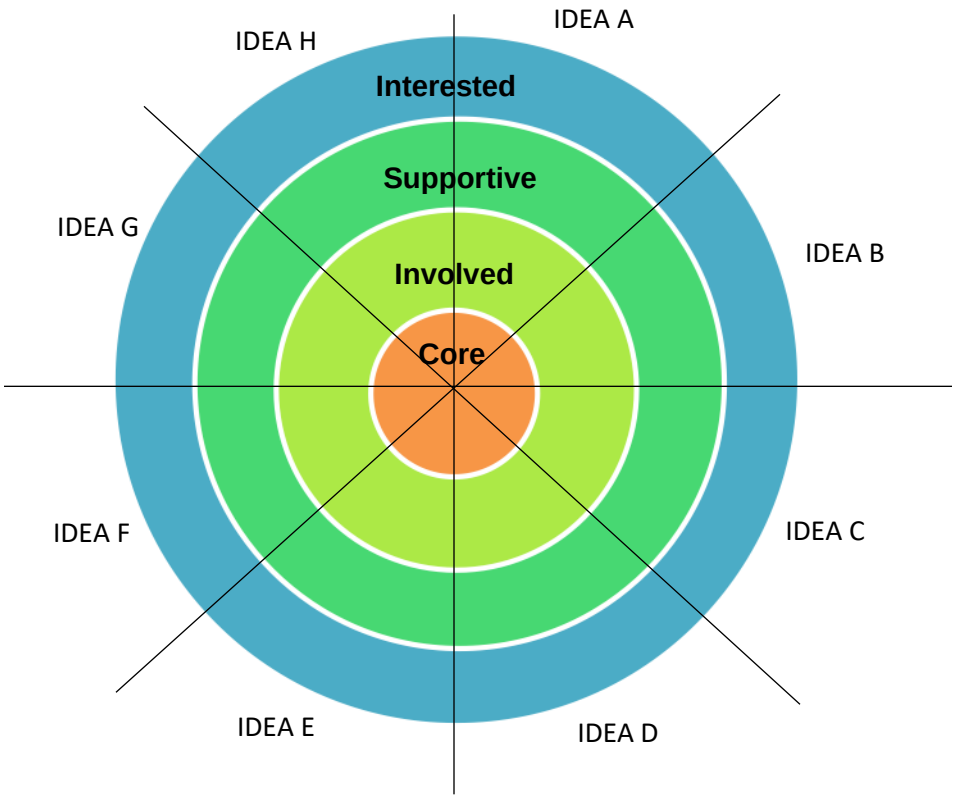
The facilitator should collect each group's idea worksheet once they are finished presenting.



Closing exercise:

Use the Wheel of Engagement Worksheet (p. 62) to gauge interest in participation and leadership.

- Take a few moments to summarize at a high-level how each level is defined:
  - **Core** - interested in being actively involved in the functioning and development of the idea
  - **Involved** - want to be frequently consulted and given opportunities to provide in-depth feedback (i.e. attending topic specific/community specific/age specific discussions or workshops)
  - **Supportive** – want to provide some form of support and input (i.e. attending future community forums, answering surveys and providing input online)
  - **Interested** – want to be kept informed of the progress of the initiative, but not be directly involved in the work (i.e. newsletter, informed about opportunities to participate in events)
- Read out the top ideas and ask participants to write them around the wheel
- Ask people to place a dot (or dots) to indicate the level of involvement they would like to have for each idea in putting the ideas explored today into action
- Hand these in to the facilitator



(10 mins)

Closing comments

The Facilitator/working group representative should thank the group for their participation and close the session by discussing the following items:

- Next steps in the process
- How we will share outcomes etc.
- Accountability back to you, the community
- Timeline

FACILITATION OPTION C:
VISIONING CHANGE

Visioning Change Orientation

This facilitation plan begins with individual and collective visioning as a starting point, which is then expanded upon to generate, prioritize, and grow ideas.

The process of Visioning Change is:

1. Community Scan
2. Community Visioning
3. Mind mapping ideas
4. Prioritizing ideas
5. Growing ideas

MATERIALS

Room set up in circles

Flip charts

Markers

Timer

Post-it notes

Printed worksheets

Tape or sticky tack

Star stickers

Community Conversation Facilitation

Throughout the session, participants will work individually, in pairs, in large groups of 8-10 (table groups) and as a full group. The ideal room arrangement is a setup of large round tables.

---

1. COMMUNITY SCAN

Think about your community – its assets and its opportunities. Get into pairs and take turns interviewing each other. Ask:

- What are the values that are core to this community?
- To you, what are the most valuable assets (places, people, events, groups, things) within this community?
- What are the biggest issues facing this community?
- What are your biggest hopes for this community?
- How do you imagine the future of this community?

You can take notes on the Community Scan Questions worksheet (p. 65).

(20 mins – 10 mins per person)

Pair up with another pair and share a summary of your discussion – what you heard, what stood out, the similarities and differences.

(10 mins)

The facilitator should document the discussion by asking groups to share back key insights and conversations.

(5 mins)

2. COMMUNITY VISIONING

Visioning Focus Question -
How do you want to see the museum engage and have a relationship with the community within the next 5 years?

Process –

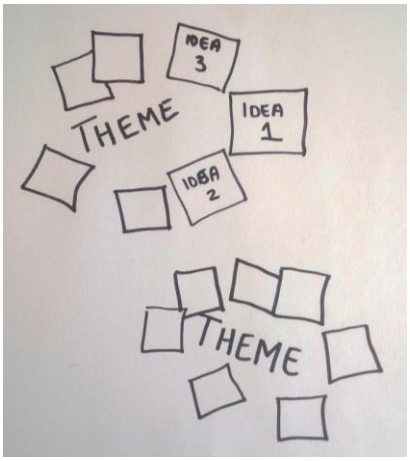
1. Individually and silently brainstorm responses to the focus question and write them down on a sheet of paper. *(5 mins)*
2. Share your ideas in table groups (7 to 10 people) to eliminate duplication, but honour diversity. Transfer the ideas to post-it notes writing one specific idea per post-it (2 to 6 words in bold big letters). Start to arrange them in priority sequence. *(10-15 mins)*
3. Share back with the full group. The facilitator will direct this in a round robin method (one idea per group at a time) in response to the following categories:

    - Round 1: Most important to achieve
    - Round 2: Most difficult to achieve
    - Round 3: Easiest to achieve
    - Round 4: Most different than others already up

    **For this exercise you want 30-40 ideas up so repeat the rounds as many times as is needed. As the last round, you can have a final category of: One that you want up that isn't yet captured.*

    As each group shares, they should stand and post the idea on the wall.

    - If it is similar or related in theme to another idea post it next to it and name the commonality.
    - The facilitator should label each themed cluster (different colour, big bold letters) as they emerge (e.g. Access to programs; better communication; community involvement in planning exhibits; etc.) Aim for 5-10 core themes.
      (15-20 mins)



4. In table groups, discuss the themes:

    - What stands out for you?
    - What do you like? What excites you overall?
    - What are the strengths of these themes?
    - What are the challenges of these themes?
    - What would be different for your community/museum if these themes were accomplished? *(10 mins)*

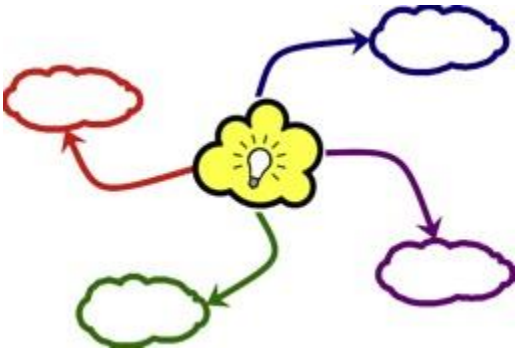
    The facilitator should document the discussion by asking groups to share back key insights and conversations.

    (5 mins)

3. MIND MAPPING IDEAS

Write each of the themes on large flipchart-sized paper around the room (whiteboards work well too). Make sure there are several markers with each theme.

Ask each table group to stand in front of a different theme (it's ok if there are more themes than groups).



Exercise: As a group, discuss ideas for how the themes could play out:

- Think of the opportunities identified in the community scan and how they may be connected
- Think of the various assets identified (places/groups/events/people) and how they may offer value
- Brainstorm specific program and service ideas

Add to the mind map! Draw in larger topics or target groups before expanding into specific ideas that could be implemented. Use different colours, lines and images.
(15 mins)

After 15 mins ask the groups to move clockwise to the next theme. As groups move to the next theme, they will be building upon the previous ideas already generated. *(After two moves, the time per vision can be reduced to 10 minutes.)*

4. PRIORITIZE IDEAS

Through dotmocracy, it's time to prioritize the ideas. Remind everyone of the goal (of establishing a deeper, more sustainable relationship between the museum and the community), then ask everyone to walk around the room and put a star next to their two favourite ideas on each theme sheet.

Count all the stars each idea has and write the number next to the title. Identify the top 5-10 ideas (depending on group size) with the most stars together in a space everyone can see.

(15 mins)

5. GROWING IDEAS

Assign each of the 5-10 top ideas to a different table. Ask each participant to go to the table of the idea that most interests them.

With your group, document the idea and discuss the following questions on the Idea Worksheet (p. 61):

1. What problem is this idea solving?
2. Who could benefit from this idea?
3. Where will this idea be used?
4. When can this idea be used?
5. How can we make this idea better?
6. What would be needed to make it real?

(30 mins)

Share back with the full group by having each table present their idea.

(10 mins)

Draw the following grid on a whiteboard or flipchart paper at the front of the room. To complete each share back, ask the table where they would plot the idea on the grid. Validate this placement with the entire room as you write the name of the idea in the appropriate place on the grid. If there are differing perspectives, take a few minutes to discuss and together arrive at where to place it on the grid.

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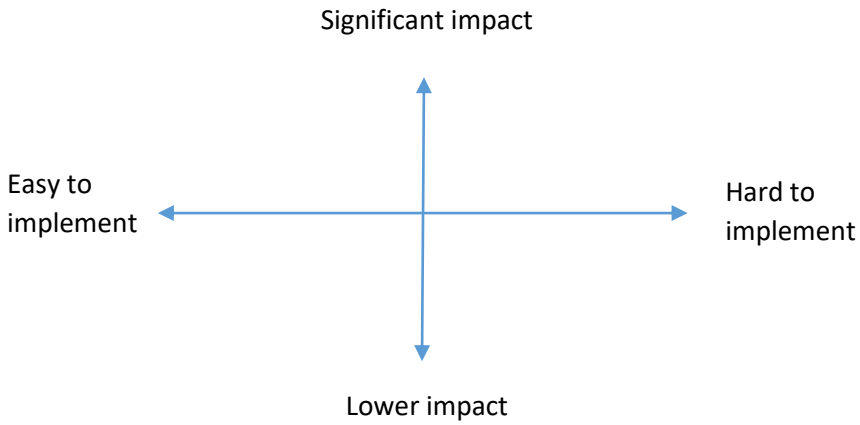

Closing exercise:

Use the Wheel of Engagement Worksheet (p. 62) to gauge interest in participation and leadership.

- Take a few moments to summarize at a high-level how each level is defined:
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- Read out the top ideas and ask participants to write them around the wheel
- Ask people to place a dot (or dots) to indicate the level of involvement they would like to have for each idea in putting the ideas explored today into action
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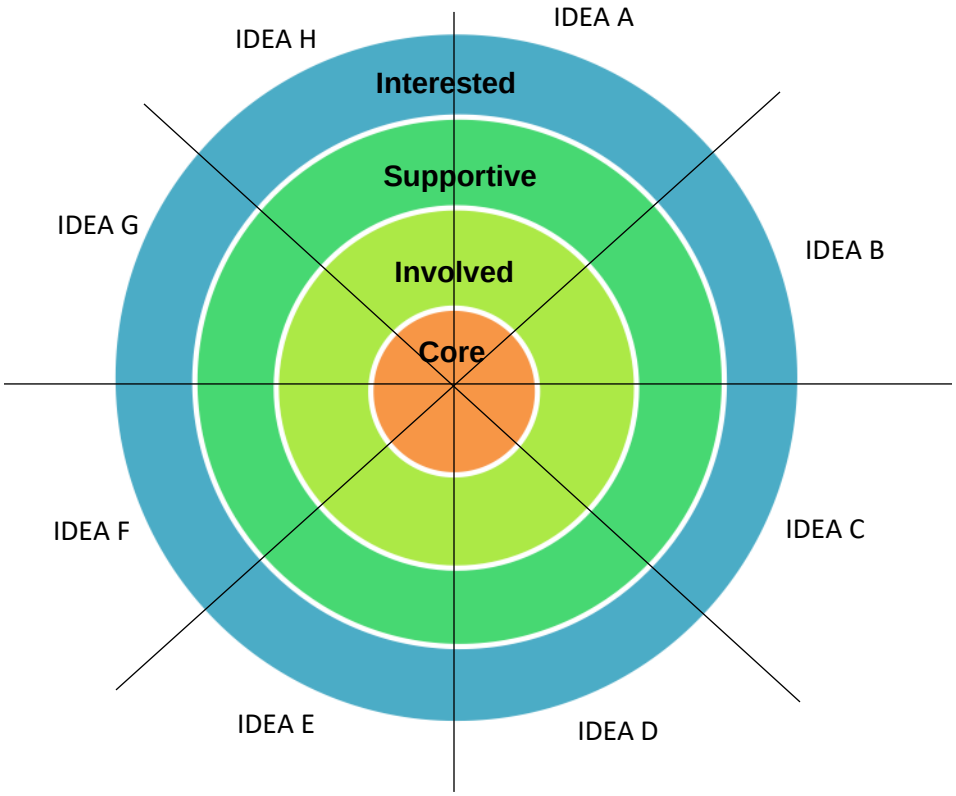

(10 mins)

Closing comments

The Facilitator/working group representative should thank the group for their participation and close the session by discussing the following items:

- Next steps in the process
- How we will share outcomes etc.
- Accountability back to you, the community
- Timeline

3) Follow up with the participants with notes and next steps (Working Group Meeting)

The facilitator should capture all notes, discussion outcomes, and take photos of any completed grids/flip charts/ whiteboards from the session.

Set up a Working Group meeting to debrief the community consultation (2-3 hours).

- Review the notes and Community Consultation Outputs
    - Impact/Implementation grid
    - Top idea sheets
    - Wheel of Engagement sheets

- Create a notes document to share back with participants. Include:
    - Photos of charts, maps, whiteboards etc.
    - Whole group insights that were shared throughout the session
    - Top idea sheets
    - Do not include Wheel of Engagement sheets
    - You are purely sharing back the outputs from the community consultation; don't feel you need to weigh in on the feasibility of ideas or commit to any ideas at this stage

- Compose an email to participants with the notes and next steps with timelines.

  The next steps can be as simple as letting participants know that the Working Group will debrief on a certain date and will be creating an action plan over the coming X months. You can commit to sharing the action plan back with participants too and ask for further involvement at that stage if needed.

6

Step 6: Plan for the Future

It's now time to take all of the outputs and learnings garnered throughout the *Engaging your Community* process and turn it into an action plan.

Each museum's action plan will look different depending on your stage of maturity, the reasons why you entered into this process in the beginning, the resources you have, the degree to which the museum and community are aligned, the commitment of the Working Group, and the amount of momentum that has been built throughout this process.

This step will begin with one Working Group meeting to debrief together, but will likely involve multiple meetings to devise your action plan, share it back with your stakeholders and the community, and to turn it into reality.

SNAPSHOT

Timeframe

Working Group: Initial meeting (3 hrs)

Participants

Working Group

Facilitator

Materials

Bring the outputs from the Self-Assessment and Community Consultations

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Process:

The facilitator will lead the Working Group in debriefing the entire *Engaging your Community* process so far.

Review:

- Group Self-Assessment outputs
  - Spider diagram
  - List of program/service ideas
- Community Consultation outputs
  - Impact/Implementation grid
  - Top idea sheets
  - Wheel of Engagement sheets

Highlight and discuss the points of alignment between the self-assessment and the community consultation. What are the priorities? What ideas generated the most excitement and interest?

Use the Engagement Mapping Tool (p. 66) to map the program/service ideas to the strategic area. For each idea, specify a larger engagement goal that the idea would help to achieve.

Based on the priorities indicated on the Engagement Mapping Tool, the Working Group will devise an Action Plan.

There are infinite possibilities for ways to move forward with the action plan with more or less integrated community involvement. Choose a method that works for the community and the museum, and best achieves your shared goals.

Examples of ways to move forward with the plan:

a) Working Group divides responsibilities in the plan and moves forward
b) Working Group augments its numbers with community members and moves forward. Use the Wheel of Engagement sheets (p.62) to invite community members to lead and be involved.
c) An advisory committee of community members is created to meet periodically to monitor the work of the Working Group
d) Working Group establishes partnership(s) to accomplish goals in the plan

If there are no points of alignment, your action plan should address the areas of disconnect and suggest ways to increase the alignment between the goals of the museum and goals of the community. Ideas for addressing misalignment include:

- Discussion and recommendations to the governing body
- Re-visit the group self-assessment
- Additional community consultations
- Re-visit the museum's strategic plan and/or the implementation of it

Helpful resources:

Template for a Community Strategic Plan
Results Worksheet: Putting it all together
Outcomes-Based Program Planning & Evaluation Workbook
Community-led Libraries Toolkit

- Community Entry (p.35)
- Relationship Building (p. 61)
- Partnerships (p. 75)
- Program Planning (p. 85)
- Customer Service (p. 111)

Community Collaborations Toolkit
The Partnering Toolbook

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Possible Triggers

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Why/When a Museum Might Decide to Use *Engaging your Community*

What is motivating your museum to use *Engaging your Community: A Toolkit for Museums?* The following symptoms or triggers suggest some possible motivators. Identifying the trigger for your museum is a useful first step in this process.

Internal Symptoms or Triggers

- Opportunities
    - Unexpected gain of financial support or resources
    - New or additional technology available to or acquired by the museum
    - 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
    - Planning to revise the museum's policies

- Decline in
    - Visitation
    - volunteer support
    - financial support from the community
    - membership
    - morale
    - qualified applicants for staff positions
    - governance support

- Facilities
    - Plan to move to a new location or facility
    - Major repairs or renovations to the current facility
    - Rising operating costs for the facility

- Collections
    - 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

- Major Change
    - Physical loss, e.g., building
    - Major staffing changes, e.g., new positions created, job descriptions redesigned, loss of staff through resignations or retirement, etc.

- Governance leadership
    - A new board has been elected
    - Difficulty recruiting board members
    - Lack of vision
    - Inability to articulate the museum's value to the community
    - Mission statement for the museum has not been evaluated or changed since the inception of the museum
    - Museum needs a new strategic plan to set a new direction for the museum
    - Museum has a new strategic plan

- Programs are
    - underutilized or unsuccessful
    - planned with little or no consultation with or representation from the audience for which a program is intended
    - receiving negative feedback from evaluations
    - not being evaluated

External Symptoms or Triggers

- Community Change
    - Demographic changes (e.g., people leaving the community, people moving into the community, aging population, 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 increased/decreased
    - New or increased competition from other leisure activities, facilities
    - New or increased competition from major events
    - Number of students in schools have increased/decreased
    - School closures/openings

- Higher cost of
    - Living
    - Utilities, insurance rates

- Politics
    - Election of a new government—municipal, provincial, federal

- Negative information about the museum has come to light in the community, i.e. negative publicity

Terms of Reference - Template

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

It is a good idea to establish a terms of reference for your working group. This will give your group an opportunity to manage expectations by determining the scope of the group's responsibility, along with the responsibility of each individual member, right from the beginning.

Official Name
Official name of the team or working group

Members/Composition
Roles / Responsibilities (e.g. chair, facilitator, report to the board) Identify various groups that will be represented on the team (i.e. board member, staff member, volunteer) What is the role of each team member?

Term of Membership
What are the terms of membership? (e.g. 6 month commitment).

Purpose
Discuss context of team - how, why and when was the group formed? What is their main purpose?

Goals
1. (primary)
2. (secondary)
3. (others)

Deliverables
Identify specific outputs required/requested from the team.

Jurisdiction
What are the bounds of responsibility and authority of the group? What do they need to address and what is outside their area of concern? What can they decide on and what needs senior leader input? What is within their scope of authority and what is considered outside their scope of authority?

Resources and Budget
Identify the resources required to meet the various objectives of the team – people, equipment, materials, rooms, funds, skills.

Governance
Decision-making technique. For example; consensus, 2/3 majority vote. What is considered a quorum? Relationships of authority within the group and with the greater organization. Who does the team report to?

Communications
How do members communicate within the team? By phone, meetings, email, mailing lists etc. How quickly should people respond? How is reporting back to the organization conducted? How does the team communicate with senior leaders?

Relationships to other groups
Is this group dependent or related to other committees, other working groups or board members?

How to Find a Facilitator

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

A skilled facilitator is a great asset in the *Engaging your Community* process. There are plenty of experienced consultants working in the museum and cultural sector you can hire, but there may be other organizations that can connect you with a skilled individual to help you at no charge.

- Your Ministry of Tourism, Culture & Sport/Citizenship, Immigration & International Trade Regional Advisor
    - http://www.citizenship.gov.on.ca/english/aboutus/ (link to regional service branch contacts)
- The Ministry of Agriculture, Food and Rural Affairs
    - http://www.omafra.gov.on.ca
- Your municipality - there may be some very skilled facilitators working with your municipality (e.g. the planning department) who could lend you their skills.
- Your union - if you operate in a unionized environment, ask if there is someone with facilitation skills willing to work with your group.
- Ontario Museum Association Services Directory
    - http://www.museumsontario.com/en/78
- Arts Consultants Canada
    - http://www.artsconsultants.ca
- CultureConsultants.ca
    - http://www.cultureconsultants.ca
- United Way (to connect to the United Way office in your area)
    - www.unitedway.ca
- Canadian Council of Human Resource Associations
    - http://www.cchra.ca
- Cultural Human Resource Council (CHRC)
    - http://www.culturalhrc.ca/index-e.asp

Community Engagement

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Community engagement is about people working collaboratively, through inspired action and learning, to create and realize bold visions for their common future.

As community engagement increases, citizens move from being passive to taking active leadership roles, as can be seen in the continuum below. As leaders, citizens can have a powerful influence and effect on the life of their communities.

Adapted From: Hashagen 2002 and Sydney Department of Planning 2003.

How the community can benefit:

- Involving people can contribute to community cohesion
- People feel that they have more ownership of and control over services
- Increased skills among the community
- Wider understanding of services that the library has to offer
- The community benefits from tailored services that better reflect its needs
- Services are strengthened and improved through partnership with volunteers and community organizations
- Active citizens are essential for healthy vibrant communities

Benefits to those getting involved

There are many benefits to people of getting actively involved in their communities. Involvement in the community can:

- Increase confidence
- Broaden experiences of diversity
- Influence career choices
- Allow for connectivity between people
- Reduce isolation
- Provide an opportunity to make friends

Group Self-Assessment

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Category 1: Mission & Planning

Mission and Planning asks questions about the museum's mission and strategic plan and how it relates to the community.

On individual post-it notes, write down:

- Ways the museum's mission statement or strategic plan is communicated/shared with the community
- Ways the museum's mission statement or strategic plan serves the community
- Ways the strategic plan prioritizes deepening the museum's relationship with the community

Category 2: Audience & Community

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.

On individual post-it notes, write down:

- Ways the museum has defined its target audience
- Ways the museum has a clear understanding of the community and its needs
- The programs and services being run that reflect the community's needs
- The programs, activities and services that are intended for specific target audiences
- The programs, activities and services that integrate audiences that normally would not interact

Category 3: Community Perception

Community Perception focuses on how the museum keeps in touch with the community and how the community responds to the museum.

On individual post-it notes, write down:

- Ways in which the museum markets its programs/exhibits to the community
- The ways in which the museum gets an understanding of how the public perceives the museum and its programs
- Ways that the museum changes and adapts according to the community's needs
- Ways that museum staff, volunteers and board members act as ambassadors for the museum
- How the museum is portrayed in the media

Category 4: Community Experience

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

On individual post-it notes, write down:

- What the public enjoys about your museum (key assets and strengths) and how you know it
- Ways the community is welcomed into the museum
- Activities that the museum offers outside of 'the norm' (regularly scheduled exhibits and programs) for the community to interact with the museum
- Ways that the museum gains information from the community to shape future programs, services and exhibits

Category 5: Community Involvement

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

On individual post-it notes, write down:

- Ways the museum profiles local community members or community groups
- Ways in which members of the community are involved in the museum in a deeper capacity than being a visitor
- Ways in which volunteers are recruited
- Ways the museum is involved in community events and programs organized by others
- Partnerships the museum has with community groups
- Ways in which the museum collaborates with the community
- The degree to which the demographics of the staff, volunteers, and board reflect the make-up of the community
- Ways that staff and board members interact with the community to inform their decision-making
- Any advisory committees or Friends groups that exist
- Training and development opportunities for staff, volunteers and the board to improve their knowledge and understanding about the community

Group Self-Assessment

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

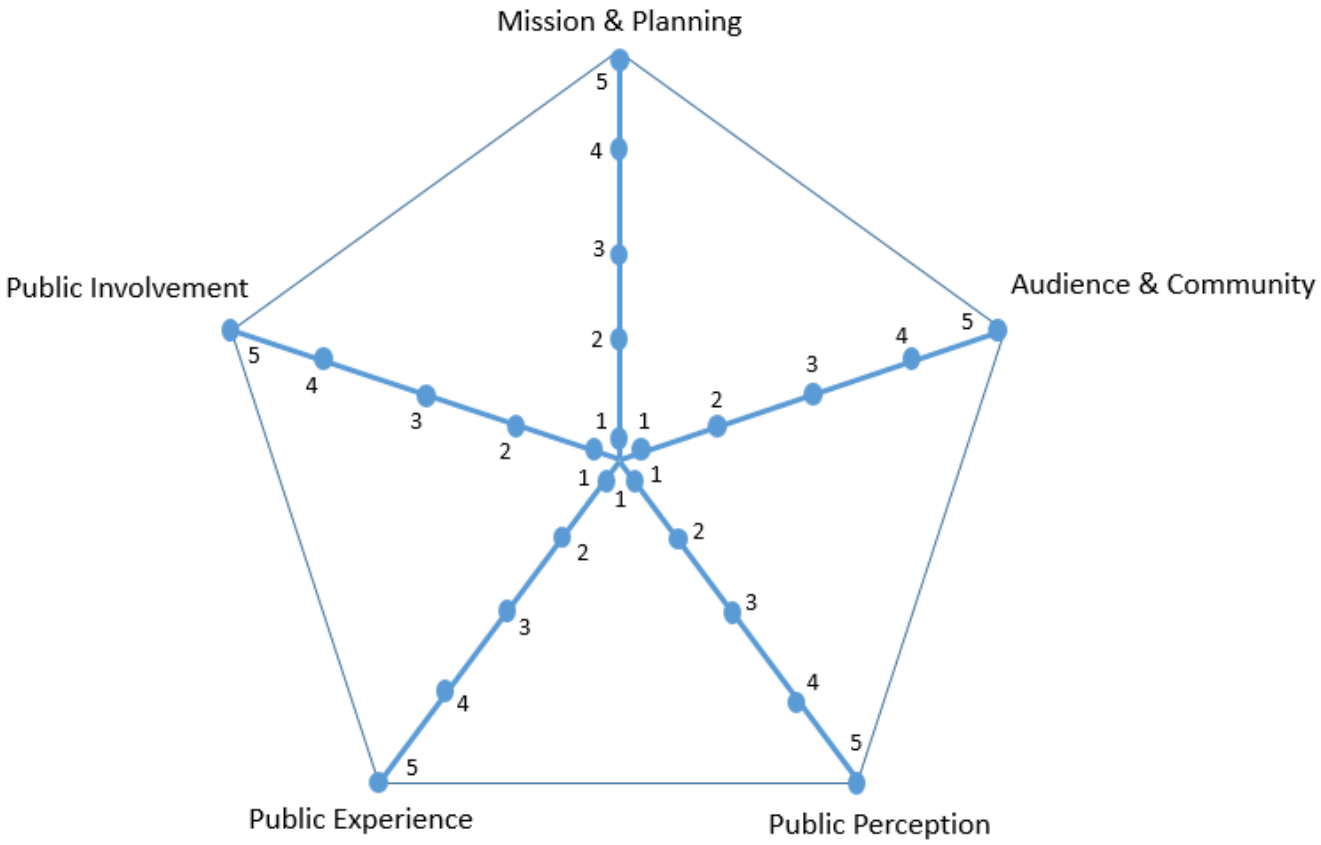
STEP 2

	1	2	3	4	5
	Early stage	**Developing**	**Moderately Developed**	**Well-Developed**	**Exemplary**
Definition:	*Have developed a plan but have not yet implemented it*	*Implemented X within the past year*	*Have been doing X for more than a year*	*Have been doing X for a number of years, it's going well and we are evaluating it*	*Have been doing X for a number of years, have evaluated it, and incorporated feedback*
Mission & Planning					
Audience & Community					
Community Perception					
Public Experience					
Public Involvement					

Group Self-Assessment

Spider Diagram

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS



Community Consultation

Generating Ideas for Who to Invite

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Community & School Groups:

- Artistic Organizations
- Charitable Groups & Drives
- Church Groups (youth, seniors, etc.)
- Collectors Groups
- Community Support Groups
- Elderly Groups
- Ethnic Associations
- Event Committees
- Health & Fitness Groups
- Interest Clubs
- Mens/Womens Groups
- Mutual Support Groups
- Neighbourhood & Block Clubs
- Outdoor Groups
- Parents Associations
- School Groups
- Social Groups
- Service Clubs
- Social Cause Groups
- Sports Leagues
- Veterans Groups
- Youth Groups

Business Representatives:

- Local business owners
- Business Associations
- Local Media

Government Representatives:

- Local Government
- Civic Event Representatives
- Political Organizations
- First Nations leaders

Community Members:

- Local advocates
- Leaders of community and school groups
- Representatives of particular populations (ethnic groups, elderly, marginalized, disabled, etc.)
- Teachers, Police, Hospital representatives

Community Consultation

Inviting People to the Table

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Use this table to organize the people you will be inviting to the community consultation, how they are connected to the museum or the community, who will be contacting them, and the status of their response.

Name	**Organization/Group**	**Affiliation**	**Working group member who will contact**	**Response**
Rebecca Smith	*Rotary Club*	*Community Group*	*Steven Chen*	*Is attending*

Community Consultation

Invitation Template

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Dear <first name>,

I'd like to invite you to join us on <date> to help contribute your ideas on the future of <Museum name> and how we can build a closer relationship with the community. Since you're a <insert affiliation> we know you are connected with the community and have a lot of ideas to share!

Building a relationship with and in our communities has become a high priority for <Museum name>. This community consultation session that you are invited to is part of the *Engaging your Community* process (supported by the Ontario Museum Association) through which individual museums can work with the community to assess their relevance and create a plan to deepen their relationship with the community, in turn increasing the sustainability of the museum. This is an exciting time for our museum and this community and we are so looking forward to your involvement.

<Time, date and location>

<RSVP information>

<Add agenda information>

Please let me know if you have any questions, or if someone else in your <organization/group/community> may be interested in participating as well.

Sincerely,

<Your name>

LATIMERNOW

About the Latimer House:

The Lewis H. Latimer House, located in Flushing, Queens, New York, was the home of Lewis H. Latimer (1848-1928), the son of runaway slaves and an extremely important inventor and electrical engineer. He is best known for working with Thomas Edison — Latimer invented and patented the carbon filament, which made it possible to create mass-producible light bulbs. Lewis H. Latimer is a significant inventor – not just because he's African American, but because he played a critically important role in the formation of lighting and electricity.

About the initiative:

Last year, New York Community Trust gave LatimerNOW a $100,000 grant for a two-year project to take the Latimer House, which has not been an economically or programmatically successful historic house museum, and experiment with Anarchist Guide concepts that push for historic house museums and sites to rethink their relevancy and how they project their information through engagement with communities. It encourages historic houses to work from the community-up and reject traditional museum practices (blocking off furniture, locked drawers, telling only one individual's story).

Goals:

- Break out of the traditional ways of doing things
- Harness collective wisdom and history
- Make resonant and relevant connections with and across communities

Process:

1. **Research the neighbouring community:**
   The LatimerNOW project started with significant demographic research in the community of Flushing, Queens, which guided who was recruited for the advisory team, and unsurfaced a lot of information about the community. The members of the project team collectively speak seven languages and are from a handful of different cultures, identities, and experiences.

2. **Community engagement & assessment:**
   The first year of the LatimerNow project was about community engagement and assessing the collections in the house. Understanding the needs and interests of the community guided their programming and helped to explore new ways to interpret the narrative of the historic house.

3. **Programming & Implementation**
   The third phase is about figuring out how to implement these ideas, engage the community with real programs and events, and start to see the shift in making the Latimer House an important presence in Flushing.

Progress so far:

Lessons from research:
The primary narrative of Latimer House is the incredibly important legacy of African American inventor, Lewis H. Latimer. But, after doing demographic research, they realized that less than 2% of the population of Flushing is African American. And 85% of the population is first- and second-generation Mandarin-speaking Chinese immigrants.

The research has shaped the project's big question: How do we take – and not lose – an important African American legacy and story, and intertwine it with stories that will speak to the Mandarin-speaking Chinese population in Flushing? Without the research, they might have created programs directed at the African American community, or at people who are interested in inventors and inventions, and that would automatically reduce the potential audience.

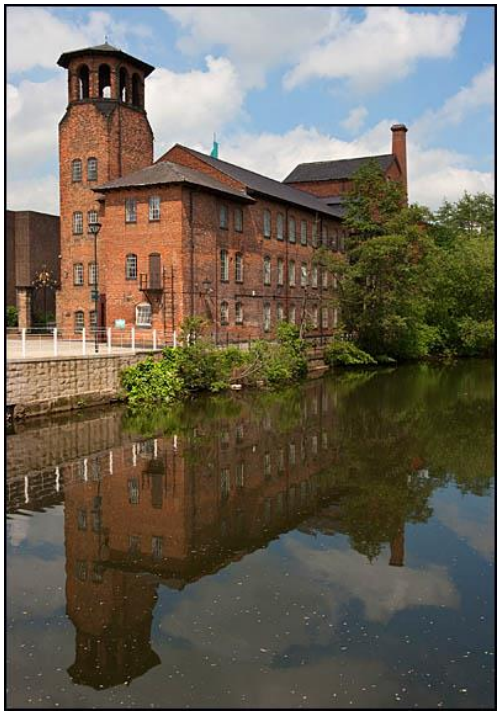
Lessons from community engagement process:
In most historic house museums, it's thought that the more narrow and focused the narrative, the better, but that can actually be limiting. This process has helped to identify common threads and build connective narratives that might not be so immediately obvious, which opens doors for a much wider range of people in the immediate community across cultural experiences..

The stories of Latimer's wife, his daughters, and his grandchildren, and what they ended up doing, have now become relevant. For example, the site also has history as a boarding house – one of Latimer's daughters rented out the upstairs to African American women who were attending college. So the house could provide a space to explore what it meant for a young woman going to college in the mid-20th century, which could offer a resonant connection to young people today who are pursuing educational opportunities.

Lessons from programming:
LatimerNow recently held a pilot event called Latimer Lounge, where they invited poets, artists, and performers of different ethnicities and languages to gather at the Latimer House for one evening. Participants spoke about the idea of creativity in all aspects of life, like in the culinary arts, for example. It was a successful test to see if people were interested in gathering together in that way, and it worked – they had a full house. Latimer Lounge is just one way they're trying to connect people across experiences by stretching beyond Lewis H. Latimer's life narrative to explore simply how he was a creative person: an inventor and poet, among other practices.

Not being afraid to fail:
The Anarchist Guide views historic houses as spaces that embrace flaws and mistakes – and thus, they actually allow for more vulnerable and honest interactions between people of varied cultural identities and experiences. LatimerNow has embraced this and declared that they don't know if they're going to succeed or fail – they're going to try stuff and when it doesn't work, they'll try something else. Their project proposal even had a section called, "We're Going to Fail," where they talked about failure being built into this whole process. Historic house museums and sites feel like they always have to have the right answer, especially when it comes to engaging their communities. And the point is, there is no right answer, but they're going to experiment together with the community.

About Derby's Silk Mill:



Derby's Silk Mill, located in Derby, UK, is the site of the world's first factory and keeper of globally significant stories of innovation, creativity and engineering. As a building of great historical importance to the city, Derby Museums is keen to conserve the most valuable aspects of the site, while modernizing the building and evolving the entire space into a museum and environment that best serves the needs of the people of Derby.

About the initiative:

The Re:Make project is a unique approach to developing a museum – encouraging visitors and volunteers to become citizen curators, designers and makers; learning new skills or applying skills they already have to support the redevelopment of Derby's Silk Mill.

Goals:

- Become a Museum of Making that inspires future generations of makers, creators and innovators
- Community members having a personal experience and interacting with the museum
- Utilizing the space so that it is meaningful and accessible to the community

Process:

From September 2013 volunteers have been invited to take part in an exciting community rebuilding project 'Remake the Museum. This project has been supported by funding from The Happy Museum Project and Arts Council England and has enabled members of the public to become citizen curators, taking part in organized sessions, helping design and build new displays, furniture and fittings for the ground floor from scratch. Participants have learned new skills, met new people and had a direct input into the future of one of the city's most well-loved icons.

1. Project Kickoff
2. Workshop 1 – Working in groups, the participants were asked to think about who would use the Silk Mill, what it would be used for and why those visitors would use it. Combining those three aspects of thought, the groups were asked to invent a scenario for a prospective visitor.
3. Workshop 2 – Participants were invited to discuss, plan and present their ideas of 'A Day at The Silk Mill.' Thinking about who could be part of the day, what could take place and how the space could work in the situation, the groups came up with a range of scenarios to be used as ideas for future programming at The Silk Mill.
4. Re:Veal Launch party!
5. Program Implementation

Phase 2 will repeat this process to generate ideas for how to use the other spaces at the Silk Museum.

Progress so far:

Lessons from community engagement:
Having so many people contributing their ideas produced ideas that the project team never would have thought of otherwise. It's then meaningful for the community participants as well as it's their thoughts and ideas. People's attitudes towards what a museum is have shifted. There is a sense of community ownership of the museum.

Involve community members in all facets of the project:
Re:Make hosted furniture making workshops where innovative furniture was built that can be used for seating, for display purposes and positioned in a tessellation to form a solid structure and surface. They also held workshops to educate on the importance of signage and way finding and invited participants to make the signs for the museum. Another workshop idea came from a participant who suggested to have lockers in the space, allowing makers to keep materials and tools secure and also display the project they're working on.

Range of programs/projects implemented:

- Signage & Wayfinding workshops
- Object Preparation Session – community invited into the process of cleaning, documenting and photographing the objects for display and storage.
- Prototyping workshops – Groups are asked to pick a product, create a rough design as well as thinking about how it used and where it would work in the space. Using a range of materials including card, wood, foam and plastic the sketches are made into rough prototypes.
- School Partnership Maker workshops

Idea Worksheet

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Idea Name: _____

Audiences reached:

_____

_____

Overview:

1. What problem is this idea solving?

2. Who could benefit from this idea?

3. Where will this idea be used?

4. When can this idea be used?

5. How can we make this idea better?

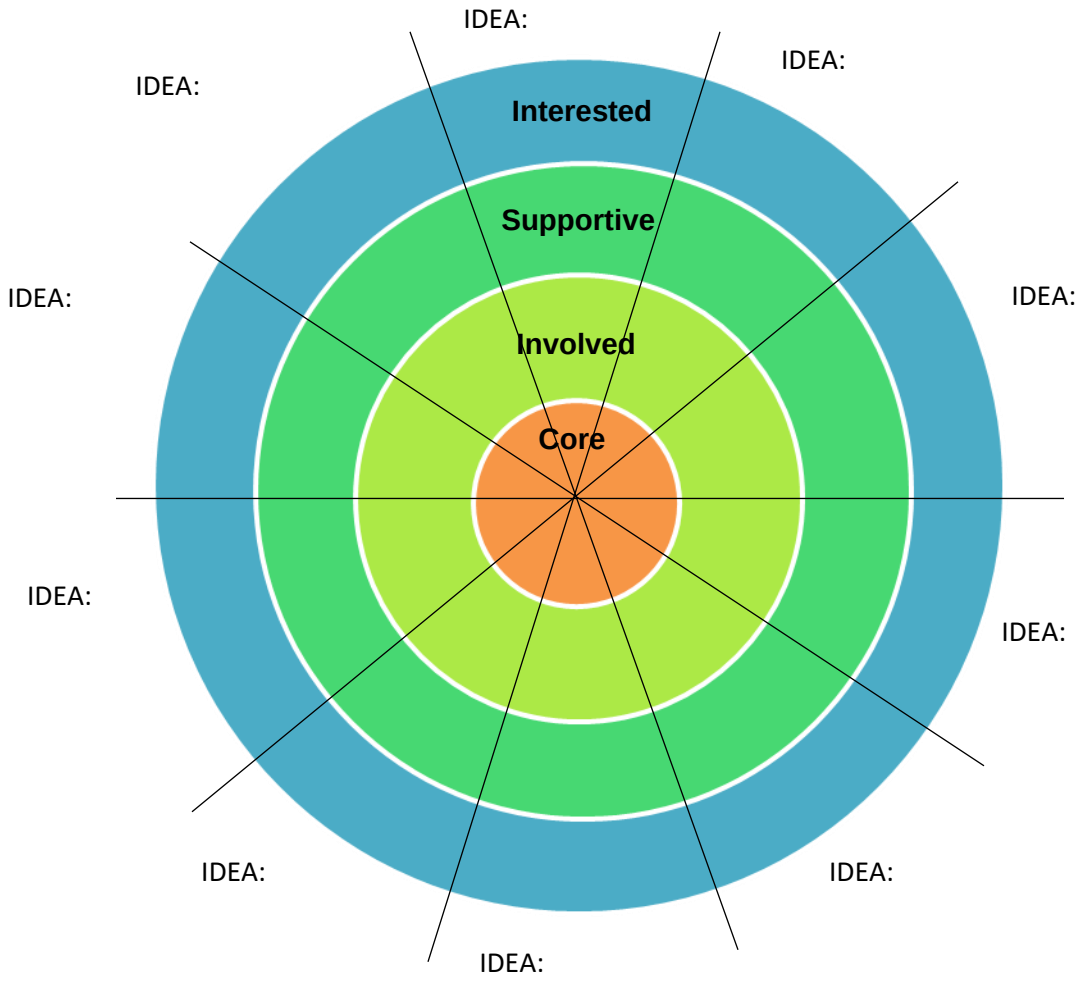
6. What do you need to make it real?

Wheel of Engagement

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Plot your ideal level of participation on the Wheel:

- **Core** - interested in being actively involved in the functioning and development of the idea.
- **Involved** - want to be frequently consulted and given opportunities to provide in-depth feedback. (i.e. attending topic specific/community specific/age specific discussions or workshops)
- **Supportive** – want to provide some form of support and input (i.e. attending future community forums, answering surveys and providing input online).
- **Interested** – want to be kept informed of the progress of the initiative, but not be directly involved in the work (i.e. newsletter, informed about opportunities to participate in events).



Name: _____

Phone: _____

Email: _____

Community Scattegories

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

You have 1 minute to write down as many things as you can think of in the assigned category.

1. Events in your community

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2. Community and education groups (eg. Clubs, societies, school-based groups, associations, etc.)

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

3. Local or community-minded businesses

4. Places in your community (eg. Parks, public buildings, libraries, gathering spaces, etc)

5. Well-known people/change makers in your community

Community Scan Questions

ENGAGING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Think about your community – its assets and its opportunities.
Get into pairs and take turns interviewing each other.

Ask:

What are the values that are core to this community?

To you, what are the most valuable assets (places, people, events, groups, things) within this community?

What are the biggest issues facing this community?

What are your biggest hopes for this community?

How do you imagine the future of this community?

Engagement Mapping Tool

ENGAING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Take the program ideas developed in the self-assessment phase and the community consultation phase and list them by Strategic area. For each idea, specify a larger engagement goal that this program/service/initiative would help to achieve.

Strategic area	**Engagement Goal**	**Ideas (programs, services etc.)**	**Priority**
	Example: *Increase connection across age groups*	*Host a buddy reading program with retirement home residents and grade 3 students*	*3*
Mission & Planning			
Audience & Community			
Community Perception			
Public Experience			
Public Involvement			

Action Plan Worksheet

ENGAING YOUR COMMUNITY: A TOOLKIT FOR MUSEUMS

Based on the priorities and strategies indicated on the Engagement Mapping Tool (p.66), devise an action plan.

Strategy:_____

Outcome	**Actions and Timeframe**				**Resources** (human, material, financial)	**Lead Role**
	Months 1-3	Months 4-6	Months 7-9	Months 10-12		