Our Museum Special Initiative
An Evaluation

ACTIVE PARTNERSHIP
MUTUAL BENEFIT
MUSEUMS GALLERIES COMMUNITIES

By Gerri Moriarty and Sally Medlyn

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AUTHORSHIP: THE EVALUATION TEAM

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Sally Medlyn is a cultural planner and creative producer. Place making and the role of cultural identity and creativity in social and physical regeneration are central to her work. She supports local authorities, cultural and voluntary organisations and communities to respond to change in innovative and creative ways. She is the co-author of this report.

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Helen specialises in quantitative research and evaluation. She works across arts, heritage and tourism sectors helping organisations to understand more about their audiences, market potential and the effectiveness of their activities. Helen developed Quantitative Baseline Assessments for each of the *Our Museum* organisations, as part of the evaluation process.

Jennifer Williams
Jennifer Williams is an artist who founded the Centre for Creative Communities (1978 - 2008). Among the Centre's projects was Creative Community Building through Cross-sector Collaboration, which traced links between arts and education collaborations, community development and social inclusion. It was published as a book in 2004. Currently, she is a member of the International Futures Forum and works as an artist making books, illustrations and photographs. She has illustrated this report.

Publications
No Longer Us and Them: How to Change into a Participatory Museum and Gallery Dr Piotr Bienkowski, Paul Hamlyn Foundation, April 2016, offers key points and practical guidance to readers who want to learn more about the *Our Museum* Special Initiative. It is available on the website *ourmuseum.org.uk.* The website also contains over 100 multimedia resources which share the learning and experiences of the *Our Museum* organisations, and others inside and outside the museum sector, on how to embed participation through a process of organisational change.

A more detailed exploration of the work undertaken by each of the participating organisations during the course of the *Our Museum* Special Initiative, written by evaluators Sally Medlyn and Gerri Moriarty, is available on the website *ourmuseum.org.uk,* in the section entitled *Initiative Partners* under the pages dedicated to each individual organisation.

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'The aim of the Our Museum programme is to facilitate a process of development and organisational change within museums and galleries that are committed to active partnership with their communities. While the broader aim is to affect the museum sector as a whole, the initiative will work with a carefully chosen representative sample of up to 12 institutions: it will support and develop them to place community needs, values and active collaboration at the core of museum and gallery work; involve communities and individuals in decision-making processes; and ensure that museums and galleries play an effective role in developing community skills.

The distinctive characteristic of the programme is a collaborative, reflective, learning process through which institutions and communities share their experiences and learn from each other as critical friends – recognising that they all have different starting points for the journeys this initiative will take them on.'

Extract from 'Paul Hamlyn Foundation: Our Museum Invitation to Apply' 2011

The Paul Hamlyn Foundation *Our Museum* Special Initiative directly addressed questions critical to the future of the museum and gallery sector through encouraging and developing the concept of museums and communities as active partners. The programme illustrated how organisational change processes can play a significant role in placing community needs, values and collaboration at the heart of museum practice. The nine museums/galleries who participated in the programme and their community partners have explored and refined a practical framework of *Our Museum* Outcomes and Indicators of Success. Others in the sector can use this framework as a valuable reference point when planning for organisational change of this kind: as a checklist of both the principles and practicalities of such change and to assess progress throughout the change process.

In addition to the organisational changes made in each of the participating museums/galleries, the programme:

- Increased participants' understanding of the many different ways in which organisational change processes could help support sustainable partnerships with communities
- Demonstrated that active partnership and collaborative working can produce tangible benefits and improved outcomes for both museums/galleries and their communities
- Increased awareness of the value of reflection and active dialogue for planning and decision-making from organisational business planning to programme development
- Documented experience and gathered evidence in ways that can inform those practitioners who wish to shift and strengthen collaborative working practices in the museum/gallery, cultural, voluntary and community sectors

- Increased awareness of the value and relevance of diverse bodies of knowledge and practice from communities and Third Sector sources to creating organisational change in museums/galleries

Beginning to gather evidence of the positive social impact of museums/galleries working with communities as active partners had been one of *Our Museum's* initial overall programme objectives. However a methodology to do so was not established or implemented during the programme.

The *Our Museum* Special Initiative has confirmed the many challenges of creating meaningful organisational change in complex institutions. It has also shown the value and importance of the principles at the heart of *Our Museum* for the museum/gallery sector and for the communities it serves, for example, through collaboration and shared decision making; building working relationships with people and organisations from outside the museum towards objectives which benefit all partners; the need to build reflection into normal every day working practices. The work of the participants has also generated valuable practical learning and a wide range of transferable methodologies for others to explore in their own organisational change journey.

RECOMMENDATIONS TO THE PAUL HAMLYN FOUNDATION

1. Promote the revised *Our Museum* Outcomes and Indicators of Success in Plain English and easy read versions

2. Encourage organisations applying to the Foundation to use the *Our Museum* Outcomes and Indicators as a reference point in designing initiatives

3. Host a seminar for key Third Sector agencies and organisations to disseminate learning and advocate cross sector collaboration

4. Encourage museums/galleries applying to the Foundation to review overall learning from the programme and consider how their proposed activities might contribute to further learning for the sector

5. Continue investment in organisations who value and prioritise processes of reflecting and planning with community partners and wish to develop skills in facilitation and active listening

RECOMMENDATIONS TO MUSEUMS AND GALLERIES

1. Benchmark current organisational strengths and weaknesses against the *Our Museum* Outcomes and Indicators of Success

2. Identify the key steps necessary to develop existing policy and practice

3. Use the principles and learning from *Our Museum,* with other international, regional and local examples of good practice, to support organisational change towards active partnership with communities

4. Lobby sector 'core' funders to advocate the importance of museums and galleries working in active partnership with communities

RECOMMENDATIONS TO THIRD SECTOR AGENCIES AND ORGANISATION

1. Consider how sharing of expertise and experience cross sector could support both parties to better achieve their objectives. This might involve strategic cross sector planning or at a local level becoming Trustees, or participating in panels or task groups, or more informal discussions between museum and community partner/Third sector organisation staff

2. Invite their local museum/gallery to talk to them about how it currently works with community partners and how this might be developed and strengthened for mutual benefit. Examples from this programme could provide useful starting-points for that conversation

3. Promote the work their museum/gallery does and wishes to do with its community partners on websites and in newsletters

RECOMMENDATIONS TO PUBLIC SECTOR FUNDERS OF THE MUSEUMS AND GALLERIES SECTOR AND OTHER TRUSTS AND FOUNDATIONS

1. Review monitoring and evaluation processes to ensure organisations are asked to report on the kinds of outcomes promoted through the *Our Museum* programme

2. Encourage and support museums and galleries to develop their own tailored organisational change initiatives, informed by learning from the programme and from other similar experiences internationally, nationally and locally

3. Consider the relevance for their own future strategic initiatives of the lessons learned through *Our Museum* on the design and delivery of a programme aimed to support organisational change

1 OUR MUSEUM: COMMUNITIES AND MUSEUMS AS ACTIVE PARTNERS

ALL PARTNERS ARE BOTH LEARNERS AND TEACHERS

Our Museum: Communities and Museums as Active Partners was a Paul Hamlyn Foundation Special Initiative 2012 – 2016. The overall aim was to influence the museum and gallery sector to:

- Place community needs, values and active collaboration at the core of museum and gallery work
- Involve communities and individuals in decision-making processes
- Ensure that museums and galleries play an effective role in developing community skills and the skills of staff in working with communities

This was to be done through facilitation of organisational change in specific museums and galleries already committed to active partnership with communities. *Our Museum* offered a collaborative learning process through which institutions and communities shared experiences and learned from each other as critical friends.

Our Museum took place at a difficult and challenging time for both museums and their community partners. Financial austerity led to major cutbacks in public sector expenditure; a search for new business models; growing competition for funding; and organisational uncertainty and staff volatility. At the same time, the debate at the heart of *Our Museum* widened and intensified: what should the purpose of long-established cultural institutions be in the 21st century; how do they maintain relevance and resonance in the contemporary world; how can they best serve their communities; can they, and should they, promote cultural democracy?

1.1 PROGRAMME DESIGN

The *Our Museum* Project Director was responsible for design and delivery of the programme and dissemination of its findings. He proposed four strategic outcomes:

Outcome 1 Rooted in Local Needs Museums and galleries understand their role within their localities; they are effectively informed of and respond to, the range of their communities' needs and values and are aware of and initiate opportunities for partnerships with communities and other sectors to meet local needs

Outcome 2 Community agency Communities are sustainably at the core of all the values, strategies, structures and work of museums and galleries: actively and regularly participating and collaborating in dialogue and decision-making about the work of the museum/gallery

Outcome 3 Capability building Museums and galleries play an effective role in developing community skills, capabilities and creativity: preparing and helping people to be engaged in their communities, to articulate their voices, to find employment or volunteering opportunities in the heritage sector and elsewhere; and supporting staff to learn how to work with communities

Outcome 4 Reflection Museums and galleries embed reflective practice into their work: internally, with community partners and across the sector, to ensure on-going reflection, dialogue and openness to challenge, alternative values and working methods

Indicators of success for each outcome set out key assumptions about organisations committed to active partnership with communities: core values; kinds of leadership; ways of working; the nature and purpose of partnerships which might help inform policy and support delivery; how community and staff capacity building might help to deliver all outcomes; what good practice in this area might look like; and the critical role of reflection and dialogue in the work.[1]

Our Museum included an annual peer review for organisations and community partners to share their work, consider lessons learned and benefit from questions and challenges posed by their peers. Independent consultants were appointed to carry out a qualitative evaluation.[2] During Year 1, another consultancy was commissioned to design and deliver a Training and Support Programme for the cohort. This did not continue in Year 2 and participating organisations, in consultation with the Project Director, developed alternative approaches.

1.2 THE *OUR MUSEUM* PARTICIPANTS

In early 2012 nine museums and galleries were selected to join *Our Museum* from participants in an earlier consultation and research period.[3] They broadly reflected key differences in the wider sector in scale, character and location. Their different starting-points, different challenges and priorities and the different kinds of resources at their disposal, were recognised by the Foundation and were also circumstances common in the sector. The museums and galleries selected were: Amgueddfa Cymru - National Museum Wales: Belfast Exposed: Bristol Culture: Glasgow Museums: Hackney Museum: Museum of East Anglian Life: The Lightbox: Ryedale Folk Museum: Tyne and Wear Archives and Museums. [4]

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[1] The Outcomes and Indicators of Success are set out in full on page 28 of the main report
[2] An account of the evaluation methodology, which was primarily qualitative, is set out in Appendix A
[3] The research was published as: Lynch, B. 2011. *Whose Cake Is It Anyway? A collaborative investigation into engagement and participation in 12 museums and galleries in the UK.* London: Paul Hamlyn Foundation
[4] The Museum of East Anglian Life and Ryedale Folk Museum were funded for two of the three years of the programme. After they left the *Our Museum* programme the Foundation supported them with separate funds for organisational review and business planning.

Each organisation identified specific strategic change objectives it anticipated would be the focus of its work during the programme. The organisations also identified the members of their *Our Museum* 'engagement team'. The model proposed for this was of five people from their own organisation, ideally including their director or head of service, and five people from community partners who would work together collaboratively to help steer their work.

2 THE JOURNEYS: THE WORK OF THE NINE *OUR MUSEUM* ORGANISATIONS

WORK ON THE IMPORTANT PROBLEMS

The organisations[5] participating in *Our Museum* experimented with a wide range of approaches to achieving their strategic change objectives in order to strengthen active partnership with communities and bring about organisational change.

2.1 Amgueddfa Cymru – National Museum of Wales (Amgueddfa Cymru**)** collaborated with community partners from local, regional and national agencies whose work involved people who were not represented in its volunteer profile, including homeless people, unemployed people, people from diverse cultural backgrounds and disabled people. This broadened the volunteer base to be more representative of the many communities the museum serves and prioritised the needs of the volunteer, not those of the museum.

2.2 Belfast Exposed worked to re-balance the priority given to development of the reputation of its photography gallery, with its archive and community programme. Its new business plan values the gallery programme, community programme and archive equally. The Volunteer Programme now includes training and opportunities to work on the community programme and new models for community agency in project work have been developed.

2.3 Bristol Culture worked with 60 diverse local communities in decision-making and content refreshment of the 'You Make Bristol' display at one of its sites, M Shed**.** Community partners and representatives of other external agencies then participated in sessions that influenced the development of a major Bristol Culture exhibition on the theme of 'Death'. Bristol Culture also worked to strengthen opportunities for volunteers and made changes in job descriptions and in its Service Plan to reflect *Our Museum* principles.

2.4 Glasgow Museums developed a cross-organisation training initiative, the Staff Ambassadors Programme, designed and delivered using the expertise of staff and community partners. It included placements and mentoring in community contexts and opportunities for staff to participate in learning groups that promoted exchange with community partners. Glasgow Museums also experimented with a new model for collaborative discussion and action, linked directly to its organisational planning cycles; the Creative Café is becoming a regular forum for staff and external partners.

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[5] A more detailed exploration of each organisation's strategic objectives and progress, assessed against each of the four outcomes, written by evaluators Sally Medlyn and Gerri Moriarty, is available on the website ourmuseum.org.uk, in the section entitled Initiative Partners under the pages dedicated to each individual organisation.

2.5 Hackney Museum built on its existing expertise in working with single communities on a single issue by exploring ways of responding more effectively to the diversity of the borough. A pilot focussed on one geographical area, with the aim of co-creating an exhibition with community partners and local residents. It developed into a 'place-based approach', using a model of 'participatory co-creation' to develop an exhibition with residents from across Hackney.

2.6 Museum of East Anglian Life wanted to better understand the community ecology of Suffolk to help it identify where activity would have most impact. It experimented with using different ways of working in two geographical areas; one was to involve local people with a 'known idea' and one was to take an open-ended approach: 'How might you like to work with the museum?' It also used a variety of quantitative and qualitative techniques to survey existing visitors with the aim of being more responsive to visitor needs and expectations.

2.7 Ryedale Folk Museum identified gaps in its overall knowledge of the needs and expectations of its community partners. It researched and piloted new museum 'offers', such as a STEM (Science, Technology, Engineering and Maths) fair for eleven local schools and craft-based classes for adults, including tourists. It commissioned a visitor survey after a gap of eight years and undertook an organisational review, developing a new business plan with the help of external consultants, community partners and key stakeholders.

2.8 The Lightbox wanted to explore whether its desire to become a nationally acclaimed gallery had moved it away from being a gallery inspiring a sense of ownership amongst local people. Partnerships were set up with four community groups, using the concept 'Starting from Zero.' Instead of going out to communities with preconceived propositions, staff took time to understand more about each partner, discussed together what types of collaboration would be meaningful and relevant for community partners and the gallery, and the resources each could offer. They then delivered jointly developed plans.

2.9 Tyne and Wear Archives and Museums (TWAM) developed ways of working that were more informed by understanding the issues people wanted them to address. It experimented with new ways to gather information through talking to visitors and local people and set up an Alternative Management Team of staff and community partners to consider difficult issues facing the museum and help develop a Community Engagement Framework.

Staff and community partners explored alternative ways of communicating through valuing difference; non-verbal communication; asset-based approaches; and improvisational theatre techniques to remove barriers to creative thinking and invention.

2.1.10 Working together: a reflection

Many of the museums/galleries in the *Our Museum* programme found it challenging to create and then sustain effective relationships with community partners that focused on organisational change as against projects on a particular theme or issue.

Three factors in the pre-submission phase contributed to slowed progress in Year 1 in several organisations:

- Lack of shared organisational knowledge about existing partnerships
- Absence of a coherent strategic view within museums/galleries about which community partners might be most appropriate to work with and be most interested in collaborating on the kinds of organisational changes proposed by each museum/gallery
- Limited community partner involvement in jointly developing bids to the Foundation

During the programme some *Our Museum* organisations mapped the full range of their partnerships and strengthened their strategic understanding of which partnerships were a priority and of gaps that needed to be addressed.

Several *Our Museum* organisations found that the more explicit they and their community partners could be about the ways in which collaborative working would be of mutual benefit, the easier it was to develop and sustain effective relationships. When *Our Museum* organisations were unclear about how the changes in the way the museum or gallery worked would be relevant to the concerns and priorities of the individuals, groups or communities they were inviting to become partners, it was much harder to attract and retain community partners.

In reflecting on their learning from *Our Museum*, several organisations commented that the early stages of forming a partnership are critical to longer-term success. Appropriate induction is important, for both museum staff and community partners, to introduce each other's ways of working, to understand each other's priorities and discuss mutual expectations. The *Our Museum* organisations which had most success in developing and sustaining purposeful relationships with their community partners, paid explicit attention to ensuring good two-way communications and to relationship building throughout the course of the programme.

2 LEARNING FROM THE ORGANISATIONS AND COMMUNITY PARTNERS

BUILD A SENSE OF COMMUNITY WHERE PEOPLE HAVE A SAY

3.1 USING THE OUTCOMES AND INDICATORS OF SUCCESS

The four Outcomes and their related Indicators of Success were at the heart of the *Our Museum* initiative: the explicit framework against which all the participating organisations designed their initial applications to join the programme and a consistent reference point throughout their work. The experience of the *Our Museum* programme suggests that a revised version of the Outcomes and Indicators of Success would provide a valuable initial reference point for museums and galleries when thinking about how to plan and carry through organisational change towards active partnership with communities. Organisations and their community partners would need to agree the priority that should be given to specific indicators at an early stage in their organisational change programme.

The four Outcomes remained unchanged during the programme. Members of staff, Trustees and community partners reflected together towards the end of *Our Museum* on whether the four 'outcomes' did accurately sum up organisational ways of working which a museum needs to adopt to collaborate successfully with communities as 'active partners'. No additional outcomes were suggested. Three of the original Indicators were modified and one added during the programme. These revisions:

- Highlighted the critical link between choices made about the use of resources – human, financial, buildings and so on – and embedding active partnership with communities
- Noted that 'removal of barriers to community participation' went beyond the core access agenda, to decisions about how space is allocated to different uses and the character of the physical environment in museums and galleries
- Made explicit that Trustees and volunteers, as well as staff, needed to recognise engagement as a core value and core activity if engagement was to be 'embedded across the organisation'
- Confirmed the value of involving community organisations and individuals in developing and delivering staff training and enhancing staff capabilities

Towards the end of the programme, participants suggested five new indicators to:
- Make clear that opportunities for communities and individuals to participate in partnerships with museums and galleries can take different forms, for example, requiring more or less of a time commitment
- Reference the importance of communities connecting at a deeper level with collections

- Emphasise the mutual benefits for museums/galleries and community partner organisations of making joint bids or tenders for public sector commissioning contracts
- Make clear that directors and senior management teams need to develop the visionary, visible leadership skills and approaches required to embed working with communities
- Highlight the importance of training and capability building of staff and communities in reflective practice

Reflection on how participants used the framework suggests additional issues and questions for revision of the Outcomes and Indicators framework. These are to:

- Make specific reference to ideas of 'mutual benefit' and 'relationships' as well as 'active partnerships'
- Achieve greater clarity in the wording of the framework
- Include a separate indicator focussed solely on issues of governance
- Explicitly encourage organisations to use the framework consistently as an integral part of the change process
- Ensure agreement between the organisation and community partners on the priority to be given to different indicators

3.2 ORGANISATIONAL CHANGE IN MUSEUMS AND GALLERIES COMMITTED TO ACTIVE PARTNERSHIP WITH COMMUNITIES:

Planning for change Making change Sustaining change
This section of the report considers three major phases in an organisational change journey and highlights learning from the experience of the *Our Museum* participants.

3.2.1 PLANNING FOR CHANGE
Prepare a base-line assessment of the museum or gallery to identify current organisational strengths and weaknesses, encourage challenging and positive feedback and agree priorities for change, linked clearly to organisational vision and mission

Map existing community partners to identify which organisations and individuals within your locality you are already connected with in some way, whether or not they might be interested in involvement in aspects of the proposed organisational change and whether or not relationships with new community partners might be mutually beneficial or necessary. This might involve using available data to better understand the demography of your locality and your visitor/non-visitor profile

Identify your strategic objectives and explain how these will be of mutual benefit to your organisation and to your communities

Focus partnerships on mutual benefit i.e. select a strategic objective important to both the museum and its community partners or on areas where community partners can play an important role in influencing strategic decisions

Use horizon scanning to identify resource opportunities to kick-start change processes; seed money can enable exploration and risk-taking

Involve community partners in the development of funding bids and explore resources together i.e. discuss whether partnership opens up new funding or resource sharing opportunities

Consider who will 'lead' the initiative and who is key to ensuring its progress: identify who will have responsibility for the strategic, advocacy and operational elements of the initiative. Ensure they have necessary skills and support to deliver

Assess the level of attitudinal support amongst staff for the proposed outcomes of the organisational change initiative and consider how this might be increased, if necessary.

Assess overall staff/volunteer training needs. Introduce tailored training and development opportunities for staff: cross-site and cross department

Decide on a clear narrative or strap-line that helps everyone to understand why what is being proposed is vital to the long-term success of the organisation

Listen to the external voice i.e. consider the value of drawing on an external voice at key moments during the change programme

Identify parameters and consider frameworks for decision-making i.e. if there are some non-negotiable boundaries, it is much better to understand this from the beginning and not partway through a process of change

Consider how risks can be mitigated i.e. assess the external and internal factors that could adversely affect the organisational change initiative

Develop an appropriate monitoring and evaluation framework so that you can see where change is happening, identify emerging barriers or challenges and respond as necessary, as the programme evolves

Encourage reflection as an 'everyday' process within everything the museum / gallery does and apply this to the change process

3.2.2 MAKING CHANGE HAPPEN

Identify an appropriate induction process for community partners and staff

Pay close attention to terminology and language and make sure there is a shared understanding of common concepts

Ensure community partners have an equal opportunity to set agenda and the time to process important information

Plan and make important decisions together

Plan for sustainability i.e. design mechanisms to help create change which are also likely to be sustainable, given the size, scale and resources of the organisation

Review key organisational policy documents to see if they 'match' with changing practice and reflect emerging aspirations

Be prepared for the unexpected to happen: for *Our Museum* organisations, good initial risk assessment in the planning stage was key to finding positive solutions to such problems

Understand the importance of 'positive failure': learn from what doesn't work as well as what does

Experiment with and learn from models of practice that offer the potential for deeper engagement with community partners

Recognise and celebrate change when it happens

Build capacity for 'distributed' leadership: enable people at different levels and positions in the hierarchy to contribute to change

Pay attention to the enemies of successful organisational change including complacency, procrastination and fear of potential to undermine expertise

3.2.3 SUSTAINING CHANGE

Fix lessons from the change initiative in organisational memory

Ensure that new habits of behaviour, new models and new policy objectives are kept under review

Identify new or revised priorities for the next phase of the organisation's journey

Review the nature of relationships over time with community partners: they may not wish to be as heavily involved with future activities but still want to maintain an on-going positive relationship with the museum/gallery

3.3 SHARING THE LEARNING

An important aspect of this Special Initiative was to share learning within and across *Our Museum* participants and with other organisations. It is not yet possible to assess the impact this dissemination of learning will have on the wider sector. Many others worldwide are also considering the principles and concerns of the *Our Museum* programme. Although its findings represent an important contribution to this on-going debate, they will be more valuable, in the long-term, if regarded as an element of a meme – a pervasive thought or thought pattern that replicates itself via cultural means – or as a set of ideas and practices whose time has come.

3.3.1 Organisations – large and small - initially faced challenges internally in describing the aims of the programme and their own strategic objectives, for example, in terms of organisational change, as against being 'an additional project'. Challenges were addressed by, for example, involving staff in CPD programmes, practical projects and facilitated workshops; embedding key values, principles and competences in mission and policy statements and operational practices.

3.3.2 Organisations shared learning across the cohort. The Peer Review held in each year of the programme included: workshops and presentations by each of the organisations; sessions for Directors and CEOs, in which they were able to consider strategic concerns together; and key-note presentations from external speakers who had led or facilitated organisational change processes. Organisations were encouraged to arrange their own Learning Visits to other *Our Museum* organisations. From Year 2, Lead Contacts from each organisation met together with the Project Director, which offered some additional opportunities to share learning.

3.3.3 Methods used to disseminate learning more widely included: a dedicated website which hosted a membership network; presentations by museum/gallery staff and community partners at Museum Association conferences; an interim report,[6] used as a way of initiating conversations with major museum / gallery funders; a web resource *www.ourmuseum.org.uk* aimed at sharing learning and thinking from the initiative and supporting the embedding of participation in museums and galleries; an international learning link with organisations in the Netherlands; and *Our Museum* legacy showcase events. Museum / gallery workers who have left participating organisations to take posts or contracts elsewhere in the sector have also shared learning from the programme in their new organisations.

3.3.4 *Our Museum* community partners have pointed out the value of sharing learning from the programme within Third Sector networks and noted that many of the principles explored through *Our Museum* are directly relevant to the concerns and priorities of the voluntary and community sector.

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[6] Bienkowski, P et al. 2013. *Communities and Museums as Active Partners: emerging learning from the Our Museum initiative* London: Paul Hamlyn Foundation.

4   LEARNING FROM THE *OUR MUSEUM* SPECIAL INITIATIVE

NOT EVERYONE IS CONVINCED OF CHANGE AT THE SAME PACE

4.1 PROGRAMME ASSUMPTIONS

A number of explicit and implicit assumptions informed the design of the *Our Museum* Special Initiative and led to some unexpected issues and challenges:

Assumption 1: An external intervention could be a catalyst for organisational change amongst cultural organisations
The extent to which this was possible was limited by a set of factors related to the impact of the national financial crisis on UK public sector expenditure, which meant that all the *Our Museum* museums / galleries were facing serious budgetary pressures. A second set of factors was internal to some, though not all organisations, and included: weak governance systems: uncertainties about overall leadership and strategic direction: relatively limited experience of working collaboratively across disciplines: limited experience of working with community partners to identify and deliver strategic objectives as against discrete projects. There was also a tension between the Foundation's role as catalyst – offering a high level of advice and support - and its role as funder, with the power to withdraw funding from organisations.

Assumption 2: There would be a reasonable level of continuity of involvement by key museum staff and community partners from research phase to completion of the programme
This did not prove to be the case, leading to gaps in understanding about the purpose and design of the initiative. In several organisations, staff turnover and changes in levels of community partner involvement slowed progress considerably.

Assumption 3: All *Our Museum* participants understood that the programme was focussed on organisational change, not on delivery of discrete projects
Despite the availability of written and verbal explanations of the purpose of the programme, some organisations initially appeared to regard the funding as a grant to deliver more projects or as a way of addressing urgent structural issues. This led to confusion, in particular for community partners, who sometimes questioned why there was any need for 'change'.

Assumption 4: Participating organisations appreciated the implications of taking part in a Special initiative of this kind
The implications of being part of *Our Museum*, such as working as part of a cohort, were not fully foreseen by organisations and possibly not by the Foundation.

It also involved a considerable additional time commitment, even though funds were available for associated costs; this was particularly difficult for community partners.

Assumption 5: The commitment of the organisation's Chief Executive to the *Our Museum* programme would be critical to achieving change

The chief officers of six of the nine *Our Museum* organisations left their organisations for other posts in the early stages of the programme; there were delays in making new appointments and uncertainty about strategic direction. In addition, the practical experience of participants soon demonstrated that, although 'top-down' leadership was very important, sustainable change required the development of distributed leadership across organisations.

Assumption 6: Organisations invited to take part would already have a strategic overview of existing and potential community partners and be able to identify which of these partners were likely to be interested in working collaboratively with them on an organisational change programme

Only one *Our Museum* organisation developed its application jointly with a range of community partners. Some organisations deliberately proposed working with 'new' community partners and so consciously built their engagement team slowly. Others invited community partners on a more ad hoc basis, because involving community partners was a condition of being in the programme: this approach appeared largely unsuccessful in supporting organisational change.

Assumption 7: Participating organisations would be enthusiastic about learning collaboratively from each other

There were factors that worked against this, particularly in the early stages: the financial pressures on museums/galleries, which often resulted in staffing cuts, could make staff wary of talking openly to peers about organisational vulnerabilities. It took longer to establish trust than had been expected and some organisations under-valued the benefits of reflective learning.

4.2 PROGRAMME DESIGN

4.2.1 Training and Support Programme

Difficulties with delivery of the proposed training and support programme had a serious adverse impact in the early stages of *Our Museum.* This kind of risk might be mitigated in future by appointing all external consultants with a cross initiative role, e.g. evaluators and trainers, at an early stage. This could enable earlier consultation with participants and more time to address any concerns. A more radical option would be to focus an initial phase on participants working together collaboratively with external consultants to develop and deliver a shared training programme.

In *Our Museum* this might have prioritised:

- Organisational change processes
- Mapping communities and establishing strategic priorities
- Effective methods of encouraging reflective practice
- Learning from each other's practice

This kind of approach in Year 1 might also have relieved the pressure of gearing up to deliver an ambitious strategic programme of this nature, with the focus for practical delivery of *Our Museum*-related initiatives shifting to Years 2 and 3 of the programme.

4.2.2 The Peer Review

The Peer Review was a key element in the design of the programme. It was seen by participants as having benefits which included: time to have structured discussions with their community partners away from every-day demands: input from keynote speakers with important things to say: opportunities for individuals and organisations to make professional connections and to talk informally about issues of mutual concern.

It proved more difficult to establish the Peer Review as a forum for rigorous and challenging exploration or as a seedbed for new thinking. Observed reasons for this included: lack of continuity in participants; some failures in design; reluctance to discuss areas of weakness with peers or in front of more senior staff and funders. It is possible that a more organic design, which built from pairing organisations with similar strategic objectives in Year 1 to a meeting of the whole cohort in Year 3, might have been more effective in building trust over time.

4.2.3 Learning Visits

Museums / galleries and their community partners appreciated the flexibility of Learning Visits to other *Our Museum* participants. It was sometimes difficult for participants to get an overview of what was happening in other organisations in order to decide whom to visit. More systematic communication of the key points of what was happening, or being planned, in each organisation amongst the cohort may have prompted more purposeful or more frequent visits.

4.2.4 Lead Contacts

Meetings between the *Our Museum* Project Director and the designated 'lead' person from each organisation began in Year 2, following the decision to not proceed with the Training and Support Programme. The sessions, which were welcomed by organisations, were an opportunity for the lead contacts to meet and talk with each other as well as with the Project Director, although there was some frustration that the 'corporate' *Our Museum* agenda could dominate.

4.2.5 The *Our Museum* ning

The ning attracted members from outside the cohort. The site did not have a dedicated curator or manager and was entirely dependent on participants generating content. There was limited interaction between participants and some comment that it did not feel like a 'safe space' for sharing, especially as most people didn't know the other people posting. It is possible that a web-based network of this type might work better in future as more museums expand digital awareness and capacity. Two *Our Museum* organisations experimented with using web-based project management and collaboration software for communication, planning and reflection. This could be considered in setting up complex programmes involving multiple participants and the funder.

4.2.6 Presentations

It is arguable that some presentations to external audiences happened too early in the *Our Museum* programme. Although they raised awareness and interest, content was inevitably based on limited experience. From Year 3 onwards, participants could offer more considered views.

4.2.7 Diverse Narratives

There are lessons to be learned and tensions to explore within all the differing *Our Museum* 'narratives'; the narrative from the Foundation's perspective, the narratives of the participating organisations and their community partners, narratives of individual participants, and the evaluators' narrative. It will be important for any organisation or funder planning strategic organisational change of this nature to try to benefit from as many of these perspectives as possible.

4.3 DECISION-MAKING PROCESSES

The *Our Museum* programme had a hierarchical decision making structure, with distributed responsibility for advising on decisions combined with a system of checks and balances to ensure accountability. This is familiar amongst both public and private agencies responsible for allocation of money and resources to others. However there are issues observed in the *Our Museum* decision-making process, which the Foundation and other similar funding bodies may wish to consider:

4.3.1 The decision to invite applications to the programme only from those organisations involved in the research phase had advantages and disadvantages

This decision meant that, as organisations, participating museums and galleries had all taken part in and benefitted from the learning of the research phase and were a cohort selected to broadly reflect the diversity of scale, location, governance and challenges faced in the wider sector. It also avoided stimulating a large number of applications when only twelve organisations could be part of the programme.

On the other hand this decision did not guarantee that staff members and community partners who had participated in the research phase also took part in *Our Museum*. This decision also meant that opportunities to include other galleries and museums already actively involved with communities and to provoke sector wide debate around the core issues were missed.

4.3.2 During the course of the programme, there was sometimes uncertainty amongst participants about which part of the Foundation's hierarchy was responsible for which decisions

In the early stages of the programme there was doubt in some organisations about who had the authority to approve potential changes of direction in work plans. This might be mitigated by more discussion at the planning stage of a programme of this complexity about the mechanisms of decision-making processes and the levels of delegated authority within the hierarchy.

4.3.3 *Our Museum* organisations sometimes felt they were receiving different messages from different parts of the Foundation's hierarchy, which caused difficulties in forward planning

There are particular challenges for a funder in communicating with a network, especially where decisions may affect some but not all participants. There may be more potential for misinterpretation or for perceived unfairness than when communicating with a single organisation.

4.3.4 Participants perceived a tension between a programme, which sought to promote collaborative decision-making between museums and community partners, but was itself governed by a set of hierarchical decision-making processes

In any funding programme there will be times when a funder needs to have difficult conversations with the funded, for example, when there are issues around performance or mismatch of expectations. In the *Our Museum* programme there was a view, expressed by museum staff and by community partners, that the Foundation did not always model the kind of positive collaborative approach that the programme advocated.

The question this raises is critical: to what extent can a funder, who wants to ensure that scarce resources are being well spent, best develop an open and honest critical dialogue with a funded organisation who is aware that their funding is subject to review?

5 THE *OUR MUSEUM* SPECIAL INITIATIVE: CONCLUSIONS

SEEING IDEAS PUT INTO PRACTICE IS OUR REWARD
—COMMUNITY PARTNER
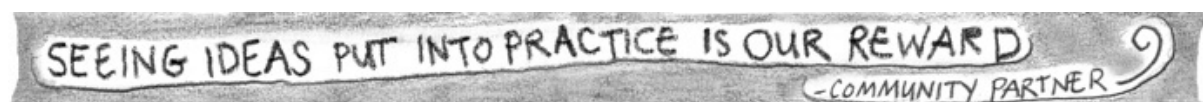
5.1 ACHIEVING THE OVERALL PROGRAMME OBJECTIVES

The *Our Museum* Special Initiative had seven overall programme objectives, which underpinned the design of the programme.

Programme Objective 1
To support up to 12 museums and galleries through a process of organisational change, through which they place collaborative work at the heart of their organisations, building sustainable partnerships with communities and involving them in decision-making

All participants have a better understanding of the meaning and implications of an organisational change process that strives to achieve these objectives. This assessment includes those organisations that did not complete the three-year programme. This understanding extends beyond the individuals in each organisation who were most actively involved in the day-to-day roll out of the *Our Museum* programme, to include many others. There has been a significant shift amongst several participant organisations in incorporating '*active partnership with communities'* as a core strand in business planning. The extent to which this is a sustainable shift will only become apparent as each organisation makes choices about how best to use whatever resources it has available of people, expertise, time, buildings and money.

Programme Objective 2
To support collaborative and reflective approaches to skills development and learning

There has been an increase amongst many participants in understanding the purpose and practical usefulness of reflection and reflective practices. There is increased awareness amongst both organisations and community partners of how much can be learnt from dialogue and collaboration with, for example, people with different life experiences or deep knowledge of place or from organisations in different sectors than your own.

Programme Objective 3
To establish a network of organisations whose participatory practice is exemplary and inspiring

There are many examples amongst the *Our Museum* partners of experiments with different types of participatory practice, some will be judged exemplary and some will inspire. However, one of the programme's achievements is in demonstrating how inspiration may come as much from 'what didn't work' as 'what did work'.

Much of the innovative practice has involved review and re-design of the processes that support participatory practice: policies, business plans, human resource systems and ways of working with volunteers. The Lead Contacts group, set up in Year 2, improved communication between participants and with the Programme Director and fostered the sense of being part of a network leading to the drafting of a joint *Community Engagement Advocacy Statement*. The purpose of networking is also likely to shift; for example, organisations are now planning networking events in their own regions.

The programme encouraged networks between museums/galleries and a range of individuals, communities and Third Sector organisations. This showed the value of drawing on diverse bodies of knowledge and a range of methodologies from outside the museum sector to achieve organisational change within the sector.

Programme Objective 4
To gather, analyse, document and disseminate compelling evidence of positive impact and best practice in museums and galleries of different sizes and types, as part of a wider strategy to achieve significant shifts in participatory practice within the sector nationwide. The analysis will include the learning from the organisations' experience, so that others may benefit from any approaches that were less successful, as well as the actions that led to the most positive impacts.

Our Museum has documented a substantial body of practical experience and gathered extensive evidence that could be used to underpin a wider strategy of achieving shifts in the sector nationwide. Further action is required to consolidate the learning gained through *Our Museum*. This might be less to do with major investment in new grant schemes by funders and more to do with formulation of a clear strategy to engage agencies and individuals with power within the sector to act.

Programme Objective 5

Impact on sector: Tested set of principles and ways of working that bring communities and their values to the core of museums and galleries and which can be applied to all types of institution.

The *Our Museum* Outcomes and Indicators of Success offer a valuable initial reference point for museums and galleries when thinking about how to plan and carry through organisational change towards active partnership with communities. The organisations and community partners who participated in the programme have generated a variety of valuable practical approaches, outlined in Part 2 and the 'Journeys' supplement of this report. The transferability of these approaches to other organisations will become evident in the period after *Our Museum* ends.

Programme Objective 6

A tool-kit for internal organisational development and change that makes community participation core, embedded through an organisation and less reliant on short-term project funding

The *Our Museum* website has been consciously developed from the concept of a tool-kit: it includes a wide range of resources, including animations, videos and documents, on different aspects of organisational change for participatory community engagement. The topics covered include, for example, governance and leadership, staff professional development, engaging with community partners, evaluation and the external voice and structures and mechanisms.

Programme Objective 7

Beginning to gather clear evidence of the positive social impact on individuals and communities that museums responding to local needs and playing a key role in their neighbourhoods have

There are many examples amongst *Our Museum* programme participants of activity designed to result in social as well as cultural benefit: for example, around health and wellbeing, skills development for employability and social cohesion outcomes. No consistent methodology was proposed or used amongst the cohort or participant organisations to define or evidence social impact; it is arguable that this would have required a separate strand of funding and access to specialist advice and support.

5.2 ACHIEVING ORGANISATIONAL CHANGE WITHIN THE PARTICIPATING MUSEUMS/GALLERIES

At the bid stage, each of the museums/galleries defined specific 'strategic change objectives' intended to create organisational change towards the active partnership and collaborative ways of working and decision-making summed up in the Foundation's description of its aims for *Our Museum*. Examples of the participants' ambitions for the programme included: building more equitable relationships with community partners; embedding principles of and approaches to community engagement across a whole organisation; moving from making offers 'to' communities to collaborating 'with' communities; creating explicit frameworks to support community engagement; incorporating active partnerships with communities in the museum's business planning. Although by January 2016 all participants had addressed some or all of their strategic change objectives, none of the museums/galleries had, or would claim, to have completed the process of creating organisational change. In all the museums/galleries, achieving this kind of systemic, embedded and profound change will require the focussed attention of Trustees, senior managers and staff and continued strategic planning for the long term.

5.2.1 **Amgueddfa Cymru–National Museum Wales's** work provided a valuable 'proof of concept' - a clear model of the considerable mutual benefits that can be achieved by working actively with community partners through shared decision-making. The museum made significant progress in collaborating strategically with a range of Third Sector organisations to develop an approach to volunteering based on delivering wider social impact and on the needs of the volunteer rather than on the needs of the museum.

5.2.2 **Belfast Exposed** succeeded in internally re-positioning its work so that equal value is given to its gallery programme, its long established community programme and its archive in organisational business planning, on its website and in day-to-day operational activities. Less progress was made in strengthening work with communities as active partners as an embedded part of organisation wide working methods.

5.2.3 **Bristol Culture** experienced a major service re-structure and changes in senior leadership during the course of the *Our Museum* programme; this hindered its ambitious plans for organisational change. However, the restructure was used as an opportunity to amend all job descriptions and to strengthen work practices to ensure that the principles advocated by the programme have begun to be embedded across the organisation.

5.2.4 **Glasgow Museums** focused successfully on building staff capacity for working with communities as active partners. In the latter stages of the programme, it initiated an innovative mechanism – the Creative Café - for staff and community partners to work together on new collaborations. The value placed by the organisation on reflection as part of its core working methods increased significantly during the course of the programme.

5.2.5 **Hackney Museum** has further developed its work with communities as active partners by more clearly identifying the different kinds of models and mechanisms it uses to initiate and support this work. It is, however, an example of the need to be cautious in attributing changes solely to participation in the *Our Museum* programme; in this museum, the local authority's establishment of a more stable and coherent vision and management structure for the organisation has also been significant.

5.2.6 **The Museum of East Anglian Life's** initial ambitions for *Our Museum* were outward facing and assumed the museum gaining a much greater understanding of social, economic and other issues affecting the wider locality. However gradually the approach became more internally focussed. The museum increased opportunities for staff, volunteers and existing community partners to participate in and influence decision-making and developed some systematic approaches to better understanding the needs of their existing audiences.

5.2.7 **Ryedale Folk Museum's** involvement in *Our Museum* strengthened previously weak processes of reflection and so helped to raise awareness in Trustees, staff and key funders of the need for radical organisational review. This has led to a new business plan that makes clear that providing quality visitor services is the responsibility of the whole organisation.

5.2.8 **The Lightbox** made considerable progress in re-balancing the organisation's desire to be a nationally acclaimed gallery with its wish to be a gallery that inspires a sense of ownership in local people. There is a wider understanding throughout the organisation of the value of working with communities as active partners and a clear methodology for collaboration has been identified.

5.2.9 **Tyne and Wear Archives and Museums** used its involvement in *Our Museum* to experiment with a wide range of different methods for staff across the hierarchy to engage with communities as active partners and for community partners to consider real issues and choices facing senior managers. The challenge now is to embed those methods it considers to have been both successful and sustainable.

5.3 *OUR MUSEUM:* A REFLECTION

The *Our Museum* Special Initiative has confirmed the many challenges of creating meaningful organisational change in complex institutions. It has also shown the value and importance of the principles at the heart of *Our Museum* for the museum/gallery sector and for the communities it serves, for example, through collaboration and shared decision making; building working relationships with people and organisations from outside the museum towards objectives which benefit all partners; the need to build reflection into normal every day working practices. The work of the participants has also generated valuable practical learning and a wide range of transferable methodologies for others to explore in their own organisational change journey.

PART 6 RECOMMENDATIONS

MAKE SPACE FOR REFLECTION AND RISK TAKERS

6.1 RECOMMENDATIONS TO THE PAUL HAMLYN FOUNDATION

1. Revise and promote the *Our Museum* Outcomes and Indicators of Success and use a service such as the Plain English Campaign's Crystal Mark to ensure clarity: consider production of an 'easy read' version
2. Encourage organisations applying to the Foundation for funding to work with communities as active partners to consider using the *Our Museum* Outcomes and Indicators as a potential reference point in designing initiatives
3. Host a seminar for key Third Sector agencies and organisations such as NCVO, Age UK, and MIND to discuss learning from the programme and how to disseminate this most effectively to their members
4. Encourage museums/galleries applying to the Foundation for Explore and Test and More and Better funding to review overall learning from the programme and consider how their proposed activities might contribute to further sector learning for the sector
5. Continue the Foundation's investment in organisations who value and prioritise processes of reflecting and planning with community partners, understanding that this may require some organisations to develop skills in facilitation and active listening

6.2 RECOMMENDATIONS TO MUSEUMS AND GALLERIES

1. Benchmark current organisational strengths and weaknesses against the *Our Museum* Outcomes and Indicators of Success
2. Identify the key steps needed to develop existing policy and practice
3. Consider the relevance of approaches explored by participants in *Our Museum* to their own organisation, bearing in mind that these can be supplemented by other international, regional and local examples of good practice
4. Lobby 'core' funders to advocate the importance of museums and galleries working in active partnership with communities

6.3 RECOMMENDATIONS TO THIRD SECTOR AGENCIES AND ORGANISATIONS

1. Consider how sharing of expertise and experience cross sector could support both parties to better achieve their objectives. This might involve strategic cross sector planning or at a local level becoming Trustees, or participating in panels or task groups, or more informal discussions between museum and community partner/Third sector organisation staff
2. Invite their local museum/gallery to talk to them about how it currently works with community partners and how this might be developed and strengthened for mutual benefit. Examples from this programme could provide useful starting-points for that conversation
3. Promote the work their museum/gallery does and wishes to do with its community partners on websites and in newsletters

6.4 RECOMMENDATIONS TO PUBLIC SECTOR FUNDERS OF THE MUSEUMS AND GALLERIES SECTOR AND OTHER TRUSTS AND FOUNDATIONS

1. Review their monitoring and evaluation processes to ensure organisations are asked to report on the kinds of outcomes promoted through the *Our Museum* programme
2. Encourage and support museums and galleries to develop their own tailored organisational change initiatives, informed by learning from the programme and from other similar experiences internationally, nationally and locally
3. Consider the relevance for their own future strategic initiatives of the lessons learned through *Our Museum* on the design and delivery of a programme aimed to support organisational change

1 *OUR MUSEUM*: COMMUNITIES AND MUSEUMS AS ACTIVE PARTNERS

ALL PARTNERS ARE BOTH LEARNERS AND TEACHERS

1 WHY *OUR MUSEUM*?

1.1.1 *Our Museum*: Communities and Museums as Active Partners was a Special Initiative, established by the Paul Hamlyn Foundation in 2012 which finished in early 2016. The aim of the *Our Museum* programme was to facilitate a process of development and organisational change within museums and galleries that were already committed to active partnership with their communities. While the broader aim was to affect the museum sector as a whole, this was to be achieved through working with a carefully chosen sample of up to 12 institutions selected to mirror the range and diversity of the sector.

The Foundation made a strategic investment in *Our Museum* as a way to:

- Support and develop museums and galleries to place community needs, values, aspirations and active collaboration at the core of their work

- Involve communities and individuals in core decision-making processes and to implement the decisions taken

- Ensure that museums and galleries play an effective role in developing community skills, through volunteering, training, apprenticeships, etc.

- Share exemplary new models with the broader museum sector

1.1.2 *Our Museum* built on an extensive consultation process, which started in 2008 and on a research phase, with museums / galleries and community partners, commissioned by the Foundation and led by Dr Bernadette Lynch.

The findings of the research phase were published in 2011 as '*Whose Cake Is It Anyway? A collaborative investigation into engagement and participation in 12 museums and galleries in the UK.*' The report concluded that investment in recent years by public and private funders in community engagement and participation in the UK's museums and galleries had not succeeded in shifting the work from the margins to the core of many organisations. Most engagement work and staffing were short-term, project-funded and vulnerable, with communities remaining passive beneficiaries rather than active partners. The report noted that funding participation work outside core museum and gallery budgets had helped to make it more, and not less, marginal. In response to these findings the focus of *Our Museum* was to be on facilitating organisational change with the aim that participatory work would become core, embedded, sustainable and less at risk of being marginalised when specific funding streams ran out.

1.1.3 *Our Museum* had seven overall programme objectives. These were:

- To support up to twelve museums and galleries through a process of organisational change, through which they place collaborative work at the heart of their organisations, building sustainable partnerships with communities and involving them in decision-making

- To support collaborative and reflective approaches to skills development and learning

- To establish a network of organisations whose participatory practice is exemplary and inspiring

- To gather, analyse, document and disseminate compelling evidence of positive impact and best practice in museums and galleries of different sizes and types, as part of a wider strategy to achieve significant shifts in participatory practice within the sector nationwide. The analysis will include the learning from the organisations' experience, so that others may benefit from any approaches that were less successful, as well as the actions that led to the most positive impacts

- To impact on the sector through a tested set of principles and ways of working that bring communities and their values to the core of museums and galleries and which can be applied to all types of institution

- To develop a tool-kit for internal organisational development and change that makes community participation core, embedded through an organisation and less reliant on short-term project funding

- To begin to gather clear evidence of the positive social impact on individuals and communities that museums responding to local needs and playing a key role in their neighbourhoods have.

From the outset, it was recognised that participation in the programme would be akin to a process of action learning. The distinctive characteristic of the programme was described as being a collaborative, reflective, learning process through which institutions and communities share their experiences and learn from each other as critical friends. Participants were encouraged by the Foundation to experiment, to take risks and to learn from their own failures as well as successes and from those of their peers.

1.1.4 The overall context in which the *Our Museum* programme was taking place was difficult for both museums and for their partners. Financial austerity led to major cutbacks in public sector expenditure; a search for new business models; growing competition for alternative sources of funding; and high levels of both organisational uncertainty and staff volatility. At the same time, the debate which lies at the heart of *Our Museum* widened and intensified: what should the purpose of long-established cultural institutions be in the 21st century; how do they maintain relevance and

resonance in the contemporary world; how can they best serve their communities; can they, and should they, promote cultural democracy?

1.2 DESIGN OF THE *OUR MUSEUM* PROGRAMME

1.2.1 *Our Museum* Project Lead and programme reporting structures

The Foundation appointed Dr. Piotr Bienkowski as *Our Museum* Project Director, with overall responsibility for design and delivery of the programme and for dissemination of its findings. He reported to and was advised by the Foundation's Head of Arts, later to become Director of Grants and Programmes. The Project Director and Head of Arts worked in collaboration with an advisory Steering Group, chaired by a member of the Foundation's advisory Arts Programme Committee. Its membership included senior staff and Trustees from museums not participating in the *Our Museum* programme, independent museum and cultural sector consultants, a representative from the Third Sector and cultural commentators. Until 2015 the Steering Group made recommendations to the Arts Programme Committee, which formally made decisions on funding. It considered reports from the Project Director, from the evaluation team and self-assessments from the participating organisations; it gave feedback; made funding decisions; made recommendations about the overall programme; and played a part in disseminating findings to a range of target audiences.

1.2.2 *Our Museum* Outcomes and Indicators of Success

The Project Director proposed a framework for the programme of four Outcomes with detailed Indicators of Success, which reflected learning from Dr. Lynch's research and from current best practice in the sector. This framework was reviewed and approved by the Foundation's Trustees. From the outset, it was understood that in working to achieve these outcomes organisations would have different starting-points, different challenges and priorities and different kinds of resources at their disposal.

The original Outcomes and their Indicators of Success were[7]:

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OUTCOME 1: ROOTED IN LOCAL NEEDS

Museums and galleries understand their role within their localities; they are effectively informed of and respond to, the range of their communities' needs and values and are aware of and initiate opportunities for partnerships with communities and other sectors to meet local needs

Indicators of success would include evidence of:

1.1 Pro-active and outward-looking leadership, defining roles of staff working to find out about community needs and issues*, and allocating financial and other resources to support active partnership*

1.2 Tried and tested mechanisms whereby museums and galleries keep themselves informed of community needs, priorities and wishes

1.3 Tried and tested mechanisms whereby museums and galleries develop local partnerships outside the sector and understand potential partners' priorities

1.4 Initiation of/involvement in local partnerships responding to local needs

1.5 Respect and trust between museums/galleries and communities, and acknowledgment and implementation of alternative values, stories and different styles of communication

1.6 Removal of barriers to community participation and collaboration including physical barriers *e.g. how space is allocated to different uses and the character of the physical environment in museums and galleries*

1.7 Feelings of shared ownership and pride in the museum/gallery, reflecting how embedded it is in the community (e.g. is it 'my museum' or is it still marginalised?)

1.8 Achievements celebrated jointly

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OUTCOME 2: COMMUNITY AGENCY

Communities are sustainably at the core of all the values, strategies, structures and work of museums and galleries: actively and regularly participating and collaborating in dialogue and decision-making about the work of the museum/gallery

Indicators of success would include evidence of:

2.1 Visionary and value-based leadership committed to participation by diverse communities

2.2 A clear community plan and strategy, and a clear shared understanding of it between museums/galleries and communities

2.3 Engagement, participation and collaboration as core values of the organisation

2.4 Engagement embedded across the organisation, so that all staff*, volunteers and trustees* recognise that it is core

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[7] The Steering Group approved a number of amendments to the original framework during the course of *Our Museum.* These are shown here in italics. Please see Part 3.1 for more comment.

2.5 Community involvement in governance, shared decision-making and authority, setting targets, monitoring and evaluation

2.6 Collaborative exhibition development, including community authoring of proposals, text, and associated programmes

2.7 Community voices, stories, histories and interpretation throughout the museum/gallery

2.8 Community participation sustainable beyond Paul Hamlyn Foundation funding, through different business models and income streams (e.g. social enterprise, partnerships)

OUTCOME 3: CAPABILITY-BUILDING

Museums and galleries play an effective role in developing community skills, capabilities and creativity: preparing and helping people to be engaged in their communities, to articulate their voices, to find employment or volunteering opportunities in the heritage sector and elsewhere; and supporting staff to learn how to work with communities

Indicators of success would include evidence of:

3.1 Commitment to development of the community and of individuals within it as core values and purposes of the museum or gallery

3.2 Museum/gallery working in partnership with the community and other sectors locally to identify and understand employment, volunteering, training and capability needs within the community

3.3 Museum/gallery development of community potential, skills and enterprise (e.g. through social enterprise models, volunteer programmes, apprenticeships)

3.4 Training and capability building of community partners (e.g. through placements, mentoring)

3.5 Training and capability building of staff to learn how to work with communities (e.g. through placements in community organizations, mentoring)

3.6 *Community organisations and individuals involved in developing and delivering staff training and enhancing staff capabilities*

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OUTCOME 4: REFLECTION

Museums and galleries embed reflective practice into their work: internally, with community partners, and across the sector, to ensure ongoing reflection, dialogue and openness to challenge, alternative values and working methods

Indicators of success would include evidence of:

4.1 Ongoing reflection and dialogue with partners about practice

4.2 Clear and ongoing museum/gallery management discussion about 'community': who? why? what? when?

4.3 Internal and external self-criticism within the organisation: staff and communities feel able to challenge assumptions, disagree and speak freely and openly without fear

4.4 Sharing good practice about engagement and participation

4.5 Willingness to take risks with new ideas and innovative practice

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1.2.3 The *Our Museum* participants

The twelve organisations that had taken part in the research phase were invited to respond to the Outcomes and Indicators of Success framework and outline the approach they would take over a three-year period to creating organisational change in their specific contexts, working in active partnership with their communities. Each organisation was asked to identify specific 'strategic change objectives' that they anticipated would be the focus of their work. The initial three-year period was eventually extended by approximately nine months, to assist organisations that experienced unforeseen delays in implementing their plans.

Applicants were asked to identify who would be on their 'engagement team'. This was a concept modelled on the teams developed in the research phase of the initiative. They were asked to choose five people from their own organisation, ideally including their director or head of service, and five people from their community partners as the members of the engagement team. It was expected that members of the engagement team would also attend annual peer reviews. It was hoped that, where possible and practical, the membership should remain constant throughout the period of the programme, to ensure continuity of process and learning. Organisations were asked to give initial ideas of the training and development they might need to support their change programme.

In early 2012, nine organisations were selected to take part in the initiative. The selected organisations were:

- Amgueddfa Cymru-National Museum Wales (Amgueddfa Cymru)
- Belfast Exposed
- Bristol Culture
- Glasgow Museums
- Hackney Museum
- Museum of East Anglian Life (MEAL)
- The Lightbox
- Ryedale Folk Museum (RFM)
- Tyne and Wear Archives and Museums (TWAM)

These organisations had all been involved in research commissioned by the Foundation and reported in '*Whose cake is it anyway?*' The selection reflected key differences in the sector, for example, in the size of organisation, the type of governance, the nature of demographic area served, and location – urban and rural. Museums and galleries were selected from each part of the UK: England, Northern Ireland, Scotland and Wales. Two of the organisations that had taken part in the initial research decided not to take part in *Our Museum* and one made an unsuccessful application.

Direct funding of up to £50,000 per annum for a period of three years was given to each of the nine museums/galleries. Separate funding streams were also available for training and development of staff and community partners and for expenses to cover the annual peer review processes. This included, if necessary, a contribution to any loss of income for community participants on engagement teams. The direct funding was not offered as a grant to an individual organisation against an agreed programme of project activities; it was given as support for participants to achieve significant organisational change.

It was expected that the experience of the *Our Museum* cohort would provide information about policy and practice that would support change in the wider cultural sector. In addition all of the participating organisations and their community partners were expected to work collaboratively together, in a supportive learning network. Each of the participating museums/galleries nominated a senior member of their staff as their *Our Museum* Lead Contact; from Year 2 of the programme, the Lead Contacts met regularly with each other and the Project Director.

Funding was initially offered for Year 1 only. At the end of each year, organisations were required to submit a report on the progress of their change programme, measured against the targets in the original application and to describe their proposals for activity in the following year. The Steering Group considered these, as well as the *Our Museum* Project Director's report and evaluators' reports on each organisation, as the basis for its recommendations about continued funding. Two of the nine museums, the Museum of East Anglian Life and Ryedale Folk Museum,

withdrew from the programme in Year 3 to focus on organisational reviews and the development of new business plans.[8]

The Foundation's initial intention had been to introduce a second cohort of museums/galleries in Year 2 of the *Our Museum* initiative. Progress in Year 1 was slower than anticipated. It was decided to focus on encouraging the work of the first cohort to learn as much as possible from their experience, rather than to extend the programme to additional museums and galleries.

1.2.4 Key Mechanisms

(i)   Peer Review

An important element of the design of the programme was an annual Peer Review. This was initially envisaged by the Project Director as a process which: '*involves an agreed representative from each organisation delivering a brief presentation of their organisation's goals for the programme, methods, what they have learned, challenges encountered, and changes in practice implemented. The other participants then devise comments/challenges/questions. Each organisation will go away having been challenged as to its practice by its 'critical friends' and learned as a result.*' Each participating organisation was asked to bring the five members of staff and five community partners making up their engagement teams to the Peer Reviews. The Peer Reviews were residential over two and a half days and held in Cardiff, Bristol and London in Years 1 - 3 respectively. Participants commented on their experience of the Peer Reviews in Year 1 and Year 2 and their feedback was used by the Project Director and Lead Contacts to guide design of the next year's event.

(ii) Independent Evaluation[9]

In 2011, prior to selection of the *Our Museum* participants, an independent evaluation team was appointed, to carry out a qualitative evaluation that would:

- Support learning for all, through summative feedback to organisations, their partners and the Foundation

- Explore, analyse and document organisational change in the participating museums

- Consider the overall progress of the *Our Museum* initiative

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[8] The work undertaken by these museums during the *Our Museum* programme in Years 1 and 2 is included in this report and described in more detail in a second document: *The Our Museum organisations: a summary of the journeys*

[9] Further detail on the evaluation methodology can be found in Appendix A

- Provide information to help influence the museum sector, community partners, funders, policy makers

The evaluation team developed an evaluation framework based on the four Outcomes and Indicators of Success and established an agreed qualitative baseline with each *Our Museum* organisation.

The qualitative baseline noted the strategic change objectives of each organisation and described the organisation's starting point assessed against each of the outcomes and indicators. A baseline quantitative report was also prepared for each organisation using data provided by each museum / gallery and drawn from a range of third party sources, including the Office of National Statistics, the Target Group Index and ACORN[10].This presented a snapshot of the venue's operational, visitor and local community profile and identified gaps in evidence that might be important for the museum / gallery to address during the organisational change process.

The inception meeting was followed by three annual visits, when the evaluators held meetings with community partners and a range of key staff, using a common agenda and structure. In each of the three years, the evaluators completed a detailed evidence review for each organisation assessed against the four outcomes and the indicators. This review included material gathered during the annual evaluation visit; material supplied in the course of the year by the organisation and its partners; and other material gathered by the evaluators from, for example, review of websites or of the online project management systems used by two of the *Our Museum* organisations. The team also maintained an evidence base that was used to reflect on overall programme objectives.

(iii) **Cross-Cohort Training and Support Programme**

In Year 1 of the programme, an independent consultancy was commissioned to design and deliver a Training and Support Programme for the *Our Museum* cohort. This contract was not continued after the early stages of Year 2. After consultation with Lead Contacts, it was agreed that organisations could submit individual bids to the Project Director for training that they believed would support their programme of work. Subsequent approaches to training and support were developed from these proposals and through discussion between the Project Director and Lead Contacts.

The Foundation also offered to provide funding for Critical Friends to work with each of the participant organisations. A Critical Friend is an experienced professional who asks provocative questions, provides additional data, evidence or lessons from elsewhere that give a different perspective, and offers a critique of the participating organisation's work, from the point of view of someone who wants them to achieve

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[10] Acorn is a consumer classification that segments the UK population. By analysing demographic data, social factors, population and consumer behaviour, it provides precise information and an understanding of different types of people to help improve service delivery.

their stated objectives. Seven of the nine *Our Museum* organisations worked with a Critical Friend, with two of the seven choosing to work with professionals who lived near to them and knew their work well. Five organisations worked with a member of the evaluation team as their Critical Friend. [11]

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[11] The evaluators were concerned to ensure that this was achieved in a way that did not conflict with the needs of an objective evaluation. It was agreed that the person who was the Lead Evaluator for an organisation would not act as a Critical Friend to that organisation and that information learned as a result of being a Critical Friend would not be documented in the evaluation evidence base without the permission of the organisation concerned

2 THE JOURNEYS: THE WORK OF THE NINE *OUR MUSEUM* ORGANISATIONS

WORK ON THE IMPORTANT PROBLEMS

The organisations participating in *Our Museum* experimented with a wide range of approaches to achieving their strategic change objectives in order to strengthen active partnership with communities and bring about organisational change.

This section begins with a summary of the different ways in which each participating museum and gallery responded to the principle of creating an engagement team with community partners, outlined at section 1.2.3 above. It also gives an indication of how, and to what extent, community partners were active in design and delivery of the museums' and galleries' *Our Museum* programmes.

The second part of this section then uses the framework of the four *Our Museum* outcomes to:

- Identify key challenges faced by each of the organisations

- Explain some of the ways in which they made use of *Our Museum* funding

- Highlight key achievements

- Note issues or questions that may need to be addressed in the future

More detailed accounts of each organisation's experiences are available on the website **ourmuseum.org.uk***,* in the section entitled *Initiative Partners* under the part dedicated to each individual organisation.

2.1 THE ENGAGEMENT TEAM AND COMMUNITY PARTNERS

2.1.1 Amgueddfa Cymru – National Museum Wales invited all the voluntary organisations previously consulted about its Heritage Lottery Fund bid[12] to a meeting to discuss their potential involvement in *Our Museum* before a final application was submitted to the Foundation. The focus of the *Our Museum* application on volunteering was agreed at an early stage and members of the engagement team were drawn from local, regional and national voluntary agencies whose work involved people who were not then represented in the volunteer profile at St Fagans. This included homeless people, unemployed people, disabled people, and young people. Some agencies had worked previously with the museum and some had not.

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[12] St Fagans National History Museum received a Heritage Lottery Fund grant for the Making History: Creu Hanes programme in 2012

Community partners included, for example, Diverse Cymru, Drug Aid, New Link Wales, Quest (supported employment), The Wallich (homelessness), VCS Cymru, Wales Council for Voluntary Action; all the organisations had specialist experience that the museum did not possess. There was a clear understanding of the purpose of the partnership for both the voluntary organisations and for the museum. Community partners worked strategically with Amgueddfa Cymru to plan and deliver the *Our Museum* programme in '*an open and democratic process, where all voices were equal and people built relationships based on trust and respect*'and were involved in delivering training to museum staff. They are now helping to develop a range of appropriate methods for themselves and other new community partners to work with the museum in the future.

2.1.2 Belfast Exposed initially set up an engagement team of staff and community partners which included two voluntary sector organisations, The Welcome Organisation and Lower Oldpark Community Association and individuals with academic, professional filmmaking, photographic practice and legal/human rights experience. The community partners had all previously engaged with Belfast Exposed through, for example, having their work exhibited there or having been involved in a project. Engagement team partners changed throughout the programme with little continuity or clarity amongst community partners about their role in working with staff or Board towards Belfast Exposed's strategic change objectives. Belfast Exposed continued its existing practice of working closely with a range of partners to design and deliver projects and programmes, including some related to *Our Museum*. Examples include: Dunmurry Community Association, Hazelwood Integrated School and Strabane District Council.

2.1.3 Bristol Culture's *Our Museum* engagement team initially comprised community partners who had already been involved with the organisation in some way, for example, a volunteer member of their Disability Advisory Group, Arts in Power - a voluntary sector organisation and the founder of a local social enterprise. Membership was then widened to increase ethnic diversity amongst the group and involve more members with experience of strategic community development and community networks in Bristol such as the Chair of the Single Parents Action Network and an experienced youth worker and activist. The name of the group was changed to The Hub to suggest its potential role within Bristol Culture. However it was difficult to establish a clear strategic rationale and shared purpose for the group and, although individual community partners made valuable contributions to the work being undertaken, membership was inconsistent. The Hub was disbanded at the end of the *Our Museum* programme. Plans are in place for development of a Youth Panel in 2016. As part of its *Our Museum* programme, curatorial staff also met with other community partners and representatives of groups with an interest in the theme of its major exhibition on the subject of 'Death.' These included Age UK Bristol, the Bristol Secular Society and The Bristol Multi-Faith Forum.

2.1.4 Glasgow Museums initially created an *Our Museum* engagement team comprising museum staff and other members of staff of Glasgow Life[13] including, for example, the Contemporary Art Manager in Glasgow Arts team, a Learning Officer, and a member of one of Glasgow's Area Teams. In Year 2 it was decided to build on an existing system, the Community Advisory Panel that had been created during the development of the Riverside Museum. Initial progress with the Community Forum appeared promising, but then faltered; there were concerns about identifying shared objectives and whether the design of the Forum was appropriate to represent the diversity of the city and to enable a broad range of people to influence the service. In Year 3, Glasgow Museums re-considered the design of the Forum and proposed a new mechanism, a Creative Café, directly linked to its organisational planning cycles, which has now been put in place. This is '*a regular discussion forum hosted several times a year by Glasgow Museums. It is an opportunity to bring people together from across Glasgow Life and external partners across the city, to share ideas about Glasgow Museums' work, collections and forward plans. It is also a chance for everyone who comes along to make new connections and meet new people.*' A wide range of existing and new partners are invited to participate in these events – for example, Coalition for Racial Equality and Rights, Drink Wise, Age Well, Strathclyde University, Village Story Telling Centre, and LGBT History Month. Community partners, such as Netherton Community Centre and Lambhill Stables have also been involved in offering training sessions and work placements for Glasgow Museums' Staff Ambassadors Programme.

2.1.5 Hackney Museum's engagement team included as community partners creative businesses, local artists, community organisations and community representatives living and working in a single geographical area, Cazenove Ward, which was the preliminary focus of its *Our Museum* programme. Community partners included, for example, Stoke Newington Common Users Group and the Boiler House Community Space and artists from Praxis and Campbell Works. In Year 1 it was not always clear to community partners what the objectives of the initiative were or what the museum expected from them; museum staff and partners worked together to establish a statement of joint intent and in Year 2, community partners were heavily involved in planning, delivering and evaluating *Our Museum* activities. In Year 3, the museum wanted to widen its community partner network, both to mitigate the dangers of a closed system and to draw in individuals and organisations with additional specialist skills and different interests from across the borough and co-produced an exhibition *Hackney@50: The People's Choice* with participants from across the borough rather than a geographical ward in the borough.

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[13] 'Glasgow Life', 'Glasgow Arts' and 'Glasgow Museums' are operating brands of the registered charity and company limited by guarantee: Culture and Sport Glasgow

2.1.6 The Museum of East Anglian Life (MEAL) did not set up an *Our Museum* engagement team of staff and community partners to meet regularly during the course of the programme. Some of its existing community partners – for example, a volunteer who worked for a local advocacy and support charity for people with disabilities and the Suffolk Museums Project Officer - attended evaluation meetings and Peer Reviews, though attendance was not consistent. MEAL identified the reasons for this as being the amount of time involved and that their community partners lacked the desire to be involved at a strategic level. As part of its *Our Museum* programme, MEAL worked with villagers in Barsham, a community that the museum had not worked with previously and with a Heritage Centre in Brandon. It also worked to strengthen the ways in which its internal communities – staff and volunteers – could be involved in planning and decision-making.

2.1.7 Ryedale Folk Museum's (RFM) *Our Museum* engagement team included the Creative Economy Officer for Ryedale District Council, a member of North Yorkshire Probation Service, a teacher from a local school, a representative of the National Park Authority and members of the museum's staff. A volunteer working on RFM's archives later joined the team. Members were scattered across a wide geographical area so the museum proposed structures to enable realistic participation by members. For example, RFM proposed that face to face meetings were held twice or three times a year. The purpose, remit and composition of the engagement team was never established and although individual community partners were supportive, the group did not actively focus on the work the museum was doing and could do with communities as active partners. RFM experimented with collaborating more closely with community partners to develop events at the museum, hoping this would both encourage innovative ideas for use of the site and its resources and increase levels of shared decision-making; partners included Ryedale Book Festival and the local branch of the Workers' Educational Association.

2.1.8 The Lightbox developed its *Our Museum* engagement team gradually, partly as a result of its practical collaborations with new community partners, using its 'Starting from Zero' concept. Community partners who worked with The Lightbox on co-created projects as part of the *Our Museum* programme included the Lakers Youth Centre, six local organisations of adults with learning disabilities, the Shah Jehan Mosque, local artists and arts organisations, Age Concern Woking and York Road Project for the Homeless. The engagement team encouraged the development of active and equitable collaboration between The Lightbox and community partners, where all were conscious of their own strengths and capabilities and aware that they could achieve more together than separately. As the *Our Museum* programme ends, The Lightbox is experimenting with a new mechanism: The Lightbox Ideas Forum. This community forum is based on the Creative Café model developed by Glasgow Museum, adapted to the needs of The Lightbox as a much smaller organisation.

This enables community input at the pre-planning stage of exhibitions and projects and generates ideas for future activity; it will have a rolling membership so no one representative has a permanent presence.

2.1.9 Tyne and Wear Archives and Museums' (TWAM) *Our Museum* engagement team had four community partners: staff from three voluntary organisations – Moving Forward (Gateshead), Launchpad and First Step – and a museum volunteer. The community partners had worked with TWAM previously and were committed to the aims of the *Our Museum* programme. Three of the four members remained directly involved with the *Our Museum* process throughout and contributed to planning, decision-making and evaluation: the fourth remained engaged with TWAM and presented part of a session about engagement practice with museums, based on experience with TWAM, at the Museums Association conference. TWAM experimented in Year 1 with a 'Critical Friends Group' that had wider community representation than its engagement team: this was not sustained, but two 'People's Parliaments' helped to shape the programme before the start of the second and third years. TWAM set up an Alternative Management Team comprising members of staff and community partners. This has played an important role in helping TWAM to develop a draft Community Engagement Framework entitled *Valuing Voices*: '*this will make explicit the ways in which people outside the organisation can engage in, and influence, its activity'*. The Alternative Management Team will help to pilot the new framework at one of TWAM's venues initially, and to roll it out further across the organisation over time. Community partners Moving Forward (Gateshead) were also involved in delivering training to museum staff and other partners, as part of TWAM's *Our Museum* programme.

2.1.10 WORKING TOGETHER: A REFLECTION

Many of the museums/galleries in the *Our Museum* programme found it challenging to create and then sustain effective relationships with community partners that focused on organisational change as against projects on a particular theme or issue. At the beginning of the *Our Museum* programme, although all participating museums/galleries had strong reputations for their work in community engagement, none had mapped their existing partnerships in a way that could be shared and used easily across the whole of their organisation. Knowledge about and relationships with partners were fragmented, held within different departments or teams or even by individuals. This was the situation in small organisations as well as larger ones.

This was the context in which *Our Museum* participants approached preparation of a bid to the Foundation. Prior to submitting bids there was little detailed discussion at a strategic level within most organisations to identify appropriate collaborators and limited or no consultation between museums/galleries and potential community partners about the content of the *Our Museum* bid.

The exception to this approach was Amgueddfa Cymru, which was strongly positioned to have such discussions because they were involved in detailed consultations with a range of community partners as part of their bid for Heritage Lottery Funding for their Saint Fagans site.

These three factors in the pre-submission phase contributed to slowed progress in Year 1 in several organisations:

- Lack of shared organisational knowledge about existing partnerships
- Absence of a coherent strategic view within museums/galleries about which community partners might be most appropriate to work with and be most interested in collaborating on the kinds of organisational changes proposed by each museum/gallery
- Limited community partner involvement in jointly developing bids to the Foundation

Some organisations – notably Hackney Museum and The Lightbox – had deliberately set themselves the task of identifying and working with new community partners as an integral part of their approach to *Our Museum*. Initially progress was easier for The Lightbox, where the work was led throughout by a practitioner with many years of experience of working with the organisation and in Woking, than in Hackney where the worker in Year 1 was appointed from outside the museum and left at the end of the year. During the course of the programme several *Our Museum* organisations mapped the full range of their partnerships and strengthened their strategic understanding of which partnerships were a priority and of gaps that needed to be addressed.

Several *Our Museum* organisations found that the more explicit they and their community partners could be about the ways in which collaborative working would be of mutual benefit, the easier it was to develop and sustain effective relationships. Some used formal written agreements, such as Service Level Agreements and Memoranda of Understanding to support this; other organisations relied on more informal methods. When *Our Museum* organisations were unclear about how the changes in the way the museum or gallery worked would be relevant to the concerns and priorities of the individuals, groups or communities they were inviting to become partners, it was much harder to attract and retain community partners. This was exacerbated by the fact that many individuals and other potential community partners were experiencing huge pressure because of the UK's financial crisis and needed to be clear that they were spending their time in ways that would be of real value to them or the communities they served.

The question of whether or not community partners should be paid by participating organisations for their involvement in the *Our Museum* programme was frequently discussed. Two organisations initially offered payments but most did not, partly because of concerns that this might set a precedent that they could not afford to apply across other projects and programmes.

Some community partners expressed concern to the evaluators that their museum/gallery did not offer re-imbursement of expenses, such as travel costs or car parking. This is likely to particularly affect participation by individuals who are not representing funded organisations.

A deeper question is how museums/galleries can best express the value they place on the work of community partners, especially when those partners are contributing to organisational change. Amgueddfa Cymru's community partners were all drawn from funded third sector organisations and valued the payment of a fee linked to a formal agreement between the museum and their organisations, as against individuals, because it acknowledged the legitimacy of the *Our Museum* work to their own organisational core concerns and also generated earned income. Through discussion with its community partners, Amgueddfa Cymru is beginning to develop new approaches which do not rely on external, 'one off' funds: these include payment of fees to community partners for training and consultancy work and identifying ways of making in-kind contributions to the work of community partners.

In reflecting on their learning from the *Our Museum* programme, several organisations commented that the early stages of forming a partnership are critical to longer-term success. Appropriate induction is important, for both museum staff and community partners, to introduce each other's ways of working, to understand each other's priorities and discuss mutual expectations. Evaluators observed that problems arose during the programme when, for example, community partners did not have the opportunity to jointly shape agendas; were not allowed the time needed to process important information; or when museum staff and community partners did not have a shared understanding of each other's terminologies.

The *Our Museum* organisations which had most success in developing and sustaining purposeful relationships with their community partners, paid explicit attention to ensuring good two-way communications and to relationship building. Two organisations used web-based project management systems as one of their means of communication and found that this was a useful way, for example, of ensuring key documents could be shared. Those organisations which identified a key member of staff with a high level of competency in relationship-building as the common point of contact for both museum staff and community partners, and ensured that member of staff was well supported by a senior manager, were more successful than others in building effective relationships.

Section 3.2 of this report sets out how these aspects of working with community partners contribute to planning for organisational change, making change happen and sustaining change.

2.2 THE WORK OF THE *OUR MUSEUM* ORGANISATIONS

2.2.1 Amgueddfa Cymru - National Museum Wales

Amgueddfa Cymru - National Museum Wales (Amgueddfa Cymru) describes itself as a family of seven museums located throughout Wales. The focus of its bid to join the *Our Museum* programme was St Fagans National History Museum which houses over forty original buildings from different historical periods, including a farm, school, chapel and a Workmen's Institute on a 100-acre site four miles to the west of Cardiff City Centre. Amgueddfa Cymru is governed by a Board of Trustees constituted in accordance with its Royal Charter and Statutes. Amgueddfa Cymru - National Museum Wales is funded by the Welsh Government as a Welsh Government Sponsored Body. Welsh Government policies and priorities provide the overall context for its work.

Amgueddfa Cymru identified four strategic change objectives for its *Our Museum* programme; all linked to an over-arching change objective to: '*Create and sustain a Community of Volunteers.*' These were to:

- Achieve a culture change in skills development and working practices in order to broaden the volunteer base[14] and embed opportunities for volunteers in all aspects of the Museum's work
- Build a community of volunteers at St Fagans based on the needs of the volunteer, not the Museum

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[14] Existing volunteers were predominantly white, middle class and educated to a high level

- Ensure that meeting the needs of users is the responsibility of all Museum staff
- Ensure that opportunities for learning are embedded throughout its work.

Outcome 1 Rooted in Local Needs

Challenges	Amgueddfa Cymru identified that *'As a publicly funded organisation, we have a social responsibility to provide enabling experiences with a beneficial social outcome. We need to re-establish our relationship with civil society.'* It chose to focus its *Our Museum* programme on volunteering: '*something we felt we were particularly bad at.'*
Examples of how funding was used	The community partners on Amgueddfa Cymru's *Our Museum* engagement team represented local and national agencies that had considerable relevant expertise in working with volunteers. Community partners were paid a flat rate fee for their time.
Key achievements	Active collaboration with community partners to identify and begin to remove barriers to participation in volunteering. Four hundred and thirty five volunteers completed over five thousand hours of volunteering at St Fagans 2013 – 2015. In 2014 there were one hundred and twenty active volunteers across all departments in St Fagans: 43% identified themselves as unemployed. The approach to volunteering and community engagement is now included at the planning stage of all St Fagans projects; focus is on how engagement can be used as an opportunity to work with communities and planning is accompanied by consideration of the wider social impact of work practices.
Plans/Issues for the future	The *Our Museum* engagement team identified portable methodologies for encouraging volunteering which are now being shared across other Amgueddfa Cymru sites.

Outcome 2 Community Agency

Challenges	Time was required at the outset of the *Our Museum* programme to develop a structure for co-working for Amgueddfa Cymru's engagement team. This aimed to achieve: '*an open and democratic process, where all voices were equal'.*
Examples of how funding was used	The bulk of funding was used to create a full time post of *Our Museum* Coordinator on a fixed term contract.
Key achievements	A written Service Level Agreement was initially developed to confirm mutual expectations and responsibilities. This later became a Partnership Agreement, focused on creating a sustainable model for sharing resources between members.
	Four of Amgueddfa Cymru's Trustees were actively involved in the programme; a first for the Museum.
	St Fagans has allocated a core budget to continue work with community partners and fund a dedicated post.
	Our Museum community partners helped develop Amgueddfa Cymru's new Community Engagement Strategy.
Plans/Issues for the future	The engagement team has developed a 2015/16 Work Plan: focused on embedding practices across Amgueddfa Cymru, staff engagement, young volunteering and sharing learning.

Outcome 3 Capability Building

Challenges	Amgueddfa Cymru regarded the *Our Museum* programme as a way to pilot approaches to capability building and to feed into wider change processes across the museum.
Examples of how funding was used	Training workshops for the staff team at Saint Fagans were delivered by community partners; these directly addressed any preconceptions or prejudices staff might have had about working with people using the community partners' services.
Key achievements	Staff used the training they had received from community partners to support and mentor volunteers, further developing their own skills through practice.
	Amgueddfa Cymru achieved Investors in Volunteers, the national award for best practice in volunteering.
	Amgueddfa Cymru is now piloting group volunteering as a way to enable people to volunteer with people that they already know until they feel ready to consider individual volunteering opportunities.
Plans/Issues for the future	Types of training that should be provided to all staff to support them to work with diverse communities have been identified in the process of developing the new Community Engagement Strategy.

Outcome 4 Reflection

Challenges	Amgueddfa Cymru aspires to be an organisation that is continually learning.
Examples of how funding was used	This outcome was seen as integral to all work on this programme. The engagement team developed a Self-Evaluation Toolkit to encourage reflection on each of the four outcomes.
Key achievements	An ongoing process of conscious reflection has fed into updating of volunteering processes and policies, as part of an '*ethos of ongoing adaptive evaluation'*.
Plans/Issues for the future	The museum has identified significant challenges to be tackled in order to embed learning and maintain the impetus of change in an organisation as complex as Amgueddfa Cymru.

2.2.2 Belfast Exposed

Belfast Exposed is Northern Ireland's principal gallery of contemporary photography. It mounts a programme of changing exhibitions; holds an archive of more than a million images largely donated by local photographers, a proportion of which are accessible online; and runs education and community programmes. Belfast Exposed is a registered charity and company limited by guarantee. It is funded by Arts Council Northern Ireland (ACNI) and Belfast City Council, project grants and earned income and is governed by a voluntary Board.

Belfast Exposed's strategic objectives for the *Our Museum* programme
These were to:

- Build a dynamic community photography programme for the future that matches and interfaces the gallery[15] programme in terms of international significance and local resonance

- Cohere the work of gallery and community projects around a set of common values and goals and transform the way it worked and was understood in the community

- Strengthen its position as part of a community of concerned and active citizens who have important things to say about a city once again under threat, this time by an economic storm that is gathering

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[15] The word 'gallery' is used here to refer to the curator led programme of changing exhibitions and related activities presented in the main ground floor exhibition space of Belfast Exposed's building

Outcome 1 Rooted in Local Needs

Challenges	Belfast Exposed believed that its focus on developing the organisation since 2003 through the gallery project had given rise to a problem of unequal development between the gallery and community programmes.
Examples of how funding was used	In Year 1, an independent consultant carried out a review, to clarify what was needed to bring about organisational change, and a perception survey with external stakeholders that identified the organisation lacked coherence and agreed strategy.
	In Year 2, the new Director used *Our Museum* funding to develop a new business plan which valued the gallery programme, the community programme and the organisation's unique archive equally.
Key achievements	The successful bid to ACNI for 3-year funding (2015-18) identified '*a joint set of values and goals'* and secured full funding for the Community Programme Coordinator's salary for the first time.
Plans/Issues for the future	Belfast Exposed intends to establish a trading arm to generate income from training and sales of artwork to cross subsidise its work; and make the archive more accessible to local communities and artists.

Outcome 2 Community Agency

Challenges	Practical responsibility for Belfast Exposed's engagement with communities, including knowledge of the content and origins of material in its archive, rested overwhelmingly with one member of staff: the Community Photography Coordinator. It was recognised this responsibility had to become integral to the work of all staff and be clearly understood by volunteers and Trustees.
Examples of how funding was used	In Year 2, a consultant was appointed to undertake a '*Review of Community Collaborative, Education and Training Programmes'* and suggested piloting 'next practice' programmes. Three pilot projects were proposed – community hubs, a collaborative commission and schools project – to test and evaluate ways of working and generate greater cross-organisation connectivity. Core principles were agreed to underpin all pilots, including the need for a sustainable business model and co-design in collaboration with community partners.
Key achievements	Two new models of community photography, *The Family Album Project* and *The Zoom Project* have been '*designed to be community led, with community involvement, empowerment and*

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	decision-making from conception of the project to the final outcome'.
Plans/Issues for the future	There is currently a gap in community expertise amongst the organisation's Board members, which it intends to fill.

Outcome 3 Capability Building

Challenges	Belfast Exposed was uncertain about how best to use its training courses to generate increased income in order to cross-subsidise other Belfast Exposed work; there were concerns that this might adversely affect training used as an integral part of community development. A small number of volunteers worked as 'Gallery Invigilators' in the ground floor gallery, greeting visitors and selling publications: volunteers were not involved with the community programme.
Examples of how funding was used	Belfast Exposed developed Photography POD, a pop up workspace designed to '*create a physical space within a local community to enable direct engagement in photography and long-term photography infrastructure development.*'
Key achievements	The POD has been piloted with Dunmurry Community Association and Hazelwood Integrated School. A Community Volunteers programme has been developed to enable volunteers to learn community photography facilitation skills through shadowing and delivering practical sessions.
Plans/Issues for the future	Belfast Exposed intends to adopt a steering group approach to the development of the POD – bringing together everyone with a stake in the project.

Outcome 4 Reflection

Challenges	Belfast Exposed initially wanted to build a range of reflective and dialogical processes into the development stages of all community projects.
Examples of how funding was used	Funding was used for reflective residential week-ends that helped staff to develop the new business plan and to identity practical ways of working more collaboratively.
Key achievements	Dialogue and reflection increased internally with gallery and community engagement staff planning together.
Plans/Issues for the future	Belfast Exposed has not yet identified ways of reflecting strategically with a range of community partners.

2.2.3 Bristol Culture
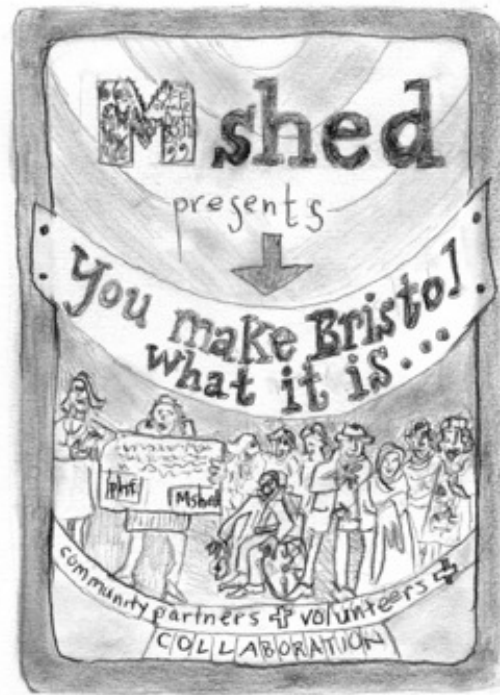
Bristol Culture operates seven venues across the City of Bristol and cares for a collection of more than a million objects. It is part of Bristol City Council's Place Directorate and is funded by the local authority, Arts Council England, and through a range of income-generating activities.

Bristol Culture's strategic objectives for the *Our Museum* programme
These were to:

- Develop new ways of working which increased people's sense of ownership and attachment to the city's public collections

- Move from static to dynamic notions of the museum as a place where multiple voices influence programme, atmosphere and meaning

- Build a sustainable ethos and culture to support equitable relationships with communities and enable innovative experiments with collections for community activism

- Pilot pro-active co-creation and sharing decision making with communities; and deepen democratic engagement

- Generate new meanings between collections and everyday life and the environment

Outcome 1 Rooted in Local Needs

Challenges	Bristol Culture envisaged a four-strand approach to organisational change intended to target all core service areas and involve as many staff as possible. Bristol Culture's progress was seriously affected by changes in senior leadership and organisational re-structuring.
Examples of how funding was used	In Year 2 Bristol Culture and the community partners decided to focus the approach to organisational change through a single project: involving 60 diverse local communities in decision-making and content refreshment of the *You Make Bristol* display at M Shed.
Key achievements	A standard paragraph about *Our Museum* principles was included in all job descriptions across the service. In Year 3, the new Head of Service initiated a 'Meet the Culture Team' event, attended by 180 people from Bristol Culture and representatives of 46 external organisations. The aim was to encourage dialogue and joint working.
Plans/Issues for the future	An explicit SMART objective related to *Our Museum* principles was included in the Service Plan for the first time.

Outcome 2 Community Agency

Challenges	In Year 1 discussions between staff, volunteers and community partners suggested that there might need to be more freedom for communities to decide on content in the context of collaborative exhibition development. The balance between community perspectives and historic/academic perspectives in exhibitions might also need to be addressed.
Examples of how funding was used	During Year 2, M Shed presented *Spaces of Dissent*, an event coordinated by one of the museum's community partners. This demonstrated a model of co-production between Bristol Culture, community partners and the University of Bristol. In Year 3, this approach was taken further in the development of a temporary exhibition on the theme of death.
Key achievements	Bristol Culture created an *Our Museum* engagement team, later called The Hub, which gave valuable advice throughout the course of the programme. It was more problematic to establish a clear strategic rationale and team membership was inconsistent. In Year 3, community partners and representatives of other external agencies took part in a series of sessions with museum staff; these influenced the development of the *Death* exhibition.

| Plans/Issues for the future	At the end of the programme, Bristol Culture decided to disband the Hub; due to lack of funding and pressure of other commitments on members. Some individual Hub members intend to continue to be involved with Bristol Culture, for example, by commenting on exhibition proposals or joining recruitment panels. A 'Youth Panel' is to be recruited later in 2016.

Outcome 3 Capability Building

Challenges	Bristol Culture wished to re-launch its Volunteer Programme and to '*empower volunteers into increased decision-making roles at the heart of the Service*'.
Examples of how funding was used	Funding was used to employ a Volunteer Coordinator and a Volunteer Apprentice to deliver an action plan.
Key achievements	Bristol Culture developed the employability programme Moving Forward in partnership with local agencies. This is aimed at unemployed people, supporting them into employment through developing transferable skills and an accredited qualification. Recruitment processes were changed so that volunteers could apply for posts previously only open to museum staff and volunteers began shaping events.
Plans/Issues for the future	The Service Plan 2015 -18 includes staff and volunteer development strands with the aim of embedding *Our Museum* principles within service practice.

Outcome 4 Reflection

Challenges	Bristol Culture wanted to embed a '*learning by doing'* approach to work using '*analyse, plan, do, review which integrates research and reflection*'.
Examples of how funding was used	Funding was not used to work on this outcome. The Hub encouraged open honest dialogue between staff and community partners and experimented with different methods of reflection.
Key achievements	In Year 3 the Hub began to include a regular ten-minute space for reflection at the end of its meeting agendas as a simple but effective tool for joint reflection.
Plans/Issues for the future	Bristol Culture's new management have changed internal systems to improve communications, rationalise meeting structures, clarify internal decision making processes and increase information flow across the organisation. Formal reflection is now included as part of the staff appraisal system.

2.2.4 Glasgow Museums
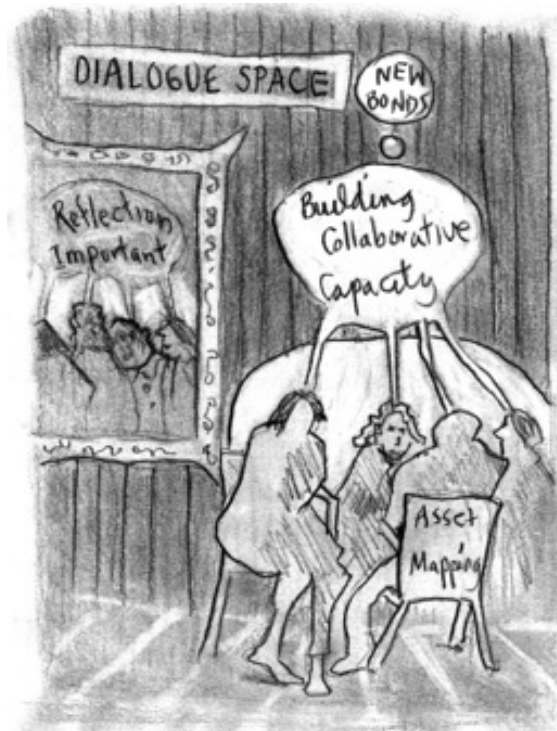
Glasgow Museums is part of Glasgow Life, a company (Culture and Sport Glasgow) set up by Glasgow City Council to run services formerly delivered by its Culture and Leisure Services department. The Service operates ten venues across the City. Its outreach service is called the Open Museum; this specialises in taking museum collections beyond the museum walls and out into the community.

Glasgow Museum's strategic objectives for the *Our Museum* programme
These were to:

- 'Scale up' community engagement and apply Open Museum's methodologies more widely across the museum, working closely with the City's Area Teams

- Move towards a more equitable participation between community, museum staff, other professional practitioners and academics in service delivery

- Create a forum for dialogue in the city about how it documented change, what it collects or discards, how it uses heritage and how it maximises collections and other resources

- Develop more integrated working across Glasgow Life, linking this with the needs of wider community partnerships and other city initiatives.

Outcome 1 Rooted in Local Needs

Challenges	Glasgow Museums proposed working more closely with Glasgow Life's three Area Teams, which provide services and facilities for communities across the city, to find out more about local needs and develop more integrated working across Glasgow Life.
Examples of how funding was used	Funding was initially used for four action learning projects. These had some limitations in achieving organisational change. The smaller projects were relatively discreet and it was difficult to influence the direction of larger projects, given the pressures of the project management of capital development schemes.
Key achievements	Glasgow Museum involved a greater range of its staff in working alongside community partners. The museum won a design award for the way it used temporary exhibition space to promote community engagement. *Our Museum* principles influenced Audience Development Plans for new capital developments.
Plans/Issues for the future	Glasgow Life has recently established a number of 'cultural hubs' in the city. Based in neighbourhoods, these provide a base for staff from museums, arts and community services to work alongside each other and will increase insight into local needs. Glasgow Museums is currently in the process of reviewing the Open Museum, with the aim of integrating its work more effectively across the museum service; the outcome of the review will indicate how it will continue to build on the Open Museum's considerable experience of local needs.

Outcome 2 Community Agency

Challenges	In Years 1 and 2, Glasgow Museums attempted different approaches towards this outcome. There were concerns about whether their initial models would enable a broad range of people to influence the service.
Examples of how funding was used	In Year 3, Glasgow Museums proposed a new model for encouraging community agency linked directly to its planning cycles – the Creative Café. Funding was used for external facilitators to help support early trials of the model.
Key achievements	The Creative Café is becoming a regular discussion forum for Glasgow Life staff and external partners; ideas are discussed and progress monitored.

|	Glasgow Museums' core planning documentation has also been reviewed: staff are asked to consider opportunities for audience/stakeholder involvement in everything proposed.
Plans/Issues for the future	The Creative Café is still experimental: much will depend on participants seeing action being taken on joint proposals. Participants suggested that their work should influence Glasgow Museums' strategic thinking; the extent to which community partners can have influence in a local authority-funded service is considered an on-going challenge by the museum.

Outcome 3 Capability Building

Challenges	Glasgow Museums wanted to encourage a stronger commitment to active partnership with communities across its diverse sites and diverse work force.
Examples of how funding was used	Funding was used to set up the Staff Ambassadors Programme; it was designed and delivered using a range of expertise from Glasgow Museums, community partners and across Glasgow Life.
Key achievements	In Years 2 and 3, Glasgow Museums' managers, curators, learning staff, Front of House staff, Finance staff and staff from Glasgow Communities took part in the Staff Ambassadors Programme, which gave opportunities for placements and mentoring in community contexts. Staff also participated in coaching, action learning sets and group project work designed to promote crossover and exchange with community partners.
Plans/Issues for the future	Glasgow Museums regards the programme as having reached a tipping point, where it has the potential to influence how all its staff work and hopes to continue developing it.

Outcome 4 Reflection

Challenges	Glasgow Museums wanted to use reflection to help develop a culture that encouraged people to be creative and take risks.
Examples of how funding was used	An Artist-in Residence was contracted to work with staff, helping them to reflect on re-aligning personal and professional vision. The Staff Ambassadors Programme prioritised reflection.
Key achievements	Insight Cafes – short informal discussion events – proved a good way to develop relationships and connections across sites and staff disciplines.
Plans/Issues for the future	Twelve members of staff and three community partners have begun training in facilitation skills, as a way of embedding reflective practices in the future.

2.2.5 Hackney Museum
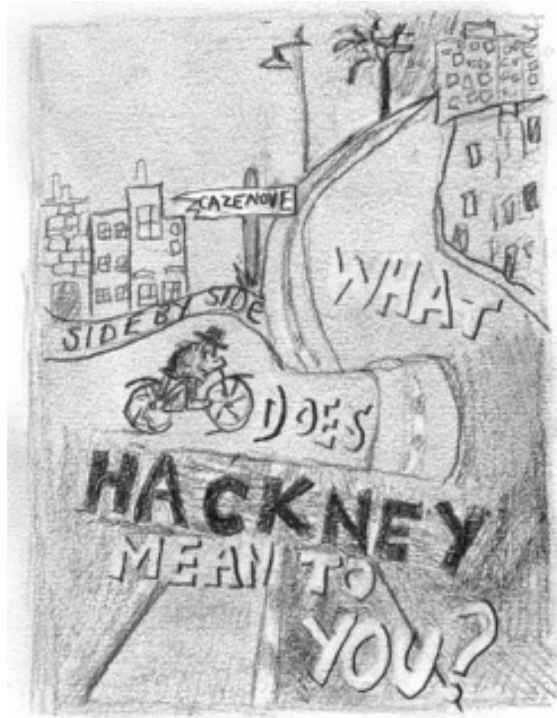
Hackney Museum is located on one site in the heart of the London Borough of Hackney and prides itself on being a community museum. Staffing and property costs are met by the local authority, which also provides a small operating budget. This is augmented by extra grant income from a range of charitable sources.

Hackney Museum's strategic objectives for the *Our Museum* programme
These were to:

- Move towards a more inter-cultural focus

- Move from working with single communities to explore one issue to a new approach that responds to the significant diversity and complexity of Hackney

- Explore contemporary meanings of community with local people

- Create a new model that will support a step change in future engagement work within the local authority and across the sector

- Develop a deeper process of reflection and analysis in order to embed learning more fully for individuals and within the organisation

- Develop additional skills in facilitating deep dialogue and narrative

- Consider how best the Libraries, Heritage and Culture Services can work together and address the broader wellbeing and social impact agendas.

Outcome 1 Rooted in Local Needs

Challenges	Hackney Museum wanted to build on its existing expertise in working with single communities on a single issue to explore ways of responding more to the diversity of the borough. The local authority and the museum went through a period of significant re-structuring during the course of *Our Museum;* this led to uncertainty for both staff and community partners.
Examples of how funding was used	The museum focussed on one geographical area as a pilot, with the aim of co-creating an exhibition with local people; it used *Our Museum* funding to encourage community partners to create small projects exploring 'What community means'.
Key achievements	The pilot ended in an exhibition, *Side by Side: Living in Cazenove,* co-produced with community partners and attended by 6,000 local residents, many of whom had not visited the museum before. The museum has moved on to develop a 'place-based approach', using a model of 'participatory co-creation' to develop an exhibition with residents from across Hackney, *Hackney @50: The People's Choice.*
Plans/Issues for the future	Hackney's Heritage Service, of which the museum is a part, is developing a social outcomes framework. This will relate the museum's work to local needs and be embedded in staff work plans.

Outcome 2 Community Agency

Challenges	The museum already had a range of mechanisms for consulting with organisations although this was not profiled to the general public. The *Our Museum* baseline assessment noted that it was difficult to understand how community involvement influenced the museum's decision making processes. Initial perceptions of staff and community partners were that involvement in *Our Museum* meant delivering more projects rather than focussing on organisational change.
Examples of how funding was used	An *Our Museum* Coordinator was appointed for the first two years of the programme. This supported staff and community partners to develop joint planning and decision-making processes and to identify mutual benefits in working together.
Key achievements	Development of a written Community Partnership Agreement. A deeper understanding of the need to identify shared objectives with community partners and to create clear briefs for co-produced exhibitions.

	More transparent processes and better shared understanding of community partner/museum expectations have been developed.
Plans/Issues for the future	Community partners have been asked to respond, contribute and develop ideas for the museum's permanent galleries which will help provide a framework for a future redisplay. The museum may need to develop a light touch mechanism that enables community partners to work together to contribute ideas and influence its work - something which *Our Museum* community partners considered important.

Outcome 3 Capability Building

Challenges	There was a need for a more systematic approach to volunteers and to staff development. The museum wanted to work across other departments in the local authority on broader shared agendas.
Examples of how funding was used	A joint training programme for staff and community partners focussed on issues such as conflict mapping, action learning inquiry, inter-cultural narrative and reminiscence work.
Key achievements	Job Descriptions now make clear that community engagement and volunteer supervision are the responsibility of all staff. A Volunteering Handbook, detailed roles and a core budget line for volunteers have been developed. The museum is piloting delivery of training in working with communities as part of London Borough of Hackney's Organisation and Development Programme for all staff.
Plans/Issues for the future	Staff development plans are now used to identify and invest in skills development '*to support active participation'.*

Outcome 4 Reflection

Challenges	Museum staff initially thought that finding time for joint reflection was difficult for a small organisation with many targets to meet.
Examples of how funding was used	This outcome was supported less by funding than by the *Our Museum* coordinator's work to integrate staff into the programme and by a more stable management structure.
Key achievements	Development of a Case Study Template; this encourages museum staff and community partners to work together to plan, collect evidence of impact and identify learning.
Plans/Issues for the future	The museum and its community partners will use the Case Study Template to evidence outcomes and share recommendations.

2.2.6 Museum of East Anglian Life

The Museum of East Anglian Life (MEAL) was founded in Stowmarket in 1967 and is an independent museum set in a large open site in the centre of Suffolk. It is home to a collection of twenty historic buildings including Abbot's Hall, which houses seven permanent exhibitions and two temporary exhibition spaces. It is a company limited by guarantee, and a registered charity, with a Board of Trustees. MEAL is funded by Suffolk local authorities, Arts Council England, project funding, admissions and other income-generating activities. MEAL completed two years of the *Our Museum* programme: after they left the programme the Foundation supported them with separate funds for organisational review and business planning.

MEAL's strategic objectives for the *Our Museum* programme
These were to:

- Shift the nature of its public facing activities by brokering more challenging conversations with users about contemporary issues and ideas

- Develop a substantive dialogue with the community around ideas of wellbeing and resilience and use the museum's collections to engage in local issues and stimulate connectivity with other groups

- Share and expand its culture into a proposed new body, a Suffolk Heritage Trust

- Deepen the engagement of community partners in strategic planning and governance at the museum and find new community partners

- Begin a systematic approach to contemporary collecting; and develop the museum's digital capacity

Outcome 1 Rooted in Local Needs

Challenges	MEAL initially wanted to better understand the community ecology and levels of social capital within Suffolk to help it discern where its activity would have most impact.
	The proposed Suffolk Heritage Trust was not formed, so plans for work on this could not go ahead.
Examples of how funding was used	MEAL appointed a Museum Activist to build its capacity to '*identify communities and individuals to use the museum's collections to engage in local issues and stimulate connectivity with other groups.*'
Key achievements	It experimented with using different methodologies to work in two geographical areas; one was to involve local people with a 'known idea' and one was to take an open-ended approach – '*How might you like to work with the museum?*'
	It used a variety of quantitative and qualitative techniques to survey existing visitors with the aim of being more aware of and responsive to visitor needs and expectations.
Plans/Issues for the future	MEAL continues to work collaboratively with a wide range of community partners including local businesses, charities, musicians, artists and environmental groups on projects / programmes, promoting this work on its website.

Outcome 2 Community Agency

Challenges	MEAL did not establish an *Our Museum* engagement team of staff and community partners that met regularly; staff were not convinced that this model was appropriate for their museum. MEAL identified a need for a wider range of staff and volunteers to be more involved in forward planning.
Examples of how funding was used	MEAL's *Our Museum* Programme Assistant piloted a co-created exhibition for the newly developed Community Cabinet at Abbot's Hall, with a local Young Parents Group.
Key achievements	The first pilot in a geographic area involved villagers deciding on an object list for MEAL's Albion Fair exhibition, working on text for the exhibition and loaning objects for it.
	The museum developed opportunities for staff, volunteers, trustees and some existing community partners to get involved in discussions about the museum's future activities and in designing and evaluating projects.

Plans/Issues for the future	The museum received funding from Arts Council England's Museum Resilience Fund for the next three years; this prioritises developments in fund-raising and income generation.

Outcome 3 Capability Building

Challenges	MEAL's Director envisaged there might be a need to '*bridge the gap between developing a contemporary socio-political context within the museum and maintaining the support of existing volunteers, users, partners and funders'*. However, plans for brokering more challenging conversations with the public were not pursued.
Examples of how funding was used	MEAL increased digital capacity, in part to support its engagement with communities. This involved designing and implementing e-communications and e-commerce solutions, staff training and improvements in the organisation's database.
Key achievements	The Museum Activist encouraged staff to take up Continuing Professional Development opportunities linked to collaboration and engagement; including exploring co-production as a methodology, attending and hosting seminars in contemporary collecting and Learning Visits to other museums.
Plans/Issues for the future	Funding from Arts Council England's Museum Resilience Fund will support work-force development '*to better equip them for the future'*.

Outcome 4 Reflection

Challenges	MEAL initially wanted to develop more systematic and documented processes of reflection. Opportunities for group review, reflection and action were seen as a challenge, because of logistical issues such as staff work patterns, capacity to cover work during opening hours and geographical spread of the site.
Examples of how funding was used	In Year 2, MEAL worked with a Critical Friend, who facilitated regular reflective sessions, mostly for the management team, and carried out some work on organisational team development.
Key achievements	The Museum Activist helped the museum develop feedback and evaluation methods in many areas of work (exhibitions, talks, workshops, events, training programmes) and ensured these were action-focussed, discussed at team meetings, circulated widely and publicly available.
Plans/Issues for the future	As the Museum Activist's post has now finished, MEAL may wish to monitor the feedback and evaluation methods introduced to ensure these are fully embedded.

2.2.7 Ryedale Folk Museum

Ryedale Folk Museum was founded in 1964, by a group of local people who wanted to preserve understanding of everyday working lives in Ryedale. The museum is set in a six-acre site in the North York Moors and has over 20 historic buildings including shops, thatched and timber framed cottages, workshops and a Tudor Manor House. The museum became an incorporated charity in late 2011, with its work largely funded through voluntary income from a range of funders and from self-generated income/trading activities. It is governed by a small group of Trustee-Directors.

Ryedale Folk Museum's strategic objectives for the *Our Museum* programme
These were to:

- Expand the mix of the museum's overall learning and engagement offer

- Investigate, assess and implementing alternative income streams

- Develop a practice learning community to build on the museum's learning practice/collaborative culture internally and externally and giving practitioners (staff, volunteers, student placements, apprentices) more opportunities to express their thinking and share practice.

Ryedale Folk Museum completed two years of the *Our Museum* programme: after they left the programme the Foundation supported them with separate funds for organisational review and business planning.

Outcome 1 Rooted in Local Needs

Challenges	Ryedale Folk Museum prided itself on close connections with its local area. Staff and Trustees interrogated these assumptions; they recognised considerable gaps in their overall knowledge.
Examples of how funding was used	The museum used funding to back-fill posts so that staff had time to talk to specific community partners about what they needed from the museum. A visitor survey was commissioned after a gap of eight years. After leaving the *Our Museum* programme an organisational review and a business plan were commissioned from external consultants with separate funding from the Foundation.
Key achievements	Piloting of new museum 'offers', for example, a STEM (Science, Technology, Engineering and Maths) fair for eleven local schools; craft-based classes for adults, including tourists. Community partners and local residents have been actively involved in consultations about the new business plan.
Plans/Issues for the future	The new business plan identifies the vision of the museum as being '*to discover, explore and communicate Ryedale's sense of place and the stories of its people'.* It recommends improved relationships with key stakeholders, including Ryedale's communities; and more effective use of information about visitors and their experiences.

Outcome 2 Community Agency

Challenges	The *Our Museum* baseline assessment noted that Ryedale Folk Museum had no processes that enabled wider involvement of community partners in shared decision-making, setting targets, or monitoring and evaluation. Although an *Our Museum* engagement team of museum staff and community partners was set up, its purpose and composition was not fully clarified and membership was not consistent.
Examples of how funding was used	The museum experimented with 'partner-managed' days, inviting community partners to develop new events at the museum with the help and support of staff.
Key achievements	New collaborations were established through the 'partner-managed' days, such as Ryedale Book Fair and the use of the museum for drama performances by a Workers Educational Association group.
Plans/Issues for the future	The new business plan makes clear that a desire to '*make a positive contribution to the community*' is a core value of the

	museum. It is not clear how communities will be encouraged to actively and regularly participate and collaborate in dialogue and decision-making about the work of the museum.

Outcome 3 Capability Building

Challenges	The museum did not have a robust system for identifying staff or volunteer training and development needs. It had an informal approach to building the capacity of staff and volunteers to work with communities.
Examples of how funding was used	The back-filling of staff posts enabled some preliminary work to be done on developing a Volunteer Handbook. The museum staff took advantage of the *Our Museum* programme to visit other museums and engage in peer learning.
Key achievements	The museum's new business plan articulates core values, so that it is clear that striving to provide quality visitor services is the responsibility of the whole organisation. The business plan identifies the importance of finalising the volunteer policy to prioritise annual communications and customer care training for staff and volunteers.
Plans/Issues for the future	The plan does not explicitly prioritise the development of staff and volunteers' skills in working actively with community partners.

Outcome 4 Reflection

Challenges	Ryedale Folk Museum staff thought that this was an area of considerable internal organisational weakness. There was also little joint reflection with community partners.
Examples of how funding was used	The experience of being involved in the *Our Museum* programme encouraged staff to identify the benefits of reflection more clearly. The new Director worked closely with a Critical Friend to help her reflect during the process of organisational review and business planning.
Key achievements	Museum staff began to place a much higher value on joint planning, monitoring and evaluation than previously. The processes adopted in developing the new business plan demonstrated the museum's commitment to more open dialogue with a range of stakeholders.
Plans/Issues for the future	Whilst the organisational review was based on dialogue with stakeholders, including community partners, it is not clear what processes the museum will use for more 'everyday' joint reflection with partners or how regular such opportunities might be.

2.2.8 The Lightbox

The Lightbox (TLB) is a purpose built public gallery and museum within minutes of Woking town centre. It was founded by a group of local people, and opened to the public in 2007 after a period during which the founders ran cultural activities in the town without a fixed building base. The Lightbox is a charity and company limited by guarantee with a Board of Trustees. It is supported by Woking Borough Council, Arts Council England and corporate sponsors, and by income generating activities. During the course of the *Our Museum* programme, a £5 Annual Pass was introduced giving entrance to all exhibitions for a full year, with free entry for community partners working with The Lightbox, under 18s and carers.

The Lightbox's strategic objectives for the *Our Museum* programme
These were to:

- Change the way The Lightbox functions as a gallery and museum by moving from being an organisation that makes offerings on our terms to the public which they can either accept or not to an organisation which presents exhibitions, does educational work and facilitates community activities arising from the needs and wishes of the local community, through genuine collaborative explorations

- Get back to the '*early roots'* of the organisation but in a better, deeper and more sustainable way

Outcome 1 Rooted in Local Needs

Challenges	The Lightbox wanted to explore whether its desire to become a nationally acclaimed gallery had moved it away from a wish to be a gallery inspiring a sense of ownership amongst local people. There was a perception that the Special Projects Manager (SPM) acted as 'the voice of the community', rather than this being seen as the responsibility of the whole organisation.
Examples of how funding was used	The SPM was contracted to work on the *Our Museum* programme. In Year 1, he carried out interviews with a wide range of community groups, staff, Trustees and external stakeholders to establish a baseline of perceptions about the organisation's role in the local community.
Key achievements	The Lightbox built greater flexibility into its exhibition programme so that it could be more responsive to community needs. It experimented with an exhibition in its main gallery space, produced in collaboration with people with learning difficulties. Visitor numbers were sustained though café/shop income reduced as the profile of people visiting the show changed.
Plans/Issues for the future	The Lightbox intends to continue to show exhibitions of collaborative work within an integrated programme, and plan for both direct and indirect impacts (e.g. on income targets) of programme decisions. The Lightbox has begun to reimagine itself as part of a connected network of organisations and communities: of interest and of place. The SPM post is now 'Community Engagement Manager', implying a shift from delivery of individual projects to a planned series of events or activities.

Outcome 2 Community Agency

Challenges	Community engagement practice was seen as primarily focused on projects, reliant on external funding. There was no overall organisational community plan or strategy. Differing impressions of what the 'core' work of the organisation was were given in on-line and print material.
Examples of how funding was used	Partnerships were set up with four community groups exploring the concept: 'Starting from Zero.' Staff did not approach communities with preconceived propositions: instead they took time to understand more about the partner, discussed together what kinds of collaboration would be meaningful and relevant for community partners and the gallery, and the resources The Lightbox and partners, like the Shah Jehan Mosque, could offer.

Key achievements	Equitable, active collaborations were promoted as essential. Working with a member of its *Our Museum* engagement team, The Lightbox acted as an enabler, establishing Woking Arts Hub as a network for local artists and arts organisations. Appreciation grew amongst staff and Trustees of the balance between 'national' and 'local' aspects of The Lightbox's work.
Plans/Issues for the future	The Lightbox plans to experiment with a clear mechanism – The Lightbox Ideas Forum - to enable community input at the pre-planning stage of exhibitions and projects and to generate ideas for future activity. This will have a rolling membership so no one member or representative has a permanent presence.

Outcome 3 Capability Building

Challenges	The Lightbox initially envisaged a training programme for staff, Trustees and volunteers to encourage collaborative work. There was no formal mechanism for staff / volunteer dialogue.
Examples of how funding was used	Community partners from local organisations working with adults with learning disabilities received fund-raising training and formed a fund-raising consortium with The Lightbox.
Key achievements	Staff became involved, not through a training programme, but more informally, through the *Our Museum* engagement team and peer review. For example, a member of the marketing and communication team began to make sure that the learning from the work was 'visible' in The Lightbox's print and on-line material During the course of the *Our Museum* programme, The Lightbox began to use their Volunteer Forums differently to encourage more active dialogue and feedback between staff and volunteers
Plans/Issues for the future	There may be a need for 'whole organisation' training as The Lightbox moves into its next phase of development; this might focus on integrated strategic planning.

Outcome 4 Reflection

Challenges	The Lightbox saw itself as an organisation that reflected informally. The *Our Museum* baseline assessment noted that the value or purpose of reflection was not formally expressed.
Examples of how funding was used	In Year 2, the organisation held two days of reflection, attended by staff and community partners, asking staff to examine their work in the light of the *Our Museum* principles. Changes in practice - some noted above - have resulted.
Key achievements	De-briefs are now held after large events and monthly reflections are given to Trustees by departments.
Plans/Issues for the future	The proposed Lightbox Ideas Forum should offer a space for regular shared reflection.

2.2.9 Tyne and Wear Archives and Museums

Tyne and Wear Archives and Museums (TWAM) manage a collection of nine museums and galleries across Tyneside and the Archives for Tyne and Wear. It is supported by the five local authorities in Tyne and Wear and Newcastle University, is a Major Partner Museum funded by Arts Council England and has Core Funded Museum status. It is governed by a Joint Committee comprised of twelve members drawn from the local authorities of Tyneside.

TWAM's strategic objectives for the *Our Museum* programme
These were to:

- Move from resource-led planning to needs-led planning

- Understand more comprehensively the issues that communities would like TWAM to help them in addressing and - in the long term – support the aspirations of local communities

- Make best approaches routine and embedded across the whole organisation; ensuring the principles of community engagement influence the way in which every part of the organisation works

- Join up the many ways in which people in the organisation work with communities.

Outcome 1 Rooted in Local Needs

Challenges	TWAM is proud of a twenty-year history of commitment to community engagement and a decade of sustained investment in the work of its dedicated community outreach team. TWAM wanted to develop ways of working that were more informed by a comprehensive understanding of the issues people wanted them to address.
Examples of how funding was used	In Year 1, TWAM used funding to enable staff at each of its sites to have a conversation with a community organisation, group or venue with whom they did not have direct links, in order to find out more about their needs and aspirations. In Year 2, TWAM organised a facilitated management symposium to look at the perceived tension between income generation to meet financial targets and engagement.
Key achievements	TWAM developed additional methods to enable Front-of-House staff to gather information through conversations with visitors. At Shipley Art Gallery, TWAM began developing a programme of co-produced exhibitions in response to community concern about the loss of a local museum. It also refreshed its work with babies and very young children in response to local needs.
Plans/Issues for the future	TWAM's management symposium concluded that there was no conflict in principle between deeper community engagement and other strategic objectives, but recognised the need for the organisation to directly address potential tensions, as well as opportunities, when making hard decisions.

Outcome 2 Community Agency

Challenges	TWAM's Senior Management identified inconsistency in community engagement practice across sites and disciplines.
Examples of how funding was used	TWAM freed staff up to experiment in creating an 'Alternative Management Team' (AMT), working with community partners to consider real problems facing the museum. They were briefed on issues involved by the Senior Management Team and worked together with them and with the *Our Museum* coordinator to explore similarities and differences in the ways they approached these problems.
Key achievements	AMT is now helping TWAM to develop a draft Community Engagement Framework, entitled *Valuing Voices*. TWAM also created an *Our Museum* engagement team; community partners worked with staff to develop initiatives.

Plans/Issues for the future	AMT will help to pilot the new Community Engagement Framework at one of TWAM's venues initially, and to roll it out across the organisation over time.

Outcome 3 Capability Building

Challenges	TWAM identified capability building for its staff as a key element in achieving its strategic objectives for the programme. An initial survey of staff and volunteers indicated that only half of respondents were confident about making contact with communities.
Examples of how funding was used	TWAM created a training programme called *Open Minds;* to provide training and participation sessions for both staff and community partners on alternative ways of communicating through valuing difference; on non-verbal communication; on asset-based approaches; and on improvisational theatre techniques to remove barriers to creative thinking and invention.
Key achievements	Practical initiatives and approaches were developed as a result of staff being involved in the training programme; for example, a member of TWAM's development team identified how she might frame funding bids to include meaningful community consultation from the start.
Plans/Issues for the future	TWAM believes that a programme like *Open Minds* will be difficult to sustain post *Our Museum*, but regards it as demonstrating an exploratory process that is valuable: '*as a means of trialling an idea in its earliest stages.*'

Outcome 4 Reflection

Challenges	TWAM regarded reflection as an integral part of achieving organisational change.
Examples of how funding was used	In Year 2, a People's Parliament was attended by a wide range of staff and community partners. This helped shape TWAM's Year 3 *Our Museum* work plan.
Key achievements	Reflection was an integral part of several strands of TWAM's programme and enabled thinking on how to deliver these to be developed over time. Collaborating with an artist, TWAM has developed an informal Conversation Space at the Discovery Museum to aid reflection.
Plans/Issues for the future	TWAM has embarked on a series of reflective conversations, aimed at finding out what staff, community partners and other stakeholders think of its mission.

3 LEARNING FROM THE *OUR MUSEUM* ORGANISATIONS AND COMMUNITY PARTNERS

BUILD A SENSE OF COMMUNITY WHERE PEOPLE HAVE A SAY

3.1 THE *OUR MUSEUM* OUTCOMES AND INDICATORS OF SUCCESS CHANGES MADE AND PROPOSED

The four Outcomes and their related Indicators of Success, which are set out in detail in Part 1 of this report, were at the heart of the *Our Museum* initiative: the explicit framework against which all the participating organisations designed their initial applications to join the programme and a consistent reference point throughout their work.

3.1.1 The four Outcomes remained unchanged throughout the programme. At the Year 3 Peer Review members of staff, Trustees and community partners reflected together on whether the four 'outcomes' did accurately sum up the organisational ways of working which a museum needs to adopt if it is going to collaborate successfully with communities as 'active partners'. They were also asked to suggest any other 'outcomes' that could be equally or more important: no suggestions were made of additional outcomes.

3.1.2 During the course of the programme, three of the original Indicators of Success were modified and one new Indicator added by the Steering Group, in light of learning from the work of the *Our Museum* participants.
The modifications and additions agreed by the Steering Group during the programme were:

OUTCOME 1 Rooted in local needs	Indicator 1.1

This indicator originally stated 'defining roles of staff working to find out about community needs and issues' as the example of 'pro-active and outward looking leadership.' This was amended to include 'allocating financial and other resources to support active partnership.' This change was made after careful consideration, given the huge challenges currently facing the sector. The revised indicator highlights the critical link between choices made about the use of resources – human, financial, buildings and so on – and embedding active partnership with communities.

OUTCOME 1 Rooted in local needs	Indicator 1.6

'Removal of barriers to community participation: e.g. physical barriers' was amended to include, as examples of what this might mean in practice, how space is allocated to different uses and the character of the physical environment in museums and galleries.

This was suggested in part to make clear that this indicator went beyond a core access agenda. It was also prompted by observing that in some organisations 'community activity' tended to be confined to more obscure areas – upstairs and at the back – or be displayed in areas not normally open to the public whilst the 'serious art' or 'important display' occupied the more prestigious and most prominent public spaces.

OUTCOME 2 Community Agency	Indicator 2.4

This indicator was amended to make explicit that if engagement was to be 'embedded across the organisation' then Trustees and volunteers, as well as staff, needed to recognise engagement as a core value and core activity.

OUTCOME 3 Capability Building	Indicator 3.6

'Community organisations and individuals involved in developing and delivering staff training and enhancing staff capabilities' was added to reflect growing awareness that community partners – whether individuals or from Third Sector organisations – had expertise and experience which was valuable and relevant to developing and delivering staff training and capabilities.

3.1.3 Towards the end of the programme, the *Our Museum* participants also suggested five additional indicators that they felt would add to the framework's value and usefulness, if it were to be used by other museums and galleries in future. These were:

OUTCOME 2 Community Agency

Two new indicators were proposed. The first should make clear that opportunities for communities and individuals to participate in partnerships with museums and galleries can take different forms, for example, requiring more or less time commitment and operating on different levels. The second was for an indicator to explicitly reference communities' connecting at a deeper level with collections.

OUTCOME 3 Capability Building

Two new indicators were proposed. The first should reference the mutual benefits for museums/galleries and community partner organisations of making joint bids or tenders for public sector commissioning contracts (e.g. in wellbeing, children's services.) The second new indicator highlighted the need for directors and senior management teams to develop the visionary, visible leadership skills and approaches required to embed working with communities. This might be achieved through participation in external leadership courses or through development of internal leadership training (coaching, mentoring, action learning), which could also encourage a wider range of staff to strengthen and embed work with communities.

OUTCOME 4 Reflection

A new indicator was proposed to highlight the importance of training and capability building of staff and communities in reflective practice.

3.1.4 The nine Our Museum organisations' practical experience of using the framework suggests a number of additional issues and questions which might inform the drafting of a revised version of the Outcomes and Indicators framework.

(i) Mutually beneficial relationships

The '*Whose Cake is it anyway?*' report identified: '*a role for funding bodies to support organisational change instead of projects, finding ways to help museums and galleries help themselves to connect with local communities through brokering mutually beneficial relationships*'. The *Our Museum* Outcomes and Indicators of Success did not explicitly include the notion of '*mutual benefit*' and the concept of '*partnership*' was used rather than that of relationships. Connections between museums and community partners can take many forms and do not necessarily involve partnership, which can tend to imply 'doing' through acting together. For the museum or gallery and for the community partner, relationships can evolve and change over time, be more active or less active depending on circumstance. This might enable a different way of thinking about building both connections and partnerships over time.

A new iteration of the Outcomes and Indicators of Success might specifically reference ideas of mutual benefit and relationships as well as partnerships; this would echo the experience of *Our Museum* participants who have often stressed the importance of identifying mutual benefits and shared purposes.

(ii) Involvement in governance

Some of the Indicators touched on complex and sensitive issues, particularly those to do with power and control and an implied shift from centralised to shared decision-making. For example, Outcome 2 Community Agency: Indicator 2.5 '*Community involvement in governance, shared decision-making and authority, setting targets, monitoring and evaluation.*' The question of community partner involvement in governance was contentious. Some *Our Museum* organisations reported that community partners had no interest in engaging in high-level governance issues. In other instances community partners became interested in governance during the course of the programme and are in the process of putting themselves forward for election to Boards of Trustees. Some organisations felt that because they were accountable to a local authority, they already operated within a democratic mandate that rendered community partner involvement in governance unnecessary.

Some *Our Museum* organisations appeared reluctant to address whether the views and perspectives of community partners are adequately represented to governing bodies and whether appropriate mechanisms are in place to allow this to happen.

There were also some questions over whether or not Trustees should have specific expertise in engagement and collaborative working. It is possible that there is a need for a separate indicator that focuses solely on issues of governance.

(iii) Jargon and clarity
In evaluation meetings and at the Year 3 peer review some of the Outcomes and Indicators were criticised for being 'too wordy' or difficult to understand, jargon heavy, too open to interpretation or ambiguous in meaning. An example given was Outcome 4 Reflection and its reference to 'reflective practice', which was an unfamiliar term to many participants.

The use of the phrase 'tried and tested' in Outcome 1 Rooted in Local Needs: Indicators 1.2 and 1.3 was queried by a respondent at the Year 3 Peer Review as suggesting that museums/galleries and communities and the relationships between them were static and that the ways in which they interacted could be fixed into routine mechanisms. In contrast the participant felt that: '*they [museums/galleries, communities and relationships] shift and these mechanisms are constantly needing to be re-worked and new approaches tried*.'

(iv) Use of the framework by organisations and community partners
The way in which the framework was used varied between different organisations. In some organisations the framework was consciously used as a planning tool, even if some of the ideas and assumptions in it were simultaneously being tested or robustly critiqued. In others the framework appeared to be perceived more as something that had been part of the funder's original application process, but was not actively and consistently used as an integral part of the organisation's own change process. The former approach seemed to be most useful, with the framework acting as a kind of 'touchstone' for the direction and purpose of activity.

(v) Weighting of the Indicators of Success
In the current version of Outcomes and Indicators it is not stated which, if any, of the indicators is considered more significant to achieving the outcomes than others. The reader might take the order in which they are listed to imply some kind of weighting. Participants attending the final Year 3 peer review - staff, Trustees and community partners - were invited to select the three Indicators of Success they considered the most significant for creating organisational change as envisaged in the OM programme.

The indicators chosen, listed in order of priority, were:

- *'Willingness to take risks with new ideas and innovative practice'*
- *'Community participation sustainable beyond Paul Hamlyn Foundation's funding, through different business models and income streams e.g. social enterprise, partnerships'*
- *'Engagement, participation and collaboration as core values of the organisation'*[16]
- *'Community organisations and individuals involved in developing and delivering staff training and enhancing staff capabilities'*

The experience of *Our Museum* participants suggests that the priority or weighting given to different indicators will vary over time dependent, for example, on the circumstances of a particular museum or gallery and the communities in its locality, or on what has been identified as the shared purpose and planned outcomes of relationships and networks. It may be valuable for organisations and their community partners to discuss the priority that should be given to the issues or actions involved with specific indicators during forward planning.

3.1.5 OUTCOMES AND INDICATORS: A FRAMEWORK FOR THE FUTURE?

The Outcomes and Indicators of Success framework provided a valuable starting point for the development of individual change programmes amongst the *Our Museum* participants. It remained a fundamental reference point in assessing programme and organisational progress. The participants' experiences confirm that the four outcomes of the original framework remain valid. The participants have also offered practical proposals to augment and strengthen the indicators of success included in the original framework.

If the learning from the *Our Museum* programme is taken into account, a refreshed version of the framework could provide a valuable practical reference point for museums and galleries when thinking about how to plan organisational change towards active partnership with communities. The framework could also be used throughout the change process to assess progress and would be a useful checklist of both the principles and practicalities of such change.
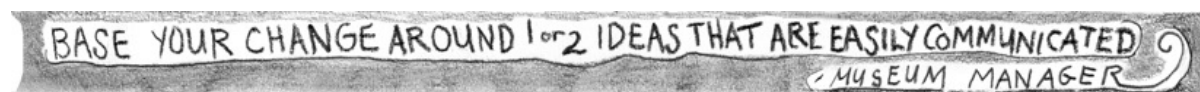
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[16] The last two indicators listed were given equal priority

3.2   ORGANISATIONAL CHANGE IN MUSEUMS AND GALLERIES COMMITTED TO ACTIVE PARTNERSHIP WITH COMMUNITIES: PLANNING FOR CHANGE MAKING CHANGE SUSTAINING CHANGE

BASE YOUR CHANGE AROUND 1 or 2 IDEAS THAT ARE EASILY COMMUNICATED - MUSEUM MANAGER

This section considers the three major phases of an organisational change journey and highlights learning from the experiences of the *Our Museum* participants. It is not intended to be a comprehensive checklist or a 'how to' guide. It does suggest a set of practical processes, approaches and issues that could be considered by any organisation wanting to plan, make and sustain change towards active partnership between museums/galleries and communities.

3.2.1   PLANNING FOR CHANGE

Prepare a base-line assessment of the museum or gallery to identify current organisational strengths and weaknesses, encourage challenging and positive feedback and agree priorities for change, linked clearly to organisational vision and mission

Establishing links between priorities for change and an organisation's vision and mission provides a strong platform and clear rationale for staff and stakeholders. For example, Amgueddfa Cymru's new vision, *Inspiring People: Changing Lives*, has a commitment to active partnership: '*changing lives, by working with local and national organisations to create a happier, healthier and more sustainable Wales, with access to culture for all, and a thriving economy*'. The London Borough of Hackney (Hackney Museum's parent body) has a new Corporate Strategy that includes an emphasis on citizen engagement to support local decision-making.

The *Our Museum* Outcomes and Indicators of Success could be used to assist with a process of establishing organisational strengths and weaknesses. External experts – existing or potential community partners, who are 'experts by experience'[17], peers and other specialists – should be involved in some way, as well as staff working at different levels or in different departments of the organisation, Trustees (or equivalent) and volunteers. All the *Our Museum* organisations identified specific strategic change objectives for their museum or gallery, based on their perceptions of organisational strengths and weaknesses; however, the person or team drafting the change objectives often did so using limited consultation processes. This later caused difficulties in implementation.

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[17] 'Experts by Experience' is a term used in sectors like health and social services to describe people who have experience of using rather than delivering services' See http://www.cqc.org.uk

Map existing community partners to identify which organisations and individuals within your locality you are already connected with in some way, to consider whether or not they might be interested in involvement in aspects of the proposed organisational change and whether or not relationships with new community partners might be mutually beneficial or necessary. This might involve using available data to better understand the demography of your locality and your visitor/non-visitor profile

Several *Our Museum* organisations found that one of the benefits of their involvement in the programme was that they consciously documented the many different kinds of partners they were working with (in their localities, nationally and internationally) for the first time. Some organisations struggled to identify and/or retain community partners to collaborate on their initiatives. This was often because they were imprecise about the outcomes they wanted to achieve through the changes they intended to make and unclear about how these changes in the way the museum or gallery worked would be relevant to the concerns and priorities of the individuals, groups or communities they were inviting to become partners.

Identify your strategic objectives and explain how these will be of mutual benefit to your organisation and to your communities
Focus partnerships on delivery of a strategic objective important to both the museum and its partners or on areas where partners can play an important role in influencing strategic decisions

The experience of *Our Museum* organisations suggests that it may be wise to focus on a small number of strategic objectives, particularly in the first phase of an organisational change process. Participants found that the more explicit they could be about the benefits of an initiative to managers, colleagues or community members, whether at the beginning of the change process or as it was underway, the more they attracted interest, support and involvement. Amgueddfa Cymru worked closely with a targeted group of community partners to improve the diversity of its volunteers; this outcome mattered both to the museum and to community partners who wanted the people they worked with to be able to access more opportunities.

TWAM's Alternative Management Team, the work of The Lightbox's *Our Museum* engagement team and Ryedale Folk Museum's organisational review and business planning process provide good examples of staff, volunteers, community partners and other stakeholders playing an important role in influencing strategic decisions.

Use horizon scanning to identify resource opportunities to kick-start change processes

All museums/galleries make strategic choices about how best to use whatever resources they have - human, financial, capital – to achieve their objectives. It could be argued that organisational change needs to be achieved within existing resources. In practice, as the Foundation's investment in the *Our Museum* programme demonstrated, it is helpful to have seed money to enable exploration and risk-taking, to free up experienced staff to help with planning and advocacy and to develop training programmes. Even in difficult financial times, museums/galleries are planning ahead to attract additional resources: work is underway on capital development projects, plans for proposed new galleries, refreshment of galleries, development of digital policy and practice and new programmes of work. If a commitment to active partnership with communities is at the core of the museum/gallery's work, the funding bids and delivery plans for all of these kinds of proposal should reflect that commitment. Glasgow Museum's application for funding from the Heritage Lottery Fund (HLF) for the re-development of the Burrell Collection, Amgueddfa Cymru's successful bid to the HLF for its *Making History* transformation of St Fagans National History Museum and Hackney Museum's early thinking on re-developing its galleries, all demonstrate this approach.

Involve community partners in the development of funding bids
Explore together whether partnership opens up new funding or resource sharing opportunities

Only one *Our Museum* organisation involved its community partners in the initial stages of writing a funding bid to the Foundation. Several organisations have since commented that they now understand the fundamental importance of involving people right at the beginning of planning processes. When an organisation is aiming to work in a geographical area where it has relatively few existing contacts or with a community of interest that it has not worked with before, it may be even more important to consider ways in which the advice of potential partners can be sought before decisions are taken about planned action and before submission of funding bids.[18] These discussions should include open conversations about expectations and assumptions, including clarity about whether or not community partners should be paid (expenses or a fee) for their involvement in an organisational change initiative. The Foundation were supportive of *Our Museum* organisations using part of their grant to do this, but only a small number of them chose to do so; some organisations were concerned that payments of any kind would set a precedent that they would be unable to sustain after the *Our Museum* programme had finished.

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[18] Increasingly, funders expect to see evidence of significant partner involvement in the development of applications

Consider who will 'lead' the initiative and who is key to ensuring its progress

It is vital that any change initiative has the whole-hearted support of the people accountable for the organisation: the governing body and Chief Executive or equivalent. The Foundation stipulated that all bids to become part of the *Our Museum* programme had been approved by the Chief Executive and Board. Experience during the programme suggests that there are other specific roles that help deliver successful organisational change. These are:

- Active commitment and an understanding of the strategic relevance of the change programme to the organisation's core purpose and mission amongst the Senior Management Team, and specific allocation of responsibility to a member of senior management to drive the initiative forward enthusiastically, advocating for it, making connections between governance, strategy and operational activity and finding ways to address barriers and challenges as these arise. The active commitment of the Chief Executive – and their intervention when necessary - is essential to creating organisational change. However it is arguable that management responsibility should not rest with them because of the generally high level of external demands on their time

- Involvement of a middle manager who is experienced in participation and engagement and who can make strong connections between the strategic and the operational. This person is likely to have a portfolio of other work, but will be professionally committed to the change initiative

- A member of staff who can follow up strategic decisions and take action at an operational level. The change initiative may not be their only role in the organisation, but it should be a major priority for them. The skills and competences of this individual are critical and might include, as one *Our Museum* organisation stipulated, experience of facilitating inclusive planning processes; experience of working with excluded audiences in a community setting; good knowledge of the philosophy and practice of community development and community participation; and experience of partnership and multi-agency working. The person might be seconded from within the organisation, or (if resources are available) it might be a fixed–term external appointment to the staff team. If an external contract is offered, it will be important to find ways to ensure that work undertaken is owned internally and not seen as 'a project'

- A Trustee (or equivalent member of the organisation's governing body) who is prepared to take an ongoing interest in the progress of the initiative and act as a champion for it

In a small organisation, such a separation of roles and responsibilities between individuals may be impossible; this makes it all the more important to define which member of staff / Trustee (or equivalent) will carry responsibility for the strategic, advocacy and operational elements of the initiative and to ensure they have the necessary skills and support to deliver. In a larger organisation, clarity about roles and responsibilities can also be helpful if, for example, one of the staff team responsible for the change initiative leaves the organisation or is ill for a lengthy period. Whether the organisation is large or small hard choices may have to be made about priorities to make sure workloads remain realistic.

Assess the level of attitudinal support amongst staff for the proposed outcomes of the organisational change initiative and consider how this might be increased, if necessary

Work undertaken with *Our Museum* organisations suggests that, in relation to working with communities as active partners, staff fall into five broad categories:

1. Highly supportive, with many suggestions as to how change could be achieved

2. Broadly supportive, but unsure or unaware of the range of methodologies and approaches which might be used and how these could benefit their own work

3. Uncertain, because of concerns about levels of financial resource and fears that resources spent on this kind of work will be diverted from other areas which they consider to be priorities

4. Unsupportive, regarding engagement and participation as a distraction from the 'real' work of the museum, which is seen as primarily maintaining and building on collections and research

5. Neutral, neither supportive or unsupportive

Carrying out this kind of broad-brush assessment of attitudes may make it easier to identify strategies for addressing and engaging each of these groups - from recruiting the friends and allies of Group 1, irrespective of their place in any hierarchy, to building awareness of practical methodologies in Group 3. It might be thought that an appraisal of this kind is only relevant in large organisations, but in practice, evaluation team encounters with *Our Museum* organisations showed it could be just as relevant in small organisations. For example, consider the difference between a volunteer who greets a member of the public warmly at a reception desk and gives them a brief introduction to an exhibition and a volunteer who barely looks up from the book they are reading; or between a curator who regards planning meaningful engagement opportunities for local community groups as a waste of time and one who goes out of their way to suggest imaginative new approaches.

Assess overall staff/volunteer training needs
Introduce tailored training and development opportunities for staff: cross-site and cross department

Several of the larger organisations believed that long-term structural change required this approach. For example, Glasgow Museums, TWAM and Amgueddfa Cymru delivered programmes that included placements with community partners, delivery of training by community partners and training alongside community partners.

The types of training offered will depend on the kinds of organisational change being prioritised. One organisation offered training in specific areas, such as mental health awareness; another organisation used a peer-coaching model - a confidential process through which two or more professional colleagues work together to reflect on current practices; expand, refine, and build new skills; share ideas; teach one another; conduct research; or solve problems in the workplace - to increase staff confidence and engagement skills across sites and departments.

Decide on a clear narrative or strap-line

Organisational change is complex but it is not necessarily helpful to try to communicate the minutiae of this to staff, volunteers and community partners who have many other demands on their time. Some *Our Museum* organisations felt that they had begun the programme trying to explain too many change theories, or focussing on too many different ideas, or attempting to solve too many issues at once. It was important to find a clear narrative that helped everyone to understand why what was being proposed was vital to the long-term success of the organisation. For example, The Lightbox's *'Starting from Zero'* concept signalled a shift from approaching communities with pre-conceived propositions to ways of working that encouraged identification and delivery of shared objectives.

Consider the value of drawing on an external voice at key moments during the change programme

The *Our Museum* programme suggests that there is value in being able to draw on a consistent 'external voice' for advice and a supportive critique. This role can be fulfilled in many different ways, for example, by an experienced volunteer or Trustee, by a Critical Friend or a peer mentor, by a facilitator or through a specialist consultancy. It is beneficial to have a written brief for the person or persons providing this kind of 'external voice', so that expectations are explicit and the person concerned has a clear understanding of the purpose of the overall organisational change programme.

Identify parameters and consider frameworks for decision-making

The *Our Museum* programme helped to identify a range of questions that need to be considered in collaborating with community partners on strategic initiatives:

- Are there important limitations, which need to be made explicit, for example, for legal or for health and safety reasons?
- Are all decisions to be made together or, for instance, are there some decisions that must finally be taken by Senior Management or by Trustees?
- If joint decisions are to be made about budget expenditure, does this require a process for declaring conflicts of interest?
- How will any partnership address serious disagreements? For example, if community partners suggest that the museum/gallery should present content that is likely to be controversial, or if museum staff consider an approach suggested by community partners to be unrealistic.

It is never possible to foresee all eventualities, but if there are non-negotiable boundaries, it is much better for everyone to understand this from the beginning and not part way through a process of change.

Assess external and internal factors that could adversely affect the organisational change initiative and consider how these risks might be mitigated

Whilst the ability to innovate and to take risks is inherent to creating organisational change, organisations need to be able to assess levels of risk and take action to reduce potentially adverse effects. *Our Museum* baseline reports identified potential risks that might hinder progress in each organisation, such as the capacity of a small organisation to take on a major initiative whilst delivering other significant programmes of work or instability in terms of recruitment at senior management level. A risk assessment may require an organisation to ask itself challenging questions. The programme demonstrated, for example, that the skills and competences an organisation requires to work successfully with community partners on an organisational change initiative are much more complex than the skills and competences required to work collaboratively on a one-off project or programme.

Develop an appropriate monitoring and evaluation framework so that you can see where change is happening, identify emerging barriers or challenges and respond as necessary, as the programme evolves

An organisation might use its existing planning, monitoring and evaluation systems for this purpose, or might decide to put something in place that is more tailored to the specific objectives of its change initiative. For example, the self-assessment reports, which formed part of the *Our Museum* programme from Year 2, required organisations and community partners to consider progress made during the year against their work plans and the four *Our Museum* outcomes and to use their findings as a tool for forward planning.

Encourage reflection as an 'everyday' process within everything the museum/gallery does and apply this to the change process

The *Our Museum* programme helped some organisations develop new methods of using reflection as an integral and useful part of normal working methods. Examples include: Hackney's Case Study Template, which staff and community partners consider together at the beginning of a project and complete towards the end; Glasgow Museums' core planning documentation, which prompts staff to identify methods of review and evaluation appropriate to the scale of activity; Amgueddfa Cymru's Self-Assessment Tool-kit.

3.2.2 MAKING CHANGE HAPPEN

THE PRIORITY IN THIS ECONOMIC CLIMATE IS TO JOIN RESOURCES and WORK TOGETHER
— COMMUNITY PARTNER

Identify an appropriate 'induction' process

Several *Our Museum* organisations considered that a conscious process of induction at the beginning of 'making the change' would be helpful for both community partners and staff. This can be light touch. In one instance, for example, the Director of an organisation began an event with a brief over-view that put plans for change into the strategic context in which the museum was operating. Museum staff in another organisation went to work alongside a community partner for a day, in order to understand better the needs and abilities of their partner's clients. *Our Museum* museums and galleries learned that community partners needed to understand more about, for example, the time frames within which museums and galleries plan major exhibitions, or why there are non-negotiable deadlines for print for an exhibition.

Pay close attention to terminology and language and make sure there is a shared understanding of common concepts

Experience in the *Our Museum* programme suggests how easy it is for terms understood in one way by one group of people to be misunderstood by others, with unforeseen consequences. One organisation initially wanted to '*scale up'* community engagement practice and came to understand that '*deepening and widening*' community engagement practice was a more accurate description of its strategic objective. In some organisations, there were staff who understood '*engagement*' as a methodology for audience development and others who regarded it as a methodology for empowerment.

Ensure that community partners involved in a change initiative have an equal opportunity to set agendas and the time to process important information
Plan and make important decisions together

Several *Our Museum* community partners and organisations recognised this as both critical and challenging. Organisations are in the habit of designing meetings and planning sessions around their core agenda and existing process. Simply sending an email to external community partners to ask if there is anything they want to put on an agenda is unlikely to elicit much response, particularly in the early stages of collaboration. Similarly, a community partner is very unlikely to be able to find the time to read through and comment on a policy document or a complex funding application at short notice and with no warning. It may help, for example, to summarise the key issues/questions that need to be considered.

Learning how best to create ways of communicating with each other that 'work' for both museum or gallery staff and community partners depends on open conversation, good listening and encouragement. Some organisations found that electronic project management software worked well as a way of communicating informally, planning schedules and commenting on ideas or documents whether posted from the museum or gallery or by a community partner. In some organisations, the key member of staff working at an operational level had exceptional competence in facilitating relationships with community partners.

Design mechanisms to help create change which are also likely to be sustainable, given the size, scale and resources of the organisation

The *Our Museum* programme revealed, for example, that there are particular challenges for some organisations in finding ways of planning with community partners (other than on a one-to-one project led basis) such as how frequently this can realistically be done, which issues should be prioritised, or whether or not digital forms of communication might be used more effectively.

Review key organisational policy documents to see if they 'match' with changing practice and reflect emerging aspirations

Some *Our Museum* organisations have reviewed and redefined their mission statements and business plans to more accurately reflect their purpose and the nature of their relationships with their communities. For example, Belfast Exposed's most recent business plan identifies its contemporary art gallery and its community programme as the twin strengths of the organisation for the first time. Other organisations developed policies and strategies to support community engagement across sites and disciplines. For example, TWAM is working on a Community Engagement Framework and Amgueddfa Cymru has adopted a Community Engagement Strategy.

The Lightbox, Bristol Culture, Amgueddfa Cymru and Hackney Museum amended job descriptions so that community engagement is seen as the responsibility of all staff not of a small number of individuals. This important change should have a long-term impact on staff recruitment, induction, appraisal and performance review processes. Hackney Museum has also revised its Volunteer Handbook to ensure that volunteers understand that communities are at the core of its work. Glasgow Museum has reviewed all its project and programme planning documentation to ensure that staff consider opportunities for audience involvement and public participation at an early stage.

Several *Our Museum* organisations have given a higher profile to their work with communities through changes to their websites, e-newsletters, marketing material and Annual Reports.

Be prepared for the unexpected to happen

Our Museum organisations had to deal with factors that were outside their control and impacted their work programme, such as the increasingly difficult financial climate, unexpected pressures from core funding bodies, staff leaving for jobs elsewhere and community partners who had to withdraw from involvement in the programme. Good initial risk assessment in the planning stage and the ability to identify and then address the likely effects of such unforeseen events were key to finding positive solutions to such problems.

Understand the importance of 'positive failure'

The *Our Museum* programme encouraged organisations to take risks and to challenge long-held assumptions. Some of the approaches that were tried did not work well at all and some were only partially successful; this did not mean they were not valuable. Those organisations who considered the nature of the 'failure', learnt from it and re-designed better and more appropriate solutions for the future, achieved more than those who tended to regard initial failures as evidence that nothing could be or needed to be changed.

Experiment with and learn from models of practice that offer the potential for deeper engagement with community partners

The *Our Museum* organisations took the opportunity afforded by the programme to experiment with newer models of collaborative practice, such as co-production, co-commissioning and co-curation. Some examples, such as The Lightbox's Ideas Forum and Glasgow's Creative Café are still in their infancy, but may have a long-term impact on the development of both practice and policy.

Recognise and celebrate change when it happens

In general, museums/galleries in the UK are under intense pressure to deliver against multiple targets and staff can feel that their efforts are unrecognised and under-valued. Implementing change is an even more demanding endeavour and it is important that senior managers and governing bodies notice and commend progress and ensure that all staff (particularly those not directly involved in the change initiative) understand that this work is vital to the future of the organisation.

Build capacity for distributed leadership

The *Our Museum* programme demonstrated that sustainable change of this nature requires distributed leadership; the commitment of a Chief Executive and the expertise of a few managers and front-line staff will not suffice.

This kind of 'top down' leadership needs to be combined with 'bottom up' and cross organisation processes to enable people at different levels and positions in the hierarchy to also contribute to change. Strong internal messaging, pro-active recruitment and induction processes, improved volunteer support and effective approaches to staff training and development were all used by *Our Museum* museums/galleries to increase awareness, expertise and leadership capacity across the organisation and to embed new approaches to practice.

Pay attention to the enemies of successful organisational change

As well as noting factors that contributed to achieving this kind of organisational change, the *Our Museum* evaluation team noticed attitudes and behaviours that appeared to hinder it. These included:

- Complacency: understandable pride in an organisation's past achievements shading into a reluctance to believe that anything needed to be or could be improved or developed, or refusal to take any account of uncomfortable data or perspectives

- Procrastination: waiting for a 'key appointment' to be made before commencing or completing any activities or avoiding the task of examining reasons for 'failure' or of building on success

- Fear of potential undermining of expertise: this could be experienced by all kinds of museum staff, from an experienced community engagement practitioner to a specialist curator

3.2.3 SUSTAINING CHANGE
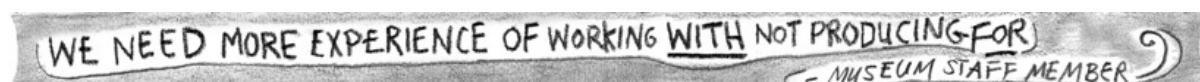
Fix lessons from the change initiative in organisational memory

Organisations need to ask what the key lessons from the first phase of an initiative have been and share these lessons internally and externally. One way in which the *Our Museum* organisations are doing this is by organising an event for other museums/galleries in their region, to reflect on and share their own learning; to stimulate debate and dialogue with their peers; and to understand more about how other organisations are working on the kinds of outcomes envisaged by the *Our Museum* programme.

Ensure that new habits of behaviour, new models and new policy objectives are kept under review

Several *Our Museum* organisations talked about building a 'new normal' – patterns of behaviour that would eventually become an embedded element of their organisational culture. In practice, it is likely to take time and re-iteration to truly embed even the most successful discoveries. It may be important to design and implement a review process, on a scale and with a regularity appropriate to the size and scale of the organisation and of the change it is aiming to embed.

Identify new or revised priorities for the next phase of the organisation's journey

Several *Our Museum* organisations are in the process of shaping new strategic objectives for the next phase of change, based in part on what they have learned through this programme. For some, this will mean extending new models of partnership into other aspects of their organisation's work, for others it will mean taking imaginative new risks with collaboration and engagement. For others it will mean restating core commitments and continuing to embed the principles and practices of active partnership with their communities within the routine and regular process of refreshing their business or service plans.

Review the nature of relationships over time with community partners

This is likely to be a critical element of transition for some *Our Museum* organisations. Many factors have influenced the character of relationships between museums/galleries and community partners during the programme. This has prompted questions such as: Who needs to be involved in conversations about the purpose and intended outcomes of relationships between a museum/gallery and communities?

Who needs to have a finger in the metaphorical pie in order to bring change about? What sort of relationship is going to be relevant and valued by both the museum/gallery and community partners?

During the *Our Museum* programme some community partners have been involved in supporting a specific element of organisational change because it is closely linked to their own strategic objectives or to their own professional or personal interests. Some community partners did not want or were unable to be as heavily involved with future activities as in the past but wanted to maintain an on-going positive relationship with the museum/gallery. There may be a need to explore what that relationship might be and how it might be nurtured.

3.3 SHARING THE LEARNING

The *Our Museum* programme was part of a wider strategy intended to achieve significant shifts in practice within the sector nationwide. An important aspect of the programme was to find ways of sharing learning within and across *Our Museum* participants and with other organisations. This section reflects on how this was done, highlighting methods which may be useful to other organisations and agencies who share a similar commitment to change.

It is too early to assess the impact this dissemination of learning will have on the wider sector. Many others across the United Kingdom and worldwide are considering the principles and concerns of the *Our Museum* programme including, for example, Nina Simon, Executive Director, Santa Cruz Museum of Art and History, contributors to the Museum of the Future, and many museums and galleries in the European Union. Although the lessons of the *Our Museum* programme will be an important contribution to this on-going debate, it will be more valuable, in the long-term, if they are regarded as an element of a meme – a pervasive thought or thought pattern that replicates itself via cultural means – or as a set of ideas and practices whose time has come.

3.3.1 Sharing learning within organisations
In the early stages of the *Our Museum* programme, several of the participating organisations found it difficult to communicate the aims of the programme and their own strategic objectives for the programme internally. In both large and small organisations, there was a specific and common perception that the programme was 'just an additional project': one of the many discrete, externally funded projects they were accustomed to undertaking. Some staff, including senior managers, found it very difficult to shift from this more familiar 'project mentality' approach to funding to viewing funding and the activities it enabled as a catalyst for organisational change. The significance of organisational change, and the intention of making overall changes to the organisation's policies and practice through the programme, was often not fully understood. Some staff mistrusted the term '*organisational change'*, believing it to be management speak for a programme of redundancies.

Our Museum organisations gradually found a variety of ways of addressing these challenges. Some, such as Hackney Museum and Bristol Culture, drew in a wider range of staff through inviting them to advise on or participate in practical projects. Others, such as Glasgow Museums and TWAM, designed Continuing Professional Development programmes to introduce staff to ways of thinking and working which were linked to the four *Our Museum* outcomes. Belfast Exposed, the Museum of East Anglian Life and Ryedale Folk Museum used reflective events such as residentials and facilitated workshops to involve a wider range of staff in what they were trying to achieve. Several organisations, including The Lightbox and Amgueddfa Cymru, gave presentations at key points in the change process to their Trustees or equivalent governing body and involved them directly in planning and delivery of the programme. All *Our Museum* organisations used the annual peer review as an opportunity to engage staff from different levels or departments in the work they were doing.

3.3.2 Sharing learning across a cohort of organisations

As described in Part 1 of this evaluation, the *Our Museum* Project Director designed the programme so that the whole cohort (staff/trustees from museums/galleries and their community partners) met annually at a residential peer review. The format of the peer reviews evolved during the programme: they included workshops and presentations by each of the *Our Museum* organisations, with engagement teams invited to share challenges, achievement and lessons with each other. There were also sessions for Directors and Chief Executives in which they were able to consider strategic concerns together and keynote presentations from external speakers who had led or facilitated organisational change processes. The Lead Contacts from each of the *Our Museum* organisations met regularly with the Project Director; this also provided opportunities to learn more from others about their experiences.

A Cross-Cohort Training and Support Programme had been envisaged as a core strand within the overall programme and in Year 1 was intended to focus on developing the skills and techniques of reflection, collaboration and the ability to be a 'critical friend'. Work on this contract was delayed at the planning stage and not continued in Year 2. It then proved difficult to design events and activities for the whole cohort or for sub-sets of the cohort; the additional time commitment that would have been required for this was considered by many to be prohibitive. Organisations were instead encouraged to arrange their own Learning Visits to other *Our Museum* organisations, to identify and implement their own training programmes; and to work with a Critical Friend.

3.3.3 Sharing learning with the wider museum/gallery sector

The Foundation established a dedicated website (http://ourmuseum.ning.com) as a method of gathering and sharing learning.

It was possible to download documents from this site, such as the Evaluation Framework, a summary report of an evaluation commissioned by the Project Director of '*Revisiting Collections*' [19] and a follow up commentary to '*Whose Cake is It Anyway*?' by Dr. Bernadette Lynch.

This site also hosted a membership network. At the beginning of 2016, this had a membership of two hundred and eighty two individuals, who were primarily staff working in museums and galleries in the UK, with some international members. Members posted information to the network, describing issues they were encountering in their organisations, asking for advice, drawing attention to interesting work being undertaken internationally and to funding and partnership opportunities.

Workshops presented and facilitated by representatives from *Our Museum* organisations and their community partners were offered at Museum Association national conferences in all three years of the programme.

Towards the end of Year 2 of the programme, the Foundation published an interim report entitled '*Communities and Museums as Active Partners: emerging learning from the Our Museum initiative.*' The Project Director used this in awareness–raising discussions with, for example, Arts Council England, Museums Galleries Scotland, and Arts Council Northern Ireland.

In Year 3 of the programme, an independent consultant worked with the Project Director and with *Our Museum* organisations and community partners to develop a web resource (www.ourmuseum.org.uk). The website is '*a mix of animations, films, audio-visual presentations and downloadable documents. It was intended to be a kind of 'travel survival kit', a guide to help organisations on their change journey to become more participatory.*' The resources are organised into five categories, each with an animated introduction:
Governance and leadership; Staff professional development; Engaging with community partners; Evaluation and external voice; Structures and mechanisms.

The Foundation established an international learning link during 2015 with the Netherland's Cultural Participation Fund, the Mondrian Fund and Dutch museums. Seminars about *Our Museum* were held in both Holland and the United Kingdom (UK). Representatives of museums and galleries in the UK who had not been involved in the programme and who had a strong interest in working with communities as active partners were also invited to the UK seminar; this was designed to include informal discussion and networking between all participants.

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[19] Revisiting Collections, developed in 2006, supports museums and archives to open up their collections for reinterpretation and knowledge capture by community groups and external experts to build and share a new understanding of the multi-layered meaning and significance of objects and records.

Many of the *Our Museum* organisations have already been pro-active in presenting their work and the lessons they have been learning at national and regional conferences. The Foundation offered additional funding during Year 3 to all *Our Museum* organisations to work with their community partners to organise 'showcase events', after the end of their formal programme. The purpose of these events is to share their experience of change, and the wider learning from the *Our Museum* programme, with other organisations and agencies in their geographic area or region, including museums and galleries, community organisations, stakeholders, and funders.

Museum/gallery workers who have left participating organisations to take posts or contracts elsewhere in the sector have shared learning from the programme with the wider sector. Some staff moved to senior positions where their thinking will affect the strategic direction of organisations or are considering lessons from the *Our Museum* programme as they plan new capital developments or major programmes of work

3.3.4 Sharing learning beyond the museum/gallery sector

Community partners have pointed out the value of sharing learning from the *Our Museum* programme within Third Sector networks and noted that many of the principles explored through *Our Museum* are directly relevant to the concerns and priorities of the voluntary and community sectors. This is particularly so amongst the many Third Sector organisations who have shifted from the 'active provider/passive recipient' relationships of the past to working in more active and equitable partnership with communities of interest or geography.

4 LEARNING FROM THE *OUR MUSEUM* SPECIAL INITIATIVE

NOT EVERYONE IS CONVINCED OF CHANGE AT THE SAME PACE

4.1 ASSUMPTIONS

This section identifies some of the explicit or implicit assumptions that appear to have informed the development of the programme, as these give clues to some of the challenges faced by the *Our Museum* Special Initiative, as opposed to the challenges faced by individual organisations.

ASSUMPTION 1: An external intervention - in this case an invitation from a progressive Foundation - could act as a catalyst for a significant level of internal organisational change in a group of cultural organisations

Two sets of factors appear to have limited the extent to which the Special Initiative could be a catalyst for change. The first set of factors was external to both organisations and community partners:

- The financial crisis in the UK and its impact on public sector expenditure meant that all participants were facing serious budgetary pressures, including an impetus to generate more commercial income. Some were fighting for survival

- Support for public expenditure on the cultural sector was potentially vulnerable at a time when social services, welfare benefits and other leisure and community facilities were being cut

- The priorities of core funders of *Our Museum* museum/galleries, such as Arts Councils and local authorities overlapped to some extent, but not completely, with the principles of *Our Museum*

The second set of factors was internal to some, though not all organisations:

- In some organisations, governance and basic organisational systems were weak and needed to be addressed urgently: this programme came at the wrong time for these organisations to fully benefit from it

- In some organisations, uncertainties about overall leadership and strategic direction and organisational re-structures led to delays and hesitancies in programme delivery

- Some organisations were emerging from a traditional pattern of hierarchy and silo-working; they had relatively limited experience of working collaboratively across disciplines

- Some organisations had considerable experience of working with community partners on projects; they had much less experience of working with them to identify and deliver strategic objectives

There was also a tension between the Foundation's role as catalyst and its role as funder. The Foundation has a reputation as a pro-active funder, prepared to ask challenging questions of applicants and to suggest ways in which applicants' proposed activities could be strengthened before making funding decisions. During the programme, the Foundation - in its catalyst role - offered a high level of specific advice and on-going support, based on its knowledge of the ways in which each organisation was developing their programme. The Foundation combined this role as a catalyst with the power to withdraw funding from organisations. Some of the organisations welcomed this type of relationship with a funder and some did not.

ASSUMPTION 2: There would be a degree of continuity between the individual staff and community partners who contributed to the '*Whose Cake is it Anyway*?' research and the *Our Museum* programme, and a reasonable level of continuity of staff and community partners involved during the course of the programme

There was a time lag between completion of the initial research and initiation of the *Our Museum* programme; key museum/gallery staff that had been involved in the research left post either before the programme got underway or shortly afterwards, and new community partners were asked to become involved in the initiative. This led to gaps in understanding about the purpose of the initiative and why it had been designed in the way it had. In several organisations, staff turnover and changes in levels of community partner involvement also slowed progress during the course of the programme.

ASSUMPTION 3 Participating organisations understood that this programme was about development and organisational change, not about delivering discrete projects

The first year of the *Our Museum* programme revealed that despite the fact that all the documentation available at time of application explained why the Foundation wanted to facilitate processes of development and organisational change and despite this being explained verbally at separate inception meetings held with each participant, some organisations regarded the funding as primarily a grant to deliver more projects or as a way of addressing urgent structural issues. There were several reasons for this:

- Applications had sometimes been written by one member of staff in an organisation, without any wider consultation; although that person understood the nature of the programme, their colleagues and community partners did not. Trustees (or equivalent representatives of governing bodies) had not all been made aware of the programme's focus on organisational change

- Many staff were familiar with the demands of project delivery but unfamiliar with and uncertain about how to approach delivery of a programme of organisational change

- A few organisations appeared to have regarded the programme as primarily an opportunity for an injection of much needed finance rather than as an opportunity for organisational development

This led to confusion, in particular for community partners, who were often proud of the work of 'their' museum/gallery and were unaware that the museum/gallery had set itself strategic change objectives; they sometimes questioned why there was any need for 'change'.

ASSUMPTION 4 Organisations appreciated the additional implications of taking part in a Special Initiative

The implications of being part of a cohort of museums/galleries participating in a Special Initiative of this kind were not initially appreciated by all of the participating organisations. This was also possibly not fully foreseen when the programme was being designed. The programme involved a considerable additional time commitment, even if funds were made available for associated costs; organisations and their community partners were expected to attend residential peer reviews, evaluation visits, Lead Contact meetings and a range of other events. These all required preparation, co-ordination and follow-up. Not all community partners were able to sustain such a high level of commitment over a period of three to four years. For many, this was very different from working on a short-term collaborative project with a museum/gallery. The Training and Support Programme, if it had gone ahead as initially proposed, would have required an even greater time commitment. This was one of the reasons given by organisations for feeling unhappy about this training programme, whilst it was being discussed with the consultancy appointed.

ASSUMPTION 5 The commitment of the Chief Executive of an organisation to the *Our Museum* programme would play a major part in achieving that organisation's strategic objectives and delivering the programme's outcomes

The Foundation required commitment from the chief officers of all the organisations selected to participate in the programme, on the understanding that serious organisational change could not occur without their support.

The chief officers of six of the nine *Our Museum* organisations left their organisations for other posts in the early stages of the programme; there were delays in making new appointments, leading to uncertainty about strategic direction and whether commitment to the kinds of changes initially envisaged could be sustained. In addition, the practical experiences of organisations soon showed that a much wider sense of organisational commitment was required to support significant change; Trustees, Senior Management Teams, site managers, curators, volunteers, Front-of House staff and community partners all had a part to play. Although 'top-down' leadership was very important, sustainable change required the development of distributed leadership.

ASSUMPTION 6 Organisations invited to take part in the programme would already have a strategic overview of the range of their existing and potential community partners
Organisations would be able to identify which of these partners were likely to be interested in working collaboratively with them on an organisational change programme

The *Our Museum* model of an engagement team - with five staff and five community partners working together - implicitly assumed that: participating organisations would have consulted with community partners whilst developing their applications; would have talked with them about proposed strategic objectives and programme outcomes; and would be able to identify community partners who could see mutual benefits in collaborating on the initiative. In practice, only one *Our Museum* organisation developed its application jointly with a range of community partners. A few organisations deliberately proposed working with 'new' community partners and so built their engagement team slowly, as these new relationships developed. A few organisations, however, invited community partners on a more ad hoc basis, because it was a condition of their involvement in the programme; both these approaches proved largely unsuccessful in supporting organisational change.

ASSUMPTION 7 Organisations would be interested in and enthusiastic about learning collaboratively from each other

The Special Initiative placed considerable emphasis on creating a supportive learning network across participating organisations; this assumed there would be a high level of interest in and enthusiasm for this in organisations, from individual staff and from community partners. There were some factors over the course of the programme that worked against this, particularly in the early stages:

- The financial pressures on museums/galleries, which often resulted in staffing cuts, had a tendency to focus energy inwards and to make staff wary of talking openly to peers about organisational vulnerabilities

- In some organisations, the benefits and value of reflective learning were poorly understood or under-valued

- Some community partners reported that whilst they had enjoyed opportunities for learning, they had not always been able to make connections back to the work of 'their' museum/gallery or to their own work

- It took longer to build the trust necessary for collaborative learning than might have been expected. This may have been partly due to the fact that the period that elapsed between the research phase for the Special Initiative and the commencement of the *Our Museum* programme meant that there was less continuity in museum/gallery staff and community partners than anticipated

- Towards the end of the programme, there was some frustration amongst participating organisations that the need to discuss aspects of the delivery of the overall programme drowned out the desire of organisations to learn from each other

4.2 PROGRAMME DESIGN

4.2.1 Training and Support Programme

The Training and Support Programme was a core element in the structure of the Special Initiative. It was intended to provide training in aspects of organisational change to the whole *Our Museum* cohort and support other training tailored to the needs of each individual organisation. The difficulties experienced in Year 1 with commission of the cross-cohort Training and Support Programme and the subsequent withdrawal of the contract for its delivery had a serious adverse impact in the early stages of the *Our Museum* programme. On a practical level, there was an unforeseen gap in the programme which needed to be addressed urgently; on a psychological level, it was unsettling for all participants and for a few it fed a sense of doubt about the validity of the programme and what it was trying to achieve.

This kind of risk might be mitigated in future by decisions at the planning stage to appoint all external consultants with a cross initiative role, for example evaluators and trainers, early in the delivery phase. This could enable earlier consultation with participants and more time to address any concerns.

A more radical option in the planning stage for a programme of this nature would be to focus an initial phase on participants working together collaboratively with external consultants to develop and deliver a shared training programme appropriate to the core purpose of the programme. This might have prioritised, in the case of *Our Museum:* organisational change processes; mapping communities and establishing strategic priorities; effective methods of encouraging reflective practice; and learning from each other's practice. This kind of training and support programme would then lay the foundations for participants to create tailored action plans, reflecting individual circumstances, for delivery during subsequent phases of a programme.

This kind of approach in Year 1 might also have relieved the pressure of gearing up to deliver an ambitious strategic programme of this nature, with the focus for practical delivery of *Our Museum*-related initiatives shifting to Years 2 and 3 of the programme.

4.2.2 The Peer Review

The benefits of the annual Peer Reviews, as identified by museums/galleries and community partners, included:

- Time for participating organisations to have structured and focussed discussions with their community partners away from every-day demands

- Input from keynote speakers with important things to say about active partnership between cultural organisations and communities and about organisational change

- Opportunities for individuals and organisations to make professional connections and to talk informally about issues of mutual concern

It proved more difficult to establish the Peer Review as a forum for rigorous and challenging exploration of a range of approaches or as a seedbed for new thinking to inform future practice. Observed reasons for this included:

- Lack of continuity in participants from year to year, particularly amongst community partners

- The large numbers of participants; over 100 individuals attended each year

- Some failures in design, for example, not fully exploring techniques to enable participants to decide together how best to use their time and choose which issues they needed to explore

- The reluctance of some organisations and individuals to fully disclose and discuss areas of weakness with peers or in front of more senior staff or in the presence of funders

- Perceptions of a 'gap in the rhetoric': whilst the aim was to encourage collaboration and dialogue between equals, there were times when hierarchical dynamics – between 'boss' and 'employee' or 'funder' and 'funded' were re-asserted

It is possible that a more phased approach to peer review might have had benefits. For example, with organisations focussing in Year 1 on setting up and beginning their own programmes and partnering with one other organisation that broadly shared their areas of interest. In Year 2, organisations might have undertaken Learning Visits to organisations that are 'not like us' and then met in larger clusters of 3 or 4 to discuss progress, challenges and the lessons learned from these visits.

The whole cohort would then have met together in Year 3, for a rigorous exploration aimed at designing the next phase of work. This might have built confidence and trust over time in a more organic way.

4.2.3 Learning Visits

The flexibility of the Learning Visits between participants, which occurred throughout the programme but more frequently in Years 2 and 3, was appreciated by organisations and their community partners. Ideas developed in one organisation were taken on board by another, although there were occasional problems when the strategic context, which enabled an initiative to flourish in one organisation, was not present elsewhere. It was sometimes difficult for participants to get an overview of what was happening in other organisations so that they could select whom to visit or were clear about the organisations with which to develop closer relationships. More systematic and consistent communication of the key points of what was happening or being planned in each organisation amongst the cohort may have prompted more purposeful or more frequent visits.

4.2.4 Lead Contacts Meetings

The Lead Contacts meetings between the *Our Museum* Project Director and the designated 'lead' person from each organisation began in Year 2, following the decision to not proceed with the Training and Support Programme. This structure was missing in the original design of the programme and the introduction of the meetings was welcomed by the participating organisations. The sessions were an opportunity for the Lead Contacts to meet and talk with each other as well as with the Project Director, although there was some frustration that the 'corporate' *Our Museum* agenda could dominate.

This kind of structure would have been valuable from the outset of the programme as a communications and planning mechanism and to help people connect and build trust together. Setting the balance in this kind of meeting will always be a challenge: between the more 'corporate' and formal aspects of the programme and the desire of participants to know what their peers are doing, to share problems or seek advice. It is also an example, in mirror image, of the question many *Our Museum* organisations wanted to address with their community partners; how to create 'shared' agendas, so that the voice and needs of the institution do not drown out the voices and needs of smaller organisations and individual participants?

4.2.5 Our Museum ning

Although the *Our Museum* ning – a website with public and private pages - attracted members from outside the cohort, the site did not have a dedicated curator or manager. It was entirely dependent on participants generating content; there was limited interaction between participants; and participants commented that it did not feel like a 'safe space' for sharing, especially as most people didn't know each other.

It is possible that a web-based network of this kind might work better in future initiatives of this kind. Several of the *Our Museum* organisations are in the process of developing their digital strategies and museum staff may become more attracted by the idea of developing content for and sharing learning on digital media. Two of the organisations experimented with using web-based project management and collaboration software for communication, planning and reflection: this kind of system could also be considered in future as a tool in setting up complex programmes involving multiple participants and the funder.

4.2.6 Presentations

It is arguable that some of the presentations to external audiences happened too early in the *Our Museum* programme. Although they raised awareness of and interest in the programme in the cultural sector, content was inevitably based on limited experience and reflection. From Year 3 onwards, participants could offer more considered views.

4.2.7 Diverse Narratives

There are many *Our Museum* 'narratives'; the narrative from the Foundation's perspective, the narratives of the participating organisations and their community partners, narratives of individual participants, and the evaluators' narrative. There are lessons to be learned from, and tensions to explore, within all of these. It will be important for any organisation or funder planning strategic organisational change of this nature to try to find ways to benefit from as many of these perspectives as possible.

4.3 DECISION-MAKING PROCESSES

There were several decision-making phases in the *Our Museum* process. These included:

- Decision making related to the move from the previous research phase into a development phase with authorisation of the staff and financial resources to run a Special Initiative. This was internal to the Trustees, Arts Programme Committee and staff of the Foundation, who also sought external advice and comment

- Decision-making around design of control, accountability and delivery mechanisms for the Special Initiative. This included: establishment of a Steering Group of external individuals with relevant experience and expertise to oversee the programme, with responsibility for selection of participants and making annual recommendations of funding; the recruitment of an external consultant to lead the development and delivery of the Initiative; recruitment of the evaluation team; selection of participants; and recruitment of consultants to design and deliver the Training and Support Programme.

This was led by Foundation staff and the Project Director with reference to the Steering Group and the Arts Programme Committee and/or Trustees as and when considered appropriate

- Decision-making during the roll out and day-to-day management of the programme, including funding decisions and dissemination initiatives. This was led by Foundation staff, the Steering Group and Project Director with reference to the Arts Programme Committee and/or Trustees as and when considered appropriate

This hierarchical decision making structure, with distributed responsibility for advising on decisions combined with a system of checks and balances to ensure accountability, is familiar amongst both public and private agencies responsible for allocation of money and resources to others. However there are issues observed in the *Our Museum* decision-making process, which the Foundation may wish to consider:

4.3.1 The decision to invite applications to the programme only from those organisations involved in the research phase had advantages and disadvantages

On the one hand this decision meant that, as organisations, participating museums and galleries had all taken part in the work and benefitted from the learning of the research phase; it continued to develop a cohort selected to be broadly representative of the diversity of scale, location, governance and challenges faced in the wider sector; and it avoided the difficulty of stimulating a large number of applications when only twelve organisations could be part of the programme.

On the other hand this decision did not mean that the individual staff members and community partners who had participated in the research phase also took part in *Our Museum*. This was due in part to high turnover of staff in museums, galleries and the Third Sector between the research phase and the start of the programme. It also meant that opportunities were missed to consider other galleries and museums, also already actively involved with the issues explored in the *Our Museum* programme, as participants and to provoke sector wide debate around the core issues.

4.3.2 During the course of the programme, there was sometimes uncertainty amongst participants about which part of the Foundation's hierarchy was responsible for what decisions

In the early stages of the programme there was doubt in some organisations about who had the authority to approve potential changes of direction in their work plans. For example, the evaluation team was often asked whether a particular approach or change in direction was acceptable; these were questions that were outside their remit.

This might be mitigated by more discussion at the planning stage of a programme of this complexity about the mechanisms of decision-making processes and the levels of delegated authority within the hierarchy.

4.3.3 *Our Museum* organisations sometimes felt they were receiving different messages from different parts of the Foundation's hierarchy, which caused difficulties with forward planning

There are particular challenges for a funder in communicating with a network, where there may be more potential for misinterpretation or for perceived unfairness than when communicating with a single organisation. For instance, decisions were made during the programme that affected particular organisations rather than the cohort: notably some organisations did not receive a third year of funding. Although the decision making process to reach a particular outcome was clear and accountable, a transparent method to share this kind of decision amongst other members of the cohort, and beyond, was not in place. This led to unhelpful concern and rumour.

4.3.4 Participants perceived a tension between a programme, which sought to promote collaborative decision-making between museums and community partners, but was itself governed by a set of hierarchical decision-making processes

In any funding programme there will be times when a funder needs to have difficult conversations with the funded, for example, when there are issues around performance or mismatch of expectations. The feedback given to *Our Museum* organisations was sometimes robustly critical, particularly after funding decisions were made in the first year of the programme, when there were concerns about slower progress than anticipated or that some organisations were focussing on 'project' delivery rather than identifying and prioritising action for organisational change. The tone of this feedback was perceived as patronising and demotivating by some organisations, although not by all.

There was also a view, expressed by museum staff and by community partners, that the Foundation did not always model the kind of positive collaborative approach that it advocated should be promoted through the programme and that this set a double standard. The question this raises is critical and does not lend itself to easy answers: to what extent can a funder, who wants to ensure that scarce resources are being well spent, best develop an open and honest critical dialogue with a funded organisation who is aware that their funding is subject to review?

4 THE *OUR MUSEUM* SPECIAL INITIATIVE: CONCLUSIONS

SEEING IDEAS PUT INTO PRACTICE IS OUR REWARD
- COMMUNITY PARTNER
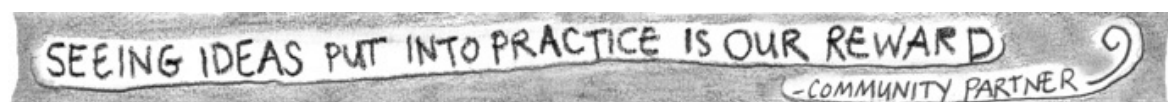
This section reflects briefly on each of the seven Overall Programme Objectives of the *Our Museum* Special Initiative, drawing on evidence gathered through the evaluation process, and then summarises each *Our Museum* participant's progress towards achieving its individual organisational change objectives. The section ends with a short reflection on what has been achieved so far through the *Our Museum* Special Initiative.

4.1 ACHIEVING THE OVERALL PROGRAMME OBJECTIVES

The *Our Museum* Special Initiative had seven overall programme objectives, which underpinned the design and delivery of the programme.

Programme Objective 1
To support up to 12 museums and galleries through a process of organisational change, through which they place collaborative work at the heart of their organisations, building sustainable partnerships with communities and involving them in decision-making

- All participants have a better understanding of the meaning and implications of an organisational change process that strives to achieve these objectives. This assessment includes those organisations that did not complete the three-year programme

- This understanding extends beyond the individuals in each organisation who were most actively involved in the day-to-day roll out of the *Our Museum* programme, to include many others: staff across the hierarchies of host organisations, volunteers and Trustees or their equivalent

- There has been a significant shift amongst several participant organisations in incorporating '*active partnership with communities*' as a core strand in business planning. The extent to which this is a sustainable shift will only become apparent as each organisation continues to make choices about how best to use whatever resources it has available, for example, of people, expertise, time, buildings and money

- There has been an increase amongst many participants' understanding of the purpose and practical usefulness of reflection and reflective practices: for the everyday work of the individual and the organisation; for projects as well as strategic planning; for the benefit of the individual as well as the team or overall organisation

- There is increased awareness amongst both organisations and community partners of how much can be learnt from dialogue and collaboration with, for example, people with different life experiences or deep knowledge of place or from organisations in different sectors than your own

Programme Objective 3
To establish a network of organisations whose participatory practice is exemplary and inspiring

- The programme has enabled nine museum and galleries and their community partners to experiment with a range of activity that fits under the umbrella term 'participatory practice.' There are many examples amongst the *Our Museum* partners of different types of participatory practice, some of which will be judged exemplary and some of which will inspire other people

- Much of the innovative practice has involved the review and redesign of the processes that support participatory practice: policies, business plans, human resource practices and working with volunteers

- One of the programme's achievements is in demonstrating how inspiration may come as much from 'what didn't work' as 'what did work'

- The fostering of a network between participants was adversely affected by their experience of the Training and Support Programme during Year 1 and the subsequent replacement of a cohort wide, unified programme of training and support with a more fragmented programme, largely reflecting participant's own sense of training need

- The programme enabled participants to learn from each other's practice, for example, through Learning Visits and participation in the annual Peer Reviews. The web based *Our Museum* ning, although attracting members from outside the cohort, did not become well used or considered a 'safe space' for debate and exchange. The Lead Contacts group, set up in Year 2, improved communication between participants and with the Programme Director and fostered the sense of being part of a network leading to the drafting of a joint *Community Engagement Advocacy Statement*

- The programme encouraged networks between museums/galleries and a range of individuals, communities and Third Sector organisations. This experience showed the value of drawing on diverse bodies of knowledge and a range of methodologies from outside the museum sector to achieve organisational change within the sector

- There are, however, significant resource implications in maintaining the kind of networking between museums/galleries encouraged through the *Our Museum* programme. It could be argued that the purpose of this networking will shift with the conclusion of the funded programme; for example, organisations are now planning events in their own localities, which could foster networks of practice and collaboration

- The strategic priority may now be to consider how best to use the learning gained through the *Our Museum* programme as a catalyst for change within active governmental, cultural and third sector networks

Programme Objective 4
To gather, analyse, document and disseminate compelling evidence of positive impact and best practice in museums and galleries of different sizes and types, as part of a wider strategy to achieve significant shifts in participatory practice within the sector nationwide. The analysis will include the learning from the organisations' experience, so that others may benefit from any approaches that were less successful, as well as the actions that led to the most positive impacts.

- The *Our Museum* programme has documented a substantial body of practical experience and gathered extensive evidence that could be used to underpin a wider strategy of achieving shifts in the sector nationwide

- Achievement of significant shifts in participatory practice within the sector nationwide will require further action to consolidate the learning gained through *Our Museum*. This action might be less to do with major investment in new grant schemes by funders and more to do with formulation of a clear strategy to engage the agencies and individuals with power within the sector to act: for example, to consider how far their own policies and practices foster the shifts in policy and practice towards active partnership, taking place amongst museums, galleries and communities across the UK

- The *Our Museum* Outcomes and Indicators of Success offer a valuable and practical initial reference point for museums and galleries when thinking about how to plan and carry through organisational change towards active partnership with communities. They are a useful checklist of both the principles and practicalities of such change, relevant to any museum or gallery wishing to embed active partnership with communities into its mission, policies and day-to-day workings

- The organisations and community partners who participated in the programme have also generated a variety of valuable practical approaches, outlined in Part 2 and the 'Journey' supplement of this report. These have not yet been fully tested and may not be applicable to all types of institution. However they offer significant learning

- This objective was addressed through creation of the *Our Museum* website which was consciously developed from the concept of a tool-kit: it includes a wide range of resources, including animations, videos and documents, on different aspects of organisational change for participatory community engagement. The topics covered include, for example, governance and leadership, staff professional development, engaging with community partners, evaluation and the external voice and structures and mechanisms

- There are many examples amongst the work of *Our Museum* programme participants of activity designed to result in social as well as cultural benefit: for example, around health and wellbeing, skills development for employability and social cohesion outcomes

- Measuring social and other impacts of investment in cultural activity has been the subject of studies and much debate in the cultural and other public service

sectors over many years. Some staff within museums/galleries were aware of the value of, for example, establishing sector wide performance measures and methodologies to identify and capture the impacts of cultural organisations and their activities; one had used Social Return on Investment measures, borrowed from the Third Sector. However participants in *Our Museum* were not required to assess social impact and no consistent methodology was proposed or used amongst the participant organisations to define or evidence social impact; it is arguable that this would have required a separate strand of funding and access to specialist advice and support

5.2 ACHIEVING ORGANISATIONAL CHANGE WITHIN THE PARTICIPATING MUSEUMS/GALLERIES

Each of the *Our Museum* museums/galleries began the programme with a good reputation for engaging with communities. This was often based on short-term projects or programmes or on work carried out by a small specialist team or by an individual member of staff. At the bid stage, each of the museums/galleries defined specific 'strategic change objectives' intended to create organisational change towards the active partnership and collaborative ways of working and decision-making summed up in the Foundation's description of its aims for *Our Museum*. Examples of the participants' ambitions for the programme included: building more equitable relationships with community partners; embedding principles of and approaches to community engagement across a whole organisation; moving from making offers 'to' communities to collaborating 'with' communities; creating explicit frameworks to support community engagement; incorporating active partnerships with communities in the museum's business planning.

The assessments of progress towards organisational change included below are based on evidence available from the period beginning October 2012 and ending in January 2016. Although by January 2016 all participants had addressed to greater or lesser extents some or all of their strategic change objectives, none of the museums/galleries had, or would claim, to have completed the process of creating organisational change. In all the museums/galleries, achieving this kind of systemic, embedded and profound change will require the focussed attention of Trustees, senior managers and staff and continued strategic planning for the long term.[20]

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[20] The Museum of East Anglian Life and Ryedale Folk Museum withdrew from the programme in Year 3 to focus on organisational reviews and the development of new business plans.

5.2.1 **Amgueddfa Cymru–National Museum Wales's** work provided a valuable 'proof of concept' - a clear model of the considerable mutual benefits that can be achieved by working actively with community partners through shared decision-making. The museum made significant progress in collaborating strategically with a range of Third Sector organisations to develop an approach to volunteering based on delivering wider social impact and on the needs of the volunteer rather than on the needs of the museum. Their approach has been based on rigorous reflection and evaluation, with clear outputs and outcomes, and active involvement of Trustees as both a particular kind of volunteer and powerful decision makers. Work has been focussed on just one of the museum's seven sites and Amgueddfa Cymru is now engaged in a structured process of developing similar approaches on its other sites.

5.2.2 **Belfast Exposed** succeeded in internally re-positioning its work so that equal value is given to its gallery programme, its long established community programme and its archive in organisational business planning, on its website and in day-to-day operational activities. Less progress was made in strengthening work with communities as active partners as an embedded part of organisation wide working methods, although the organisation has begun to develop advisory groups for new initiatives with community partners. Opportunities are now offered for volunteers to engage with its community programme as well as its gallery programme.

5.2.3 **Bristol Culture** experienced a major service re-structure and changes in senior leadership during the course of the *Our Museum* programme; this hindered its ambitious plans for organisational change. However, the restructure was used as an opportunity to amend all job descriptions and to strengthen work practices to ensure that the principles advocated by the programme have begun to be embedded across the organisation. More equitable approaches to volunteering were developed, alongside exploration of models for active decision-making by community partners in the refreshment of permanent exhibitions and in creation of temporary exhibitions.

5.2.4 **Glasgow Museums**, which is a large organisation in its own right and a part of an even larger organisation, Glasgow Life, focused successfully on building staff capacity for working with communities as active partners. In the latter stages of the programme, it initiated an innovative mechanism – the Creative Café - for staff and community partners to work together on new collaborations. This requires bedding in to Glasgow Museum's organisational systems and the outcomes of these collaborations will need to be documented and used to inform longer-term changes to policy and practice.

The value placed by the organisation on reflection as part of its core working methods increased significantly during the course of the programme.

5.2.5 **Hackney Museum** has further developed its work with communities as active partners by more clearly identifying the different kinds of models and mechanisms it uses to initiate and support this work. An important contribution to understanding the value of clear frameworks and articulating limits of decision-making powers was made through its work with its *Our Museum* community partners. It is, however, an example of the need to be cautious in attributing changes solely to participation in the *Our Museum* programme; in this museum, the local authority's establishment of a more stable and coherent vision and management structure for the organisation has also been significant.

5.2.6 **The Museum of East Anglian Life's** initial ambitions for *Our Museum* were outward facing and expansionist and assumed the museum gaining a much greater understanding of social, economic and other issues affecting communities and the wider locality. However gradually the approach became more internally focussed. The museum increased opportunities for staff, volunteers and existing community partners to participate in and influence decision-making and developed some systematic approaches to better understanding the needs of their existing audiences.

5.2.7 **Ryedale Folk Museum's** involvement in *Our Museum* strengthened previously weak processes of reflection and so helped to raise awareness in Trustees, staff and key funders of the need for radical organisational review. This has led to a new business plan that makes clear that providing quality visitor services is the responsibility of the whole organisation. New organisational priorities for working with communities as active partners have not yet been identified.

5.2.8 **The Lightbox** made considerable progress in re-balancing the organisation's desire to be a nationally acclaimed gallery with its wish to be a gallery that inspires a sense of ownership in local people. There is a wider understanding throughout the organisation of the value of working with communities as active partners, a clear methodology for collaboration has been identified and a forum set up to enable community input in the early stages of development of ideas and plans.

5.2.9 **Tyne and Wear Archives and Museums** used its involvement in *Our Museum* to experiment with a wide range of different methods for staff across the hierarchy to engage with communities as active partners and for community partners to consider real issues and choices facing senior managers. The challenge now is to embed those methods it considers to have been both successful and sustainable in its new 'whole organisation' Community Engagement Framework, developed with its community partners.

5.3 *OUR MUSEUM:* A REFLECTION

The Paul Hamlyn Foundation *Our Museum* Special Initiative directly addressed questions critical to the future of the museum and gallery sector through encouraging and developing the concept of museums/galleries and communities as active partners. The programme illustrated how organisational change processes can play a significant role in placing community needs, values and collaboration at the heart of museum practice. The nine museums/galleries who participated in the programme and their community partners have explored and refined a practical framework of outcomes and indicators. Others in the sector can use this framework as a valuable reference point when planning for organisational change of this kind: as a checklist of both the principles and practicalities of such change and to assess progress throughout the change process.

In addition to the organisational changes made in each of the participating museums/galleries, the *Our Museum* Special Initiative:

- Increased participants' understanding of the many different ways in which organisational change processes could help support sustainable partnerships with communities
- Demonstrated that active partnership and collaborative working can produce tangible benefits and improved outcomes for both museums/galleries and their communities
- Increased awareness of the value of reflection and active dialogue for planning and decision-making from organisational business planning to programme development
- Documented experience and gathered evidence in ways that can inform those practitioners who wish to shift and strengthen collaborative working practices in the museum/gallery, cultural, voluntary and community sectors
- Increased awareness of the value and relevance of knowledge and practice from communities and Third Sector sources to creating organisational change in museums/galleries

Beginning to gather evidence of the positive social impact of museums/galleries working with communities as active partners had been one of *Our Museum's* initial overall programme objectives. A methodology was not established or implemented during the programme.

The *Our Museum* Special Initiative has confirmed the many challenges of creating meaningful organisational change in complex institutions. It has also shown the value and importance of the principles at the heart of *Our Museum* for the museum/gallery sector and for the communities it serves, for example, through collaboration and shared decision making; building working relationships with people and organisations from outside the museum towards objectives which benefit all partners; the need to build reflection into normal every day working practices. The work of the participants has also generated valuable practical learning and a wide range of transferable methodologies for others to explore in their own organisational change journey.

5 RECOMMENDATIONS

MAKE SPACE FOR REFLECTION AND RISK TAKERS

5.1 RECOMMENDATIONS TO THE PAUL HAMLYN FOUNDATION

The experience of the *Our Museum* programme suggests that the proposed Outcomes and Indicators of Success are a useful and practical tool for organisations that want to work with communities as active partners. It is clear that the weighting and priority given to particular indicators will vary from organisation to organisation depending on the context in which they work, their assessment of organisational strengths and weaknesses and the resources they have available to make change happen. The programme also illustrated the vital importance of joint reflection and planning involving museums and their community partners. The Foundation could:

1. Revise and promote the Outcomes and Indicators of Success and use a service such as the Plain English Campaign's Crystal Mark to ensure clarity: consider production of an easy read version

2. Encourage organisations applying to the Foundation for funding to work with communities as active partners to consider using the *Our Museum* Outcomes and Indicators of Success as a potential reference point in designing initiatives

3. Host a seminar for key Third Sector agencies and organisations such as NCVO, Age UK, and MIND to discuss learning from the programme and how to disseminate this most effectively to their members

4. Encourage museums/galleries applying to the Foundation for *Explore and Test* and *More and Better* funding to review overall learning from the programme and consider how their proposed activities might contribute to further learning for the sector

5. Continue its investment in organisations who value and prioritise processes of reflecting and planning with community partners, understanding that this may require some organisations to develop skills in facilitation and active listening

5.2 RECOMMENDATIONS TO MUSEUMS AND GALLERIES

In Section 2 of this report a range of effective approaches to developing policy and practice are summarised; these are described in more detail in the section entitled *Initiative Partners* on the website *ourmuseum.org.uk* under the name of each individual organisation. In Section 3, the experience of the *Our Museum* programme is analysed to suggest steps that are likely to help museums and galleries committed to active partnership with their communities to plan for organisational change, make it happen and make it sustainable. Museums and galleries could:

1. Benchmark their current organisational strengths and weaknesses against the *Our Museum* outcomes and indicators

2. Identify the key steps they need to take to develop existing policy and practice

3. Consider the relevance of approaches explored through this programme to their own organisation, bearing in mind that these can be supplemented by other international, regional and local examples of good practice

4. Lobby their 'core' funders to advocate the importance of museums and galleries working in active partnership with communities

5.3 RECOMMENDATIONS TO THIRD SECTOR AGENCIES AND ORGANISATIONS

The *Our Museum* programme illustrates ways in which community partners can work with museums and galleries to deliver outcomes which are of mutual benefit; help them understand better the needs and aspirations of the communities they serve; influence and inform their strategic decision-making; work collaboratively with them to co-produce exhibitions, events and activities; and support effective planning and co-resourcing of activity. Community partners and Third Sector organisations could:

1. Consider how sharing of expertise and experience cross sector could support both parties to better achieve their objectives. This might involve strategic cross sector planning or at a local level becoming Trustees, or participating in panels or task groups, or more informal discussions between museum and community partner/Third sector organisation staff

2. Invite their local museum/gallery to talk to them about how it currently works with community partners and how this might be developed and strengthened for mutual benefit. Examples from this programme could provide useful starting-points for that conversation

3. Promote the work their museum/gallery does and wishes to do with its community partners on websites and in newsletters

5.4 RECOMMENDATIONS TO PUBLIC SECTOR FUNDERS OF THE MUSEUMS AND GALLERIES SECTOR AND OTHER TRUSTS AND FOUNDATIONS

The *Our Museum* programme tested a set of outcomes and indicators for museums/galleries committed to working with communities as active partners and explored the value of a range of policy and practice initiatives. Funders distributing public money from the government and the National Lottery to museums/galleries, such as Arts Councils and local authorities, and Trusts and Foundations could:

1. Review their monitoring and evaluation processes to ensure organisations are asked to report on the kinds of outcomes promoted through the *Our Museum* programme

2. Encourage and support museums and galleries to develop their own tailored organisational change initiatives, informed by learning from the programme and from other similar experiences internationally, nationally and locally

3. Consider the relevance for their own future strategic initiatives of the lessons learned through *Our Museum* on the design and delivery of a programme aimed to support organisational change

APPENDIX A: *OUR MUSEUM* EVALUATION METHODOLOGY

An independent evaluation team was appointed in 2011, with the aim of carrying out a qualitative evaluation that would:

* Support learning for all, through summative feedback to organisations, their partners and the Foundation
* Explore, analyse and document organisational change in the participating museums
* Consider the overall progress of the *Our Museum* Special Initiative
* Provide information to influence the museum sector, community partners, funders, policy makers

The team developed an evaluation framework based on the four Outcomes and Indicators of Success already agreed as a core strand of the Special Initiative. The structure of the evaluation framework, its ethos, the evaluators approach to confidentiality and the practicalities of the evaluation process were explained through presentations at inception meetings held with each of the *Our Museum* organisations and their community partners during 2012. Full and summary written versions of the evaluation framework were also produced. The latter was posted on the *Our Museum* website/ning for easy reference.

The evaluation team established an agreed qualitative baseline for each organisation using information provided by the museum/gallery as well as evaluator observation from the inception visits. It assessed existing practice within the organisation in relation to each of the four outcomes and the indicators of success and noted each organisation's strategic change objectives. The baseline report also summarised over-arching factors, which in the view of the evaluators might affect the organisation's ability to achieve these objectives.

The evaluation team also prepared a baseline quantitative report for each organisation. This report analysed quantitative evidence provided by each museum/ gallery and drawn from a range of readily available third party data sources, including the Office of National Statistics, Target Group Index and ACORN data. The report drew on this evidence to present a snapshot of the museum's operational, visitor and local communities profile at the outset of the *Our Museum* programme. It also identified gaps in evidence that could be important to consider in the organisational change process.

The inception meeting was followed by three annual visits, when the evaluators held meetings with community partners and a range of key staff, using a common agenda and structure. Two members of the evaluation team undertook the inception and Year 3 visits to all participants. In Years 1 and 2 one member of the evaluation team acted as Lead Evaluator for each organisation, working to a common agenda. During the course of the *Our Museum* programme, the Foundation agreed extensions to calendar years, so that organisations could complete work plans and the evaluation team took account of this in their programme of work.

In each of the three years, the evaluators completed a detailed evidence review for each organisation assessed against the four outcomes and the indicators. This review included material gathered during the annual evaluation visit, material supplied in the course of the year by the organisation and its partners, and other material gathered by the evaluators from, for example, review of websites or scrutiny of online project management systems. In addition they read organisations' self-assessment reports and work plans, reviewed a range of documents produced by the organisations for their own internal and external purposes and visited organisations informally to see events and activities at first hand.

The evaluators provided written reports after each annual visit to the participants, recording key issues and suggesting reflective questions that the organisation might which to consider. The participants checked these for accuracy before confirmation. In Year 2, these reports also contained a risk analysis and in Year 3 participants received transcripts of all discussions, interviews and group work. The evaluation team also prepared guidance notes on self–evaluation and use of quantitative data, produced several newsletters commenting on emerging issues for the participant organisations and their community partners and maintained an evidence base which could be used to consider progress towards Overall Programme Objectives.

In Year 4, the evaluation team drew on the qualitative and quantitative baseline assessments, the qualitative evidence bases from Years 1, 2 and 3 and the Overall Programme Objectives evidence base for this evaluation report.