
Our Museum Special Initiative **Summary Report of Evaluation**



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Acknowledgments

The 'banner' headlines which begin each section of the summary report are taken from comments made by three of the *Our Museum* Peer Review key-note speakers: John Holden (cultural commentator and co-author of '*All Together: A Creative Approach to Organisational Change*'), John McGrath (founding Artistic Director, National Theatre Wales) and Nina Simon (Director, Santa Cruz Museum of Art and History and author of '*The Participatory Museum*'). Other 'banner' headlines are taken from comments made by museum staff and community partners.

Publications

This summary report is based on the full findings set out in ***Our Museum Special Initiative: an evaluation*** Gerri Moriarty and Sally Medlyn, Paul Hamlyn Foundation June 2016. A more detailed exploration of the work undertaken by each of the participating organisations with their community partners during the course of the *Our Museum Special Initiative*, also written by the evaluators, is available on the website ourmuseum.org.uk, in the section entitled *Initiative Partners* under the pages dedicated to each individual organisation.

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.

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KEY FINDINGS

'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. 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.² 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.³

¹ The Outcomes and Indicators of Success are set out in the Appendix to this summary report

² 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

³ 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.



The organisations⁴ 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 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.

⁴ 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.

2.4 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.

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 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.

2.10 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.



3 LEARNING FROM THE *OUR MUSEUM* 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

Learning from the experience of the *Our Museum* participants can inform the three major phases in an organisational change journey.

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 Continuing Professional Development 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 Chief Executive Officers, 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,⁵ 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.



⁵ 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 undervalued 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**

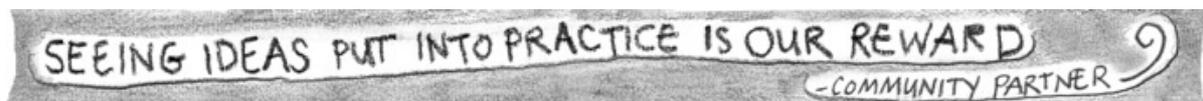
There are particular challenges for a funder in communicating with a network, especially where decisions may affect some but not all participants. There may be more potential for misinterpretation or for perceived unfairness than when communicating with a single organisation.

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



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 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.



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 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



APPENDIX: THE *OUR MUSEUM* OUTCOMES AND INDICATORS OF SUCCESS

The *Our Museum* Steering Group approved a number of amendments to the original framework during the course of the programme. These amendments are shown here in italics. Please see Part 3.1 of this summary report and the full evaluation report for more comment on the use of the framework and proposed further revisions.

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

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
- 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*

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