Reframing the Museum: Working with Staff to Step into a New Community Focused Mission and Vision

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Submitted to the Graduate Faculty of the

School of Education in partial fulfillment

of the requirements for the degree of

Doctor of Education

University of Pittsburgh

2023

UNIVERSITY OF PITTSBURGH

SCHOOL OF EDUCATION

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April 26, 2023

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University of Pittsburgh, 2023

Folsom History is an organization that is embarking on a journey to become more relevant in the 21st century. It consists of *Folsom History Museum*, *Pioneer Village,* and the newly conceived *Chinese Heritage Museum*. As it has been most recently operating, Folsom Historical Society was not relevant to most communities in Folsom. Over the past eighteen months Folsom History's board approved a new mission, vision, and strategic framework; and it took its first steps in reinventing itself. The organization's staff, board, and volunteers will need to step into its new community-focused direction to be successful.

This series of Plan-Do-Study-Act (PDSA) cycles were focused on creating a set of iterative interventions that created opportunities for staff to step into a new more community-focused mission and vision. Over the course of 19 weeks I introduced three interconnected change ideas designed to introduce staff to change management theory, reflection tools, and new models of operation in hopes it would result in a better execution of programs and services; decrease the amount of tension with volunteers; and result in more mission focused programs and services that would be brainstormed and developed. To measure the results of my improvement science intervention, I analyzed weekly survey score cards, transcripts of staff discussions, and staff works product to assess changes in staff thoughts, processes, and products. Results of my intervention indicated that staff had a better grasp of how change was impacting our organization, felt volunteer

tensions were reduced, identified new inclusive models to help them move ahead in the future, and grew closer as a core team.

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Preface

I am a lucky individual to have stumbled into a life filled with one intellectual adventure after another. Enrolling in Pitt's Ed.D. program and then taking on the role of Executive Director at Folsom History has been an amazing opportunity to study and experience the process of leading an organization through change. To thanks everyone on my journey would be a dissertation in itself, but I would like to thank a few key people.

First, thanks to my staff who were part of this intervention. I very much enjoyed learning from all of you as we journeyed through these uncharted waters at Folsom History. Next, thank you to all my NLI friends (C7 – I'm looking at you) who been a part of my reflective leadership journey. My walk and talks that started ten years ago with Alicia Borrego led to a wonderful friendship that has got me through many leadership trials and tribulations. Steve Snyder taught me what good leadership and community engagement looks like, and who continues to be a great person to bounce off all my reframing ideas.

To all at Pitt for reminding myself how much I love learning; even when it meant staying up too late completing assignments. A special shout out to my Out of School Learning ARCO, especially Audrey Sykes and Denise Esposto, our weekly texts and Zoom calls over this final year have made the DiP journey much less lonely and much more fun.

Thanks to my Dissertation Committee for all their helpful feedback and insights. Jennifer Russell helped me focus my data collection and analysis plan into a measurable DiP. Leslie Bedford who, in addition to serving on this committee, introduced me to the concept of reframing museums at Bank Street two decades ago. And Kevin Crowley who I had the great fortune of

working on a learning ecosystems initiative at The Franklin Institute and was the reason I chose Pitt (despite the time zone difference).

Finally, thanks to my family for all their love and support during this undertaking. My husband Brett never questioned why this was important for me to do and kept our house running when I was busy doing too many things all at the same time. My kids, Maya and Max, loved the idea that their Mom was in school again, together we commiserated over homework and instructional woes that are part of any formal education experience. I hope my experience will remind them to learn and grow long after they enter adulthood.

1.0 Naming & Framing the Problem of Practice

1.1 Broader Problem Area

Over the last two decades there has been a call to action for museums to become more embedded into the fabric of their individual communities. These reasons extend beyond strengthening learning ecosystems in our communities. Museums need the economic and political support of their communities. To do so, they need to invest in the growth and strengthening of the various communities that they are a part of. But individual institutions and as a field, museums have yet to make this transition. Institutionally, as most museums are not community focused and do not co-create with the various communities that they claim to be serving.

Folsom History (formerly known as Folsom Historical Society) is an organization that needs to become more relevant in the 21st century. It currently consists of Folsom History Museum, Pioneer Village, and the newly conceived Chinese Heritage Museum. The core identity of the organization is the Folsom History Museum. The space consists of a permanent exhibition gallery, rotating temporary exhibit, gift shop, archives and historical collection, and staff offices. In April of 2022 the organization opened a new permanent exhibition to replace the older one that was more than 20 years old with content mainly focused on the Gold Rush and other early history. The older exhibition had ignored the second half of the 20th century. It was during this time period in which Folsom experienced major residential and commercial growth, becoming the place most people recognize it as today. Pioneer Village is an active artisan space featuring working blacksmith along with volunteers that are "living history" actors/actresses dressed in historical garb connecting visitors with Folsom's creative past. There are many mechanical objects on the

grounds with no clear interpretive purpose, but more importantly the site does not appear to be open to visitors, nor is there much communication on what the place is and what can visitors participate in. The new strategic plan addresses how this space can be reframed into a more community focused asset.

The museum seeks funding to open a Chinese Heritage Museum. During the Gold Rush and the development of our railroads, Northern California was the home to many Chinese American pioneers. Yet their history is a relatively untold and unknown. More recently historians, including those with Asian American heritages, have been researching these communities to better understand the impact they had on their local communities and the challenges they faced as the first Asian Americans in the United States. This new museum would tell this story.

Folsom History has recently launched a fundraising campaign of 3 million dollars for our new site and other necessary upgrades. But in order to be successful in raising money and doing all the work that lies ahead, it needs to demonstrate to its various communities that the organization is worthy of the cash investments they seek. It needs to garner economic and political support from its surrounding communities. And more importantly, it must transform the way the entire organization works together. As it has been recently operating, Folsom Historical Society is not relevant to most communities in Folsom.

1.2 Organizational System

I started as Interim Executive Director of the Folsom Historical Society in September 2021. At the time I assumed the position, I expected it would continue until the end of December of 2021. My primary focus was to help the organization develop a more sustainable plan for operating

their organization. Upon my hiring I conducted empathy interviews to better understand the needs and perspectives of staff, volunteers, board members, current supporters, city officials, and other stakeholders. Community engagement means many different things to different institutions. During my literature review I uncovered that museums did not have a shared understanding of what community engagement looks like. Some see it as just getting brown and black people into their doors, others look at it as a one way transmission of content, while a small number of organizations view it as a chance to co-create with their local communities (Lewenstein, 2016; McCallie et al., 2009). I knew from this research and my empathy interviews that I would need to frame the need to be relevant in a broad and inclusive manner to create necessary buy-in from the board, staff, and volunteers. Specifically, my empathy interviews indicate that board members were not "risk-averse" when it came to most of my ideas for reframing the organization. But during the hiring process they fixated on my interest in social justice. While dealing with social justice is important in how we move forward, I realize that there are many other aspects of this plan that resonate with them. Through my discussions with board members, I realized that there is a way to frame the organization into broader terms that everyone could get excited about.

On October 19th, 2021, the board approved a new "case statement" proposing a new direction for the museum. This statement provided a new vision for remaking Folsom Historical Society into a more relevant, community-focused, and higher performing organization. On December 9th, 2021, the board voted to remove "Interim" from my title and hire me as the ongoing Executive Director of the organization.

1.2.1 Fishbone Analysis

Over the past year I have had the unique opportunity to begin to reshape an organization which has not been very relevant to the communities that surround it. I believe the root causes of this problem of practice are diagramed on the fishbone of **Figure 1**.
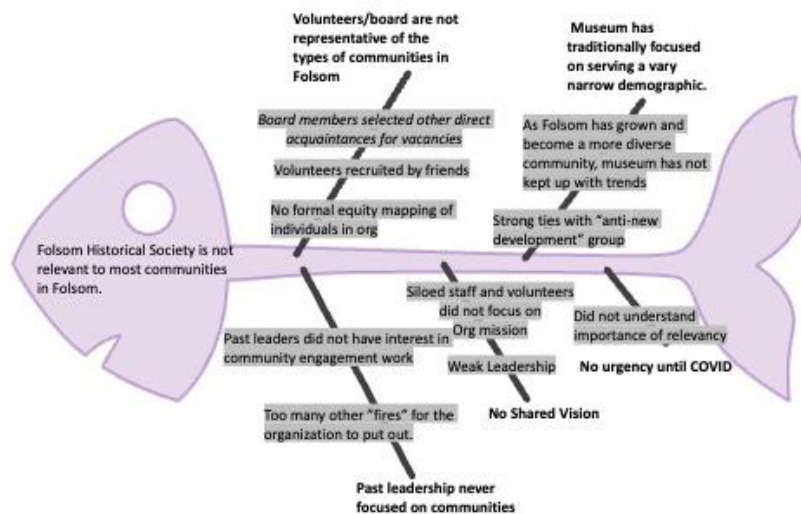
Figure 1 Root Causes Fishbone

Organization is not representative of the communities in Folsom: First of primary importance, a majority of our organization does not reflect the diversity of the community Folsom is today. The city of Folsom is 70% white, 17.2% Asian, 12% Latino, and 3.4% African American. The average resident is 40 years old. When I started, our board was 100% white, and all but three were over the age of 60. In addition, all but two of the board members were men. Since that time our demographic have shifted a bit. One of our new board members is Asian American, another is African American, and one has some Native American ancestry. Five of them are under the age of

60. When I arrived our volunteer population also skewed white and older, with close to 100% being retired individuals. There appeared to be a close to equal number of individuals of each gender. The age and ethnicity of the volunteers and board members skews what the organization thinks it should be doing. Many of them are on our board or volunteers through word of mouth, i.e. a friend was part of the museum, so they thought they should join as well. This type of informal recruitment can lead to "group thinking" where everyone things the same things should be done, and no one is looking to see what other groups think.

Folsom History needs to understand who it is serving and deal with other equity concerns which my equity snapshot revealed. Prior to my arrival we did not measure the number of visitors who attend the museum, nor the number we impacted through school outreach. We do not have an HR department, and we have given minimal attention to equity in hiring. We have been an all-white organization at the staffing level for many years. Our organization does not offer competitive salaries or benefits, nor until recently, a work environment that would be seen as challenging and "resume building." Because the compensation is low, the positions only appeal to those who have financial security either through background (i.e. social class) or marriage (i.e. spouse is breadwinner). We have not done any DEAI training but have just recruited a new board member who is Chinese American and has experience in doing this work. Our organization will need to be educated on all of this work moving ahead.

Traditionally served a very narrow demographic: Folsom is a city that has experienced exponential growth. Over the past 40 years it has grown from roughly 11,000 to 83,000 residents. Yet the museum has not kept up with these changing demographics. Many of the volunteers in particular live in the historic "core" of Folsom that was built prior to 1980. They still idealize

Folsom to be a quiet town and confuse protecting and interpreting history with literally protecting Folsom from new housing developments and making Sutter Street (our downtown main street) a 24/7 place to be. In fact, in 2003 our organization split into two and spun off The Heritage Preservation League of Folsom as a separate entity. This group became a political advocacy group, dedicated to preserving Folsom's heritage in the face of growing development that was occurring in the historic district and elsewhere in Folsom. The split is a fairly recent one, and many volunteers and a few board members are a part of both organizations. Our membership is also an older group; there are not as many family memberships as there are senior memberships. All of the program and fundraising efforts had focused around these groups.

Past Leadership was not Community Focused: The previous two executive directors were relatively inexperienced and struggled to make the organization more functional. One appeared focused on much needed fundraising processes and mechanics without updating the programs and services that the fundraising was in service of. The other director was focused on reducing expenses and creating rudimentary procedures and processes. With respect to the operations of the museum, each department has been functioning independent of each other. For example, the marketing, curatorial, and education departments rarely work with each other. The previous executive directors did not seem to be able to foster dialog and discussion between functional groups. In addition, the organization did not rely on many metrics (attendance, membership retention) to help them understand how well they were doing with engaging communities with various programmatic offerings.

No Shared Vision: Until my arrival the organization did not have anyone with extensive museum experience who could think about how to reinterpret the museum in a way that would be leverage its assets and present itself and its stories in a way that would be appealing to communities outside the current one they were serving. To do so would require creating a focused narrative that everyone could agree on. The museum had no clear mission or vision that could be shared with the staff, volunteers, or community. There was no shared vision for each "arm" of the organization. The two current sites, Folsom History Museum and Pioneer Village, are small but were siloed. When I started at the organization the two sites did not share any of the same messages, design, personnel, or even admission structures. There has been no planning to integrate the third museum into an existing framework. My interviews with staff when I started indicated that they did not see that their work was dependent on each other, I saw very little work product that was collaborative in nature. Over time the siloed thinking of the organization has led to animosity and/or tension between the various groups, and appears to be a major reason why the last three executive directors departed. Both sites did not engage visitors in current museum best practices. The exhibits at the Folsom History Museum (which were revamped in April 2022) were old and dated. There was too much text on the wall and not enough interactivity. The museum has not allocated any resources to their temporary exhibits' gallery. The volunteer who runs the gift store focused on what she authority over and worked to make the store profitable. Over time the store became the reason to visit and not the museum. The store slowly began chipping away at the museum floor space, and volunteers at the front desk started to focus first on retail sales and then ask if guests are interested in visiting the museum as an afterthought. Most visitors see no reason to return to the museum once they have visited.

No Urgency: Finally, before COVID, the museum thought it did not need to change much to grow into its third museum. There were not many organizational indicators that were being monitored that would have told them they were not relevant to most of the communities in Folsom. But if it had not been for an unexpected (and unasked) estate gift during COVID, the organization would have permanently closed its doors to the public.

1.3 Stakeholders

1.3.1 Staff

Staff at FHS are the smallest group of users. When I arrived there were three staff members working at the museum (a few left during COVID-19). They were all white women; the one full time staff member was in her thirties and has a museum background. The two part time staff, one in her twenties and another in her sixties, had no formal understanding or experience with how a well-run museum should operate. Two of the staff had worked for two previous executive directors (EDs) over the last five years. The two previous EDs were younger managers and my empathy interviews indicated that the directors issued many rules as ED rather than making changes that were harder and more systematic. The EDs didn't seem to have much of adaptative leadership framework and rather took things as technical problems to be solved.

During my initial empathy interviews some of the staff were direct with me and told me about how the museum had been operating without a "leader" for many years, and how the previous directors had little training or experience in how to lead an organization with a clear sense of vision or purpose. Another staff member expanded on her personal feelings of hurt and

frustration about a personnel issue with a volunteer who was also a board member. She said the previous executive director felt bullied by this board member and didn't get support from the board chair in time. She did not attribute the ED's lack of leadership experience as part of why the situation became unmanageable, but it is clear to me that was a factor related to this incident.

From my observations, the staff was friendly with each other, but didn't seem to have much experience of working together as a team with an organizational focus to work with. They seemed to think that the work they do doesn't really impact the rest of the team. Change management experience and training indicated to me that they didn't really want to be a part of that change that I'm implementing.

Today, all three of my original staff have departed and I have four new staff members. Two of my staff have worked for me before at my previous organization. I have built up a level of trust and rapport with them that extends well beyond our time together at Folsom History. At my previous institution, I was responsible for leading the development and implementation of a science center's programmatic vision. Both have experience in creating creative collaborative programming under my direction. My other two staff members are interested history, and how to make it accessible to others. They need to learn how to step into their roles more effectively and unlike past staff they need to being to work together in a more collaborative fashion. Together I think we have the right team to start to turn this organization into a more highly performing, community-focused organization. Of the three groups of stakeholders, this group seems most ready to take on the transformation ahead.

1.3.2 Volunteers

By my count there were approximately 40-50 active volunteers at Folsom History when I started at the organization in September 2021. They work the admissions desk, ring up sales in the gift shop, assist in the archives, and operate Pioneer Village. Two of them are Asian American, the rest are white. All appear to be over the age of 50, with most being older than 65. Very few of them have any experience working at other museums. While it might not appear to be the case from the outside, volunteers hold a lot of power at Folsom History. In theory volunteers know they report to the staff, but since they are not paid, volunteers sometimes feel entitled to just do what they would like to do, when they would like to do it. For example, I have been told by the volunteer who runs the gift shop that it would be hard for the admission volunteers to follow a script on what to say to visitors if one was developed because "everyone likes to say whatever they are currently saying."

The staff at Folsom History are often frustrated by the informal and unspoken power volunteers have over staff. I believe this is due to the relatively large number of them present, as well as their age and volunteer status (no one pays me, so I decide what to do). The new staff members I have brought on have been charged with working with me to shift this dynamic. As we move forward all volunteers will report to staff. In January of 2023 we dismantled another formal structural power imbalance. The last of our volunteers serving at the operational level just stepped down as board members. Until this occurred, staff that had issues with either of these two volunteers, were technically outranked by them, which created an awkward power imbalance.

Historically, Pioneer Village was almost exclusively run by older volunteer men, while Folsom History Museum is "staffed" with mostly women volunteers. The women volunteers work more closely with the museum staff and seem to have a better relationship with them. Until I

arrived, the men at Pioneer Village had a contentious working relationship with the staff located at Folsom History Museum. They felt staff never spent time with them or tried to understand what they were doing. The men said that the previous two EDs just issued statements like "all interpretive signage has to go through me," but did not spend much time explaining why that might be the case. It's apparent that there was mistrust on both sides which eventually blew up into a rather nasty set of arguments and work environment issues that was part of the reason behind the previous ED departure.

During the empathy interviews staff said part of the reason there was friction between the two groups was due to age and gender. But when I spoke to the men, it appeared that they had great admiration and respect for the younger woman who ran the training program for all blacksmiths in Northern California. In addition, the member who had been accused of pulling rank with the previous ED iterated time and time again that he was grateful that I could understand his concerns about not being appreciated (and being stripped of his board membership). I think a larger cultural tension between the two groups centers around the blacksmiths having a "creative" identity that tends to be oppositional to rules and arbitrary standards that the previous two EDs used their formal power to implement.

There is a final group of outside volunteers that I did not conduct any empathy interviews with, but the group is worth noting. After the situation between the blacksmith and the rest of the organization, our board chair asked one of the docents at Pioneer Village if an interpretive group that the docent was part of would be interested in doing interpretation at Pioneer Village. The docent agreed and now the museum has a set of docents from the Church of Latter Day Saints. This group does a few larger living history weekends for other historic sites in California, but our site is the only place to have docents that are almost exclusively from the Church of Latter Day

Saints. Currently we do not provide any additional training to this group and have heard from others that this group is interpreting our content with a focus of early Mormon pioneers. In addition, the values of the Mormon church are known to be exclusionary of LGBTQ+ community.

The challenges of dealing with volunteers are not limited to our organizations. Museums across the country who have docent (volunteer) led tours are replacing docents with paid staff (Pogrebin, 2021). There are many reasons for this. Most docents are wealthy older white women with a fair amount of privilege. It has been problematic for this groups to present content that is not squarely grounded in a Eurocentric perspective. This is especially concerning as museums are trying to reach a more underserved, younger, and ethnically diverse audience. These docents are seen as systematic oppression that must be dismantled as museum strive to be more anti-racist organizations. Folsom History does not currently have the funds to replace docents with paid staff, so we must find ways to retrain our current volunteers. In addition we have begun to actively recruit high school volunteers into our pool as a way of getting younger, more ethnically diverse individuals representing the organization. As the executive director, I do not have time to retrain our retired or teen volunteers. My staff will need to take on a large portion of this responsibility.

1.3.3 Board

We now have six men and two women serving on our board. Of our new board members one is Asian American, another is African American, and one has some Native American ancestry. Five of them are under the age of 60. We currently have three vacancies on the board, and there are only three board members remaining who were part of the group that hired me in September of 2021. Moving forward there is the opportunity to further shift board dynamics that have been at play before I arrived.

Our board needs to shift from an operational board to a governing board. During our last retreat in February, I introduced the board to the life stages of a board. The board expressed interest in moving to a governance board now that they hired an executive director with significant museum experience.

In addition to this shift, I will slowly need to shift them into a board with more of an eye for equity. Creating a more ethnically diverse board is an important first step. My hiring process was an example of why these changes are needed. Four board members that were part of the hiring committee wanted to bring me on as ED. The other five members (three of whom have departed) did not and during the interview process expressed concerned about the phrase "social justice" on my resume used to describe the Pitt program. I was told by the board chair that this group was "risk-averse," and I was the riskier of the two candidates. Based on my conversations with the board prior to my hiring, I suggested that I step into an Interim ED role to help them develop a strategic plan, and then we would determine next steps.

My empathy interviews indicated that board members are not "risk-averse" when it came to most of my ideas for reframing the organization. But during the hiring process they fixated around my interest in social justice. My past work experiences have not focused on social justice, but instead on creating engaging experiences that were accessible to all. But the other board members could not see that; they were so aware of my ethnicity that my words around social justice were amplified in their heads and they thought it would be the primary focus of my efforts. They were risk-averse to their misconceptions of "social justice." In addition, there is much alignment over some of the other framing I'm using. While dealing with social justice is important in how we move forward, I realize that there are many other aspects of this plan that resonate with them.

I was able to garner support for these ideas first and am now ready to think about how to have harder conversations with them.

1.3.4 Positionality

As executive director is it is my job to guide and lead the organization. I have the formal authority to make necessary changes to the organization. However, there are many "tripwires" in the way of making changes. I need to make sure we are on track with our financial goals as an organization, as well as ensure the board is happy with the progress I am making with what they feel is important to do. I need to give them what they need as I work towards ideas that are important to me.

In addition, it is interesting to note that my experiences as an Asian American make it easier for me to have conversations with donors and other stakeholders from that community. That is why my board chair wanted to hire me. But by me acknowledging this, I appeared as the "other" group to the board. No one was skilled enough at the board level to unpack any of this (I would not have been able to unpack any of this before my education at University of Pittsburgh). To say there was implicit bias at play is an understatement. But unfortunately, this is the case with many museums. As unfair as this might be, I have an opportunity to learn from it. By being more strategic in how and who I choose to discuss my ethnic identity with, I can move this project ahead with more success.

1.4 Statement of the Problem of Practice

As it has been currently operating, Folsom Historical Society is not relevant to most communities in Folsom. The organization has not been a reflection of the community it is in. The programs and exhibits are not very engaging and serve a small and limited demographic. The past few executive directors did not have much leadership experience and most of the staff had limited museum experience. As a result, the organization was informally run by volunteers, and the board lacked the focus that a more strategic executive director would be able to provide.

Since my hiring, I have created a framework to unify the organization; created a new mission, vision, and strategic plan; and have begun to make changes to the types of programs and exhibits we deliver. In addition, I have hired new staff and worked with the board chair on replacing vacant board member seats with individuals who better represent the faces of Folsom.

Our new mission "to inspire an innovative future together by connecting Folsom to its inventive roots" is an externally focused one. It will transform our museum into a relevant and community engaged museum. That is fundamental departure from our past mission of a much more traditional history museum which was "The society operates and maintains a history museum to collect, preserve and make accessible the heritage of the city of Folsom, California and its surrounding area. The society also promotes Folsom's history through educational and interpretive services." Moving ahead we will need to work with all these groups to better step into our new mission and vision for the future.

1.5 Review of Supporting Knowledge

Most content focused museums, including history museums, were built on the premise that they held some expertise on a particular type of content and part of their duties include making the general public more aware or knowledgeable on this content. This translation of content implies a unidirectional conversation, one where the museum is doing something for others. But it is critical to move away from this model and create a more collaborative type of institution that values two-way conversations and co-creation with their communities. Museums must do a better job connecting people and their communities to content that is personally relevant. Museums cannot assume to understand what is important to communities they are not embedded in. Only by this shift of working with versus for communities can museums truly understand the needs of the various communities we serve. These communities include but aren't limited to underrepresented groups, formal educators, local non-profits, universities, physical neighborhoods, and adult populations.

Staff culture and institutional positionality both contribute to this problem of practice. If museum staff see themselves as "docents" or "interpreters" the implication is that the museum and the content it represents has the answers. The organization's duty is to uncover methods which make these answers more accessible to laypersons. This is not true collaboration because it assumes the museums staff holds the wisdom, understanding, and power. In addition, many museums do not see themselves as part of the community they are embedded in. Feinstein and Meshoulam (2014) indicated that staff at science centers have two very different narratives and justifications around the equity work they do. The first view is with "client logic" (i.e. they are doing work for an external group of people), the second view is "cooperative logic" where they collaboratively work with their communities with shared purpose and value (Feinstein &

Meshoulam, 2014). I believe this dichotomy can be extended to all work museums engage in with their various communities.

There is much confusion over how we define community engagement, partnerships, collaborations, and co-creating. Therefore this literature review first outlines different frameworks of non-profit community engagement, then examines examples of what museums are currently doing and how this fits or doesn't fit into existing frameworks. Finally it identifies any tools or framing that would be helpful for museums to have as they take on the challenges of creating bi-directional, institutional level community engagement.

This literature review started by searching for articles that outlined frameworks of non-profit or museum focused engagement, collaboration, or co-creation with communities. It focused on publications written after 2005 since Lewenstein (2016) argues that the middle of the 2000s was when educational public engagement first began to be studied by science centers and other educational entities. In addition to peered reviewed journals and published books, this review looked for examples of co-creation and collaboration informalscience.org. Key search terms included "museum community engagement," "museum co-creation," community collaboration," and "community engagement."

1.5.1 Frameworks of Community Engagement

A recent interest in the concept of community and public engagement occurred in the early 2000s in multiple fields. Ross et al. (2016) argue that the field of environmental management saw a shift towards "community engagement" as it redefined environmental decision making during this time period. The researchers note that as a Google search term, "community engagement" surpassed "public participation" around 2008 and by 2016 "community engagement" was double

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that for "public participation" worldwide (Ross et al., 2016). In an overview article by Bruce Lewenstein on the CAISE website, he states that the informal science education community quickly began using the term "public engagement" in literature by 2008 and 2009, and that it became a short hand way of fostering interactions between scientists and the general public; yet many of the individuals using these terms were unaware the more political foundations in which public or participatory engagement "were intended to transfer power form elites to publics." (Lewenstein, 2016).

The Spectrum of Public Participation: The International Association of Public Participation (IAP2) created the Spectrum of Public Participation (©International Association for Public Participation www.iap2.org) to clarify these community or public interactions (IAP2 Spectrum of Public Participation, 2018). It outlines the role of the public or community in planning and decision-making and identifies five levels of community engagement (or public participation) (**Figure 2**). They are outlined as levels not steps and the IAP2 had previously produced a tool kit for how to work at each level of the continuum (Stuart, 2017).

IAP2 Spectrum of Public Participation

IAP2's Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public's role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

INCREASING IMPACT ON THE DECISION

	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

Figure 2 Spectrum of Public Participation ©International Association for Public Participation www.iap2.org

The first level *Inform*, is unidirectional conversation in which the objective is to provide good information to the public. In the next level of *Consult,* the goal is to obtain community feedback on plans, ideas, options, or issues. At the *Involve* level the goal is to work with the community through an entire process, not just during the sporadic touchpoint in the consult level. The decision making usually still resides with the organization or institution and is limited to a specific focus. The fourth level *Collaborate*, is where partnerships are formed and a back and forth between projects occurs. Finally at the *Empower* level, the final decision making is in the hands of the public. At this level, a decision could be made by the community that requires very little

discussion with the organization, thus the bi-directional communication may actually be less than the *Collaborate* level.

Adoption/Modification of The Spectrum of Public Participation: The spectrum of public participation is used with great frequency in Australia (where is was developed), with a particular emphasis in the environmental decision making process, but it has also been adopted by other US groups such as the Environmental Protection Agency (Ross et al., 2016). The National Institution of Health has included a modified version of it into its manual on Community Engagement ("Principles of Community Engagement (2nd Edition)," 2011) presented in **Figure 3**. In this interpretation more attention is given to the nature of the information flow and as well as outcome. The first and last columns are given different names, with *Outreach* replacing *Inform* and *Shared Leadership* replacing *Empower*. The NIH reports interpretation is a bit different as well thinking of this as a continuum:

Over time a specific collaboration is likely to move along this continuum toward greater community involvement, and any given collaboration is likely to evolve in other ways, too. Most notably, while community engagement may be achieved during a time-limited project, it frequently involves- and often evolves into- long term partnerships that move from the traditional focus on single health issue to a range of social, economic, political, and environmental factors that affect health (Principles of Community Engagement, (2nd Edition) 2011, p.7).
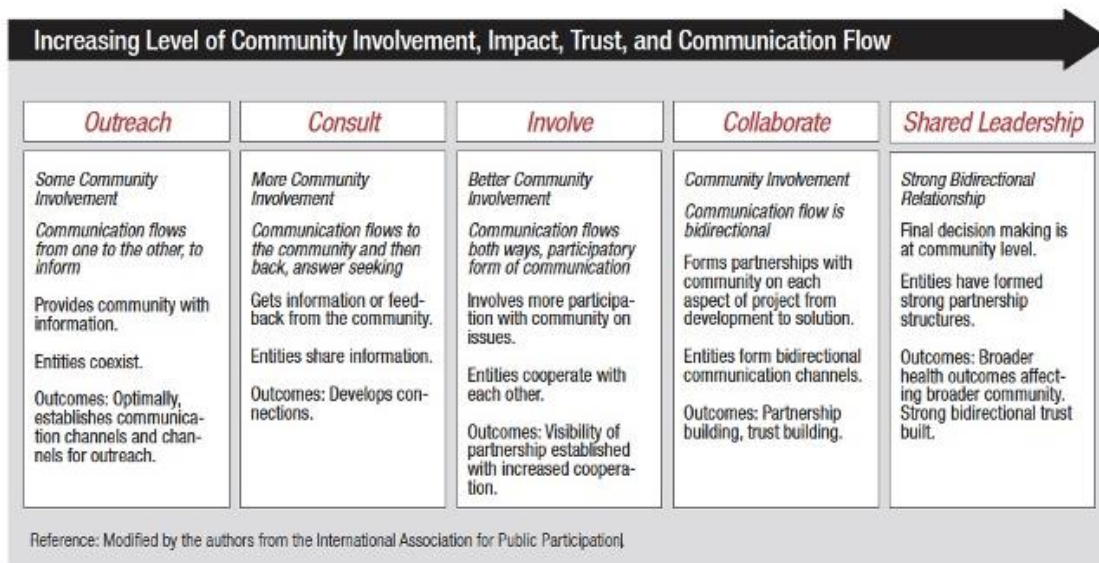
Figure 3 Principles of Community Engagement, (2nd Edition) 2011, p.8

Finally, as universities are engaging their communities, this participation continuum model has been modified and adopted by this group as well (L.D. Dostilio, 2020). Here there are 6 levels on the continuum. The framework starting with low levels of collaboration, and ending with the highest are as follows: *Outreach/ Researcher Subject*; *Inform*; *Consult*; *Invol*ve; *Collaboration/ Shared Leadership*, and *Citizen Control/Delegated Power*.

Here *Outreach* is added a as rudimentary level before *Inform*. The *Collaboration* and *Shared* leadership columns form the NIH model have been collapsed into one and the *Citizen control/Delegated* power from the original IAP2 model has been added back in. A more simplified typology to measure community engagement in the health sciences is proposed by Eder et al., (2013) consisting of three relation types: *engagement, collaboration,* and *shared leadership*. In this model, engagement is "an intention to exchange information and possibly resources…through an individual event or a short term series of events. Outcome expectations for all participants are indeterminate because of the absence of ongoing information exchange, dialogue, and shared

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goals" (Eder et al., 2013, p. 1443). *Collaboration* "signifies an intention for the members of a partnership to cooperation over time for the purpose of achieving specific goals; these goals may or may not be shared" (Eder et al., 2013, p. 1443). Finally*, shared leadership* "signifies an intention for the partnership to achieve shared goals. Partners share resources and information to enhance capacity for bidirectional exchange and achieve expected outcomes" (Eder et al., 2013).

Looking at these models, it is interesting to note differences in the final level of participation, which differ depending on the outcome desired. Full community empowerment/delegation speaks to a different type of collaboration than the co-creation outlined in shared leadership. One would expect that if shared leadership occurred between an organization and its communities, individual projects might move outside of the scope of an institution and move wholly into the community as a final step. The other question raised in the description of the above models is the fluid versus discreet nature of the categories, i.e. can steps from the previous level be built on, or is each category distinct in its own right?

Museums' activities on the spectrum of participation: After reviewing this literature, my professional experiences lead me to assert that most museums are most comfortable doing work at the *inform*, *consult*, and *involve* level on the spectrum of participation table. Exhibits and programming at museum have inform as their primary goal, to translate and inform the public about interesting science. Museums often use the consult level when "prototyping" exhibits or programs by inviting visitors to participate in the activity and then provide the feedback for the developer. These types of interactions are initiated by the museums during specified timeframes. The rest of the review seeks to understand examples of *collaborate* level, *shared* leadership, or *delegated power* approaches that are documented in the literature.

1.5.2 Examples of Museums Collaborating with Their Communities

Over the last ten years the notion of co-creation has spread rapidly through the museum field. Nina Simon's book "The Participatory Museum" documented many case studies of museums 1) inviting visitors to create their own exhibits/displays while visiting the museum, or 2) working with their communities to develop portions of or full exhibit experiences. This second example fits into an *involve* or *collaborate* model to exhibit development with various communities. Simon makes the distinction that co-creative projects are very similar "to collaborative projects, but that they confer more power to participants" (Simon, 2010, p. 264). Her position is that collaborative projects start with the institution's needs first, "we want to do an exhibit on potato farmers, please come and help make it happen," whereas a co-creative process start with "potato farmers, do you have an idea for an exhibit you'd like to make with us" or perhaps the museum is approached first by potato farmers (p. 263). This nuance is not captured in IPA2, NIH or university frameworks, but it is worth noting. Noticing who initiates the collaborative idea or project is a way of documenting which group has the power in the relationship. Rogers and Rock (2016) documented two exhibitions which follow Simon's criteria for a co-creative process. They noted challenges around creating a cohesive experience and the additional facilitation requirements. An unexpected outcome they noticed was a sharpening of critical thinking skills around scientific topics.

Beyond exhibits and programmatic co-creation: In her book, Simon wonders how many museums are committed to co-creative processes that extend beyond just exhibition and programmatic efforts. She only mentions one museum, the Wing Luke Asian Museum, for being wholly co-creative with their entire institution (Simon, 2010, p.264-8). First the museum has an exhibition development process that embeds co-creation into each step of the process: from

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concept creation, to production, opening, and during the run of show. The values of co-creation that shape the exhibit development process are also embedded in their institution's indicators of success which measure community members support and continued engagement. Finally, the museum's institutional hiring process hires individuals for their relationship building skills in addition to their content expertise. The rest of Simon's examples document how museums have integrated aspects of co-creation into various projects they are involved in. Barnes and McPherson (2019) suggest that perhaps the use of the term "co-production" as defined by Brandsen and Honingh as "services [that] are not only delivered by professional and managerial staff in public agencies but also co-produced by citizen" (2016, p. 427) will create better value for both museums and their communities. One could imagine "co-producing" joint fundraising or marketing efforts with various museum communities.

To better understand the differences that arise between individual museum staff departments in how they approach 'community engagement,' Morse (2018) conducted a series of interviews at the Tyne & Wear Archives & Museum in England to understand how various staff viewed the importance of 'community engagement.' She noted four different patterns of accountability that emerged which are listed and described below:

1) *Local-Public Accountability*- this is about framing in the principles of what it means to be a public museum, with a strong emphasis on access, "we do community engagement to make our collections and displays relevant to the public which we serve." The public were thought of as a very local group in this context.

2) *Managerial Accountability*- this frame is much more financially focused (i.e., we need to deliver a financial return to our taxpayers by providing services that better our communities).

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3) *Professional Accountability*- This framing refers to the professional duty staff had to adhere to a code or set of standards. Many curatorial staff expressed this type of accountability. As a curator, I need to involve the public when I tell stories about the history.

4) *Personal Accountability*- this is about the moral values staff have for effecting the lives of others (i.e., we do this because we believe this work is important). Not surprisingly this was most powerfully expressed by staff doing the community engagement.

Morse (2018) suggests that these types of accountabilities show the different perspectives various staff have around the need to do community engagement work and it suggests a fifth form accountability: a relational accountability:

> It is about relations that are cultivated between the museum institution, museum workers, communities and participants, where the quality of such relations depends on people's capacity to engage in dialogue and meaningfully represent and defend their interests. Relational accountability goes beyond monitoring and evaluation and checks and balances to address the quality of the museum's relationships with its different constituents and the mechanisms through which constituents can talk back to the museum and hold it accountable. Relational accountability therefore challenges those parts of the museum that approach communities at a distance. The point here is not to say that all managers (as decision-makers) need to be always 'on the ground,' but rather that they become much more aware and sensitive to local engagement work. Relational approaches aim for more horizontal relationships in museums, rather than only upwards and indirect ones (Morse, p 181).

Finally, a study funded by the Paul Hamlyn Foundation and conducted by Bernadette Lynch investigates the types of engagements and participation in twelve museums in the UK (Lynch, 2011). The report finds that despite government funding, public engagement and participation work has not shifted from "the margins to the core of many of these organisations" (p. 5). Lynch cites the barriers to this shift include the role of temporal project based funding and unequal partnerships between the museum and community partners. She notes that small museums fared better in integrating with their communities, and that:

> The strongest work that emerged from this study came from those organisations that had shifted the role of their community partners from beneficiaries (or supplicants) to active agents and partners of the museum. They had transformed their role into one of supporting people in developing their own capabilities. These museums and galleries had realised their capability in helping others to realise theirs. At the same time, they gained from the reciprocal capability of others in helping them reflect on their public engagement role. The best examples of embedded and effective community engagement came from those organisations that, while sharing similar ideals, were pragmatic in their approach and thoroughly embedded in their particular locality. They think– and talk to each other and their partners, constantly – about what they do (p. 20-21).

Looking at these examples of how museums and science centers are currently collaborating with their communities, one might speculate that the first step to co-creation at the institutional level is to have a strong programmatic initiative that has embedded co-creation into its entire life cycle as outlined by Simon (2010) and others. The Wing Luke Asian Museum had a strong

commitment to co-creation that could be extended to other parts of the museum (although in this case it is not clear if co-creation at the exhibit level led to co-creation at the institutional level). This literature review did not find any examples of museums co-creating with community on fundraising or marketing efforts as a first step to institutionalizing co-creation, and thus it is likely that co-creation would start with mission driven portions of museums. This is consistent with the perspectives of Morse (2018), in which the education staff are most closely connected with the importance of community engagement. Finally, size of institution appears to be an important factor too, as Lynch (2011) notes that smaller museums were better at co-creating with their communities.

1.5.3 Potential Collaboration Tools and Models

There are some tools and resources for museums to better integrate co-creation into the core of what they do. First, the International Association of Public Participation has created public spectrum tools and other resources to help group effectively increase community participation (Stuart, 2017). Second, a set of twenty-three practice based health science coalition tools were developed based on Butterfoss and Kegler's literature review of developing and sustaining effective constituencies (2002). Eder et. al.(2013) also articulate the necessity to measure trust and partnership synergy as a key community engagement metric and outlines resources to measure this component (p. 1433). Finally, a set of tools needed to prepare university staff to take on more collaborative work are outlined by Dostilio (2021) and Harden (2020).

There are fewer resources and tool kits developed specifically for museums focused on institutional community co-creation/collaboration. There are a few introductory guides on how to collaborate with your communities on individual projects such as "Museum & Community

Partnerships: Collaboration Guide" and "SHARE Museums East, Co-creating Community

Projects: An Introductory Guide" (Hutcheson, n.d.; McCarthy & Herring, 2015). However these

are not geared to senior leaders in an organization, and do not address the challenges of balancing

community co-creation with other priorities museum must address. Louise Glover identifies in her

case studies three arts organizations (a dance, opera and theatre company) that produce

programming that are exclusively co-creating with their communities (2008). It is likely that these

three institutions have radically shifted their organizations to accommodate this new model.

Finally, Lynch has identified four communities in the United Kingdom that are attempting to create

clusters of empowering practices by "reviewing policy and practice, and forming 'cluster' groups

to purse new ideas for co-developing practice" (Lynch, 2011, p. 21).

1.5.4 Key Literature Review Findings

The Spectrum of Public Participation (IAP2 Spectrum of Public Participation, 2018) and

all of its variations are helpful models when framing different types of institutional collaboration,

co-creation, or shared leadership. Although this model is used by universities, health and

environmental organizations; this review was unable to find any references of museums using this

spectrum in their work. Moving forward, a version of this model could be incorporated into a

framework for museum shared leadership that has a more rigorous definition than "community

engagement."

This literature review indicates that there are not many examples of institutional shared

leadership that are published in journals or trade newsletters, The Wing Luke Art Museum was the

only example found. From professional correspondences with colleagues, I am aware that there

are fledgling examples of this, however none are written about in a comprehensive manner. To

uncover these models will require other methods that might include surveys or informational interviews. In addition to uncovering these practices in museums and science centers, this literature indicated there were promising practices in art and performance centers, as well in clusters of co-developing communities in the United Kingdom that might warrant further investigation. Finally, the review did unearth tensions in organizational culture in museums that could be explored further, understanding how entire organizations and/or departments view community collaborations, is likely a key component of the change that needs to occur.

1.5.5 Setting The Stage for Community Engagement at Folsom History

Community engagement is usually framed as one of the most advanced growth models in museum development. Interpreting content, training staff, and employing best practices with respect to education and exhibition are usually milestones that organizations accomplish before they effectively engage communities in their mission. Many of the museums in this literature review have mastered these skills. They have staff who have worked together on complex projects, and boards who have a shared understanding of their role as a governance board as well as examples of successful projects to build on.

But when a poorly performing museum updates their programs and services, why do they do so, i.e. what are these changes in service of? There can be many answers to this question, but for Folsom History, the answer is to become more relevant to a wider range of communities in Folsom. We must rework our mission, vision, and offerings to create this relevance. This reworking will require the staff, board, and volunteers to think clearer and act with more intentionality than we have in the past. As this relevance is created, we will have more opportunities for community engagement with the models outlined in this literature review.

2.0 Theory of Improvement & Implementation Plan

2.1 Theory of Improvement and the Change

2.1.1 Progress to Date:

On October 19th, 2021, the board approved a new "case statement" that proposed a new direction for the museum. In the case statement I pitched the idea that a rich innovative history has allowed Folsom to grow into the vibrant and diverse community it is today. Folsom has always been innovative, since our gold rush beginnings, to our dredging and dam initiatives, and now in our more recent advances in technology. Innovation has led us to grow from 11,000 residents in 1980 to 83,000 residents in 2020. It is a place where many cultures have shaped our thinking. Innovation, of course, is not a straight trajectory. There are many failures along the way, but by understanding them and learning from them we become a more innovative and resilient community. Rather than focusing on just developing the visitor experience for the Chinese Heritage Museum we needed to create a unified narrative for our organization around innovation. We need to honor the roots of our history and become a more innovative and resilient institution. As we remake our own identity, we have the unique opportunity to engage, activate, and connect various communities in Folsom.

I was most worried about the board becoming supporters of an organization that is relevant to our communities, but thanks to this framing they were all excited. On December 9th, 2021, the board voted to remove "interim" from my title and hire me as the ongoing Executive Director of the organization. In March 2022 the board approved a new Mission, Vision, and Strategic

Framework which I prepared as the first step for reinventing Folsom History. It is a working, living document that provides overall structure and focus to the work ahead, including the launch of a $3 million fundraising campaign to support our new focus and efforts. To create a quick win for the board, staff, and volunteers, in April of 2022 we opened a new permanent exhibition on the history of Folsom. And in June of 2022, we rebranded Folsom Historical Society into Folsom History. See Appendix A for a set of images that document some of the transitions we have implemented over the past eighteen months.

We have a new mission and vision to step into, and a strategic framework that needs to be implemented. It will require us to change who we are, what we do, and how we do it. If we start to make these shifts, we will be able to demonstrate our worth to our various communities and raise $3 million to help us fully execute on the outcomes in our new strategic framework. Without these improvements that focus around creating a more relevant externally focused organization we will not be successful with our fundraising efforts. The organization has tried unsuccessfully to raise money in the past but were not able to excite or engage the community for support.

The strategic framework is a starting point and it not prescriptive in focus. Instead it broadly outlines five areas of work to be done in the next three to five years as a way of moving the organization ahead with a new mission and vision (**Figure 5**). The new mission and vision are as follows: Vision: To strengthen the social, intellectual, and connective fabric of Folsom, CA. Mission: Inspire an innovative future together by connecting Folsom to its inventive roots. Both statements are intentionally aspirational. This mission and vision positions us as a community organization. The accompanying strategic plan (**Figure 6**) in place is a mechanism for realizing the mission and vision. Connecting with community and stakeholders is one of our major pillars in our newly adopted plan.

Figure 4 New Vision, Mission, and Brand

Figure 5 New Strategic Framework

Our new approach and strategy are being noticed by many in our community. I have been

invited to be part of planning groups that are busy planning for other aspects of Folsom's growth.

We have secured a large pledge of $.5 million from a longtime supporter who is delighted to give us financial support in support of our new mission. Our board has grown into a board who now supports most of the reframing of our museum. But at the beginning of my Dissertation in Practice (DiP), I recognized that I was the only one in my organization who has some concept of what this new organization might look like and what types of changes would need to occur in order for the organization to transform into a new more forward-thinking organization. Our organization would need to be able to work more effectively as cohesive team united by an understanding of a new community focused mission and vision. To do so meant establishing new workplace norms around internal communication and process. It also meant reformulating how we presented ourselves to all of our communities in Folsom. Our programs and services needed to be reframed in in a way that was more responsive to our community needs. My team needed to become more reflective as we took on this new reframing.

2.1.2 Change Idea and Driver Diagram

My overarching change and transformational idea has been to introduce a new mission and vision that positions us as more relevant community organization. However this larger change idea must be broken down into many smaller change ideas to be executed by myself and others at the museum. These small test of changes are nested inside the larger transformative change idea and are all necessary to move our organization ahead to our AIM statement. For my DiP, I focused on changing the way my staff thinks and functions as a team.

Prior to my intervention, my staff had not been meeting as a smaller group. We have an operations meeting which they attended with three volunteers (two whom were on our board until December 2022). These meeting are reporting meetings and do not let us dive into the details of

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planning. We take these "offline" to separate discussions between the individuals involved in the planning. What has happened as a result is there is no staff meeting to work through how we think, reflect, and work together. On September 6th 2022, I launched a weekly staff planning meeting to start to tackle issues we needed to discuss together. Our initial staff meeting (see Appendix B for these meeting notes) indicated to me that my staff were very aware of root causes of our lack of relevance in our community. While they are aware of root causes, they appeared to be less sure about how to think through situations that arise as they quickly attempt to develop and implement new initiatives. Two of them have experience with how to work in creative environments in science centers but are unsure how to transfer some of the experiences into a more historically focused environment. The other two are more junior level and have some experience around cultural sensitivity and historical issues. They all need to become thoughtful in how they plan their current efforts as we forge a path to tomorrow. They also need to have a better understanding of how to work with volunteers through this institutional change that I am initiating. Finally they need to start becoming a more reflective team as we implement changes together.

Figure 7 is a driver diagram that outlines a change idea that I tested for my DiP. I was interested in creating a set of iterative interventions to create opportunities for staff to think differently about the work they need to do. A new mission and vision meant staff must deliver a different set of programs and experiences to our public. To do so, meant planning the work together in more collaborative ways; dealing with change management concerns; reframing or revamping programming to reflect our new direction; and becoming a more reflective team. With this intervention I hoped my staff would have a more shared framing of their work, be able to work with volunteers more productively, and begin to find new models to inform the work that they do. This would lead to a better execution of our program and services, less tension with our volunteers,

and the creation of more mission focused programs and services. These changes, and other initiatives I am driving, will bring us closer to my aim statement, "by 2025 Folsom History will be living our new mission and vision, which will result in the reframing of our organization into a forward thinking, relevant, community organization."

Stepping into a new Vision/Mission of Folsom History

Problem Statement: Folsom History is not relevant to most communities in Folsom.	Primary Drivers (the what)	Secondary Drivers (the where)	Change Ideas (the how)	
Aim By 2025 Folsom History will be living our new mission/ vision reframing our organization into a forward-thinking, relevant, community organization.	Better execution of programing/services	Staff will be able to reflect on the shared framing of their work	By introducing change management/adaptive thinking staff will be able to think through challenges ahead as we step into our new mission/vision.	Cycle 1
	Less unproductive tension with volunteers	Staff will change how they work with volunteers	By introducing reflection as an organizational practice and encouraging staff will be able to think through challenges ahead as we step into our new mission/vision.	Cycle 2
	More mission focused programs/services are brainstormed and developed	Staff will be able to connect with other groups/resources that might be able to inform on new models to better reflect our mission/vision	By exploring new models of programming/ operations staff will be able to think through challenges ahead as we step into our new mission/vision.	Cycle 3

Figure 6 Initial Driver Diagram

This overall mission and vision level transformation is a large organizational change, but one I believe I can drive successfully. It is the primary job I have been charged to do over the course of the next two to five years. As executive director, I will be measured by the board on my ability to drive this change, and I have authority to make any necessary interventions to my organization. By the same token, I had many other competing priorities related to our new mission and vision articulated in our strategic plan that I am also leading. It was important for me to not allow my DiP, which focuses on staff development, to overshadow all the other responsibilities I had to manage over this time period.

2.1.3 PDSA cycle plan:

To develop a discrete set of time-bound staff interventions, I adapted the approach and a few of the tools from two programs that I was fortunate to be a part of. The first was my Noyce Leadership Institute (NLI) experience funded by the Robert Noyce Foundation. NLI began in 2008 to help prepare the next generation of leaders for science-intensive museums with a particular emphasis on gaining the skills and perspectives needed to increase the engagement of those organizations with their immediate communities. The program created a safe space for group and individual reflection. It also introduced participants to change management tools as they were looking to shift their organizations into more community focused institutions. After the program was sunset in 2015, participants of NLI worked with the Association of Science and Technology Centers (ASTC) to create the Leadership Learning Labs (L3) which was targeted to participants who were at the same level as my staff at Folsom History. Here, ideas around leadership, equity, and inclusiveness were introduced and discussed in a reflective manner in a small cohort. I participated as one of two NLI graduates who were embedded into each cohort as gentle guides, and modeled behaviors such as reflection and higher level of personal disclosure.

These two programs showed me how ideas around change, inclusion, and communities could be woven together with group and personal reflection to create personal and professional growth in a cohort setting. For my Dissertation in Practice, I conducted three Plan-Do-Study-Act (PDSA) cycles over 19 weeks around staff professional development. The three distinct cycles were designed to build on each other, integrating theory with reflection and then focused on reframing the way our organization could move into our new mission statement.

The first cycle I provided staff with concepts in change management which were discussed as a group over a six-week period. My inquiry questions were as follows:

- *Will providing staff with a framework around change management help them be able to frame the some of the chaos that they were experiencing with volunteers?*

- *Would they be able to use this change leadership framing as a way of creating an outline of what they needed to do with their own mission focused programming/services?*

- *Would they start working with each other using this framing as a guide?*

Since my arrival, I have initiated considerable change in the organization. Much of my thinking was guided by these change management ideas. I thought it was important to introduce my staff to them as well so we could start framing all our actions as a team with these concepts. I hoped it would help them identify patterns that they were experiencing as a staff. My hope is that with a shared understanding of the implications around driving change we would then be able to reflect on aspects of the change in cycle 2.

During the seven weeks of the second cycle I provided my staff with opportunities to reflect in journals, in pairs, and as a team. I encouraged them to be reflective about the programming and services they were creating and implementing; the nature of their volunteer interactions; and their own thoughts and actions. My inquiry questions as I started this cycle were as follows:

- *Will reflecting with other staff that they have not worked with in the past lead to better team work between staff?*

- *Will reflecting on areas they want to improve help them create better programing and decrease volunteer tension?*

For my final six week cycle I asked my staff to work in pairs to identify new models and framing to help us do a better job. Rather than have them just respond to new models for what our museum can be, I instructed them to first create an assessment of where our museum is, what needs to change, and then review potential models and resources as we move forward. I realize that for

them to be able to go out and look for ideas on how to change they need to have some scaffolding in place first. My inquiry questions before I ran this final cycle were the following:

- *Will they identify and own the change that they think our organization needs to make?*

- *Will they develop an appreciation for the insights of the person they are paired with?*

- *Will they be able to identify new models that will be helpful as we reframe our organization?*

- *Will they be able to start thinking strategically about what needs to be done next?*

I had hoped after the work we had done in the first two cycles my staff would be able to do the work independently without my supervision in this final cycle. I was very curious what they would uncover in their assignments.

2.2 Methods, Measures and Data Analysis

2.2.1 Participants:

The participants for this study included my four staff members whose titles and roles are as follows:

Exhibit/Program Developer (EPD): Part of a core team that creates exhibits and programs for Folsom History visitors. Researches, develops, prototypes, and participates in the implementation of permanent and temporary exhibits in both indoor and outdoor locations. In

addition, this individual creates programming for a wide range of learners including school groups and the general public.

Museum Manager (MM): Manage all parts of our museum including run processes/metrics reports; coordinate regular marketing/communication updates to a variety of stakeholders; and oversee collections and archive processes and procedures.

Operations Director (OD): Charged with upgrading the operations at all of our sites including creating an exceptional experience of our visitors; training and managing volunteers; and coordination the execution of programming and events at all our sites.

Program Director (PD): Oversees the planning and production of individual programs and ongoing series—including liaising with external program speakers and performers, ensuring the highest quality of programming experience for Museum visitors.

Since this is a small group I am not including any identifying demographic information about my staff. In addition, throughout the report I refer to staff with their corresponding initials (i.e. PD for Program Director) and use the non-binary pronouns they/them to conceal their identities.

2.2.2 Protocols:

All intervention work was conducted in newly created weekly staff meetings. The meetings were generally an hour in length. When there was a fair amount of material to cover, the entire

meeting focused on the intervention. Other times when we needed only group discussion time, the first part of the meeting was often about immediate work the staff needed each other's input or feedback on, and the last 15 to 20 minutes of each staff meeting were set aside to reflect on how their reading impacted how they were perceiving and reacting to events at the museum. **Appendix C** outlines all protocols used in the three PDSA cycles. For all staff reflection, the discussion was recorded as a voice memo on my iPhone, then all recordings were uploaded to Amberscript, www.amberscript.com, for automate (AI) transcription. Approximately 300 minutes of staff discussion was recorded and transcribed, including individual post interviews.

Weekly surveys (see **Appendix D** for copy of the survey) were sent to staff via SurveyMonkey, www.surveymonkey.com. Each week staff answered three questions designed to see how they were feeling about their interactions with volunteers, the amount of reflection they did, and if they were able to integrate our new mission and vision into their work. Seventeen surveys were sent out and all replies were anonymous.

For my own record keeping, I imported their answers into a master weekly Excel sheet. On this sheet I recorded the following 1) the week, 2) nature of meetings held or not held that week 3) data collected that week, 4) staff scorecard 5) my own scorecard- I answered four weekly questions how I felt the staff/volunteer interactions went; if we advanced our mission/vision; how well the staff worked together without me; and how frustrated was I during the week about missed opportunities 6) any staff work product, and finally 7) any reflection and or insights I had during the week. **Appendix E** has the complete matrix from my intervention.

2.2.3 Data Collection and Analysis Plan:

Table 1. lists the data collected from these three intervention cycles. The final data collection emerged out of a discussion with my dissertation committee. Audio files of all staff meeting discussions served as process measures and guided my understanding of how staff were describing their thoughts, reflections, understandings, and/or feeling around the secondary drivers of my change ideas. These discussions also became a way of noting any other balancing measures that might appear in the system.

Table 1 Data Collection Plan

Data Collection Plan and Measurements			
Cycle	**Item**	**Data Collected**	**Improvement Measure**
All Cycles	Staff meeting	Audio files of staff discussions except first initial meeting, that was captured in my handwritten notes during the meeting.	Process Measure Balancing Measure
All Cycles	Staff Scorecard	Staff responded to 3 questions on a 1-5 scale to gauge on a weekly basis their volunteer interactions, reflection level, and efforts integrating mission and vision into their work	Driver Measure
All Cycles	Rita's Scorecard	Weekly	Driver measure
All Cycles	Rita's weekly reflection	Rita's two to three sentence weekly reflection	Process measure
All Cycles	Rita's analytic memo	At end of each cycle, I wrote an analytic memo to answer my inquiry questions and modify my next cycle accordingly.	Process measure
Cycle 3	New models	Staff PowerPoint presentation	Leading measure
Post intervention	Individual staff post intervention interviews	Audio files of individual interviews	Leading measure
All Cycles	Brochures etc.	Various work products	Lagging measure

The weekly scorecard provided quantitative data on how staff and myself felt about aspects of the organization over the course of the intervention. My weekly reflection and analytical memos were another process measure designed to assess how each cycle was running and they helped me refine the structure of my next cycle. The staff PowerPoints and post intervention interviews served as a leading measure indicator, designed to assess how the full three cycles impacted staff's thinking, while staff work products measured continual external progress on their output.

The bulk of my data (**Table 2)** was qualitative by nature. Weekly scorecards were my only quantitative data. Averages scores for each cycle were tabulated and compared between each cycle. The rest of my data was qualitative and required that I use a different set of data analysis tools than I have traditionally used. My initial staff meeting served as a group empathy interview and help guide the design of my initial intervention PDSA cycles. The remainder staff discussions were recorded and transcribed. To find trends and themes in the transcripts I imported them into Delve, delvetool.com, a qualitative data analysis software program designed as a simple coding tool to help users find coding patterns and quickly iterate on them based on insights that occurred during the initial coding process. Codes could be clustered and nested within each other. A final Codelist with categories and subcategories created in Delve is shown in **Figure 8**.

Table 2 Data Analysis Plan

Data Collected	Data Analysis
Weekly Staff scorecard	Averages scores for each cycle were tabulated and compared between each cycle.
Rita's scorecard	Averages scores for each cycle were tabulated and compared between each cycle.
Notes Focus group from staff pre meeting.	Meeting notes were used to look for opportunities for increasing staff capacity through professional development.
Transcripts from weekly staff discussion and individual post interviews	Transcripts were imported into Delve and preliminary codes were identified and reorganized into final codes
Rita's weekly reflection	Entries were used to inform the planning of the subsequent cycle, as well as analyze for any other notable data influencing the system.
End of cycle Analytic Memos	Entries were used to inform the planning of the subsequent cycle, and analyzed for any other notable data influencing the system.
Staff Final Power point	Document analysis
Staff work products	Document analysis

Delve coded transcript text called "snippets" was exported into an Excel file and the entire file of snippets that was coded is in **Appendix F**. I was able to filter this data set for various code categories and subcategories to just view quotes or "snippets" pertaining to the categories I was interested in studying. To look for trends in the snippet files, I ran an analysis in Delve plotting out the frequency of certain codes over the course of the intervention (**Appendix G**). This was helpful when I was looking for patterns in the types of discussion we were having over the course of the intervention. Finally, weekly reflections and end of cycle memos were used to inform next steps of the PDSA cycle. A document analysis was conducted on staff work products and final PowerPoint presentations.

Cycle intervention topics
Change Management: General
Change Management: Volunteers
Individual reflection (Gibbs or journaling)
FYI Book
Paired reflection
Mission related program/services
New models
Score Cards
Reflections
Externally focused
Positionality
communication
teamwork/working together
Internally focused
Mentoring
Staff Feelings/Perceptions
Positive
empathy/responsiveness
frustration/tension
confidence
uncertain/ confused
safety
scary

Figure 7 Code list: Categories and Subcategories

3.0 PDSA Results

3.1.1 Cycle 1

Over a six-week course I introduced my staff to my first change idea that was focused on change management and adaptive leadership (a model of leading during uncertainty). John Kotter's 8 Step Model of Change (Kotter, 1996) was developed by studying hundreds of organizations that were going through a process of change. He identified a sequence of steps that successful organizations used to create change that sticks in an organization, this included: creating a sense of urgency, forming powerful guiding coalitions, developing a vision and a strategy, communicating the vision, removing obstacles and empowering employees for action, creating short-term wins, consolidating gains, and strengthening change by anchoring change in the culture. The second perspective of adaptive leadership (Heifetz et al., 2009) requires organizations to be reflective when solving challenges that are not technical challenges that have known prescriptive solutions. It requires leaders and manages to "get on the balcony" and study the system in a detached reflective way, make changes, and study the results. Much of the thinking of adaptive leadership is complementary to improvement science methods.

The first week I probed my staff on their current understanding of change management. The second week my staff watched a video on Kotter's change management and another video on adaptive leadership. I also provided them with accompanying handouts on both sets of ideas (see **Appendix A** for protocols). *In this first cycle I was interested to learn if providing staff with a framework around change management would help them be able to frame the some of the chaos that they were experiencing with volunteers? I wondered if they would be able to use this change*

leadership framing as a way of creating an outline of what they needed to do with their own mission

focused programming/services? Finally I wondered if they would start working with each other

using this framing as a guide?

After the second week of cycle 1, I experienced a troubling conversation with one of our volunteers. She had already spoken to my board chair, who encouraged her to speak with me about my concerns. In our conversation she challenged my authority and my decisions on many fronts. It was clear that she was not happy with many of the changes I was making. She questioned my leadership abilities and wondered if two of my staff were able to do the work that I hired them to do. She felt like I was relying too heavily on them and not other staff, who she thought more favorably about. The exchange caught be by surprise because it was not one of the volunteers who were part of our core group. She came in infrequently, so I was curious why she had such strong opinions about how our team was working. It became clear she was talking to other volunteers that were more closely associated with the day-to-day work and that she was voicing concerns from others as well.

I suspected our group needed more resources to be able to deal with this situation. All the changes I was making meant the staff needed to be more reflective on how to handle push back from volunteers moving forward. At our next staff meeting I introduced an article on change resistance to ramp up staff thinking on change resistance. I realized we needed to be careful not to overreact to the situation. The article did a good job categorizing individuals who were resistant to change into three categories: *Level 1 – Resistance created from a lack of understanding; Level 2 – Resistance based on an emotional reaction to the proposed change;* and *Level 3 – Resistance created from lack of trust in the agents of change.*

With this framing in mind my staff began to determine how individual volunteers might fall into these three camps. On the next Thursday I had a meeting with my OD and two key volunteers who gave us excellent feedback on what would be useful to help mitigate this problem. After the two of us reflected, we decided one of the volunteers saw most of our issues as a Level 1 communications gap to be bridged, while the second volunteer was more hurt and was acting in unproductive manners because of a Level 2 emotional reaction. We wondered if the volunteer who initially challenged my authority was a Level 3 resistor and would be difficult to appease. As a result of this disruption our focus in cycle 1 fell very much on reflecting on how to manage volunteers and less on how change management applies to developing new programming in a more collaborative or mission focused way.

Reviewing the transcripts and coding during this cycle, I made the following observations. First, during our first pre meeting in staff meeting in October, there were many questions that my staff raised as well as end results they wanted to see. They did not talk about any paths to be able to get them there. I now see evidence in the cycle 1 transcripts that they see a path forward. Second, when I probed my staff about what they knew about change management before I introduced the frameworks, most of them though it was a procedure help implement new process/procedures. As the process unfolded they realized it was sometimes less about controlling the external situation and more about how you could be reflective about your own reactions. I was delighted to see this learning on their end. Many individuals mistakenly think management is about managing others, when in fact the hardest and most critical aspect of it is managing your own reactions. By the last meeting they were beginning to reflect on how they might be doing things that weren't helpful and wanted to know if there were other tools that I could introduce them to that would help them grow.

During our meetings with the volunteers this cycle it was apparent that the volunteers were wary of the bond between myself and my two staff who had worked for me before at my previous institution. When I reviewed the transcripts I noticed that often the two would build on each other's ideas easier than the others. I realized that while one of my goals was to have the staff work better when I was not around, the pair who had worked together before already worked well with each other but did not work as well with my other two staff. Finally, I noticed that the scorecards indicated that staff felt they were reflecting well throughout the cycle. This was despite the fact that they commented to me a few times that they wished they had more time to reflect, indicating this was a fairly unused technique they were utilizing.

In answer to my inquiry questions for this cycle, I wondered first *if providing staff with a framework around change management would help them be able to frame some of the chaos that they were experiencing with volunteers?* From our discussions I saw this was very helpful to them. Change management and change resistance made them realize that the conflict they were experiencing was not directed at them personally, but the changes we were going through as an organization. In the transcripts during this cycle they noted that the volunteer anger and silence was part of a larger issue around change resistance, and wondered how they could do a better job listening to volunteers while still moving the change forward.

My second inquiry question was *would this change leadership framing help them create an outline of what they needed to do with their own mission focused programming /services?* I do not think this occurred in this cycle, there is no evidence of this in the transcripts, and the scorecard numbers stayed the same. The volunteer situation grew to a level that it occupied most of our discussion time, therefore we did not have a chance to connect change management to program and services as much as I would have liked to. My final inquiry question was *would they start*

working with each other using this framing as a guide? In our discussions it was clear they were building shared language together, but I was unsure of how much work together was actually happening with this framing in mind. I did not see any evidence in my weekly journal notes, in fact my notes indicated frustration on lack of team work on museum initiatives.

At the end of the cycle, I knew it was important in the next cycle to carve out more reflection time beyond the group discussions at the end of every staff meeting. The group reflection was not enough and needed to be supplemented with other types of reflection. This reflection time could help them think more about the adaptive leadership challenges ahead. As I was planning cycle 2, I modified my original plans to 1) Provide more paid time for staff reflection, 2) Allow staff to reflect with staff that they have not worked with in the past and 3) Allow them to reflect on what they might want to shift about how they react/approach situations to help them as they develop more mission focused programming and/or deal with others.

3.1.2 Cycle 2

Over the next six weeks I introduced my second change idea of self-reflection through journaling and paired reflection. I continued collecting score cards for my staff and myself as well as continuing weekly staff meetings. The first week I introduced videos and articles on how to utilize the process of reflection to become a better manager and create better programming. I distributed premium journals to encourage staff to begin journaling any personal reflections. Staff were given 2 hours a week to spend time reflecting individually; in pairs; or in groups. Finally I introduced a book that encourages individuals to reflect on areas that they could improve on professionally and gives them tools to create positive changes. In subsequent weeks staff were introduced to walk and talks and had time to talk to all three other staff members in this paired

reflection exercise. Walk and talks are outlined in more detail in my protocols, but the idea is very simple. On a walk between two individuals one person talks uninterrupted for 15 minutes with a 5 minute dialog afterward, on the second half of the walk, the other individual talks for 15 minutes uninterrupted with a second 5 minute discussion. It is a way to "hold space" for another individual's thoughts in a safe and undistracted way.

My implementation schedule varied from what I proposed. This cycle it was harder to have a regular weekly meeting that consistently included reflection. This was due to a few seasonal reasons. First, staff took time off for the holidays or shifted their hours which made them unavailable for our Wednesday meetings. Second, we have a very open office space and it is sometimes hard to have private conversations. Our museum is usually closed on Wednesday, but during cycle 2 we were open on Wednesdays due to holiday hours therefore staff was left to scramble for quiet uninterrupted space. Finally, with the increased open hours staff were juggling more operational tasks.

At the end of the cycle 2 I reviewed my inquiry questions for this cycle. My first inquiry question was: *Will reflecting with other staff that they have not worked with in the past lead to better teamwork between staff?* My staff really enjoyed the walk and talks. All of them remarked in the staff transcripts that they enjoyed this paired reflection. It was nice to see them connecting with staff members who they had not had many conversations with. In hindsight the volunteer who challenged my authority early in cycle 1 was very insightful to notice that two of my staff seemed to pair off more frequently together. I think this cycle addressed some of that dynamic. It was clear that staff became more comfortable with each other after their paired discussion. In the staff transcripts for this cycle they mentioned that they bonded more with each other beyond just the professional lens. During this cycle, our volunteer brochure (discussed in more detail later in this

section and in the subsequent chapter) was developed in a more collaborative manner. In my weekly notes, I noted that a volunteer training was developed with two staff members who had not collaborated as much in the past.

After I did some reflection of my own, I realized that I am very loose in how I construct positions. I have a very flat organization chart and have not talked explicitly about how staff should pair up to work beyond the larger group. All positions report to me, but for any given project there is a matrixed way they might be interacting. This was never drawn out by me. In **Figure 9** I tried to diagram out how they work together on tasks in my journal.

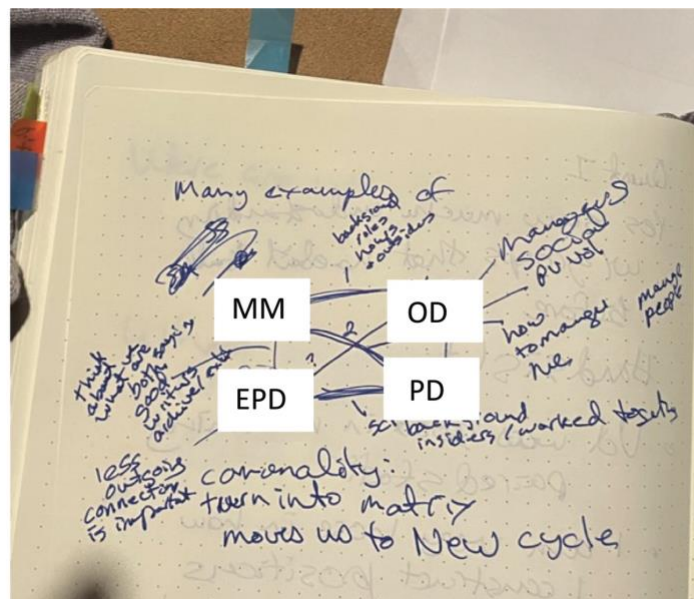**Figure 8 My Cycle 2 Reflections**

While my chicken scratch might be difficult to decipher, I realized that two of my staff, our PD and OD, had more people and manager focused tasks directed at dealing with volunteers and upgrading our visitor experience. The other two staff, our MM and EPD, will have to be more involved in content reframing and architecture around our exhibits, programs, and collections. As

I looked to plan the next cycle, I wanted to incorporate these insights into the intervention. I could give more focus and direction to the types of new models to be explored if I broke the work into two categories: *reframing history* and *reframing how we work together* as an organization. I learned in this cycle that the paired reflection was a successful way of moving more collaborative team work forward. I wanted to use paired reflection to explore new models in my final cycle.

My second inquiry question was: *Will reflecting on areas they want to improve help them create better programing and decrease volunteer tension?* In my weekly reflections I noted evidence of staff working together informally on programming together in a more collaborative way. For example my staff worked together on putting together and implementing a craft activity in Pioneer Village. The handoff seemed smoother; our OD didn't seem to have everything dumped on to them the day of training the teen volunteers. In addition, one week the OD had a lot of negative interactions with volunteers. I had a few private conversations with OD about how they should not personalize the situation and any staff member in their shoes would have the same issues. My OD needed to reflect on how to react before reacting. It was the only thing to be controlled in the situation. In addition they realized they had been sitting on the production of the volunteer recruitment brochure. OD addressed my concerns and worked with MM who produced the final brochure that was very good (see upcoming discussion section). MM also worked with the rest of the staff to put together a walking tour brochure that was great as well. Finally the speaker series under PD is coming along great. PD seems to be finding new ways to frame and talk about history.

I think the volunteer issue has gotten better as well. Over this cycle I had come to realize that it is about strategically tag-teaming some of this work. I need to take the lead on some key meetings. I met with Pioneer Village volunteers and led a meeting about where we are headed;

met with our gift shop volunteer about how we needed to change how we do things; and met with our collections volunteer about a plan moving forward. By doing that, my staff can have better meetings to push the day-to-day operations around each of these areas. The direction I take impacts the energy and the focus of my staff. I need to keep framing for them, then hand things over. There are really three key volunteers that need to stay "happy." They all need different things, but it is up to me to set the tone with them.

For my next and final cycle I was interested to have staff to continue to work in pairs. But rather than have them just respond to new models for what our museum can be, I wanted them to first create a needs assessment of where our museum is, what needs to change, and then together review potential pathways as we move forward. I realized that for them to be able to go out and look for ideas on how to change, they need to have some scaffolding in place first. This was different than my original goal of just exploring new models of programming and operations to help them step into our new mission and vision.

In cycle 3 I wanted to create opportunities where they could 1) continue to reflect with an individual who they are not as connected to personally but might be a good sounding board as they move forward with duties in their assign areas, 2) Take a critical look at what we are currently doing and agree on areas that need to shift, and 3) Start to be able to assess other models for their usefulness to our organization.

3.1.3 Cycle 3

For the final six week cycle my change idea was to used collaborative reflections as a way of moving forward strategic thinking on how we could begin to plan next steps as an organization. I continued weekly staff meetings and scorecards with staff and myself. I also paired up my staff

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according to functional position for this cycle. The first week I assigned OD and PD to do a walk and talk about reframing volunteer program. EPD and MM were assigned to talk about reframing the museum/history interpretation. At the end of walk and talk they needed to summarize their reflections in written form to me. I planned for each pair to present at our staff meeting two to four ways our organization needs would need to shift. Based on this presentation I would present them with some various models that might be good starting points to get to where we might want to shift. They would then reflect as a pair on this work over the next week and then present their thinking to the larger group. My initial inquiry questions were as follows:

Will they identify and own the change that they think our organization needs to make?

Will they develop an appreciation for the insights of the person they are paired with?

Will they have a better a sense of focus in identifying what types of models will be helpful as we reframe our organization?

However, based on all the work that has been going on, I realized that I needed to marry my initial concept of staff bring new models with owning the work that we need to do moving forward. After two weeks of cycle 3, I revised my protocol and inquiry questions. Due to time constraints at our week 3 staff meeting each pair did not present their thinking. One pair had presented me with their thinking, the other pair was still working to put it together. Based on the first pair's write up, I realized that they were capable of researching new models/approaches as a pair without as much help as I worried they would need. Instead of me presenting them with models, we discussed how I could help them find resources and what their final presentation would be. I couched it as we would need to be learning from each other when we visited places or attended workshops, so they needed to put together a short power point on what they found. There were

three main things they needed to cover: 1) The needs that our organization had, 2) What they found, and 3) Next steps. I decided that we would become institutional members of both AAM (the American Alliance of Museums) and AALSH (American Association for Local and State History) which would give them full online access to member's only materials. My revised inquiry questions and revised Driver Diagram (**Figure 10**) are below:

Will they identify and own the change that they think our organization needs to make?

Will they develop an appreciation for the insights of the person they are paired with?

Will they be able to identify new models that will be helpful as we reframe our organization?

Will they be able to start thinking strategically about what needs to be done next?
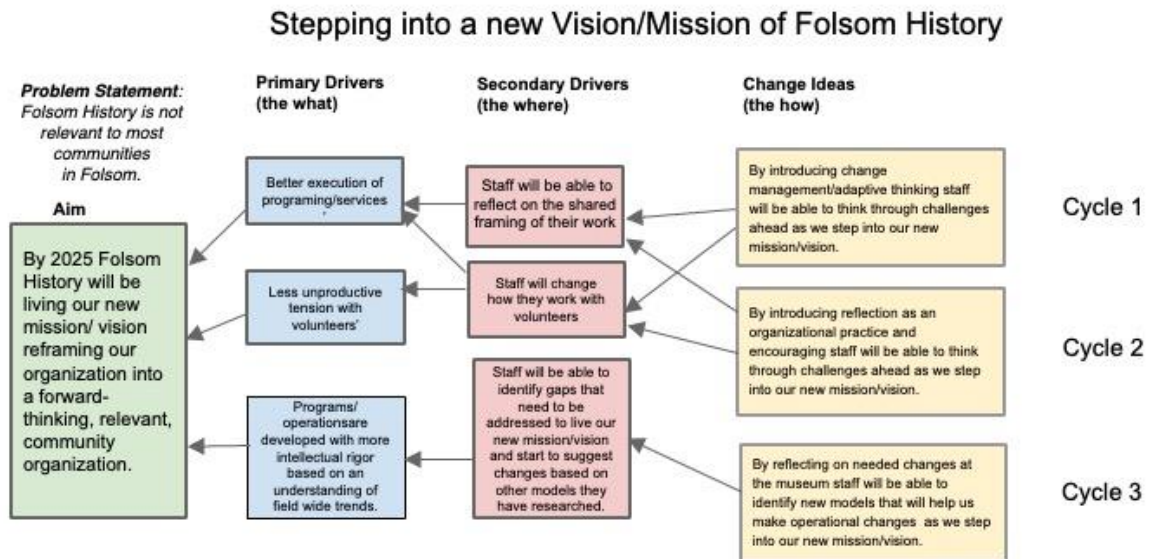

Figure 9 Revised Driver Diagram

I shared with all staff my update to the board on our new strategic plan. I hoped that it would be helpful as they start to write up their own plans as they move ahead. I realize that their final presentation is like starting their own problem of practice for them to work on. In retrospect in order for me not to do all the work, I needed to give my staff the ability to own their individual problems of practice and come up with ways of addressing them. This required an understanding of change management and using reflection as a tool.

I have been reflecting on why I was hesitant to have staff work with new models. Unlike the first two cycles, I didn't want to be the one to introduce new models to them. That really needed to be their job; I didn't have the time to do it. But I didn't know if they knew what models would be useful to bring in to the discussion. By creating an intermediate step of asking them to assess where we are I thought this would help. Individually I see that my staff are all at different levels of being able to assess other models. MM is able to find resources and adapt them to our needs. MM is also in a Master's in Museum studies which helps a lot. OD has been grappling with how to implement new structures that they have not directly experienced. OD seems to have more confidence at making changes to the gift store, but is still challenged by the volunteer who runs it. In addition, they need to start making the time to investigate new resources to utilize. I think reflection has helped OD deal with a few things, I'm hoping to continue to see some progress. PD has a history of being able to apply models that have been given to them by me, but I am expecting them to be more independent in this role. EPD is a very creative thinker when it comes to thinking about ideas and turning them into accessible program/exhibits, I'm wondered how much extends to model/resource assessment/acquisition.

On the final week of cycle 3 the staff presented their PowerPoints. I was not sure what to expect. I was pleasantly surprised. Both teams were thoughtful and pulled together a lot of useful information.

Overall I followed my revised my plan pretty well. There were less staff meetings which meant there were fewer ways things could go wrong. It was a bit unnerving not having weekly check ins as a group, but it really was nice to have the final cycle feel more independent. Had we had weekly staff meeting on top of the time needed for them to do the pair work it would have been too much. This unit was the least formally structured; we did not have many group check ins. From my end it felt more like a regular work cycle rather than one where I was intervening at a weekly level like the prior two cycles. I had to just hope I had given my staff enough tools in the first two cycles for them to execute this final cycle without as much oversight. I very much enjoyed the staff presentations and my post intervention interview with each of them. It was very gratifying to see the individual and group growth that had occurred during the process.

Responding to my inquiry questions:

Will they identify and own the change that they think our organization needs to make? In their summarized walk and talks and presentations, all of my staff were able to identify key areas that our organization needed to change. It was interesting because in the post interview transcripts some of them said that didn't want to do this assessment, because they felt they were complicit in where the organization is today. But all of them were relieved to get it all "out on paper".

Will they develop an appreciation for the insights of the person they are paired with? OD and PD developed a strong rapport with each other and really enjoyed finding common ground together. They worked on their project together even though that meant waiting until they both

had time to collaborate. MM and EPD both seemed to enjoy working with each other but they are

both a little more introverted, and they each created their own individual presentation. Both pairs

wanted to keep working with each other on their initiatives.

Will they be able to identify new models that will be helpful as we reframe our

organization? In their presentations both pairs found models that would be helpful for us moving

forward. EPD and MM found a concrete set of tools that will help us move forward. OD and PD,

identified some potential models to look at moving ahead.

Will they be able to start thinking strategically about what needs to be done next? Both

groups were able to think about what needs to be done next but were not as strategic about it. In

their presentations they were not strategic about the timing or the planning of their proposed

changes. As a next step (or in the next cycle so to speak) I would want to help them create a yearly

plan of growth that helps them focus their ideas/goals.

I was heartened to see that inclusivity was a need that both pairs brought up independently

of each other (EPD and MM in reframing content with a DEAI lens, and PD and OD with the pool

of volunteers they were drawing from). I did not ask them to look at this directly. While MM and

EPD indicated in their post intervention that this process had helped with their approach to the

mission, OP and PD were less certain it had. My guess is because the first pair spent cycle 3

thinking about the mission a bit more as they thought specifically about how to reframe the

museum exhibits, programs, and collections with the new mission. In addition, MM does all of our

social media and is always writing about what we are doing. I do think this is an area we will have to continue to explore together.

Table 3 displays the average scorecard ranking for all three cycles. Staff ability to work with volunteers and integrate the mission and vision into their worked increases from cycle 1 to cycle 3. Reflective thought stayed steady over the cycle 1 and 2 and then decreased in cycle 3. This contradicts evidence in the staff transcripts in which participants stated their ability to reflect increased over time. It is likely their gauge of reflection evolved over time. My own scorecard showed much larger perceived gains managing volunteers and working towards our new mission. In addition, my frustration with staff decreased over the 3 cycles.

The post intervention interviews indicated that the team felt more like a "core group" than they had at the beginning and could now rely on each other better. Many of them noted that they saw growth in each other as well as themselves. During the post intervention interviews all agreed volunteer tensions have been reduced, although one staff was a bit more cautious in their observation that there were still a few that they felt guarded around. While none of the staff loved the fact that this intervention required extra work, all of them were happy it happened during a period of time that was difficult to navigate. All felt the tools helped them cope better with the challenges in the organization. All of them liked the walk and talks, while none of them enjoyed the journaling.

Table 3 Scorecard Averages for Each Cycle

Cycle	Staff scorecard			Rita's scorecard			
	1. How did your volunteer interactions go this week?	2. How reflective were you this week?	3. Were you able to think about how to integrate our new mission and vision in your work this week?	Did staff do a good job managing volunteers? (1- not at all, 5- very well)	Did we advance our new mission vision? (1- not at all, 5- very well)	Did staff work together without me to build better programming/services? (1- not at all, 5- very well)	How frustrated was I with staff output missing the mark? (1= high frustration, 5= low frustration)
Cycle 1	3.55	3.83	3.53	2.75	4.25	3.67	2.50
Cycle 2	3.57	3.83	4.43	3.17	4.33	4.50	4.00
Cycle 3	4.28	3.70	4.18	4.60	4.80	5.00	4.80

I also noticed during our final staff reflection that all participants seemed to contribute at equal levels, where at the beginning PD and EPD seemed most comfortable in speaking. Finally I realize as their boss I have a great deal of power and privilege that could have biased my interviews. But I feel like the transcripts throughout the intervention reveal a fair amount of candor between my staff; they are able to express concerns they have with me about how things are moving. I would expect concerns that they have about my leadership would be more difficult to express, however this intervention was directed at how the staff work with each other and volunteers.

<center>**4.0 Learning & Actions**</center>

<center>**4.1 Staff Discussion Analysis and Learnings**</center>

4.1.1 Change Management:

My dissertation in practice contained three interlinking change ideas that I hoped would impact how my staff would be able to step into our newly reframed organization. In my revised driver diagram (**Figure 10)** I predicted that by introducing ideas around change management my staff would be able to *reflect on a shared framing of their work* as well as *change how they worked with volunteers*. Looking at my codelist for snippets under Change Management: General, and Change Management: Volunteers I was able to track these changes over our 19-week intervention. Unsurprisingly, my staff did not have much of an understanding of change management at the beginning of our time together. A few thoughts from staff during our preintervention discussion included:

> I don't know anything about it, but it sounds like how you handle how you want to control, but it's just how you handle implementing new procedures and policies.

> I've never heard the term before.

When probed further they defined it in a very prescriptive controlled manner:

> The thing that comes to mind right away is diplomacy, you know, like, how would you work with others to? Make this happen? How do you manage change? How do

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you stay in control of it and not let the process of change? Or people's reactions to it overwhelm you.

I see it as having a procedure in place that everybody is aware of, and comfortable with, or at least they know what to expect. So it's a smoother transition and you can connect buy in along the way at the relevant level, because people know when something's new. You feel safer doing it if you kind of know what's coming or how it's going to work.

A few of them reflected from a personal perspective that change could be scary if it was unexpected or if they were not part of the process. One person felt their current communications with volunteers was making the change less scary. After our first introduction unit on change management one staff member was surprised that there were both adaptive and technical problems to be solved and that change management was more about the second type of problem that was less defined and more about assessing and adapting a solution that fit the needs:

Well, I have never thought there were two very different ways of handling things. Because I think I tend to err on trying to find a technical solution for it, whereas often that's not the way, the way to look at it. And that's where I have to learn this process (adaptive leadership), because I just want to know what buttons push, what switches to switch to make everything work (technical problem solving).

The staff started to use change management as a way of seeing their issues with the volunteers and spent a fair amount of time reflecting on their positionality and their need to have empathy:

But I think like it all makes sense and it summarizes a lot of like running thoughts into, like a cleaner piece of explanation. I think, kind of, when you're like if you're at the volunteer level, you only have to really focus on you and up, right? And if you're at the board level you've on you and down? For all of us you're in the middle and it goes and I think, like the biggest thing for me personally, looking at my place in all of this is balancing the forces on either side and keeping both forces invested and happy. And were, especially, you know, looking at the force going down, where do you draw a line of trying to make this work? When it won't work? When do you say this is not a process that will work with this person?

All right, just being able to put yourself in their shoes. How would you want to be treated in a way from the other way around? And so it's just kind of reminding myself of going through that and just not taking everything like so like seriously into the point and everything, and just making sure like there's room for humanity and growth no matter what, especially with people that are just volunteering in general for going, discussing in that route, it's like they're not being paid to.

They were also using shared language around collation building, communication, and change resistance and began to appreciate how they were viewing the situation as a united team:

I think I'm still dwelling on the whole part about the co creating a coalition, because at this point I don't think we've quite done that yet. So I'm hopeful, you know, by getting some key volunteers in place that will help with the communication I think a lot. What is being said is like a game of telephone. I think that's going to be very

valuable and when we can move forward with doing that and then hearing from key voices that have, I guess, a lot of influence with the rest of the group.

You know, there's still a lot to do before we find ourself in, I guess, just have healthy dialogue, you know, and right now I think it's kind of interesting looking at the different levels (of change resistance), because I can kind of identify all three. and you know, but it makes sense. The last one is probably the most damaging just because that trust isn't in, people who are part of the leadership team.

I think navigating this together too is going to help give us a little bit more of a unified voice, because when things start to break down, its super easy for people to start pin pointing stuff on one person.

By the post intervention surveys all staff were grateful to have had a larger framing of change management to guide their work during this time of rapid change and felt like volunteer tensions (Primary Driver) had subsided if not completely disappeared:

It's like, I know, like at the beginning of all of this, like I was very much at like wits end with a lot of things going on, and so it just took allowed me to take time to like reflect and look at the whole process and shift gears of how to approach things, especially with like making changes, everything and just being able to take the time to get to know them properly and like hear them out and understand back and forth.

I mean gosh, so I think with change management what was really helpful with the training was it helped identify different ways, different reactions from people, you

know, and it really helped for me to just make the connections of who within our volunteer base might be a little bit more resistant to some of the change that had happened and then the stuff that is continuing to go through.

I feel so much better now, I mean that was giving me a lot of anxiety for a couple of months just because the tensions, and they were tensions that were building. They were stuff that it was almost like a delayed response to some of the changes that had happened started happening like a year ago. And I feel like with me, there were sometimes I felt like I was in the middle.

It's definitely better, I think (volunteer tension). Like I said, I think there's still some underlying animosities that are still there. You know they might not be as loud as they were before, but I still don't breathe easy around them, which you know again that might never change.

4.1.2 Introduction to Reflection:

My second change idea was to introduce reflection tools and processes to my staff to help them change how they work with volunteers and reflect the on the shared framing of their work. With respect to the tools that I introduced they received a mixed response from staff. None of them enjoyed individual journaling, remarking, "I had attempted to reflect and I just found myself in a weird place," and "I never kept the diary or anything like that, so it is not what I'm used to." In

addition our work environment made it difficult, "yeah, in-house it's like impossible to do a deep reflection here. And then for all of us, when you get home it's hard to flip a switch."

One staff enjoyed thinking and writing about the Gibbs Cycle. The same staff member enjoyed the For Your Improvement book:

But the book was good for me because it made me stop and do more self-reflection which I struggle with. It was like I was like I think I need to work on this and I read you know the list of things and it would be like 10 things. It's like I can check eight, of at least 10 boxes like this is me.

The others were put off by its content, one staff said, "I didn't enjoy this book, it is really judgey." All of the staff enjoyed the paired walk and talks. It brought safety and psychological closeness to the team and they enjoyed getting to know others better in the process:

You think that you know what's going on with other people's minds and stuff. Or like you have with the people you talk to the most. But you don't know the other people.. And so it's kind just like cool. I'm not alone and I'm not going insane. Got it.

And that other people are in the same boat as you, even if you might not be like eye to eye on it all the time. I think just getting out too. I think anytime a meeting is offsite, it allows for it to be viewed different and it allows your brain to work a little bit differently.

But I think there is a level of trust that gets built-in and a level of respect, you know, and it's a different kind of respect, like you can respect someone for their skills and

I think we've kind of had that going, but there's a personal respect level as well and trust.

During the second cycle, our group staff discussions were very focused on the tools of reflection (see quotes above) and their own internal reflection process so the transcriptions did not contain many external reflections. However, many commented on how the walk and talks allowed staff to get "out of their own head":

I found it really hard to channel my reflection reflective process, so it always ended happening in the worst time, where I'm usually in bed or something like that, and I have a tendency to kind of do a cyclical thing where I just get caught in a reflective process. So that the most helpful part of that (paired reflection), though, was having somebody to reflect with, because that really helped, I guess, hearing the reflection out loud. It makes a better, deeper impact and helped me get out of that that cyclical (thinking). You know where you're just kind of stuck and then worrying about things, and you don't get results out of it.

In the third cycle where staff focused on the needs of the organization and next steps, the paired reflections let them process how they might move forward on the work ahead as well, see aspects of their challenge differently, and realized how their work was connected to others:

I feel like in all three of the walk and talks, like I feel like I brought up like how uncertain and like big of a scope the collection is and how I didn't know where to go. But the walking with EPD the second time I was just like, oh no, like this has more structure. This is where I know I should start and so that definitely it gave me a peace of mind in like an area focus with, like any research involvement project

thing, I like focus on the big thing and I know my scope is far too big and what I can handle and so, like EPD was able to help reel me in a lot better.

Even though PD and I have similar ideas, we also have different ideas and so being able to bounce those off of each other ultimately, I think, makes for a better... So I mean PD's giving me some great ideas on you know how to not only just get like people interested in volunteering but like, okay, well, now that they're here, how do we actually match them to the right area? So they want to stick around. You know so, and those are things I probably if I felt like I was alone on it, I would have completely just thought about, just skipped over and it would have just created issues down the road.

I mean that was kind of really what opened my eyes the most was it's not necessarily a departmental issue, it's kind of like again... There was a lot of crossover stuff where we both had very similar needs for different reasons.

4.1.3 New Models:

After the final presentations staff discussed the process of assessing the needs and next steps of our organization as a paired activity. Many commented on how it was a big daunting step, but gave them focus and energy that they would need to move ahead in a new direction:

This was like the rock being thrown in the pond. For me it was like I knew, I knew it was there and we finally just chucked it. And now the ripples have started and it was a big pond. And like I know as a staff, we are fully capable of this and I know

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it's going to happen, because it has to happen. It is not a choice for this to work, but it is very overwhelming to me. There's a ton of resources out there, but like I can only synthesize so much and have so much time. …Yes, the resources are there, but there are some very limited resources too, so it's going to be a challenge… But even if it's a slow rolling ball it's rolling, so I hope we can keep the momentum going even if it's baby steps.

You know, with CAM (CA Association of Museums) coming up there was several workshops that they're offering all revolving around volunteers, and there is some other stuff I really wanted to see too, but this is our biggest need. So this is what I'm going to focus on. So I think it was great because it just helped me better prepare for these opportunities to have that one on one kind of dialogue and learning with other groups.

Both groups focused their presentation on the need to create better processes for better representation in our organization, and have started to think about the implications of bringing that work to our organization:

I found it very helpful in that, like I've said before in the past, I said yeah, you know, we really need to be more, we really need to give voice to underserved groups, but I never really knew how to do that or even how to find out how to do that, and so I think that this has given me a chance to learn the steps I need to take in order to improve it, in order to improve my ability to be inclusive, and so I think it's been very valuable use of my time.

But it's really interesting that I found, like there's so much inclusivity, information and documentation for the public areas, like the exhibits and displays and programs. And there's so little information about it when it comes to like the back end collection side. So that's where my biggest struggle is coming from, and there is it's just it's such a broad topic that's being discussed, that is a blanket for all the museums and it's hard to find actual, like selected individual museums to utilize as an example. So that's something I'm still working on, but it's very interesting, enjoyable at least.

4.1.4 Mentorship:

One of the most interesting things for me to note in the transcripts is how my voice transformed into a one of a mentor, especially in the earlier discussions. I suspect I was lapsing into a role of gentle guide that I assumed during the NLI and ASTC Leadership Learning Labs project. I communicated with a level of candor and humbleness about my own leadership journey. I suspect it helped my staff understand that leadership was a learning process, one that often takes many tries to get right, and how self-reflection was key to understanding how to improve. I also hoped it would set the tone for how they communicated with one another during their reflections. Some of what I said to them in our discussion that I would not have disclosed at a normal staff meeting included:

It's hard, because all of this is very personal. It is very frustrating. You know, and you just want to yell, but that's not for me at least not very helpful. So like to kind

of contextualize this and be like: okay, what's happening? How do I move the pieces?

I used to be a really crappy listener, I didn't know how to do it. It was causing trouble, so I was like ok I have to get better. I'm probably not as great as a lot of people that are just good at it, naturally, but I think I'm a lot better than I used to.

Everybody has a different personality; they work in different ways. (People) have the stuff that makes them be great at what they do and it's all different things for different people. And then you have this other stuff that gets in the way of you being the best version of yourself. So no one wants you to change and become like a different person, because you can't and that's stupid. But you can realize how you might be tripping up yourself. So if there are obvious things that you can do, that make it you know, like, if you become more reflective or you kind of pause before you do something, it's just figure out how to do it in a way that might be a little more open than you would normally be to it.

4.1.5 Team Building:

Another unplanned outcome of this intervention was the team building. In cycle 2, one staff remarked "yeah, it's just going to get, we're going to get stronger, like a cohort." Many staff commented how much they enjoyed coming together during this transformative period. Most referred to the paired walk and talks as being instrumental to this process. During their post intervention interviews staff had the following to share:

And I think really I'm most happy with the fact that I feel like it brought everybody together to like you were saying that only two or three of you had worked together really for a long time, and so now I feel like I can lean on any one of you and vice versa, you now. So it was a great team building kind of experience too, which is important.

The walk and talks obviously have been great and I think that's something that as a team we need to make a conscious effort to continue. I think that's been our biggest growth as a staff. Having that time with each other has been really good.

Just having those like one on one interaction with them, where you could just be open and honest about some of the stuff that you were really like you couldn't break-out of that reflects cycle like, as doing a terrible job, just hearing that that they felt the same sometimes because there was so much pressure to do things, and I really felt that was a great, built comradery a little bit, you know.

4.1.6 Staff Growth:

Each of my staff experienced personal learning during this intervention.

Museum Manager: Prior to working for our organization, our MM had never worked in a museum, but was just starting an online master's Museum Studies program. MM was often afraid to speak up in the first group discussions. Through the course of our discussions, I could see MM gain confidence, participating more in group discussions, and offering their thoughtful insights to others as we explored new models together. During our post interview MM stated:

I think it's definitely put me in like a better middle ground to be like okay. Well, it's how do we combine, like the people that are just so very historical society based, to like the innovative base, like where is that middle ground, to slowly start integrating it towards that? So it's nice because, like I follow the mission very well but at the same time I love the history and all that kind of portion, and so it's easier for me now to be kind of shifted, a little bit nicer. And so a lot of like the change management techniques have helped me be able to move that over to kind of change, like the wording in posts, or in different research things and trying to weed out like what should I actually be researching and what shouldn't I. It really helps me like kind of set up to like start thinking of like what do we want in our collection and what shouldn't we need in our collection? So it's been nice to think about.

Operations Director: Our Operations Director has the formidable challenge of having the volunteer program under their responsibilities. OD is a very likeable individual with a background in history museums. When our volunteers were responding negatively to changes that I had initiated, the volunteers went to OD to complain about the changes. While OD was in support of our changes, OD had a difficult time expressing their support of the changes to the volunteers. Through this intervention OD learned to manage some of the volunteer pushback. During OD post intervention interview OD commented:

I feel like with me, for there were sometimes I felt like I was in the middle. You know I was. I was the person, the liaison for the volunteers. They definitely felt comfortable being able to be able to air their grievances with me and I did make it a little difficult for me. Like I questioned, sometimes, like what am I doing here?

You know because I'm super confused, like I sympathize, but if we go that route we're just going back five steps. You know and I was able to find a way to work through it, but only could do it by leaning on people… There was point where I felt like I was kind of being used also. You know, I don't think it was intentional or anything, but I mean they were coming to me wanting me to do things and it's like that's I can't. You know, because I believe in what we're going and when I finally like kind of put the line there, things have really calmed over and that's it's I don't know. I think we're in a much better place now. I think boundaries are always great and I feel like now there's been some established boundaries, like my relationship with volunteers, and it's just made things work now.

Exhibit/Program Developer: EPD was most interested in some of the framing around adaptive leadership, and how it was important it was to keep their composure and reflect before acting. During our final team meeting EPD remarked, "I think the ops meeting is what we are doing with our jobs and I think these meetings are how we do our jobs." In addition, EPD was very excited about how new models could help them be more inclusive about the content EPD was developing. In the post interview EPD stated:

I think this (inclusion) is really exciting for me. Personally, I feel like it really gives me a direction to do work that I've never done before. The intent has always been there, but I don't feel like I really had the tools to do it, and this, I think, is showing me how to, how to obtain those tools, and this is something that, personally, I think is personally and professionally, I think, is a really important step for me to take.

Program Director: My PD was the newest team member to arrive at the museum. PD experienced a fair amount of judgement from our long-term volunteers when PD arrived. During the process PD felt like they gained their bearings, integrated with the rest of the staff, and addressed the volunteer needs that PD had been ignoring. In addition PD very much enjoyed the profession development opportunity. In PD's post intervention interview PD stated:

> But being out of the museum world for the last like two and a half years, I feel like I've kind of lost a lot of the communities and resources that I had at my disposal and I feel like I'm back on track trying to figure out how to get back into them again. So it was it was exciting in that I started to remember that there's a lot of cool stuff out there and that like we don't have to do it all from scratch and there's like real knowledge we can work off of.

> But I would appreciate it if moving forward just from your professional background and education, if you could bring in random things, even like once a month. You've always been good about advocating for professional growth and going to conferences, but talking about it at this level right here has probably been the best professional growth I've ever received because it was regular, it was consistent, it was relevant and I really would appreciate if it could continue on some scale, moving forward and hopefully again that ripples out in our workplace to volunteers. It just really set a tone for growth and acceptance that I appreciate.

4.2 Work Product Evolution and Learnings

4.2.1 Final New Models Assignment:

Appendix E includes the two sets of paired final projects my staff were assigned to produce together. The first presentation done by our Exhibit/Program Developer and Museum Manager focused on how the museum could be more inclusive with their programs, exhibits, collections, and archives. I was delighted to see both of them realized that our organization had glaring equity issues when it came to interpreting and collecting our content. They both identified organizations and conferences they could utilize to create more inclusive work processes and products. I think the work was more meaningful than it might have been if I had followed my initial driver diagram of finding models for them. They were invested in next steps in a manner that I think they would not have been, had I driven the process of discovery.

The second paired project focused on volunteer recruiting and training. This presentation was put together by our Operations Director and our Programs Director. Their presentation focused on a joint effort between the two of them. Before this intervention, they were not able to see how their needs were so closely aligned, but thanks to the paired assignments in cycle 2 and cycle 3, they became better collaborators, and they began to enjoy the process of working together. In their presentation they articulated the need for a more diverse group of volunteers who embraced our new mission and they outlined an ambition plan to get there.

4.2.2 Public Facing Documents:

Throughout my intervention cycles I kept weekly notes on work products that staff produced to see how the products shifted over time. One example of a work product that highlight an evolution of thinking and processes was the volunteer recruitment brochure. Before we started this intervention OD handed me a draft brochure shown in **Figure 11**. I had many questions about the content and images included in the brochure and sent OD my feedback. I did not hear back for a few weeks, and later heard that OD felt a bit overwhelmed by the process and my comments.

Once our volunteer crisis interrupted our first cycle, I asked how the recruitment was going. It was "on the back burner," but I asked OD to work with MM on a new version. Together they produced version 2 (**Figure 12**). In this version, our words are much more on brand with who we are today and is a reflection of the type of organization we wish to be.

The pictures needed to go through one more iteration, and our PD added some additional language about student volunteers who are also showcased in our final brochure in **Figure 13** that was completed during cycle 2.

ONE FAMILY THREE LOCATIONS

YOUR HISTORY LIES DIRECTLY IN FRONT OF YOU.

RIGHT IN THE HEART OF FOLSOM'S HISTORIC DISTRICT!

- FOLSOM HISTORY MUSEUM
- PIONEER VILLAGE OUTDOOR MUSEUM & MAKERSPACE
- CHINESE HERITAGE MUSEUM (currently under development)

do we want?

Folsom History is a 501 (C) 3 nonprofit organization working to preserve and promote the history of Folsom. We depend on our diverse pool of dedicated volunteers to continue the spirit of education and preservation of the past that push us forward to this day.

VERSION 1

GET INVOLVED

Join our robust community of talented volunteers by submitting an application today!

ONLINE: www.folsomhistory.org/volunteer
EMAIL: info@folsomhistory.org
PHONE: Call us at 916.985.2707 ext. 405
IN PERSON: Stop by our visitor services desk located inside the Folsom History Museum

Folsom History
823 Sutter Street, Folsom, CA 95630
info@folsomhistory.org
www.folsomhistory.org

BECOME A VOLUNTEER

HISTORY BEGINS
HISTORY IN THE MAKING READY, SET, GO

SHARE YOUR TIME AND TALENTS WITH THE COMMUNITY!

VOLUNTEER

Folsom History would not be where it is today without the support of our dedicated volunteers. Our volunteers - numbering over 100 individuals - use their unique skills, hobbies, and abilities to help us achieve our vision, mission, and goals.

Mission: Inspire an innovative future together by connecting Folsom to its inventive roots.

Vision: To strengthen the social, intellectual, and connective fabric of Folsom, CA.

BACKGROUND

You don't have to be a history buff to get involved either. We have unique volunteer opportunities for every type of interest!

VISITOR SERVICES VOLUNTEERS
Help promote a positive visitor experience by providing knowledgeable guidance to individuals and groups, promoting exhibits and events, and assisting with museum store sales.

YOUTH & COMMUNITY PROGRAMS VOLUNTEERS
Field trips, workshops, special tours, and living history demonstrations are just a few of the fun opportunities we provide to the public. Have a special hobby or craft? Let's share it with others!

LIVING HISTORY VOLUNTEERS
Showcase the innovative nature of Folsom's History through living history. Portray a historic citizen, demonstrate crafts or skills, and educate the public about the way we used to live!

MARKETING?

COLLECTIONS & ARCHIVES VOLUNTEERS
Interested in collections and archives? Help us catalog new acquisitions, update records, clean/maintain collection items, and provide research assistance to members of the public.

LANDSCAPE & MAINTENACE VOLUNTEERS
Do you love working outdoors? Help maintain the grounds/gardens at our different sites! This is a perfect role for volunteers interested in handiwork and gardening.

STUDENT INTERNS & VOLUNTEERS
Are you a high school or college student looking to build experience for applications and resumes? We need you!

ACADEMIC EXPERIENCE

And so much more!

Figure 10 First Draft of Volunteer Brochure

Figure 11 Second Draft of Volunteer Brochure

JOIN OUR VOLUNTEER FAMILY

GET INVOLVED

BECOME A VOLUNTEER

APPLY TODAY!

YOUR HISTORY LIES DIRECTLY IN FORNT OF YOU.

- **FOLSOM HISTORY MUSEUM**
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- **PIONEER VILLAGE**
  OUTDOOR MUSEUM & MAKERSPACE
  196 Wool Street, Folsom, CA 95630

Join our robust community of talented volunteers by submitting an application today!

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SHINE ON.

Folsom History is a 501 (C) 3 nonprofit organization. We depend on a diverse pool of dedicated volunteers to continue the spirit of education and innovation that has pushed us forward to this day.

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SHARE YOUR TIME AND TALENTS WITH THE COMMUNITY!

VOLUNTEER

Folsom History would not be where it is today without the support of our dedicated volunteers. Over 100 individuals since 1961 from diverse backgrounds and ages have worked to create and preserve history here. Our volunteers use their unique skills, hobbies, and abilities to help us achieve our vision, mission, and goals.

Mission: Inspire an innovative future together by connecting Folsom to its inventive roots.

Vision: To strengthen the social, intellectual, and connective fabric of Folsom, CA.

There is a place for everyone in our community. We have unique volunteer opportunities for every type of interest!

VISITOR SERVICES VOLUNTEERS

Help promote a positive visitor experience by welcoming visitors to our sites, providing knowledgeable guidance to individuals and groups, promoting exhibits and events, and assisting with museum store sales.

Familiarity with local history is a plus but not necessary (training will be provided).

PROGRAMS VOLUNTEERS

Field trips, workshops, classes, special tours, and living history demonstrations are just a few of the many experiences we provide to the public.

Are you experienced in a particular craft, trade, or hobby? Share it with others!

COLLECTIONS & ARCHIVES VOLUNTEERS

Interested in collections and archives? Help us catalog new acquisitions, update records, maintain and restore collection items, and provide research assistance to members of the public.

AND SO MUCH MORE!!!

We also provide unique opportunities for:

- Living History Volunteers
- Blacksmith Volunteers
- Administrative Volunteers
- Marketing & Social Media Volunteers
- Landscape & Maintenance Volunteers

Students ages 13+ are welcom to apply!

SHINE ON.

Figure 12 Final Volunteer Brochure

I provided a fair amount of feedback as the staff worked through the iterations of the Volunteer Recruitment brochure. During our final cycle staff collaboratively produced an insert for an annual quilt show that we attend each year. Our gift store volunteer sells donated fabric at it, the show a great place to get crafters excited about our new mission. Last year I was frustrated that we were not able to create any collateral that let quilters know about what we do at the museum. I could have imaged what it would have looked like but didn't have the bandwidth to create it myself. This year my staff produced the brochure (**Figure 14**) without any guidance from me. I was ecstatic that they were able to collaboratively pull together this piece, integrating all the insights from their collective wisdom and departmental perspective. I could see the future of our organization in this work that was created by my DiP intervention.

Figure 13 Quilt Show Insert

4.3 Next Steps & Implications

4.3.1 Impact of Intervention on Primary Drivers

Because was a cumulative set of change ideas, our team spent the most time on the first two change ideas. Looking at the Primary Drivers I feel like we made more progress on the first two drivers (better execution of programming/services, less unproductive tension with volunteers). Staff is working together in more collaborative ways and their work product reflects this. There is

also much reduced tension with volunteers. We still experience issues with volunteers, but my staff seem better able to diagnose the root of the conflict and quickly work to figure out how to address it.

In my weekly notes I documented evidence of more mission focused programs and services being brainstormed and created. The paired discussions provided a place for staff to discuss their thoughts, but we did not have much group time to reflect on our mission and introduced the new models change idea last in the sequence of intervention. The pair that focused on new models around inclusion of our program and services in cycle 3 felt like they had new understandings on how to think about our mission. The two staff who focused on visitor services/volunteers felt less so. If I had flipped the order of the cycles and started with cycle 3 first I think I would have seen more of an impact on the third driver since the cycles built on each other. But I think the change management and reflection cycles were important to introduce in the order that I did so that there was more intellectual framing and reflection around change.

4.3.2 Next steps

In terms of next steps, we need to find the time to continue to meet monthly or more frequently. While I see the value in this, there are many other competing priorities I need to attend to. In addition, I need to find a way to refine all of my staffs' big change ideas from cycle 3 into something more manageable. Again with limited time on my hands I wonder if there is a way I can create more peer led interventions, much as I did in cycle 3.

5.0 Reflections

5.1 General improvement reflections

My intervention was longer than many other DiPs in both duration and in number of hours. On the one hand that made it challenging to collect data. On the other hand, I saw real change happen over time. As someone who works in museums, we are like the cool aunt who swoop in to create a few "interventions" over the course of a visitor's lifetime. We hope it will stick, but we don't know. Having staff instead of visitors as the focus of my intervention was interesting to do. I documented growth that often goes unnoticed or gets forgotten. It forced me to slow down, watch, and document behaviors and thoughts that I was not attentive to before. At the heart of it, I felt like improvement science is a good way of uncovering hidden patterns in the system and then determining how to iterate with this new understanding. In addition, the level of accountability I had to this staff development initiative was much larger than what I would have done without the formality that was necessary.

I very much enjoyed the process of "riffing" off a previous cycle. It was very hard for me to get to a detailed level for what I wanted to do with cycle 2 and cycle 3 without seeing how cycle 1 unfolded. I think if I had created too much structure and thought at the beginning, it would have been hard for me to shift in the process. For example, I didn't know what the reflection cycle (cycle 2) would really look like from an implementation perspective until I completed cycle 1. Only after I completed cycle 1 did I realize that paired reflection might be a way to break up an existing team dynamic. Had I written up the complete protocol for cycle 2 at the very beginning of the intervention, it would be harder to do. With multi cycle improvement science it seems important

to have a general plan without falling in love with the specifics, since plans tend to shift after you are immersed in the thick of things.

5.2 General leadership reflections and questions

As I reflect, I again realize how wonderful it is to be able to capture staff growth over time. Museums are usually hopping from one project to the next, rarely having time to reflect on external progress/impact, much less the evolution of individual thinking. To have my staff thoughts captured in audio, transcribed to text, and then coded into nicely organized "snippets" was an amazing process I was able to see their growth in thought in a way few supervisors ever can. In the process I was forced to show up as a mentor (which I enjoy, but time rarely permits). I think I was more generous as a mentor, whereas being a boss forces me to focus on getting the work done.

I also I wonder how much of this I will be able to hold on to? How do I keep making time and space for my staff, but more importantly how do they continue to do it for each other? Radical transformation of an institution is not for the faint of heart. I have my own set of confidants to bounce ideas off of, listen to my rants, and encourage me on while reminding me of my own blinders. I am elated that my staff have found psychological safety with each other. I wonder how long will it last? How can I keep it growing? What will happen if there is an obstacle that divides them, and how can I keep a running weekly tab on how things are going?

This process has reminded me of the power of reflection. Thanks to my participation in the Noyce Leadership Institute, I have friends and colleagues to have regular walk and talks with. But keeping a two to three sentence weekly journal has been another a good way to assess progress. I

would like to continue these mini reflections on a regular basis. They are wonderful to review and look for trends, patterns, and accomplishments.

Finally doing this intervention as an Executive Director was interesting task to take on. Most of my board was not aware that I was doing this professional development, as I did not update them in my monthly board reports. Process leveling thinking rarely bubbles up to the top of work that an ED is responsible for. But to do the work that needs to happen at my organization, this intervention pushed my staff forward in a focused and united manner. As one of my staff said, "most meetings tell you *what* to do in your job, but these meetings I feel as a group we really learn *how* to do our jobs better together." Creating a safe space for staff to grow into more thoughtful and reflective professionals was an incredible gift given to me by the improvement science process.

Appendix A Folsom History – A Work in Progress

Figure 14A and 14B. Old Exterior and Branding
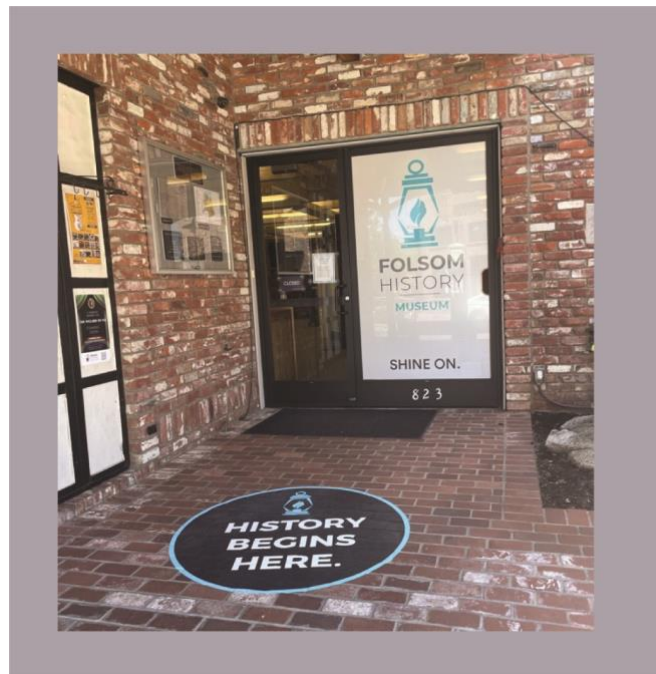
Figure 15 New Exterior and Branding

Figure 16A, 16B, 16C, 16D, 16E, and 16F. Older Exhibits at Folsom History Museum and Pioneer Village.

Figure 17A, 17B, 17C, 17D, and 17E. New Exhibits at Folsom History Museum

A

B

Figure 18A and 17B New Pioneer Village Renderings

Appendix B Initial Staff Meeting Notes

PREDISCUSSION/FRONT END/ HOW TO USE NEW STAFF TIME

Notes from focus/group meeting with staff   9/7/22 (One staff absent)
How do we want to use this meeting time together?
- There are lots of programs that need happen
- We are not starting from scratch but need significant remodeling.
- Don't know what things looked like in the past, but we need to think about structuring of our programs. Do we do guided programs, and then add on lessons?

Let's not get into the details yet, what are the big questions that this meeting can help us through?
- What are our public offerings?
- How do we tie them into our events that are happening and our marketing?
- What are our procedures? How do people book them?
- Ways to navigate resources/procedures/institutional knowledge

What are some norms we want to create?
- Consistency, there's a way things are done, there's a systematic way we present ourselves to the public
- How do we act? Hold ourselves? The language that we use? Our body language when we are in the public? Is it ok to knit at the front desk?
- Also cultural awareness/sensitivity, we need to change how we talk about groups of people.
- We need to clean up this space, our programming space is a mess. The physical space is a reflection of us.

What about our mission/vision, what do you think about it?
- I like it, the vision seems softer than the mission. The mission is not what people would expect. It could be interpreted in a very sciency way.
- It seem like innovation could be interpreted as progress, not seen as a good thing by some here

It could also be seen as risk taking. Folsom has always taken risks.

- In Folsom our successes are celebrated, but our history is about failures too. It's expected that we tell stories in a certain way.

- To learn from history we can't just talk about the winners
- "not everyone can be the homecoming queen"
- Staff and volunteer need cultural training, I tried to model new ways of talking about indigenous people when I was talking to (volunteer) about NAGPRA I used better terminology
- Age of institutional knowledge lies with "super seniors"

But some of what they know isn't going to work moving forward.

It occurs to me, staff can model behavior for volunteers. What would that look like?
- Use correct terminology to describe different groups
- How do we speak to our customers?
- Have dialog and collaboration, this organization was Balkanized. Everyone did their own little thing. We can no longer be siloed
- Our planning can be with all five of us.
- We need to be not defensive about good ideas that someone else suggests, it's okay to get push back from an idea.
- There needs to be mutual respect for each other
- Questioning with respect, we all bring something to the table. Everyone has valuable skills they are contributing
- How our collection is treated and touched. As well as in a kind, cultural, and scientific manner that is not disrespectful and could cause corrosion.

People with different perspectives make better programs/products than if they were going at is alone.

MM, you started in May, have you noticed any changes in how we are working as an org?
- It feel more fluid than it use to be. The balance is better. OD is really helping communication with PV.

OD brings experience from Sutter's Fort, that make the docents take OD seriously
- We need to build relationships with other adults that are interested in volunteering. How do we do a better job linking interest to needs we have?
- Right now some volunteers are like "mine" when it comes to what they do. They don't want any other help.
- If we are a community focused org, we need to be welcoming of the skills and interests the community has. How can we do that?

We need to transition from a volunteer run org to a staff run org. We still need volunteers.

- Staff can plan, Volunteer can execute and be the face of our org. How can we tap into their expertise. Not just the Mormons, other religious groups?

We are a museum for today. we are a reflection of our past, that has made us who we are today, our mission is also about today and tomorrow.
- That is a change in framing

Rita's reflections:
I think these staff discussion/reflections are more helpful for staff than I imagined them to be. The conversations build on each other and I don't need to do most of the talking. They are building on what each of them bring to the conversation. They are having conversations with each other that I want them to have with each other when I am not in the room. That is the key, what are they doing and thinking when I am not around? Are they asking the right questions? Building on each other? Modeling this behavior for volunteers?

Snippets from 1:1 with missing staff member on 9/14/22

RMH: Based on what we talked about today, I'm just kind of curious in what your reactions, are, your thoughts, just using that, using staff time as a way of moving forward.

Well, I appreciate that that this meeting is going to happen. You know because I think I had a kind of a reality check on whatever last day VOLUNTEER 1 was here and it just reminded me how I have to be careful, how I say certain things. So you know we were kind of just talking about admissions and. You know because I kind of made it known to you that I'm kind of the camp that if lower admissions, would mean more people in the door. And she kind of snapped back, that is was not our (staff) decision, it was a board decision. That it was money out of our, out of the organization's pockets. So, but so it was good and forced me to recognize exactly who I was talking to and It was that mentality that this is the way it works. So I think that was good, but you know I like the idea of now having a forum to be able to discuss these interaction at. With more staff coming on board. You know more of just that. You know we have to be careful, a good lesson, and it's not like. I mean, I value what VOLUNTEER 1 has to say because she's been with us. I mean 20 plus year, I mean VOLUNTEER is exactly what is wrong with when it comes to history that you can't pick and choose, what history is right and wrong. I'm glad it happened because again it was just kind of made me realize I still need to be cautious of how, how, how I talked to people and who I talked to.

PD got a very direct way of talking I mean PD's going to eventually be also working with a lot of these volunteer. It's just. We got to be careful

Yeah, that's it. I think too, it's because you're absolutely right, like the meeting that that's really seems to have just turned into an update meeting from everybody. But there is times where there's discussions that happened during that. Probably really they're not necessary. It's and it seems to be with VOLUNTEER 2 pushes back on a lot of stuff. So I do like having the idea of having some more of the core group gets together, because that kind of reminded me when we went to Reset the day. It was just I felt like that was really good. Yeah, discussion like we, we got a lot on paper. The only concern is again falling into these old habits where we discuss things, we put it on paper and then things still don't move forward. I know, but I think it's a good start. It's a good way to keep everybody on the same page. I think, which is really good. And curate how we come across to other people. Whether it's the public or our volunteer base, because I mean that's one of my always my biggest fears. And am I going to say something accidentally? That's you know, just because I don't know and I do have a tendency to ramble. I just... Fill the air! Yeah, so, so I think this will. This will definitely benefit.

Appendix C Protocols Used During Staff Intervention

Cycle 1

10/26/22 Staff intervention #1: Introduction to Change

Watched video on Kotter's change management:
https://www.youtube.com/watch?v=7qlJ_Y8w5Yk

Distributed and reviewed handout on change management:
Leading Change: Why Transformation Efforts Fail, John Kotter Harvard Business Review March/April 1995
https://www.dropbox.com/s/08s6yxpu5l1ylrk/KotterWhyTransformationEffortsFail.pdf?dl=0

Watched Video on Adaptive Leadership:
https://www.youtube.com/watch?v=9kVxxfknua4

Distributed and reviewed handout on adaptive leadership:
http://eastsidepathways.org/wp-content/uploads/2021/07/Practice-of-Adaptive-Leadership.Heifetz-et-al.EBS_.pdf

Prompt: Based on these discussions, how might this information help guide our work together?

11/9/22 Staff discussion: Reflection on Change Management:

Prompts: Let's talk about our discussion 2 weeks ago. Anything thoughts on what you read?

Introduced Score Cards: Moving forward, I want to gauge on a weekly basis how you are all thinking/feelings on three areas: Mission programming/services; Reflection; and Volunteers

11/16/22 Staff discussion: Reflection on Change Management and Introduction to Change Resistance:

Prompts: Let's talk about our discussion 2 weeks ago. Anything thoughts on what you read?
Want to introduce you to understanding change resistance.
Article a summary of Rick Maurer, "Why Don't you Want What I Want."

https://www.dropbox.com/s/vb4l2sm698rnin6/LevelsofResistance.pdf?dl=0

11/29/22 Staff discussion: Final Reflection Change Management

Prompts: As we have been thinking about change management, adaptive leadership, and change resistance over the past month, what are some thoughts you have?

Cycle 2

12/7/22: Introduction to Reflection

Distributed Self assessment reflection pdf:
https://www.dropbox.com/s/u2pc11e974vqtz1/Cycle%203%20transcripts.docx?dl=0

Prompts: Please take this assessment as a way to explore how you utilize all the different types of reflection. Reset the baseline based on the answers to your weekly survey based on your on your reflection of your responses

Watched two videos on reflection as a way to be a better manager and a way of creating better programming (5-10 mins each in duration).

Leadership reflection
https://www.youtube.com/watch?v=jiU9x2YYKi8

Practitioner's reflection (Gibbs Cycle)
https://www.youtube.com/watch?v=-gbczr0lRf4

Distributed handout on Gibbs Cycle:

pdf handout:
https://my.cumbria.ac.uk/media/MyCumbria/Documents/ReflectiveCycleGibbs.pdf

Other Assignments: Passed out notebooks to encourage staff to use to record any personal reflections. Let them know I will not be reading the contents and that they be paid up to 2 hours a week to spend time reflecting individually; in pairs; or in groups.

Introduce the book FYI (For your improvement), let staff skim over the next week and pick an area that they might want to improve on and reflect on.

12/14/22: Reflection on Reflections and Introduction to Walk and Talks

Prompt: Let's briefly reflect on reflection

Walk and Talk Assignment: over the next two week you are to do a walk and talk. Walk one direction for 20 mins, and then walk back. On the way out one person talks for 15 mins without being interrupted. You may ask short clarifying question when you are the listener, but nothing else. Then take 5 minutes to discuss, and then turn back and repeat with the other person. All conversations are confidential and should not be shared with others, nor discussed again unless the person who divulges the info brings it up again. During this time of talking, discuss a project you are working on or an issue you are dealing with professionally. Use Gibbs reflection if you are able to.

Pair one: Operations Director: Programs Director

Pair two: Museum Manager: Exhibit/Program Developer

12/28/22: no meeting but emailed the assignment below:

Walk and Talk Assignment #2: By our next meeting on Jan 5th repeat walk and talk assignment again, but with the following pairs:
Pair one: Operations Director: Exhibit/Program Developer

Pair two: Museum Manager: Programs Director

Reminder: You can have 2 paid hours a week of time to reflect. If you extend to your own personal time that is terrific too. Things to reflect on: 1) how is my program/project going (gibbs cycle), 2) where are my actions/thoughts tripping me up as I am trying to move ahead, review a section in the FYI book in the office for tips on what areas you might identify. or 3) anything else you might want to do a brain dump on by writing it out.

1/4/23: Discuss Reflections on walk and talk

Prompt: Reflect on walk and talk
Assignment: Please do your final walk and talk of the unit, this time talk about something that you are working on personally that may help how you work professionally.

Pair one: Operations Director: Museum Manager

Pair two: Exhibit/Program Developer: Programs Director

1/11/23: Reflections

Prompt: Reflect on reflection

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1/18/23: No Meeting

Assignment: Took two of my staff that were available to a coffee shop to reflect in their journals for an hour.

Cycle 3

1/25/23: New models and Needs Assessment

Assignment: introduce the pairings and a walk and talk assignment. Operations Director and Programs Director to talk about the visitor experience by reframing the volunteer program. Exhibit and Program Director and Museum Manager to talk about reframing the museum/history interpretation. At the end of walk and talk need to summarize their reflections. I asked them to think about what was needed and where they might be able to find additional models and support. Both Pairs to email me a summary of their discussion and any reflections.

2/8/23 Final Assignment

Assignment: Paired staff were instructed to put together a short power point on what they are thinking about the implementation of new models into our work. There were three main points they needed to cover in their presentation 1) The needs that our organization had, 2) What models they found, and 3) Next steps.

Post Intervention

2/28/23 post intervention interview questions:

We met at a group on 10/17 to discuss how a meeting together could help us. Here's what we said, hand sheet to them. We explored 3 sets of concepts together 1) Change management (10/24) 2) Reflection (12/5/22), and 3) New models (1/25/23). I want to understand the impact of this training/focus on how you do your everyday job.

> Change management:
> 1)Describe your thoughts on change management training.
> 2)Has the concept of change management shifted how you do your job?
>
> Reflection:
> 3)Describe your thoughts on our reflection unit
> 4)Has the introduction of reflective habits shifted how you do your job?
>
> New models
> 5)Describe your thoughts on the new model
> 6)How did it feel to own the problem/doing a needs assessment

How has this process helped you shape your ideas and/or approach to:

> 7)Volunteers
> > a.How would you assess volunteer tensions today?
>
> 8)Mission
>
> 9)Thinking about what needs to be done next in our org

Other aspects:

> 10)How was it filling out the score cards?
>
> 11)What did you enjoy most about the process?
>
> 12)What did you enjoy least?

Appendix D Weekly Staff Scorecard

Staff survey- Week of Jan 9 -15th

1. How did your volunteer interactions go this week?

very difficult	difficult	neutral	easy	very easy	N/A
★	★	★	★	★	○

2. How reflective were you this week?

Never	Rarely	Occasionally	A moderate amount	A great deal	N/A
★	★	★	★	★	○

3. Were you able to think about how to integrate our new mission and vision in your work this week?

not at all	rarely	occasionally	a moderate amount	a great deal	N/A
★	★	★	★	★	○

4. any other thoughts/reflections?

Table 4 Cycle 1 Weekly Data

week	Cycle	Meetings held	data collected	1. How did your volunteer interactions go this week?	2. How reflective were you this week?	3. Were you able to think about how to integrate our new mission and vision in your work this week?	4. Any other thoughts/reflections	Did staff do a good job managing volunteers? (1- not at all, 5- very well)	Did we advance our new mission vision? (1- not at all, 5- very well)	Did staff work together without me to build better programming/services? (1- not at all, 5- very well)	How frustrated was I with staff output missing the mark? (1= high frustration, 5= low frustration)	Work product documented	Rita's notes and reflections
				staff score card				Rita's score card					
10/17/22		pre discussion change management	transcription pre discussion staff										
10/24/22		1.1: Introduction to changement and adaptive leadership	transcription - introduction to change									volunteer recruitment brochure Volunteer weekly	
11/7/22	Cycle 1	reflection on changement	transcription on reflection on change management session 1 (4 respondents)	4	3.3	3.8		3	4	4	2	rental brochure (nov 8th) FB/instagram member newsletter Volunteer weekly update	was a good week. MM produced a nice event flyer that we turned into a brochure. The flyer was on brand. Ended the week at a museum store conference with our OD. Hoping they will make good connections there.
11/14/22		reflection on changement and intro to change resistance	transcription on reflection on change management session 1 (4 respondents)	2.5	4	3.8	Complex but productive interactions. Needed to happen. There feels like a lot of tension in the air I'd love to see calm. All the stress of working with volunteers & key donors has been exhausting, time consuming, and mentally taxing this week more than I've noticed in the past.	2	4	na	1	bulldog mask activity (low mission) Volunteer weekly update	Had a conversation with a volunteer on Tuesday, challenged my authority and my decisions on many fronts in very inappropriate ways. Had talked to my board chair as well. Was a volunteer that we did not have weekly interactions with. Was clearly talking to other volunteers. At our Wednesday staff meeting introduced an article on change resistance to ramp up staff thinking on change resistance. Need to be careful not too overreact. On Thursday had a meeting with OD and two key volunteers. gave us really great feedback. Were happy to be part of conversation. Will need to discuss the week of 11/28/22
11/21/22		no discussion due to shortened week that was busy with work	no meeting, score card optional (1 respondent)	4	4	3.5		3	5	3	3	-maker holiday ornament -walking tour Volunteer weekly update	Staff didn't work well together to plan all events. OD left to handle many details of week for PV programming.Also holiday hours were not discussed with group. On the other hand, walking tour was well planned. PV ornaments were aligned with new mission/vision, author talk was less so. need to examine the walking tour to see where it falls.
11/28/22		final reflection	transcription on final reflection on change management (3 respondents)	3.7	4	3		3	4	4	4		was a good week for reflection. Not much new product was created, but staff understood they need to learn from the process. Staff are figuring how how to engage volunteers a little more productively. (this is my reflection after our staff meeting)
				3.55	3.83	3.53		2.75	4.25	3.67	2.50		

Table 5 Cycle 2 Weekly Data

week	Meetings held	data collected	staff score card				Rita's score card				Work product documented	Rita's notes and reflections
			1. How did your volunteer interactions go this week?	2. How reflective were you this week?	3. Were you able to think about how to integrate our new mission and vision in your work this week?	4. Any other thoughts/reflections	Did staff do a good job managing volunteers? (1- not at all, 5- very well)	Did we advance our new mission vision? (1- not at all, 5- very well)	Did staff work together without me to build better programming/services? (1- not at all, 5- very well)	How frustrated was I with staff output missing the mark? (1= high frustration, 5= low frustration)		
12/5/22	introduction to reflection	no discussion, just introduction to reflection and scorecards (2 respondents)	4	3	5		3	4	3	3	donor candycanes were great	was annoyed about response XX had after the discussion with the 2 of us. She was upset? Do I have OD try to work through it all without me? I don't have time for this!
12/14/22	reflection on reflections and introduction to walk and talk	transription on reflection and score cards	4	3.8	5	Hard to find time to make time to reflect. Plan to start setting aside 30 mins before I leave.	2	3	4	3		gift shop hours and pricing were a real source of frustration. On some areas volunteers what to know everything staff are doing, in other areas they make descion without consulting anyone. Christmas items of questionable mission took over our gift shop just in time for my board meeting. Was less than thrilled about the appearance and wondered if OD had had any meaningful coversations with our gift store volunteer. on the other hand, PV activities and walking tours are going great and are on mission. staff and volunteers did an archives tour together as well. was staff driven
12/20/22	no discussion due to shortened week that was busy with work. Were instructed to do second walk and talk	score cards	3.7	3.7	4.3	t will be hard to move forward with the volunteers we have now. None will seem to be happy and all our actions good or bad will be picked apart and looked upon poorly.	2	5	5	3		am noticing that PD is working with both OD and MM on integrating the history into her activities. EPD is working with others on his walking tour histories. MM did three very differse but on mission FB posts. OD is struggling with volunteer issues. Needs help in becoming more firm with them instead of just letting them vent. Has accomodated them too much and is now finding himself picking up the slack. It is affecting his other time and work. OD did say in a phone call " our mission is to support the community in however we can." that was excellent.
12/27/22	no staff meeting told to compete walk and talks and reflect.	score cards	3.3	4	4.3							
1/4/22	staff meeting to discuss reflection and final walk and talk	transription on reflection and score cards	3	4	4		3	4	5	5	Volunteer brochure	The reworked vol brochure was exellent! MM and OD worked well on it together. MM is better at understanding nuances, hope OD sees this and relies on her more. Had lunch with one of our main volunteers. They are happy with the way things are headed overall "the changes needed to happen" how they happened, well things happend that worked, and didn't work. Looking forward to working with myself and OD on store changes.
1/11/22	staff meeting reflections	transription on reflection and score cards	3.3	4.3	3.7		4	5	5	5	walking tour brochure / volunteer training clipboard	This week was great, was a good example of how to make change together. OD and rest of staff did a front desk volunteer training. I gave OD a little advice, he worked with PD to implement. OD seems to be getting his feet on thinking about the gift store budget. Asked MM to help him create a spreadsheet. I took on a bi weekly meeting with PV core volunteers that introduced the larger change we were implementing at PV and got a very positive reaction. Staff seem to be enjoying the walk and talks, not using the personal journalling as much. We haven't focused much on new programming. looking forward to digging into this at the next meeting.
1/18/22	no meeting- just one hour reflection time	score cards	3.7	4	4.7		5	5	5	5	wood burning finalization and promotion speaker series write up	2 of 4 staff were in the building. went to a coffee shop with them to reflect for an hour. No staff member took me up on the FYI disscussion. Was going to repeat with my other two staff, but one just got covid. I am feeling optimistic about how the staff are working together. they share more with each other than me, and seem to be making progress on their initiatives. this week i reflected alot on their interactions with each other and what were the hidden obstacles that needed to be dismantled. PD and I had a brillant discussion with an outside speaker about history. i have to be careful not to sterotype them. Understands the context of what we are doing. we need to have a discussion together as a staff about interpreting history.
			3.57	3.83	4.43		3.17	4.33	4.50	4.00		

(Cycle 2 label appears vertically alongside the week rows)

Table 6 Cycle 3 Weekly Data

week	Meetings held	data collected	1. How did your volunteer interactions go this week?	2. How reflective were you this week?	3. Were you able to think about how to integrate our new mission and vision in your work this week?	4. Any other thoughts/reflections	Did staff do a good job managing volunteers? (1- not at all, 5- very well)	Did we advance our new mission vision? (1- not at all, 5- very well)	Did staff work together without me to build better programming/services? (1- not at all, 5- very well)	How frustrated was I with staff output missing the mark? (1= high frustration, 5= low frustration)	Work product documented	Rita's notes and reflections
			staff score card				Rita's score card				Work product documented	Rita's notes and reflections
1/25/23	ended up having a meeting. Gave instructions on the pairing for Cycle 3's walk and talk	score cards	3.7	3.7	3.7		5	5	5	5	great meeting with PD and MM with XX on how to launch a +21 series. MM created a speakers flyer that was nice. She had to work through a frustration of not having all the info, but figureing out how to move ahead.	I'm excited that my team has created a "safe space/pychological safety" for doing work. There is a lot of literature out there that suggests this is of primary importance on productive risk taking teams. That notion alone is worth this entire intervention in my mind.
2/2/23	No meeting, Kyle and pam out at gift conference	score cards	4.3	3.7	4		5	5	5	5	Staff getting better intincts with each other, MM and PD both had same reaction to lack luster program title and graphics for over 21 plus event. 3 of us worked quickly on getting that back on line. OD had a good experience with XX at offsite. Able to better work with them on issues. MM got a title change, one of core voluteers is treating her with more respect.	Had a PV meeting that was ok, but one of the volunteers questioned the direction that had been set for over a year. Was interesting he did that, as one board member said, don't they know that you run the place? Isn't it your decision? Had a board retreat where volunteer discussion came up. Board was updated on status with volunteers and i feel like i have their full support moveing ahead.
2/8/23	them to put together a power point on 1) the need, 2) their findings and 3) next steps. Talked to dm and ss about their observations	score cards	3.7	3.7	4.7		5	5	5	5		
2/15/23	no meeting, met with SM and SM to review their obervations over their walk and talk	score cards	4	3	3.7		5	5	5	5	quilt show insert	Quilters insert was great, I didn't have to do much other than say we need to create a way for quilters to know about what were were doing. A year ago I had no ability to create anything meaningful. Our museum store is starting to sell products more inline with our mission. launched a speaker series, speaker was terrible! but staff knew it, and it was mainly because of me that it happened. Staff seemed to have embraced what needs to change about our orgnization. Will be interested to see what models they bring back to us.
2/22/23	no meeting	score cards	5	4	4.5		4	5	5	4		short 3 day week. overall going well, still figuring out how to support one staff member to look for resources. OD is in a role that makes him deal tension with volunteers. It seems to be better, but not sure if they feels that way?
3/1/23	final meeting, needs, models, next steps presentation	score cards, transcription after final presentation, individual staff post intervention interview transcription	5	4	4.5	I mentioned that I find it hard to integrate our mission since I don't have the same connection to Folsom that others may have. I should have mentioned that even though I don't live in Folsom, I am a growing part of the community. I'm working to make connections with other stakeholders, participating in community events to promote our cause, and am actively working to recruit locals as volunteers to help promote our mission. While I may live in Citrus Heights, it's not my community. It doesn't have the same connection or cultural identity that Folsom has. I'm proud to be a part of an organization that works to strengthen the social, intellectual, and connective fabric of the community.	4	4	5	5		really happy with where we are. This weekend staff will help vol with quilt store and hope to communicate our mission better to others. Enjoyed the staff presentations a good deal. A few minor volunteer interactions, but that won't change unless there is some turn over specific to those individuals.
			4.28	3.68	4.18		4.60	4.80	5.00	4.80		

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Appendix F Coded Snippets from Staff Transcripts

Code Category	Sub category	Transcript	Snippet
Cycle intervention topics	Change Management: General	Cycle 1.1	I don't know anything about it, but it sounds like how you handle how you want to control, but it's just how you handle implementing new procedures and policies. I don't know anything.
Cycle intervention topics	Change Management: General	Cycle 1.1	I've never heard the term before.
Cycle intervention topics	Change Management: General	Cycle 1.1	Other than, the thing that comes to mind right away is diplomacy, you know, like. How would you work with others to? Make this happen? How do you manage change? How do you stay in control of it and and not let the process of change? Or peoples reactions to it overwhelm you.
Cycle intervention topics	Change Management: General	Cycle 1.1	I see it as having a procedure in place that everybody is aware of, and comfortable with, or at least they know what to expect. So it's a smoother transition and you can connect buy in along the way at the relevant level, because people know when something's new. You feel safer doing it if you kind of know what's coming or how it's going to work.
Cycle intervention topics	Change Management: General	Cycle 1.1	I think if, if it gets to a certain level without them knowing it's coming, it feel like being slapped in the face. Yes. They can be taken aback and they're automatically defensive.
Cycle intervention topics	Change Management: General	Cycle 1.1	I think one of the two of the biggest things about changes. It's scary when it's unexpected and you don't know the procedure.
Cycle intervention topics	Change Management: General	Cycle 1.1	Also, it's scary. When you don't have a voice, so if I know what's happening and I feel like somebody's listening to me, even if I change, is something I don't like.
Cycle intervention topics	Change Management: General	Cycle 1.1	As long as I like, I was part of the process.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.1	So it's like as long as she knows we didn't forget about her, she felt better about it and it wasn't then to change. She was scared that she wouldn't know what the change was. So communication, I would say, is huge and again knowing every month I'm going to get an email communicating the changes. So I know I'm aware of them. It makes people feel safer.
Cycle intervention topics	Change Management: General	Cycle 1.2	Well, I have never thought there were two as having very different ways of handling things. Because I think I tend to err on trying to find a technical solution for it, whereas often that's not the way, the way to look at it. And that's where I have to learn this process, because I just want to know what, what buttons push, what switches to switch to make everything work.

Code Category	Sub category	Transcript	Snippet
Cycle intervention topics	Change Management: General	Cycle 1.2	This explains a lot of your management style. So I would say that this is insight to RMH. Hmm, I'm like oh, she has a real method, so that was fun. RMH through the years
Cycle intervention topics	Change Management: General	Cycle 1.2	But I think like it all makes sense and it summarizes a lot of like running thoughts into, like a cleaner piece of explanation. I think, kind of, when you're like if you're at the volunteer level, you only have to really focus on you and up, right? And if you're at the board level you've on you and down? For all of us you're in the middle and it goes and I think, like the biggest thing for me personally, looking at my place in all of this is balancing the forces on either side and keeping both forces invested and happy. And were, especially, you know, looking at the force going down, where do you draw a line of trying to make this work? When it won't work? When do you say this is not a process that will work with this person
Cycle intervention topics	Change Management: General	Cycle 1.2	I mean obviously a lot of this is a process that you use over and over again to build trust and to build a relationship with the people around you and your organization. So you're all buying into this process together. But initially, how do you get the trust that you are the right person to be starting this process?
Cycle intervention topics	Change Management: General	Cycle 1.2	Obviously something along the process failed because you know in in management they always say you know your team's only as good as your your leader. But if somebody, if an employee, let's say, fail, something goes wrong a lot of times, it's reflective of the organization. You know, did we not give them the training? Did you not put them in a place that they really could be themselves and shine and bring more to the table? So so I think, just looking at this
Cycle intervention topics	Change Management: General	Cycle 1.2	like one of the when I was talking about short-term create short-term wins, like just in life in general. I'm very short-term in mentality, set short goals and I reach that and I'm like: yes, okay now, next short goal, yes, reach that, and that's just how I mentally frame things for myself.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.2	But I think to make it as an organization that relies so much on volunteers, we really need to include them in the short-term and call them out specifically for their short timeline, not just as a group, we did this.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.2	You talk at board meetings, well, that's the two levels, but we need to be so careful to make sure our volunteers feel safe to reflect and that might be different formats for different people.
Cycle intervention topics	Change Management: General	Cycle 1.2	So you have to create a new structure where they feel like their expertise is part of that and they're feeling valued, and we're getting something useful out of it that it's different than. What it was before.
Cycle intervention topics	Change Management: General	Cycle 1.2	I think that's and that's probably the hardest thing sometimes, is to just shut up and just be like actually just going to listen to you.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.2	But I think you let them say their peace and you give some time to genuinely reflect on it and not turn it around instantly.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.2	Then, I think, almost to show them the respect for what they have to offer, you need to give them a level of expectation.

Code Category	Sub category	Transcript	Snippet
Cycle intervention topics	Change Management: Volunteers	Cycle 1.2	Why should they be a player in it and not know where they fit in the process?
Cycle intervention topics	Change Management: Volunteers	Cycle 1.2	They don't need those eight steps. They do need to understand that here's it's the communicate part right, the communicate part, like. How were they understanding the communication as it relates to all of these?
Cycle intervention topics	Change Management: General	Cycle 1.2	And the transparency it goes a long way you like. Like we've obviously been in board situations where I feel like it's a closed door and they have their own secret mission going and we are just these little players and you have no trust, no faith and no buyin in the project. Where, if we're given, hey, here's where we see you and we are investing in that and care about your part. And I feel like we need to pay that respect to the volunteers and docent.
Cycle intervention topics	Change Management: General	Cycle 1.2	Yeah, I agree, I don't have to or even want to know. Everything with the board. But I'd like to get a sense of what, my, what role I'm playing in the process
Cycle intervention topics	Mission related program/services	Cycle 1.2	This is the organization's mission. All right, and that's really very important, because what I got to get the sense is this institution has had years and years of people just making it be about their own political thing
Cycle intervention topics	Mission related program/services	Cycle 1.2	I think the problem that there was no big picture on everyone just came in and did their own.
Cycle intervention topics	Change Management: General	Cycle 1.2	I think navigating this together too is going to help give us a little bit more of a unified voice, because when things start to break down, its super easy for people to start pin pointing stuff on one person. It's because I didn't like this person. Listen to me, you know, so, having unified voice.
Cycle intervention topics	Change Management: General	Cycle 1.2	It's having each other's backs, and if, if someone missed that, then there's a time and place to address that.
Cycle intervention topics	Change Management: General	Cycle 1.2	So this will be good for everything, for us.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.3	We've seen examples of how it can go wrong, and so, like the like, I feel like we're making some progress towards, like forming coalitions with volunteers and all that, so you know.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.3	Because we're like finally communicating with them and go out in the right direction about this, and hopefully that will be the same for all the volunteers up here too.
Cycle intervention topics	Change Management: General	Cycle 1.3	Now that we're starting to actually put some of our plans in place and projects are happening, I want to make sure we pay attention to these little Victories. So, for example, with the quilt thing today, if in the volunteer next volunteer newsletter, if you could include like, thank you to the four women that helped with that today and maybe in one of your facebook posts, you can, they're doing it because it's their own passion and they love it, but it was, it was hard work for them.

Code Category	Sub category	Transcript	Snippet
Cycle intervention topics	Change Management: Volunteers	Cycle 1.3	Leadership rather than bossing around. Setting an example. Of how we handle change. I think it is important. If we expect the volunteers to handle it, then we need to handle it ourselves effectively.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.3	All right, just being able to like feel like put your like, put yourself in their, somebody shoes like theirs, whatever like. How would you want to be treated in a way from the other way around? And so it's just kind of reminding myself of going through that and everything, and just not taking everything like so like seriously into the point and everything, and just making sure like there's room for humanity and growth no matter what, especially with people that are just volunteering in general for going, discussing in that route, it's like they're not being paid to.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.3	We need to provide leadership and sometimes that can be a bit authoritative and it needs to be.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.3	Even having us jump in moments in events like this, actually helping them to make sure that, like they're not the only one doing to be able to actually be doing stuff.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.3	If we're expecting other people to do things, we should need to be willing to just jump in and do it.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.3	Like the whole point of introducing all of this change management is, we're changing into something else right. It's not just to manage the volunteers, which is a task in itself, but it's to manage them through this change. we're asking for different things.
Cycle intervention topics	Mission related program/services	Cycle 1.3	And also just managing the volunteers, but also hearing, hearing them, really hearing them and and being responsive to them, while still ensuring that the changes that need to take place happen.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.3	We need to treat them as individuals, and although that can be painstaking at times, because it's a lot of hand holding with a lot of different people, it is what makes a stronger institution. So, for example, with the quilts, like, if we need to tell a deeper story or a different level of the story than what is being told right now, then I think that if we simply had the right questions to ask them, we would get the right information and I think they would start going. And, I think, with other volunteers you need you know with like, let's say, the speaker series. If we have expectations that need to be met by our speakers, it's going to have to be more of an authoritative of. Here's the timeline when we need to see your slides by. So I think you know just cater each scenario in each group. The way that they need to.
Cycle intervention topics	Change Management: General	Cycle 1.3	Like, if people start having that clash, like not wanting to listen and do something on their own and not comply it's it's possible they don't understand.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.4	now, so I think I'm still dwelling on the whole, the part about the Co creating a coalition, because at this point I don't think we've quite done that yet. So I'm hopeful, you know, by by getting some key volunteers in place that will help with the communication. I think a lot. What I said is being through telephone. Not behind their backs, but they are hearing things. Changes and all that, so so again, I think that's going to be very valuable and when we can move forward with doing that and then hearing from key voices that have, I guess, a lot of influence with with the rest of the group.

Code Category	Sub category	Transcript	Snippet
Cycle intervention topics	Change Management: General	Cycle 1.4	Well, and I think I was kind of in my head for part of yesterday thinking about some of the stuff, and I think, as far as building a coalition to, I think we need to recognize that to build a well-rounded coalition too, it might not be that these people have, you know, the best relationship with all five of us.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.4	You know, there's still a lot to do before we we find ourself in, I guess, just have healthy dialogue, you know, and right now I think it's kind of interesting looking at the different levels, because I can kind of identify all three. and you know, but it makes sense. The last one is probably the most damaging just because that trust isn't in, people who are part of the leadership team.
Cycle intervention topics	Change Management: General	Cycle 1.5	I liked the change (resistance) articles. I really thought during the whole time reading it and things, and like I marked down: oh yeah, I've seen this here and I've seen this here. Resistance, yeah, and like I know, like I've marked even down like what I'm guilty of
Cycle intervention topics	Change Management: General	Cycle 1.5	I was totally doing some self reflection as I read too..did that too.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.5	Yeah, it's very interesting because it's like, oh yeah, I've I've seen the anger and I've seen the silence especially and just like.: It was. Was really reflective to just kind of think back of like, okay, what have I seen? There was a good list of things that I've seen. It's like, well, what can be done to fix things, so it's like we've already started the like volunteer emails. The one on one meeting. But it's like also just thinking of. What more can we do, like? What's their reasoning behind all of these resistance actions?
Cycle intervention topics	Change Management: Volunteers	Cycle 1.5	You know it's it's kind of a slow and steady approach to a lot of this and you know as much as conflict would be great if you could just solve it and move on. This is definitely not going to be the case. Especially part of the reading was talking about previous history to change. You know, and I do think the organization kind of has that cloud over its shoulder. It's had a lot of turnover over the years, a lot of different directions, that things have gone and not all of it's been positive. And so, whether or not, whether, you know, we are positive or not, like the perception of us, that's always going to be kind of been drained in some of especially little longer-term volunteers who have been so involved. So just again to navigate that and then, you know, making them a part of the change too is super important, because I think that would help them feel better, appreciated, like they're part of the solution. So it's just we just can't solve it right away. It's just going to take some time and discussion and application.
Cycle intervention topics	Change Management: Volunteers	Cycle 1.5	three (3rd stage of resistance) when it was talking of, like, do projects and give them opportunities to work together in a collaborative fashion. It must be, found. And so it's like, that's kind of one of the reasons why i'm excited for doing like the tour and inviting multiple volunteers and everything, because I feel like getting out and away from the museum environment setting.. it gives the different attitudes. It's little less like professional intense that I feel also it gives us a chance to be in a different light. It's like hey let's do this different activity and make sure that we're all involved
Cycle intervention topics	Mission related program/services	Cycle 1.5	I think I did more self-reflection, than organization reflection, and definitely. It made me stop and realize that I'm the type. At least right now, where I'm ignoring it. Because I just want to get my job done. And I don't want to care about other people's feelings you know, sometimes I think that's a skill that's good, but sometimes I need other people to put a check and balance on me and remind me that I do need to make the friends, and I know we're all on different paths with this and we've all started at different times, that I'm very much an outsider in the organization

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Cycle intervention topics	Mission related program/services	Cycle 1.5	I think we need to be reflective in our each of our roles as to what some quick wins are, because quick wins for all three of us can be very different, but we can still support each other and celebrate the individuals quick wins.
Cycle intervention topics	Mission related program/services	Cycle 1.5	Of course you're supposed to do that, but at the same time, like it's big steps and it's great stuff to get done.
Cycle intervention topics	Mission related program/services	Cycle 1.5	The human element is still there, even though it's our job, it's still stressful. You still lose sleep over and we are exhausted at the end of the day, and you. It's just nice to be recognized
Cycle intervention topics	Mission related program/services	Cycle 1.5	Yeah, I think you know, going back to being reflective, we're going to be doing a lot of new and I think we all need to recognize that there needs to be a grace around it, but not an excuse around it.
Cycle intervention topics	Mission related program/services	Cycle 1.5	Quick wins need to be a celebration, but it needs to be a quick celebration and then a quick reflection and room for improvement.
Cycle intervention topics	Change Management: General	Cycle 1.5	I mean, obviously it's really hard to look at yourself and find fault or not even fault. But where you can improve, I mean we all know something that you can improve on, but other things and I think to put you on the spot, RMH, for you to give us information like the resistance to change, the more that can be fed to us that we can read and reflect on, helps you start recognizing you can look at it yourself too. Like if I hadn't read that article, I wouldn't have stopped to say I'm ignoring, ignoring the problem because I don't want to deal with it. Stop and think that I think it's information gets and there's time and permission for us to stop and think about those kind of things.
Cycle intervention topics	Individual reflection (gibbs or jounaling)	Cycle 2.1	I had attempted to reflect and I just found myself in a weird place.
Cycle intervention topics	Mission related program/services	Cycle 2.1	I'm a note taker and so by taking notes I can process better. So I personally kind of focus on the Gibbs Reflective Cycle. I rewatched the other video that we had already watched. just because I think I needed second round of it. But the Gibbs cycle, it seems. It seems like something I kind of do naturally, but I don't do it with purpose.
Cycle intervention topics	Mission related program/services	Cycle 2.1	But it's easy to move on and not stop and make yourself set real, attainable, purposeful goals to improve on things, and when they are talking like the analysis, what hindered what helped? I watched a couple of different videos on the gibbs reflective cycle just to see if other people had other takes on how to use it and work it. And, like everyone was saying, you know, focus on academic models and tools, which I was like. Well, that's not in my tool box and so I think that's where I could use some professional growth is like building up that tool box which I think we're starting to get more of, which is nice. And then you know they said: like at the end the action plan. You really need to create a plan, commit, and then take the action. And I feel like that step falls off our plates a lot of times because we're like on to the next, on to the next. So, even though I do a lot last, naturally I think by having an actual six step process that you can like check each step, maybe I'll use it more effectively and actually complete the cycle and not stop at four or five.

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Cycle intervention topics	New models	Cycle 2.1	so I was really trying hard to find something out of literature or like case studies, and I'm working with like seniors, as volunteers and I was having a hard time finding. So it's really odd. But if anyone stumbles across anything, that's something that I know I personally would love to read and kind of digest because I don't have a lot of experiences.
Cycle intervention topics	Paired reflection	Cycle 2.2	I would say: feel like you're not alone. If that makes sense.
Cycle intervention topics	empathy/responsiveness	Cycle 2.2	I, like you, think that you know what's going on with other people's minds and stuff. Or like you have the people you talk to the most. But you don't know the other people. And so it's kind just like cool. I'm not alone and I'm not going insane. Got it.
Cycle intervention topics	empathy/responsiveness	Cycle 2.2	but that someone else is feeling in a similar way that that I do. That the issues I am having, I'm not the only person having those issues, and so that that was helpful.
Cycle intervention topics	empathy/responsiveness	Cycle 2.2	You're like, oh, I'm the whole staff for this and it's like there's actually a lot more intermingling of projects and of mindset. Where it was, it's good to put yourself in check that you're not as alone as you feel sometimes
Cycle intervention topics	empathy/responsiveness	Cycle 2.2	And that other people are in the same boat as you, even if you might not be like eye to eye on it all the time. I think just getting out too. I think anytime a meeting is offsite, it allows for it to be viewed different and it allows your brain to work a little bit differently.
Cycle intervention topics	empathy/responsiveness	Cycle 2.2	And there's a bonding to it, you know. But yeah, and just permission to stop. And, like I've said before, it's nice to have permission to stop and it's okay to just think and things come up that you didn't even realize were on your mind, because it's like especially talking for 15 minutes. It was almost a cyclic conversation, like, well, speaking of that, like you end up on tangents that you weren't planning on talking about, but they were good tangents to talk about. And I think, without having that time reserved, that would have happened because you're so pointed all the time, like this is what we need to talk about.
Cycle intervention topics	Paired reflection	Cycle 2.2	That's I was to say I like the team aspect of it is because we're.. Like you were saying we've got a lot of work ahead of us and the only way we're going to get through it is if we're supporting each other, you know, making things happen, and I like that.
Cycle intervention topics	Paired reflection	Cycle 2.2	But I think there is a-level of trust that gets built-in and a level of respect, and it's a different kind of respect, like you can respect someone for their skills and I think we've kind of had that going, but there's a personal respect level as well and trust.
Cycle intervention topics	Paired reflection	Cycle 2.2	yeah, it's just going to get, were goin to get stronger, like a cohort.
Cycle intervention topics	Individual reflection (gibbs or jounaling)	Cycle 2.2	I never kept the diary or anything like that, so it's not what I'm used to.
Cycle intervention topics	Individual reflection (gibbs or jounaling)	Cycle 2.2	one of the reasons why I kind of haven't really been writing. I've done a like a few pages and stuff, but it's like it makes me nervous to write here because it's like my desk is right there and then I know there's going to be people that are like what are you doing ? And like getting nosy and I'm like I don't really want them involved.

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Cycle intervention topics	Individual reflection (gibbs or jounaling)	Cycle 2.2	Honestly, part of it will be easier when the weather is nice too. Then you can step outside and sit on one of the benches in journal for like a little bit of time is like, oh, i'm going to take my own you now, 30 minutes myself, journal time. But yeah, in-house it's like impossible to do a deep reflection here and then all of us. When you get home it's hard to flip a switch.
Cycle intervention topics	Paired reflection	Cycle 2.3	I was enjoying it. Opening up was kind of difficult for me, but I was able to do it. I think if I had more practice I might be able to get better at that.
Cycle intervention topics	Reflection FYI Book	Cycle 2.3	I didn't enjoy this book, it is really judgey.
Cycle intervention topics	Paired reflection	Cycle 2.3	I really like the walk and talks. I think A. I just feel closer with everybody now and it's so it's a great team building thing. It's been super productive. I'd like to apply it maybe with some other people with the organization
Cycle intervention topics	Reflection FYI Book	Cycle 2.3	But the book was good for me because it made me stop and do more self-reflection which I struggle with, and I was telling EPD at one point that book. It was like I was like I think I need to work on this and I read you know the list of things and it would be like 10 things. It's like I can check eight, of at least 10 boxes like this is me. And I started going down one course on one of those that I thought was me, but then it referred to another area and I was like whoah wait. That's actually what I meant. This is me.
Cycle intervention topics	Reflection FYI Book	Cycle 2.3	So it is meet that you can kind of bounce around and see how things connect to each other and how. Maybe you don't have strength here, but it's really rooted in. This is a bigger thing right. So it almost helps you focus on like what should you be most working, because there's more traits, that then maybe some of the outliers that you identified. I mean in an ideal world. I would pick up one of the three sources they give you to read about that. And they pour into it, but it's not going to happen
Cycle intervention topics	Individualref lection (gibbs or jounaling)	Cycle 2.3	And I worked on the reflective cycle a couple of times with two different projects and both times I got stuck on like the fourth stage of where it says use more models and like scholastic literature. I'm like I don't even know what to do with this. And then I stopped the reflection!
Cycle intervention topics	Individual reflection (gibbs or jounaling)	Cycle 2.3	To like look through the book or to do the journaling and things like that. It's just like I don't feel like I have enough time here, plus my own work and then at then home as well.
Cycle intervention topics	frustration/ tension	Cycle 2.3	I mean put aside my work and focus just on this, because then I feel bad that I'm leaving other work behind. That needs to get done as well, and so then it sets me into a moral spiral, doing my actual work instead, and I like this reflection where I feel better then.
Cycle intervention topics	Paired reflection	Cycle 2.3	And I think part of it is that you're not sitting there looking at another person, the other side of a table or a chair. You're just when you're moving. I think your mind. It's just much better when you're moving around. I think everything about it was just really to me, conducive to that process.
Cycle intervention topics	Internally focused	Cycle 2.3	For each of those traits, there is a healthy middle ground and it's like, but we look at those traits because we're either on the low end or the high-end and it's like there is a medium.
Cycle intervention topics	Externally focused	Cycle 3	I found it very helpful in that, like I've said before in the past, I said yeah, you know, we really need to be more, we really need to give voice to underserved groups, but I never really knew how to do that or even how to find out how to do that, and so I think that this has given me a chance to learn the steps I need to take in order to improve it, in order to improve my ability to be inclusive, and so I think it's been very valuable use, use of my time.

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Cycle intervention topics	Externally focused	Cycle 3	You know, with CAM (CA Association of Museums) coming up there was several workshops that they're offering kind of open lunch dialogues and we're all revolving around volunteers, and there is some other stuff I really wanted to see too, but this is our biggest need. So this is what I'm on to focus on. So I think it was great because it just helped me better prepare for these opportunities to have that one on one kind of dialogue and learning with other groups.
Cycle intervention topics	New models	Cycle 3	This was like the rock being thrown in the pond. For me it was like I knew, I knew it was there and we finally just chucked it. And now the ripples have started and it was a big pond. And like I know as a staff, we are fully capable of this and I know it's going to happen because it has to happen. It is not a choice for this to work, but it is very overwhelming to me. There's a ton of resources out there, but like I can only synthesize so much and have so much time. So you know again, you know there's five of us, but like there's not just one of us on this. So it's like, yes, we can do it. Yes, the resources are there, but there are some very limited resources too, so it's going to be a challenge. I don't think it's going to be a simple oh you know, we post on these sites and it happens. But even if it's a slow rolling ball it's rolling, so I hope I hope we can keep the momentum going even if it's baby steps.
Cycle intervention topics	New models	Cycle 3	But it's really interesting that I found, like there's so much inclusivity, information and documentation for the public areas, like the exhibits and displays and programs. And there's so little information about it when it comes to like the back end collection side.
Cycle intervention topics	New models	Cycle 3	So that's where my biggest struggle is coming from, and there is it's just it's such a broad topic that's being discussed, that is a blanket for all the museums and it's hard to find actual, like selected individual museums to utilize as an example. I haven't really been able to find any aside from like the big names, but that doesn't really do anything for us because that's not us, we are a two room museum and not a four-story National Institute museum. And so it's very hard for me to find that information and to like really dig deep and to uncover that. So that's something I'm still working on, but it's very interesting, enjoyable at least.
Cycle intervention topics	New models	Cycle 3	I found this assignment being beneficial is like when we first started talking. OD was saying this is what my needs are, and I said this is what my needs are. But then eventually whittled down that we have the same needs, even though it might take us different directions in our roles. So it was kind of nice to like get that buy in with each other. That like, okay, we're in this together, we will. It'll benefit us. This is our tool. We need to be able to go.
Cycle intervention topics	Mission related program/services	Cycle 3	I don't think it was a whole lot of help to MM, but MM was help to me. Your resources, like let me give you masters education.
Cycle intervention topics	Mission related program/services	Cycle 3	I was going to say I feel like in all three of the walk and talks, like I feel like I brought up like how uncertain and like big of a scope the collection is and how I didn't know where to go. But the walking with EPD the second time I was just like, oh no, like this has more structure. This is where I know I should start and so that definitely it gave me a peace of mind in like an area focus with, like any research involvement project thing, I like focus on the big thing and I know my scope is far too big and what I can handle and so, like EPD was able to help reel me in a lot better.

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Cycle intervention topics	Cycle intervention topics	Cycle 3	Through all the work of, like the last six months, going through all the different reflection topics and change topics, and this I always, you know, you often would give us an assignment and I feel like more work and at times was more stressful than others trying to get it done.
Cycle intervention topics	Cycle intervention topics	Cycle 3	I appreciated there was always like a grace with it that you understood that this wasn't always the main priority. But you have faith that we did care and we're trying to put time into. So that made it a little less stressful knowing that that grace was there
Cycle intervention topics	Cycle intervention topics	Cycle 3	But I would appreciate it if moving forward just from your professional background and education, if you could bring in random things, even like once a month, like I appreciate. You've always been good about advocating for professional growth and going to conferences, but talking about it at this level right here has probably been the best professional growth I've ever received because it was regular, it was consistent, it was relevant and I really would appreciate if it could continue on some scale, moving forward and hopefully again that ripples out in our workplace to volunteers. It just really set a tone for growth and acceptance that I appreciate.
Cycle intervention topics	New models	Cycle 3	And again, if there's stuff that people bring back from conferences that would be relevant to different sectors of our volunteer pool, I think it would be wonderful for us to get that OD or to partner with them on disseminating, because they need professional growth just as much as we do.
Cycle intervention topics	New models	Cycle 3	It's like we don't need to keep that to ourselves, a tool we can share, you know, or if there's like workshops that come up that anyone can sign up for, there might be volunteers that want to participate in those, and why should we not share that of them?
Cycle intervention topics	Paired reflection	Cycle 3	like if each of us could partner up like once a month with each staff person to walk and talk, and then if stuff comes up that we feel needs to be talked about, we have once a months a month meeting with all five of us kind of doing a deeper dive into anything that we need to.
Cycle intervention topics	Cycle intervention topics	Cycle 3	ops meetings are what staff meetings are at a lot of places. Where I felt like this was, it's more of a professional growth meeting. And that's why I really appreciated having these. It's like, yeah, we could say a few things, but it was nice to really do like the deep thinking here.
Cycle intervention topics	Cycle intervention topics	Cycle 3	Because I think the ops meeting is what we're doing with our jobs and I think these meetings are how we do our jobs.
Cycle intervention topics	Change Management: General	Post interview: EDP	I think a lot of what I got out of it was just reminding me to that that change is going to happen, that it's not something that's bad, that that there's a process. Then if I know the process, then I can feel like I'm aware of what's going on rather than a victim of forces that are mysterious and scary, and I don't know what's going on. And so I think that just being aware of this is part of a process and this is, and this is natural and good. It made me feel like I had a much better handle on the situation and again it made it something natural rather than something scary.
Cycle intervention topics	Change Management: General	Post interview: EDP	I would say maybe not how I do my job and how I feel about doing my job, that you know there's something that is again change, or even just something that I might otherwise have been uncomfortable, uncomfortable with. I have this to fall back on again. It's okay, it's part of a process and the process is something that happened. It's not something to fight against, is not something to resist, it's something to acknowledge and go with.
Cycle intervention topics	confidence	Post interview: EDP	I think this is really exciting for me. Personally, I feel like it really gives me a direction to do work that I've never done before, that I've always. The intent has always been there, but I don't feel like I really had the tools to do it, and this, I think, is showing me how to, how to obtain those tools, and this is something that, personally, I think is personally and professionally, I think, is a really important step for me to take.

Code Category	Sub category	Transcript	Snippet
Cycle intervention topics	Post Intervention	Post interview: EDP	I hadn't gotten there yet, and that that was a little difficult, but to be honest, it was true that just my intent wasn't enough
Cycle intervention topics	Change Management: Volunteers	Post interview: EDP	Absolutely giving a lot more slack, also remind me that they are here to help us when they aren't getting paid. You know, I mean they also, I'm coming to a situation where a lot of changes are being made and I've through this process, been given the tools to help myself deal with it, and maybe they don't have those same tools as I have. So I need to be a little more understanding.
Cycle intervention topics	Change Management: Volunteers	Post interview: EDP	Way lower, way lower I mean the temperature has just dropped and now I feel comfortable. Before I was feeling very uncomfortable. Now I feel it's okay. I'm good.
Cycle intervention topics	Change Management: Volunteers	Post interview: EDP	I just don't feel the tension like I did for a while there. I just don't, I feel like everyone for a while seem like people were just on edge and it's like, I mean, we're able to talk to each other again and you know I can come over to the table and sit-down we can have a conversation again and I feel like the bonds of have been strengthened.
Cycle intervention topics	confidence	Post interview: EDP	I feel less worried that things that I do or things that happen are going to have negative repercussions and, like everyone, we went through a kind of trial or not a trial.. a difficult time, and I think we came out the other side. And I think I'm hoping that we have more of an understanding of each other and of what's going, what's going on and hopefully more buy in, and I know that not everybody made it through, but I think that those that did are more on board than they may be even more when we started.
Cycle intervention topics	confidence	Post interview: EDP	it's given me a new goal for myself and like, like I said personally and professionally, it's given me not the tools yet, but it's given me a way, I think, to obtain the tools to do this job the way I really think it should be done.
Cycle intervention topics	positive	Post interview: EDP	I mean it was just it's just what my thoughts so totally with that, yeah, I mean it was just how do you feel? Three questions: boom, boom, boom next week, do it again. It was not at all stressful or anything, just kind of this week I felt this way and this week I felt that way.
Cycle intervention topics	Change Management: General	Post interview: MM	I think that it was really enlightening. Honestly, I think that it changed my perspective of how to handle things with other people, especially like volunteer pool, just taking the time to reflect and think about it and see in other people's viewpoints. I think that's always been something of a struggle for me to like, not instantly go to like they think that they're thinking like this. I have to actually take the time and slow down. Be like let's realistic, leaving this out, and so that was a big help for that and just see like where my flaws were and all the risk, or the change management ideas and what? Like the flaws and everything that would have listed out.
Cycle intervention topics	Change Management: General	Post interview: MM	So that really made me reflect where I am at and, like understand why I'm where I need to change myself.
Cycle intervention topics	Change Management: General	Post interview: MM	Yeah, definitely, I think it's I'm taking more time to think about it and understand where the changes are and just thinking about, like the why of these changes and why, even like when I do different procedures on what was done previously, like I want to understand it myself.
Cycle intervention topics	Paired reflection	Post interview: MM	I think the walking and talks were perfect. I think that really helped us get to know each other better and come together a lot easier and feel like we're all included. Came to realize, like all of us kind of had this feeling of like not being included, and so we decided to bring that in better.

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Cycle intervention topics	Individual reflection (gibbs or jounaling)	Post interview: MM	I know that reflection is something definitely need to work on and something they like made me timid to do just with, like the work environment, people always around and look around.
Cycle intervention topics	New models	Post interview: MM	So it's definitely it's something I need to work on I think a little bit more. To be able to fully step into that ability to have enforced and I feel like I can lead new changes and new models.
Cycle intervention topics	Externally focused	Post interview: MM	It's hard to reflect on yourself and not be your worst critic, but I think it definitely opened up a better structure of like what I do actually need and what need to focus on in a bunch of areas. So it was a good way to focus something on something that I probably would have just like kept pushing back further further, but I didn't have to look at it.
Cycle intervention topics	New models	Post interview: MM	So this kind of really brought it to the forefront in a good way, of course, to be able to work on that.
Cycle intervention topics	Change Management: Volunteers	Post interview: MM	It's like, I know, like at the beginning of all of this, like I was very much at like wits end with a lot of things going on, and so it just took allowed me to take time to like reflect and look at the whole process and shift gears of how to approach things, especially with like making changes, everything and just being able to take the time to get to know them properly and like hear them out and understand back and forth.
Cycle intervention topics	Change Management: Volunteers	Post interview: MM	I'm sure there's spotty stuff here and there that I miss or I know, like we still a little clustered, but for the most part I think it's a lot better.
Cycle intervention topics	Change Management: Volunteers	Post interview: MM	But like in this kind of situation, suddenly we're able to work and talk together and feel like we can actually communicate, which is a lot nicer than probably what it could have been.
Cycle intervention topics	Mission related program/services	Post interview: MM	Well, it's how do we combine, like the people that are just so very historical society based, to like the innovative base, like where is that middle ground, to slowly start integrating it towards that?
Cycle intervention topics	Mission related program/services	Post interview: MM	I think that's gotten us into a bigger understanding, that we need that inclusivity, not just like our collections, exhibits, programs, volunteers, and I think that's really come to the forefront of this, is that we need to have all the voices in the community. Like you've always brought up, like community such a big aspect of this and changing the word history to community, and it's obvious that it's not here, and so that's something that's been glaringly obvious and really has come to the forefront of these projects.

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Cycle intervention topics	Post Intervention	Post interview: MM	It was harder to judge because it's like sometimes I wasn't too involved with volunteers. The weeks I was, so it was kind of just. It was harder to not based on just like one event. I had to actually like, think about it and think like, okay, like what I did actually do with everybody and then, yeah, that we explore together. So it's like this week. And then it's just also thinking like seriously, like I don't I think, automatically try to put our mission involved with everything, and so I don't like outwardly think about it too much. And so it's kind of like what did I do? That involved that? So it was interesting and I know like at first I was kind of like, oh, I didn't reflect because I didn't write down in my journal. And then I was like you're holding yourself up a little too high in your standards with that, you reflected in other ways, then I was a little bit more lenient with myself and kind.
Cycle intervention topics	Paired reflection	Post interview: MM	Definitely just obviously walk and talks, but I think just like looking through the FYI. And being able to understand where I need to work on as myself, as well as just be able to have that cohesion with our core group here and being able to come together a lot easier and closer to be able to tackle all these problems and rise above everything.
Cycle intervention topics	Individual reflection (gibbs or jounaling)	Post interview: MM	Definitely the journaling. Just because our time finding the ability to. I've felt like very watched and it's hard for me to like... I'm so used to that. Probably like that retail like aspect has been drilled and to me so long where it's like I have to constantly be working, I can't take breaks. I always have to seem like I'm working and doing stuff like sitting down isn't allowed, and so that's still kind of ingrained in my mind that like no, I need to work on like actual stuff. And so in my head, like I know that's still like work, and things to do but also like it's the judgment of everybody else being like you're just sitting around like writing and whatever, and that's something that I just need to work on for myself.
Cycle intervention topics	confidence	Post interview: MM	I think it it was like perfectly timed to like help solve bigger problems for the museum as well as like personal problems for everybody, and I think that helped us get over a big hurdle at the end of the year and into the new year.
Cycle intervention topics	Change Management: Volunteers	Post interview: MM	I mean gosh, so I think with change management what was really helpful with the training was helped identify different ways, different reactions from people, you know, and it really helped kind of for me to kind of just make the connections of who within our volunteer base might be a little bit more resistant to some of the change that had happened and then the stuff that is continuing to go through.
Cycle intervention topics	Change Management: Volunteers	Post interview: OD	It's definitely help me. I've always tried to be diplomatic just in life, but I think that there's more of a weight now associated with it. If that makes sense, and then you can say one thing, but it doesn't necessarily solve something. It's a. It's a process, guess, really change management.
Cycle intervention topics	Change Management: Volunteers	Post interview: OD	You're no going to be able to solve it within a day. It's something that you kind of to use terminology like sow the seeds and watching kind of grow and and see they kind of take a certain direction
Cycle intervention topics	Change Management: Volunteers	Post interview: OD	So I think for the most part it's taught me. Yes, I can be open and honest with some people, other people, the passion is just, you're never going to convince them, I guess. And so why waste your energy? You know when, when you can get better results from people who are more willing to to work with you.
Cycle intervention topics	Individual reflection (gibbs or jounaling)	Post interview: OD	I found it really hard to channel my reflection reflective process, so it always ended happening in the worst time, where I'm usually having bed or something like that, and I have a tendency to kind of do a cyclical thing where I just get caught in a reflective process. So that the most helpful part of that, though, was having somebody to reflect with, because that really helped hearing the reflection out loud.

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Cycle intervention topics	empathy/responsiveness	Post interview: OD	Programs really need volunteers to kind of move forward so that it's not all landing on just PD or just EPD. Same with me, you know, not all landing on just me. If we don't have somebody covering downstairs, I don't have to do it, you know. So the fact that we found some common ground was really great and I do think PD and I, and there's some humor there. We can bounce ideas to each other, have fun, and I think that is like one of my favorite things about any work atmosphere is when you you can make those connections with another person because it just makes things fun and fast.
Cycle intervention topics	Externally focused	Post interview: OD	Even though PD and I have similar ideas, we also have different ideas and so being able to bounce those off of each other ultimately, I think, makes for a better... Whether it's a program or, you know, just recruiting. So I mean PD giving me some great ideas on you know how to not only just get like people interested in volunteering but like, okay, well, now that they're here, how do we actually match them to the right area? So they want to stick around. You know so, and those are things I probably if I felt like I was alone on it, I would have completely just thought about, just skipped over and it would have just created issues down the road. So ultimately, I think, by bringing everybody together in a team it's going to just make us a little bit more.. what, the word? I'll go to your resilience, that you brought into, like trying to make Folsom History more of a resilient organization
Cycle intervention topics	empathy/responsiveness	Post interview: OD	I mean that was kind of really what opened my eyes the most was it's not necessarily a departmental issue, it's it's kind of like again... There was a lot of crossover stuff where we both had very similar needs for different reasons.
Cycle intervention topics	Change Management: Volunteers	Post interview: OD	there's there's two different versions of Folsom history. There's a professional and then there's the volunteers that have just been doing what they've been doing, the best, you know intentions all along, but it's created a division. So, and I think, along the way, we have applied some of the stuff that we've learned to kind of better integrate.. some of the I wouldn't call a resistant volunteers, but the volunteers who felt like they were being left out.
Cycle intervention topics	Mission related program/services	Post interview: OD	So they moved on, you know, so so I think for volunteers it's going to help create a little bit more of a responsive program, one that's a little bit more. There's more energy in it, you know, and hopefully healthier too,
Cycle intervention topics	Change Management: Volunteers	Post interview: OD	I feel so much better now, I mean that was giving me a lot of anxiety for a couple of months just because the tensions, and they were tensions that we're building. They were stuff that it was almost like a delayed response to some of the changes that had happened started happening like a year ago. And I feel like with me, for there were sometimes I felt like I was in the middle. I was the person, the liason for the volunteers. They felt comfortable being able to be able to air their grievances with me and I did make it a little difficult for me. Like I questioned, sometimes, like what am I doing here? You know because I'm super confused, like I sympathize, but if we go that route we're just going back five steps. You know and I don't know, I was able to find a way to work through it, but only could do it by leaning on people.
Cycle intervention topics	Change Management: Volunteers	Post interview: OD	But for there was point where I felt like I was kind of being used also. You know, I don't think I don't now it was intentional or anything, but I mean they were coming to me wanting me to do things and it's like that's I can't. You know, because I believe in what we're going and when I finally like kind of put the line there, things have really calmed over and that's it's I don't know. I think we're in a much better place now. I think boundaries are always great and I feel like now there's there's been some established boundaries, like my relationship with volunteers, and it's it just made things work now. It's really made things work

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Cycle intervention topics	Mission related program /services	Post interview: OD	That's the weakest, I think. For me, you know I'm not a resident of Folsom, so it's. Not about. It's hard for me sometimes to connect the like. I find the history of Folsom, the innovative history of its, fascinating, but I don't have as much a direct connection to the community as people who live here, who who have worked here, you know, I'm still building that. So I think I sometimes forget to to make the mission front center. And again it's super easy to get caught up in everything else and just forget to step back and just remind yourself what our mission is and what our vision is. And I mean I know it, but need to bring that into the reflective process. I think and how? How? How does the work I do reinforce both of those?
Cycle intervention topics	Change Management: Volunteers	Post interview: OD	So it's a great way to bring together, people of different backgrounds, to create something new and beautiful, I guess, exciting. So so I think that that's that's kind of what I want to keep working to. How do we bring people together? Because ultimately, you know everybody has on their own strengths and weaknesses, but when you put in group of people together, those strength usually are what shine through and make something even more than what you anticipate. So so that's my hope. That's my goal is to keep working towards that volunteer staff and everybody and the know, the community too, because I mean there's opportunities.
Cycle intervention topics	Post Intervention	Post interview: OD	They were ok (scorecards). They were just kind of another thing, but it was easy to forget about them because they did go to span a lot or my junk folder.
Cycle intervention topics	Change Management: Volunteers	Post interview: OD	You know there was a lot of kind of hurt feelings directed at staff, even though they were new to this it too. And it's just they were they were more mad at the change, as opposed to, and they were mad at the change and they were looking for the easy targets, and that seems to have really dissipated a lot.
Cycle intervention topics	Cycle intervention topics	Post interview: OD	But ultimately I think this was actually it was good. I feel like I got a lot out of it and again brought people, it brought us together as a group and and and I don't no, I don't have too much negative to say about the actual process of the program that you put us through and all that.

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Cycle intervention topics	Paired reflection	Post interview: OD	I would like to kind of see the walking to continue. I mean it's a great way you know there's a value of getting out of your place that you work at every single day, because I mean sometimes when you're out you get an idea that you know you wouldn't have otherwise thought about sitting at a computer or being downstairs, and I do think it's it's important.
Cycle intervention topics	Change Management: General	Post interview: PD	It was very relevant and like immediately applicable and it was like a glaring problem that we had. So it was like, oh, here's some ointment to put on the wound kind of thing and it was something that made sense but I had never really thought about it. Now since we've been doing this for a while and I feel like some of that shaky ground has gotten more solid. I don't think change management is like constantly on my mind as much, but I feel like we're also we're going to have after shocks of the big change and it will be nice to be able to like refer back as we talk amongst each other, to be like oh.. change management and maybe go back and refresh on some of the things that.
Cycle intervention topics	Change Management: General	Post interview: PD	I would love it for it to come back up in conversation periodically as like a refresher, because I think it's something like I said. It makes sense and it's applicable but we don't always think about it right. So I think it'd be nice if, even like every six months we went, let's talk about change management again or like before we start a big endeavor.

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Cycle intervention topics	Change Management: General	Post interview: PD	because since that was our first topic, it was also when I was really new here, so I sort of felt like I was dealing with a lot at that moment. But now that I've gotten better reads on a lot of the people, I feel like I can kind of categorize them better on how to manage them through changes. So it was. it was nice that I got that information right at a time where I knew I was going to be a disruptor in a lot of things.
Cycle intervention topics	Individual reflection (gibbs or jounaling)	Post interview: PD	I haven't in all honestly been like journaling.
Cycle intervention topics	Individual reflection (gibbs or jounaling)	Post interview: PD	I try to go through some of those cycles or processes to make sure I'm not forgetting stuff I need to think about. So that that's just giving me a framework that I have found useful, kind of like checkboxes like, oh, you know, have I checked in with OD to see how he felt about that? Should check with MM to see how marketing went for it? So I think it's that's helped. I haven't sat in like just free journal a lot, but I try to be reflective on some of the projects we've done.
Cycle intervention topics	Paired reflection	Post interview: PD	The walk and talks obviously have been great and I think that's something that as a team we need to make a conscious effort to continue. I think that's been our biggest growth as a staff. Having that time with each other has been really really good.
Cycle intervention topics	Individual reflection (gibbs or jounaling)	Post interview: PD	it's nice to have kind of a more formula based way to do it where I don't feel like I'm missing something and it makes me maybe pause in areas that I would breeze through faster because it's like, oh, that's a valid, like you need to stop there and think about these questions. So I've gone back a few times to where they list the questions for each of the steps and I'm kind of okay, do have answers for all these.
Cycle intervention topics	Paired reflection	Post interview: PD	I think with the walk and talk it's maybe brought up conversation with coworkers on stuff that wouldn't necessarily feel like I need their feedback on. You know I'd be like, oh, that's not their department or like they don't need to worry about that. But it's like we can all have an opinion or insight on something, even if it's not our thing. So it's kind of interesting to get feedback from outside perspectives and you know oh, I didn't think about it that way, where I don't think I would have gone up to them just in the office like, hey, what do you think about it? Because I wouldn't have wanted to bother them with, it would have felt like they already have enough. So it gave me an excuse to bother them when we are walking, so that that's been kind of. That was an unexpected bonus, I think, to learning that technique.
Cycle intervention topics	New models	Post interview: PD	But being out of the museum world for the last like two and a half years, I feel like I've kind of lost a lot of the communities and resources that I had at my disposal and I feel like I'm back on track trying to figure out how to get back into them again. So it was it was exciting in that I started to remember that there's a lot of cool stuff out there and that like we don't have to do it all from scratch and there's like real knowledge we can work off of.
Cycle intervention topics	New models	Post interview: PD	But at the same time I'm like, oh man, I forgot that I need to like get back into all this and you know, and obviously not being a science center is a very new thing to me. So like what resources are out there, that were just as great as the ones we had at the science center, but more applicable here. So I think you know having MM as a resource, here's some, and then you have your hands more into the museum community as a whole. So that's where I'm like I'm now feeling like I'm getting hungry again for resources and it was like I don't want these training to stop because it's like, oh that's right, I love professional development. I need this and it builds a confidence that I think I ended my science center time with, but I haven't found it again since I've been here right. So I'm hoping this is just like building, you know the beginning of setting that precedent of liked PD being a real thing for the staff here.

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Cycle intervention topics	New models	Post interview: PD	And OD started talking about their big needs and then I started talking about my big needs and then we were both like so basically we have the same big need, like we need bodies. We need good volunteers. That gave me some reassurance that I wasn't asking for something just for me. It's like no, institutionally, this is a problem which means it's not just my problem, it's a need for all of us and you know, I think OD and I will be the biggest advocates to solve this problem
Cycle intervention topics	New models	Post interview: PD	I think the current volunteers recognize the need for more trained volunteers, and so I think it'll be an easier solution if it has to know the buy in from everybody versus me saying this is my need, is my need. And everyone's like, yeah, PD I get it. So I mean it's it's a big, it's a big endeavour to solve and it'll be... it won't be a quick fix.
Cycle intervention topics	frustration/tension	Post interview: PD	And it's like it could be very exciting to put a lot of resource into this. But realistically, how much resource do we have, and how much can we put into this right now and not neglect other things? So it's it's kind of frustrating too, because I feel like we have some finite resource and want more. So that's you know, I don't want to be discouraged, but it's frustrating.
Cycle intervention topics	Change Management: Volunteers	Post interview: PD	you know change management kind of taking them each as an individual and where they're at, versus the volunteers in the staff. And so you know, I think you can react and have a relationship with each volunteer differently, depending on where they're at and what they need. And again I think time around them has helped me kind of gage that a little bit better. I still feel.. like there's it's not a hard line any more, but I feel like there's still a blurred line and you know that might not go away. But I feel like I've made some stride with volunteers and built some report by thinking about how things have gone with interactions and trying to approach things differently the next time and there's been some reflection. You know involved in that
Cycle intervention topics	Change Management: Volunteers	Post interview: PD	And as far as you know, looking at goals and needs you know, like I feel like the volunteers here, are such a community, but at the same time we need them to be a community with open arms and I don't know if we are there yet.
Cycle intervention topics	Change Management: Volunteers	Post interview: PD	It's definitely better, I think. Like I said, I think there's still some underlying animosities that are still there. You know they might not be as loud as they were before, but I still don't breathe easy around them, which you know again that might never change.
Cycle intervention topics	Mission related program/services	Post interview: PD	As far as programming goes, I don't know if this has done a lot for me in regard to the mission. Other than you know, as EPD and I discussed programs, I try to like read our mission statement. Does that kind of match? Does that make sense? You know it's almost to me along the same lines as like state standards. It's like we don't need to spell it out, but like does this make sense for them? Is is the meat and potatoes there? So that's why I like keep it up on my corkboard, because then I can just go wait, check real quick. And I think that could be part of the reflective cycle. But it's kind of something I just have made myself do anyway. So I don't think I really needed that.
Cycle intervention topics	Mission related program/services	Post interview: PD	One of the things I really stress with OD when we are talking is like we need immediate buy in. Like when you sit-down for your initial, you know, meet and greet with them like show them here's our mission. You know what do you think about this? What do you think this means? Talk to them not just about their job that they'll be doing here, but our organization. See what their thoughts are about it. And if you're getting someone that only is like, oh yeah, innovation in the gold rush, gold rush, gold rush pioneers, they might not be seeing the mission the way that we see the mission. You know, talk to them about, like I love your idea of popping in community for history. Get a read on people about that, because I think that's going to be like you know our big filter for anyone coming into our organization at this point is if they aren't seeing the mission the way we do. This is not the right place for them. Like don't waste our resources and don't waste their time. There's other organizations out there that can fit their needs better if that's not what they're excited about it

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Cycle intervention topics	New models	Post intervi ew: PD	With the program side of things it's like that I don't know, catch 22 or cart before the horse like, how much do we build up programs without people? All right, but how do we get people if we don't have programs? How much time and resource do I put into cool things if I don't know if I have the people coming to do them. So that's kind of always going back and forth in my head and you know, at some point we have to bite the bullet on one or the other
Cycle intervention topics	New models	Post intervi ew: PD	problems can... aren't just mine but would be like shouldered by others who I feel like maybe this like dilemma and like not coming up with a solution in my head that keeps going around and around could be something that would be safe to bring up in a team forum and talked about. And maybe as team we could come up with like a healthy solution or further step where it doesn't just have to be this broken recording going around in my head. So that I think it can help us go in a positive direction, but it's not there yet.
Cycle intervention topics	Post Intervention	Post intervi ew: PD	I think my reply on the mission was almost the same every week because I felt pretty ok with that. The volunteer thing it was nice to have like a weekly moment, even if it was just for like a couple of minutes to stop and reflect. It made me reflect on my volunteer interactions the week where maybe I wouldn't I'm not if I didn't have that to answer. So that was kind of, I was always like: like, what did I do with volunteers? And you know, give me a chuckle because I'm like, yeah, that happened. So even for like, like I said two minutes it made you reflect on the week in a way that you probably wouldn't have stopped for those new minutes and done so.
Cycle intervention topics	Cycle intervention topics	Post intervi ew: PD	I would say the professional development aspect and just helping me get new tools and insights on how I could be a stronger member of the organization or how I can move in the organization with more confidence, knowing that... I like knowing that there's a right way to do things. They might not be, it might not be black and white, but I like knowing that there's reason behind stuff.
Cycle intervention topics	Cycle intervention topics	Post intervi ew: PD	So like reading a lot of that literature has been really helpful for me. I liked the staff building that was created through all of it. I think it kind of gave us all like a stronger standing here, like we're we're here for real, right right? We are professionals and know we do have skills that we bring and I think that was really really useful and it kind of it gave common language for us to talk about problems and have the right words to express them or, you know, see where we have gaps and how to look back on those. And I think it just set a culture of thoughtfulness, whether it's being reflective or thoughtfulness, to be open to talking to others about problems.
Cycle intervention topics	Post Intervention	Post intervi ew: PD	I also love that book, FYI. Yeah, that's what made sense to me. I don't like ambiguity. I like, I like you know, I like my science communication program. I think I really liked it because there is research done backing it and even if it's something silly that other people question, you can say no, there's a purpose and here's the research shows why. And so I'm okay with like stuff being open-ended but there needs to be real reason behind it and I don't like just making stuff up to make stuff up, and so that book it's like, yeah, I know this is an issue of mine and all this stuff makes sense that I'm reading, but I didn't just feel like it was some one's opinion, like on my personality. There's like real reasons that they are saying this and I like that.
Cycle intervention topics	Individual reflection (gibbs or jounaling)	Post intervi ew: PD	written reflection has just never been something that I feel I benefit as well from. I feel like it's like homework and I'm just writing because I'm told I just have to write. I think much better in conversation and like taking notes or reading literature and pulling stuff from it that I find. So it's like ... when I did journaling. Some of the journaling I did was reading stuff that you gave us and then kind of reflecting on that, and that was beneficial for me. But just like sitting in my own mind lopping stuff out, it just like I'm just writing to do lists. And it's like I do that anyway, so that for me was probably the least beneficial. I think it's a really valid thing for people, it's just not not for me.

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Cycle intervention topics	Cycle intervention topics	Post interview: PD	But again, even if it's just like once a month, bring something new to the table for us to read and synthesize, give us an assignment. Like being assigned stuff was incredibly helpful. It was yeah, like that's what it takes. Yeah, and you know, I wish I could say we would have done it all, even if it wasn't assigned, but we wouldn't because there's a million other things to do. So I think at this point we're all sold that this has an importance in the organization for us to like, do things correctly and go the right direction. So it's not painstaking. You know, it's like, oh, we got to do it, but that's what we say about every other we have to do. You know, got to do it, got to do that. So I would, I would really advocate that this moves forward in some fashion.
reflections	Change Management: General	Cycle 1.1	Other than, the thing that comes to mind right away is diplomacy, you know, like. How would you work with others to? Make this happen? How do you manage change? How do you stay in control of it and and not let the process of change? Or people's reactions to it overwhelm you.
reflections	Change Management: General	Cycle 1.1	I see it as having a procedure in place that everybody is aware of, and comfortable with, or at least they know what to expect. So it's a smoother transition and you can connect buy in along the way at the relevant level, because people know when something's new. You feel safer doing it if you kind of know what's coming or how it's going to work.
reflections	Change Management: General	Cycle 1.1	making sure everyone has the opportunity.
reflections	Change Management: Volunteers	Cycle 1.1	So it's like as long as she knows we didn't forget about her, she felt better about it and it wasn't then to change. She was scared that she wouldn't know what the change was. So communication, I would say, is huge and again knowing every month I'm going to get an email communicating the changes. So I know I'm aware of them. It makes people feel safer.
reflections	Change Management: General	Cycle 1.2	But I think like it all makes sense and it summarizes a lot of like running thoughts into, like a cleaner piece of explanation. I think, kind of, when you're like if you're at the volunteer level, you only have to really focus on you and up, right? And if you're at the board level you've on you and down? For all of us you're in the middle and it goes and I think, like the biggest thing for me personally, looking at my place in all of this is balancing the forces on either side and keeping both forces invested and happy. And were, especially, you know, looking at the force going down, where do you draw a line of trying to make this work? When it won't work? When do you say this is not a process that will work with this person
reflections	Externally focused	Cycle 1.2	Like, is it me? Am I the crazy one or is it this? And I mean that's something that you grow over time, but like not to name names. But there are people that i'm like oh. This is not going to work. This is just not going to work. The question is: how far along do you take it?
reflections	Change Management: General	Cycle 1.2	I mean obviously a lot of this is a process that you use over and over again to build trust and to build a relationship with the people around you and your organization. So you're all buying into this process together. But initially, how do you get the trust that you are the right person to be starting this process?
reflections	Externally focused	Cycle 1.2	That's why, when I think about how I framed my vision with them, talk to what was important to them. If you let people know that and don't be inauthentic, figure out what that thing is that you care about and they care about and that will help you find the commonlity find the commonality, take them somewhere else. You know, like yesterday we talked to those teachers. What I said to them was completely different. There was plenty of similarity, but completely different than I would have talked to a board or city council, because they were educators, so they needed to be acknowledged for the work that they do with kids and how hard and difficult that is.

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reflections	Change Management: General	Cycle 1.2	Obviously something along the process failed because you know in in management they always say you know your team's only as good as your your leader. But if somebody, if an employee, let's say, fail, something goes wrong a lot of times, it's reflective of the organization. You know, did we not give them the training? Did you not put them in a place that they really could be themselves and shine and bring more to the table? So so I think, just looking at this
reflections	Change Management: General	Cycle 1.2	like one of the when I was talking about short-term create short-term wins, like just in life in general. I'm very short-term in mentality, set short goals and I reach that and I'm like: yes, okay now, next short goal, yes, reach that, and that's just how I mentally frame things for myself.
reflections	Change Management: Volunteers	Cycle 1.2	But I think to make it as an organization that relies so much on volunteers, we really need to include them in the short-term and call them out specifically for their short timeline, not just as a group, we did this.
reflections	Change Management: Volunteers	Cycle 1.2	You talk at board meetings, well, that's the two levels, but we need to be so careful to make sure our volunteers feel safe to reflect and that might be different formats for different people.
reflections	Change Management: General	Cycle 1.2	I think that's and that's probably the hardest thing sometimes, is to just shut up and just be like actually just going to listen to you.
reflections	Change Management: Volunteers	Cycle 1.2	But I think you let them say their peace and you give some time to genuinely reflect on it and not turn it around instantly.
reflections	Change Management: Volunteers	Cycle 1.2	Then, I think, almost to show them the respect for what they have to offer, you need to give them a level of expectation.
reflections	Mentoring	Cycle 1.2	So you give them something, then you follow up. You have to do two things. You have to be comfortable with them. You don't have to say it's okay if you fail completely at this task right, but you in your head have to have that as something that could be and then to work with them to figure out why, rather than say you mess this whole damn thing up, i'm never handing you something again. right now so that you're like ok I'm going to work with you to figure out how we can do a better job next time
reflections	Change Management: Volunteers	Cycle 1.2	They don't need those eight steps. They do need to understand that here's it's the communicate part right, the communicate part, like. How were they understanding the communication as it relates to all of these?
reflections	Change Management: General	Cycle 1.2	And the transparency it goes a long way you like. Like we've obviously been in board situations where I feel like it's a closed door and they have their own secret mission going and we are just these little players and you have no trust, no faith and no buyin in the project. Where, if we're given, hey, here's where we see you and we are investing in that and care about your part. And I feel like we need to pay that respect to the volunteers and docent.
reflections	Change Management: General	Cycle 1.2	Yeah, I agree, I don't have to or even want to know. Everything with the board. But I'd like to get a sense of what, my, what role i'm playing in the process

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reflections	Mission related program/services	Cycle 1.2	I think the problem that there was no big picture on everyone just came in and did their own.
reflections	Change Management: General	Cycle 1.2	I think navigating this together too is going to help give us a little bit more of a unified voice, because when things start to break down, its super easy for people to start pin pointing stuff on one person. It's because I didn't like this person. Listen to me, you know, so, having unified voice.
reflections	Change Management: General	Cycle 1.2	It's having each other's backs, and if, if someone missed that, then there's a time and place to address that.
reflections	Change Management: Volunteers	Cycle 1.3	We've seen examples of how it can go wrong, and so, like the like, I feel like we're making some progress towards, like forming coalitions with volunteers and all that, so you know.
reflections	Change Management: Volunteers	Cycle 1.3	Because we're like finally communicating with them and go out in the right direction about this, and hopefully that will be the same for all the volunteers up here too.
reflections	Change Management: General	Cycle 1.3	Now that we're starting to actually put some of our plans in place and projects are happening, I want to make sure we pay attention to these little Victories. So, for example, with the quilt thing today, if in the volunteer next volunteer newsletter, if you could include like, thank you to the four women that helped with that today and maybe in one of your facebook posts, you can, you know, think our, because I think you know they need that recognition and yes, they're doing it because it's their own passion and they love it, but it was, it was hard work for them.
reflections	Change Management: Volunteers	Cycle 1.3	Leadership rather than bossing around, setting an example. Of how we handle change. I think it is important. If we expect the volunteers to handle it, then we need to handle it ourselves effectively.
reflections	Change Management: Volunteers	Cycle 1.3	All right, just being able to like feel like put your like, put yourself in their, somebody shoes like theirs, whatever like. How would you want to be treated in a way from the other way around? And so it's just kind of reminding myself of going through that and everything, and just not taking everything like so like seriously into the point and everything, and just making sure like there's room for humanity and growth no matter what, especially with people that are just volunteering in general for going, discussing in that route, it's like they're not being paid to.
reflections	Change Management: Volunteers	Cycle 1.3	We need to provide leadership and sometimes that can be a bit authoritative and it needs to be.
reflections	Change Management: Volunteers	Cycle 1.3	If we're expecting other people to do things, we should need to be willing to just jump in and do it.
reflections	Internally focused	Cycle 1.3	I was going to say: I feel like the reflection aspect is the one that we could use. Or I could use a lot of time working on, because. We're busy. You don't stop, and I think that's where we could also help each the like, wait before you send that email. stop.

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reflections	Change Management: Volunteers	Cycle 1.4	I think I'm still dwelling on the whole, the part about the Co creating a coalition, because at this point I don't think we've quite done that yet. So I'm hopeful, you know, by getting some key volunteers in place that will help with the communication. I think a lot. What I said is being through telephone. Not behind their backs, but they are hearing things. Changes and all that, so so again, I think that's going to be very valuable and when we can move forward with doing that and then hearing from key voices that have, I guess, a lot of influence with with the rest of the group.
reflections	Change Management: General	Cycle 1.4	Well, and I think I was kind of in my head for part of yesterday thinking about some of the stuff, and I think, as far as building a coalition to, I think we need to recognize that to build a well-rounded coalition too, it might not be that these people have, you know, the best relationship with all five of us.
reflections	Change Management: Volunteers	Cycle 1.4	You know, there's still a lot to do before we we find ourself in, I guess, just have healthy dialogue, you know, and right now I think it's kind of interesting looking at the different levels, because I can kind of identify all three. and you know, but it makes sense. The last one is probably the most damaging just because that trust isn't in, people who are part of the leadership team.
reflections	Change Management: General	Cycle 1.5	I liked the change (resistance) articles. I really thought during the whole time reading it and things, and like I marked down: oh yeah, I've seen this here and I've seen this here. Resistance, yeah, and like I know, like I've marked even down like what I'm guilty of
reflections	Change Management: General	Cycle 1.5	I totally doing some self reflection as I read too..did that too.
reflections	Change Management: Volunteers	Cycle 1.5	Yeah, it's very interesting because it's like, oh yeah, I've I've seen the anger and I've seen the silence especially and just like.: It was. Was really reflective to just kind of think back of like, okay, what have I seen? There was a good list of things that I've seen. It's like, well, what can be done to fix things, so it's like we've already started the like volunteer emails. The one on one meeting. But it's like also just thinking of. What more can we do, like? What's their reasoning behind all of these resistance actions?
reflections	Change Management: Volunteers	Cycle 1.5	You know it's it's kind of a slow and steady approach to a lot of this and you know as much as conflict would be great if you could just solve it and move on. This is definitely not going to be the case. Especially part of the reading was talking about previous history to change. You know, and I do think the organization kind of has that cloud over its shoulder. It's had a lot of turnover over the years, a lot of different directions, that things have gone and not all of it's been positive. And so, whether or not, whether, you know, we are positive or not, like the perception of us, that's always going to be kind of been drained in some of especially little longer-term volunteers who have been so involved. So just again to navigate that and then, you know, making them a part of the change too is super important, because I think that would help them feel better, appreciated, like they're part of the solution. So it's just we just can't solve it right away. It's just going to take some time and discussion and application.
reflections	Change Management: Volunteers	Cycle 1.5	three (3rd stage of resistance) when it was talking of, like, do projects and give them opportunities to work together in a collaborative fashion. It must be, found. And so it's like, that's kind of one of the reasons why i'm excited for doing like the tour and inviting multiple volunteers and everything, because I feel like getting out and away from the museum environment setting.. it gives the different attitudes. It's little less like professional intense that I feel also it gives us a chance to be in a different light. It's like hey let's do this different activity and make sure that we're all involved

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reflections	positive	Cycle 1.5	when I was helping downstairs with the volunteers set up for Christmas. It was real, it was actually a really fun experience. You know we were, the job had to be done, but we were all having fun doing it and laughing and really I felt a lot of comradery there. I felt closer to some of the volunteers and I ever felt so far and I feel like it was the same, you know, with them. So I think if we can have situations where you know we're coming together in teams and just doing things together, that's that's where a lot of the possible distrust or misunderstandings, that's that's going to help bridge the gap there a lot. It will be fun in the process, hopefully, which is always good.
reflections	Mission related program/services	Cycle 1.5	I think I did more self-reflection, than organization reflection, and definitely. It made me stop and realize that I'm the type. At least right now, where i'm ignoring it. Because I just want to get my job done. And I don't want to care about other people's feelings you know, sometimes I think that's a skill that's good, but sometimes I need other people to put a check and balance on me and remind me that I do need to make the friends, and I know we're all on different paths with this and we've all started at different times, that I'm very much an outsider in the organization
reflections	frustration/ tension	Cycle 1.5	And i'm not here to be best friends with people But I think that part of it is intimating that i'm newbe. And there's already some angst and then here's the newbe, dealing with the angst that's already there, plus exacerbating the angst. So just getting insight onto, like where I can have firm footing to start getting past this.
reflections	team work/working together	Cycle 1.5	The more we can share internally, like how we've read different people in one way, because I think some of us can better insight
reflections	Mission related program/services	Cycle 1.5	think we need to be reflective in our each of our roles as to what some quick wins are, because quick wins for all three of us can be very different, but we can still support each other and celebrate the individuals quick wins.
reflections	Mission related program/services	Cycle 1.5	Quick wins need to be a celebration, but it needs to be a quick celebration and then a quick reflection and room for improvement.
reflections	Internally focused	Cycle 1.5	that's like part of the reading were. It was like. People ask a lot of questions. Sometimes it can be like going against them, but a lot of the time it is just a way of processing. To better understand. So it's not a negative and it's not anything like against the idea or you, it's just to break it down more.
reflections	Internally focused	Cycle 1.5	my reflection might be that I need to be more aware how what I'm doing gives impressions to other people. That that I might not be aware that what I'm doing affects what other people think of the process.
reflections	Change Management: General	Cycle 1.5	I mean, obviously it's really hard to look at yourself and find fault or not even fault. But where you can improve, I mean we all know something that you can improve on, but other things and I think to put you on the spot, RMH, for you to give us information like the resistance to change, the more that can be fed to us that we can read and reflect on, helps you start recognizing you can look at it yourself too. Like if I hadn't read that article, I wouldn't have stopped to say I'm ignoring, ignoring the problem because I don't want to deal with it. Stop and think that I think it's information gets and there's time and permission for us to stop and think about those kind of things.

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reflections	Mission related program/services	Cycle 2.1	I'm a note taker and so by taking notes I can process better. So I personally kind of focus on the Gibbs Reflective Cycle. I rewatched the other video that we had already watched. just because I think I needed second round of it. But the Gibbs cycle, it seems. It seems like something I kind of do naturally, but I don't do it with purpose.
reflections	Mission related program/services	Cycle 2.1	I think it's kind of natural for me and then how to improve. I think where I need to spend more energy, not that i'm not open to improvement and I think that's my ultimate goal. But it's easy to move on and not stop and make yourself set real, attainable, purposeful goals to improve on things, and when they are talking like the analysis, what hindered what helped? I watched a couple of different videos on the gibbs reflective cycle just to see if other people had other takes on how to use it and work it. And, like everyone was saying, you know, focus on academic models and tools, which I was like. Well, that's not in my tool box and so I think that's where I could use some professional growth is like building up that tool box which I think we're starting to get more of, which is nice. And then you know they said: like at the end the action plan. You really need to create a plan, commit, and then take the action. And I feel like that step falls off our plates a lot of times because we're like on to the next, on to the next. So, even though I do a lot last, naturally I think by having an actual six step process that you can like check each step, maybe I'll use it more effectively and actually complete the cycle and not stop at four or five.
reflections	Internally focused	Cycle 2.1	That, like I care a lot about what people needs are and their thoughts are because I want to make sure that they're heard and listen over myself. Which isn't a good thing, but still , so like I scored high on a lot because of my own personal issues rather than an I'm actually doing this.
reflections	Internally focused	Cycle 2.1	mean it's obvious, but how much of our personal selfs are put into the workplace. And it's it's like, yeah, that's how I am at work. And it's it's a fine balance, like building on your strengths that way but also tapping down some of your personality to be professionals.
reflections	Internally focused	Cycle 2.1	you get trapped in your own head. It's very easy to do. I feel like while we have a staff of five, if we can get into this mindset, encourage it in the workplace. It's setting a cultural tone that will be adapted with any new hire it and it's like: let us get a healthy bone structure before we build the whole body. So I'm grateful that it's being used to build up and not to problem solve after we're already beyond right.
reflections	safety	Cycle 2.1	we all get along right now. So we feel more comfortable talking. So when eventually like, because there will be times where it gets more heated, we have a safe space with, like professional way of dealing with.
reflections	empathy/responsiveness	Cycle 2.2	I would say: feel like you're not alone. If that makes sense.
reflections	team work/working together	Cycle 2.2	You're like, oh, I'm the whole staff for this and it's like there's actually a lot more intermingling of projects and of mindset.
reflections	team work/working together	Cycle 2.2	like I feel like it's already gotten in that habit. So it's like even just yesterday, with OD and I walking down the street like we found ourselves, like kind of one, like an impromptu one. And so it's just that habit of going outside and like walking together. It's like, yeah, just whatever it's like, that's what we should be doing.
reflections	Paired reflection	Cycle 2.2	That's I was to say I like the team aspect of it is because we're.. Like you were saying we've got a lot of work ahead of us and the only way we're going to get through it is if we're supporting each other, you know, making things happen, and I like that.

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reflections	Paired reflection	Cycle 2.2	yeah, it's just going to get, were goin to get stronger, like a cohort.
reflections	Internally focused	Cycle 2.2	think that was really good, points you out of your head.
reflections	Internally focused	Cycle 2.2	Lets you externalize these things that might have been bouncing around in my head I had noticed that. Definitely notice that that happened with me.
reflections	Reflections	Cycle 2.3	I'm just when I go home. It's not my agenda to, you know, sit back and reflect and I still feel like I'm stuck in that reactive mode a lot of times where things pop-up here and I just that's my attention as opposed to giving myself time to actually stand back and see how, what‚Äôs the bigger picture?
reflections	Internally focused	Cycle 2.3	Some it's not about how you interact with others, it's about your own thoughts. They can sabotage how you move forward. Your own thoughts in the way of your own goal.
reflections	Internally focused	Cycle 2.3	For each of those traits, there is a healthy middle ground and it's like, but we look at those traits because we're either on the low end or the high-end and it's like there is a medium.
reflections	Externally focused	Cycle 3 Final	I found it very helpful in that, like I've said before in the past, I said yeah, you know, we really need to be more, we really need to give voice to underserved groups, but I never really knew how to do that or even how to find out how to do that, and so I think that this has given me a chance to learn the steps I need to take in order to improve it, in order to improve my ability to be inclusive, and so I think it's been very valuable use, use of my time.
reflections	Externally focused	Cycle 3 Final	You know, with CAM (CA Association of Museums) coming up there was several workshops that they're offering kind of open lunch dialogues and we're all revolving around volunteers, and there is some other stuff I really wanted to see too, but this is our biggest need. So this is what I'm on to focus on. So I think it was great because it just helped me better prepare for these opportunities to have that one on one kind of dialogue and learning with other groups.
reflections	team work/working together	Cycle 3 Final	So you know again, you know there's five of us, but like there's not just one of us on this.
reflections	confidence	Cycle 3 Final	I'm just saying I definitely feel more like I've grown and learned a lot and feel a lot more comfortable in my role in in this group. So it's been very helpful.
reflections	positive	Cycle 3 Final	I will say this whole process was kind of a pain just because there was so much there and it was. How do you juggle it? But in the end I really think it helped frame like what's the next step, what happened to make your job successful? For the museum to be successful? And I think really I'm most happy with the fact that I feel like it brought everybody together to like you were saying that only two or three of you had worked together really for a long time, and so now I feel like I can lean on any one of you and vice versa, you now. So it was a great team building kind of experience too, which is important.
reflections	Cycle intervention topics	Cycle 3 Final	But I would appreciate it if moving forward just from your professional background and education, if you could bring in random things, even like once a month, like I appreciate. You've always been good about advocating for professional growth and going to conferences, but talking about it at this level right here has probably been the best professional growth I've ever received because it was regular, it was consistent, it was relevant and I really would appreciate if it could continue on some scale, moving forward and hopefully again that ripples out in our workplace to volunteers. It just really set a tone for growth and acceptance that I appreciate.

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reflections	Cycle intervention topics	Cycle 3 Final	ops meetings are what staff meetings are at a lot of places. Where I felt like this was, it's more of a professional growth meeting. And that's why I really appreciated having these. It's like, yeah, we could say a few things, but it was nice to really do like the deep thinking here.
reflections	Cycle intervention topics	Cycle 3 Final	Because I think the ops meeting is what we're doing with our jobs and I think these meetings are how we do our jobs.
reflections	Internally focused	Post interview: EPD	It helped me remove myself a little bit from a certain, from the situation, that what I was taking a personal it let me, I think, anytime, like with a therapist getting it out and I'm making it external rather than internal, and also reminding myself that my perception is not necessarily what was going out and what I, what I took in, was not necessarily wasn't given out. And so I had to realize that there was maybe a negative filter in me interpreting things that didn't have to be interpreted that way.
reflections	confidence	Post interview: EPD	Absolutely without a doubt it, it made me much more comfortable here. Even if something happens that I can feel a little prick. I realize, you know, just just don't it's OK, it's OK, it doesn't happen to be like that and you know how, how it was intended or how I take it that I can remove myself a step from the situation and let my front frontal cortex take over.
reflections	Change Management: Volunteers	Post interview: EPD	Absolutely giving a lot more slack, also remind me that they are here to help us when they aren't getting paid. You know, I mean they also, I'm coming to a situation where a lot of changes are being made and I've through this process, been given the tools to help myself deal with it, and maybe they don't have those same tools as I have. So I need to be a little more understanding.
reflections	Change Management: Volunteers	Post interview: EPD	I just don't feel the tension like I did for a while there. I just don't, I feel like everyone for a while seem like people were just on edge and it's like, I mean, we're able to talk to each other again and you know I can come over to the table and sit-down we can have a conversation again and I feel like the the bonds of have been strengthened.
reflections	confidence	Post interview: EPD	I think, watching each other and our growth, ah just how seeing other people kind of go through in some ways the same process I was going through, seeing things maybe in a different way. Gaining tools that I don't know if they had before, but I could see them utilizing those new tools and just doing that as a group. I'm not. Like I said before, most meetings tell you what to do in your job, but these meetings I feel as a group we really learn how to do our jobs better together.
reflections	Internally focused	Post interview: EPD	Sometimes it's hard to let go of negative feelings and I want to be,well, he said what, what, what? And it was hard to just you know again, it wasn't that, it was that, it was just not as... It was a little hard to just let that go. I just let it go and I had to keep that. That's what took the most work. Just remind you know what, just don't... just don't... just let it go, so that would be the hardest part.
reflections	empathy/responsiveness	Post interview: MM	Honestly, I think that it changed my perspective of how to handle things with other people, especially like volunteer pool, just taking the time to reflect and think about it and see in other people's viewpoints.
reflections	Internally focused	Post interview: MM	I have to actually take the time and slow down.
reflections	Internally focused	Post interview: MM	a big help for that and just see like where my flaws were

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reflections	Change Management: General	Post interview: MM	So that really made me reflect where I am at and, like understand why I'm where I need to change myself.
reflections	Paired reflection	Post interview: MM	I think the walking and talks were perfect. I think that really helped us get to know each other better and come together a lot easier and feel like we're all included. Came to realize, like all of us kind of had this feeling of like not being included, and so we decided to bring that in better.
reflections	Internally focused	Post interview: MM	So I think that's where I struggled the most and that's why, like I, had a hard time, like wanting to take time to write and journaling and things like that. But I still took time to at least reflect. Like going driving home, like reflecting. I'm like okay. How did the day I've done better? What were the goods and the bads and what should I prepare mentally for the next coming day, week or whatever?
reflections	Internally focused	Post interview: MM	I think it's taken me on like a level where I can stop and think of like like what can realistically do, like where am I going on this path and just kind of think it all through and reflect on what I'm wanting, versus what I can do, as well as just like what I need to do.
reflections	confidence	Post interview: MM	So it's just being able to reflect a little bit better throughout all of those and understanding a better workflow and mentality for myself.
reflections	Externally focused	Post interview: MM	hard to reflect on yourself and not be your worst critic, but I think it definitely opened up a better structure of like what I do actually need and what need to focus on in a bunch of areas. So it was a good way to focus something on something that I probably would have just like kept pushing back further further, but I didn't have to look at it.
reflections	Change Management: Volunteers	Post interview: MM	But like in this kind of situation, suddenly we're able to work and talk together and feel like we can actually communicate, which is a lot nicer than probably what it could have been.
reflections	Paired reflection	Post interview: MM	Definitely just obviously walk and talks, but I think just like looking through the FYI. And being able to understand where I need to work on as myself, as well as just be able to have that cohesion with our core group here and being able to come together a lot easier and closer to be able to tackle all these problems and rise above everything.
reflections	Change Management: Volunteers	Post interview: OD	It's definitely help me. I've always tried to be diplomatic just in life, but I think that there's more of a weight now associated with it. If that makes sense, and then you can say one thing, but it doesn't necessarily solve something. It's a. It's a process, guess, really change management.
reflections	Change Management: Volunteers	Post interview: OD	You're no going to be able to solve it within a day. It's it's something that you kind of to use terminology like sow the seeds and watching kind of grow and and see they kind of take a certain direction
reflections	Change Management: Volunteers	Post interview: OD	So I think for the most part it's taught me. Yes, I can be open and honest with some people, other people, the passion is just, you're never going to convince them, I guess. And so why waste your energy? You know when, when you can get better results from people who are more willing to to work with you.
reflections	Individual reflection (gibbs or jounaling)	Post interview: OD	I found it really hard to channel my reflection reflective process, so it always ended happening in the worst time, where I'm usually having bed or something like that, and I have a tendency to kind of do a cyclical thing where I just get caught in a reflective process. So that the most helpful part of that, though, was having somebody to reflect with, because that really helped, I guess, hearing the reflection out loud.

Code Category	Sub category	Transcript	Snippet
reflections	positive	Post interview: OD	But it really was great because it helped me not only work through some problems but also kind of see the positives that have come through the whole process. And I think that's super important just because people, we all need that kind of positive reinforcement too, and that could be part of the reflective process for sure.
reflections	Internally focused	Post interview: OD	I would say I'm probably less hard on myself. I mean a little less. I've always been really hard on myself, but I mean again just being able to reflect and see that.
reflections	positive	Post interview: OD	there has been a lot of movement forward and it's so easy to get stuck, especially when you're reflecting in a negative way. To get stuck that we are still phase one or or something like that. And really I mean, when you take the whole thing in, things are getting a little easier. I think people are working together more. There's more integration happening. So I do think it's given me a little bit more confidence, the work that I do. Just that positive you now it's helping, it's pushing me forward, but again I still can reflect more. You know, to keep that that momentum going. But yeah, no, I think overall, just reflection was important to make me feel more integrated as a staff member, as part of the organization, and really just a team to be part of the team. That that's been super great.
reflections	empathy/responsiveness	Post interview: OD	Programs really need volunteers to kind of move forward so that it's not all landing on just PD or just EPD. Same with me, you know, not all landing on just me. If we don't have somebody covering downstairs, I don't have to do it, you know. So the fact that we found some common ground was really great and I do think PD and I, and there's some humor there. We can bounce ideas to each other, have fun, and I think that is like one of my favorite things about any work atmosphere is when you you can make those connections with another person because it just makes things fun and fast.
reflections	Externally focused	Post interview: OD	Even though PD and I have similar ideas, we also have different ideas and so being able to bounce those off of each other ultimately, I think, makes for a better... Whether it's a program or, you know, just recruiting. So I mean she's giving me some great ideas on you know how to not only just get like people interested in volunteering but like, okay, well, now that they're here, how do we actually match them to the right area? So they want to stick around. You know so, and those are things I probably if I felt like I was alone on it, I would have completely just thought about, just skipped over and it would have just created issues down the road. So ultimately, I think, by bringing everybody together in a team it's going to just make us a little bit more.. what's the word? I'll go to your resilience, that you brought into, like trying to make Folsom History more of a resilient organization
reflections	empathy/responsiveness	Post interview: OD	I mean that was kind of really what opened my eyes the most was it's not necessarily a departmental issue, it's it's kind of like again... There was a lot of crossover stuff where we both had very similar needs for different reasons.
reflections	Change Management: Volunteers	Post interview: OD	I feel so much better now, I mean that was giving me a lot of anxiety for a couple of months just because the tensions, and they were tensions that were building. They were stuff that it was almost like a delayed response to some of the changes that had happened started happening like a year ago. And I feel like with me, for there were sometimes I felt like I was in the middle. You know I was. I was the person, the liason for the volunteers. They they, definitely felt comfortable being able to be able to air their grievances with me and I did make it a little difficult for me. Like I questioned, sometimes, like what am I doing here? You know because I'm super confused, like I sympathize, but if we go that route we're just going back five steps. You know and I don't know, I was able to find a way to work through it, but only could do it by leaning on people.

Code Category	Sub category	Transcript	Snippet
reflections	Mission related program/services	Post interview: OD	I find the history of Folsom, the innovative history of its, fascinating, but I don't have as much a direct connection to the community as people who live here, who who have worked here, you know, I'm still building that. So I think I sometimes forget to to make the mission front center. And again it's super easy to get caught up in everything else and just forget to step back and just remind yourself what our mission is and what our vision is. And I mean I know it, but need to bring that into the reflective process. I think and how? How? How does the work I do reinforce both of those?
reflections	Change Management: Volunteers	Post interview: OD	So it's a great way to bring together, people of different backgrounds, to create something new and beautiful, I guess, exciting. So so I think that that's that's kind of what I want to keep working to. How do we bring people together? Because ultimately, you know everybody has on their own strengths and weaknesses, but when you put in group of people together, those strength usually are what shine through and make something even more than what you anticipate. So so that's my hope. That's my goal is to keep working towards that volunteer staff and everybody and the know, the community too, because I mean there's opportunities.
reflections		Post interview: OD	just having those like one on one interaction with them, where you could just be open and honest about some of the stuff that you were really like you couldn't break-out of that reflects cycle like, as doing a terrible job, just hearing that that they felt the same sometimes because there was so much pressure to do things, and I really felt that was a great built comradery a little bit, you know.
reflections	Paired reflection	Post interview: PD	The walk and talks obviously have been great and I think that's something that as a team we need to make a conscious effort to continue. I think that's been our biggest growth as a staff. Having that time with each other has been really really good.
reflections	Change Management: Volunteers	Post interview: PD	you know change management kind of taking them each as an individual and where they're at, versus the volunteers in the staff. And so you know, I think you can react and have a relationship with each volunteer differently, depending on where they're at and what they need. And again I think time around them has helped me kind of gage that a little bit better. I still feel.. like there's it's not a hard line any more, but I feel like there's still a blurred line and you know that might not go away. But I feel like I've made some stride with volunteers and built some report by thinking about how things have gone with interactions and trying to approach things differently the next time and there's been some reflection. You know involved in that
reflections	New models	Post interview: PD	problems can... aren't just mine but would be like shouldered by others who I feel like maybe this like dilemma and like not coming up with a solution in my head that keeps going around and around could be something that would be safe to bring up in a team forum and talked about. And maybe as team we could come up with like a healthy solution or further step where it doesn't just have to be this broken recording going around in my head. So that I think it can help us go in a positive direction, but it's not there yet.
feelings	uncertain/ confused	Cycle 1.1	don't know anything about it, but it sounds like how you handle how you want to control, but it's just how you handle implementing new procedures and policies. I don't know anything.
feelings	Change Management: General	Cycle 1.1	I think one of the two of the biggest things about changes. It's scary when it's unexpected and you don't know the procedure.
feelings	Change Management: General	Cycle 1.1	Also, it's scary. When you don't have a voice, so if I know what's happening and I feel like somebody's listening to me, even if I change, is something I don't like.

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feelings	Change Management: Volunteers	Cycle 1.1	So it's like as long as she knows we didn't forget about her, she felt better about it and it wasn't then to change. She was scared that she wouldn't know what the change was. So communication, I would say, is huge and again knowing every month I'm going to get an email communicating the changes. So I know I'm aware of them. It makes people feel safer.
feelings	Change Management: Volunteers	Cycle 1.2	You talk at board meetings, well, that's the two levels, but we need to be so careful to make sure our volunteers feel safe to reflect and that might be different formats for different people.
feelings	Change Management: General	Cycle 1.2	So this will be good for everything, for us.
feelings	Change Management: Volunteers	Cycle 1.3	We've seen examples of how it can go wrong, and so, like the like, I feel like we're making some progress towards, like forming coalitions with volunteers and all that, so you know.
feelings	Change Management: Volunteers	Cycle 1.3	All right, just being able to like feel like put your like, put yourself in their, somebody shoes like theirs, whatever like. How would you want to be treated in a way from the other way around? And so it's just kind of reminding myself of going through that and everything, and just not taking everything like so like seriously into the point and everything, and just making sure like there's room for humanity and growth no matter what, especially with people that are just volunteering in general for going, discussing in that route, it's like they're not being paid to.
feelings	Mission related program/services	Cycle 1.3	And also just managing the volunteers, but also hearing, hearing them, really hearing them and and being responsive to them, while still ensuring that the changes that need to take place happen.
feelings	Change Management: General	Cycle 1.3	Like, if people start having that clash, like not wanting to listen and do something on their own and not comply it's possible they don't understand.
feelings	Change Management: Volunteers	Cycle 1.5	three (3rd stage of resistance) when it was talking of, like, do projects and give them opportunities to work together in a collaborative fashion. It must be, found. And so it's like, that's kind of one of the reasons why i'm excited for doing like the tour and inviting multiple volunteers and everything, because I feel like getting out and away from the museum environment setting.. it gives the different attitudes. It's little less like professional intense that I feel also it gives us a chance to be in a different light. It's like hey let's do this different activity and make sure that we're all involved
feelings	positive	Cycle 1.5	when I was helping downstairs with the volunteers set up for Christmas. It was real, it was actually a really fun experience. You know we were, the job had to be done, but we were all having fun doing it and laughing and really I felt a lot of comradery there. I felt closer to some of the volunteers and I ever felt so far and I feel like it was the same, you know, with them. So I think if we can have situations where you know we're coming together in teams and just doing things together, that's that's where a lot of the possible distrust or misunderstandings, that's that's going to help bridge the gap there a lot. It will be fun in the process, hopefully, which is always good.
feelings	frustration/ tension	Cycle 1.5	And i'm not here to be best friends with people But I think that part of it is intimating that i'm newbe. And there's already some angst and then here's the newbe, dealing with the angst that's already there, plus exacerbating the angst. So just getting insight onto, like where I can have firm footing to start getting past this.

Code Category	Sub category	Transcript	Snippet
feelings	scary	Cycle 1.5	And there's already some angst and then here's the newbe, dealing with the angst that's already there, plus exacerbating the angst.
feelings	Mission related program/services	Cycle 1.5	think we need to be reflective in our each of our roles as to what some quick wins are, because quick wins for all three of us can be very different, but we can still support each other and celebrate the individuals quick wins.
feelings	Mission related program/services	Cycle 1.5	The human element is still there, even though it's our job, it's still stressful. You still lose sleep over and we are exhausted at the end of the day, and you. It's just nice to be recognized
feelings	Mission related program/services	Cycle 1.5	Yeah, I think you know, going back to being reflective, we're going to be doing a lot of new and I think we all need to recognize that there needs to be a grace around it, but not an excuse around it.
feelings	Mission related program/services	Cycle 1.5	Quick wins need to be a celebration, but it needs to be a quick celebration and then a quick reflection and room for improvement.
feelings	safety	Cycle 2.1	we all get along right now. So we feel more comfortable talking. So when eventually like, because there will be times where it gets more heated, we have a safe space with, like professional way of dealing with.
feelings	empathy/responsiveness	Cycle 2.2	I would say: feel like you're not alone. If that makes sense.
feelings	empathy/responsiveness	Cycle 2.2	I, like you, think that you know what's going on with other people's minds and stuff. Or like you have the people you talk to the most. But you don't know the other people's. And so it's kind just like cool. I'm not alone and I'm not going insane. Got it.
feelings	empathy/responsiveness	Cycle 2.2	but that someone else is feeling in a similar way that that I do. That the issues I am having, I'm not the only person having those issues, and so that that was helpful.
feelings	empathy/responsiveness	Cycle 2.2	You're like, oh, I'm the whole staff for this and it's like there's actually a lot more intermingling of projects and of mindset. Where it was, it's good to put yourself in check that you're not as alone as you feel sometimes
feelings	empathy/responsiveness	Cycle 2.2	And that other people are in the same boat as you, even if you might not be like eye to eye on it all the time. I think just getting out too. I think anytime a meeting is offsite, it allows for it to be viewed different and it allows your brain to work a little bit differently.
feelings	empathy/responsiveness	Cycle 2.2	And there's a bonding to it, you know. But yeah, and just permission to stop. And, like I've said before, it's nice to have permission to stop and it's okay to just think and things come up that you didn't even realize were on your mind, because it's like especially talking for 15 minutes. It was almost a cyclic conversation, like, well, speaking of that, like you end up on tangents that you weren't planning on talking about, but they were good tangents to talk about. And I think, without having that time reserved, that would have happened because you're so pointed all the time, like this is what we need to talk about.
feelings	Paired reflection	Cycle 2.2	But I think there is a-level of trust that gets built-in and a level of respect, you know, and it's a different kind of respect, like you can respect someone for their skills and I think we've kind of had that going, but there's a personal respect level as well and trust.

Code Category	Sub category	Transcript	Snippet
feelings	Paired reflection	Cycle 2.3	I was enjoying it. Opening up was kind of difficult for me, but I was able to do it. I think if I had more practice I might be able to get better at that.
feelings	Reflections	Cycle 2.3	I'm just when I go home. It's not my agenda to, you know, sit back and reflect and I still feel like I'm stuck in that reactive mode a lot of times where things pop-up here and I just that's my attention as opposed to giving myself time to actually stand back and see how, what's the bigger picture?
feelings	frustration/ tension	Cycle 2.3	I mean put aside my work and focus just on this, because then I feel bad that I'm leaving other work behind. That needs to get done as well, and so then it sets me into a moral spiral, doing my actual work instead, and I like this reflection where I feel better then.
feelings	Paired reflection	Cycle 2.3	And I think part of it is that you're not sitting there looking at another person, the other side of a table or a chair. You're just when you're moving. I think your mind. It's just much better when you're moving around. I think everything about it was just really to me, conducive to that process.
feelings	confidence	Cycle 3 Final	And like I know as a staff, we are fully capable of this and I know it's going to happen because it has to happen.
feelings	scary	Cycle 3 Final	It is not a choice for this to work, but it is very overwhelming to me.
feelings	confidence	Cycle 3 Final	But even if it's a slow rolling ball it's rolling, so I hope I hope we can keep the momentum going even if it's baby steps.
feelings	New models	Cycle 3 Final	So that's where my biggest struggle is coming from, and there is it's just it's such a broad topic that's being discussed, that is a blanket for all the museums and it's hard to find actual, like selected individual museums to utilize as an example. I haven't really been able to find any aside from like the big names, but that doesn't really do anything for us because that's not us, we are a two room museum and not a four-story National Institute museum. And so it's very hard for me to find that information and to like really dig deep and to uncover that. So that's something I'm still working on, but it's very interesting, enjoyable at least.
feelings	Mission related program/se rvices	Cycle 3 Final	I don't think it was a whole lot of help to MM, but MM was help to me. Your resources, like let me give you masters education.
feelings	Mission related program/se rvices	Cycle 3 Final	I was going to say I feel like in all three of the walk and talks, like I feel like I brought up like how uncertain and like big of a scope the collection is and how I didn't know where to go. But the walking with EPD the second time I was just like, oh no, like this has more structure. This is where I know I should start and so that definitely it gave me a peace of mind in like an area focus with, like any research involvement project thing, I like focus on the big thing and I know my scope is far too big and what I can handle and so, like EPD was able to help reel me in a lot better.
feelings	confidence	Cycle 3 Final	I'm just saying I definitely feel more like I've grown and learned a lot and feel a lot more comfortable in my role in in this group. So it's been very helpful.
feelings	confidence	Cycle 3 Final	Yeah, and like I said that, I had an issue that I didn't know how to deal with, it being my again, not knowing how to go about being more inclusive and what I did, and I think this has given me the tools I need to move forward.

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feelings	positive	Cycle 3 Final	But in the end I really think it helped frame like what's the next step, what happened to make your job successful? For the museum to be successful? And I think really I'm most happy with the fact that I feel like it brought everybody together to like you were saying that only two or three of you had worked together really for a long time, and so now I feel like I can lean on any one of you. So it was a great team building kind of experience too, which is important.
feelings	frustration/ tension	Cycle 3 Final	I will say this whole process was kind of a pain just because there was so much there and it was. How do you juggle it?
feelings	Cycle intervention topics	Cycle 3 Final	Through all the work of, like the last six months, going through all the different reflection topics and change topics, and this I always, you know, you often would give us an assignment and I feel like more work and at times was more stressful than others trying to get it done.
feelings	Cycle intervention topics	Cycle 3 Final	I appreciated there was always like a grace with it that you understood that this wasn't always the main priority. But you have faith that we did care and we're trying to put time into. So that made it a little less stressful knowing that that grace was there
feelings	Cycle intervention topics	Cycle 3 Final	But I would appreciate it if moving forward just from your professional background and education, if you could bring in random things, even like once a month, like I appreciate. You've always been good about advocating for professional growth and going to conferences, but talking about it at this level right here has probably been the best professional growth I've ever received because it was regular, it was consistent, it was relevant and I really would appreciate if it could continue on some scale, moving forward and hopefully again that ripples out in our workplace to volunteers. It just really set a tone for growth and acceptance that I appreciate.
feelings	Change Management: General	Post interview: EPD	think a lot of what I got out of it was just reminding me to that that change is going to happen, that it's not something that's bad, that that there's a process. Then if I know the process, then I can feel like I'm aware of what's going on rather than a victim of forces that are mysterious and scary, and I don't know what's going on. And so I think that just being aware of this is part of a process and this is, and this is natural and good. It made me feel like I had a much better handle on the situation and again it made it something natural rather than something scary.
feelings	Change Management: General	Post interview: EPD	I would say maybe not how I do my job and how I feel about doing my job, that you know there's something that is again change, or even just something that I might otherwise have been uncomfortable, uncomfortable with. I have this to fall back on again. It's it's it's okay, it's part of a process and the process is something that happened. It's not something to fight against, is not something to resist, it's something to acknowledge and go with.
feelings	confidence	Post interview: EPD	Absolutely without a doubt it, it made me much more comfortable here. Even if something happens that I can feel a little prick. I realize, you know, just just don't it's OK, it's OK, it doesn't happen to be like that and you know how, how it was intended or how I take it that I can remove myself a step from the situation and let my front frontal cortex take over.
feelings	confidence	Post interview: EPD	I think this is really exciting for me. Personally, I feel like it really gives me a direction to do work that I've never done before, that I've always. The intent has always been there, but I don't feel like I really had the tools to do do it, and this, I think, is showing me how to, how to obtain those tools, and this is something that, personally, I think is personally and professionally, I think, is a really important step for me to take.
feelings	Post Intervention	Post interview: EPD	I hadn't gotten there yet, and that that was a little difficult, but to be honest, it was true that just my intent wasn't enough

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feelings	Change Management: Volunteers	Post interview: EPD	Absolutely giving a lot more slack, also remind me that they are here to help us when they aren't getting paid. You know, I mean they also, I'm coming to a situation where a lot of changes are being made and I've through this process, been given the tools to help myself deal with it, and maybe they don't have those same tools as I have. So I need to be a little more understanding.
feelings	Change Management: Volunteers	Post interview: EPD	Way lower, way lower I mean the temperature has just dropped and now I feel comfortable. Before I was feeling very uncomfortable. Now I feel it's okay. I'm good.
feelings	Change Management: Volunteers	Post interview: EPD	I just don't feel the tension like I did for a while there. I just don't, I feel like everyone for a while seem like people were just on edge and it's like, I mean, we're able to talk to each other again and you know I can come over to the table and sit-down we can have a conversation again and I feel like the the bonds of have been strengthened.
feelings	confidence	Post interview: EPD	think I feel less worried that things that I do or things that happen are going to have negative repercussions and, like everyone, we went through a kind of trial or not a trial.. a difficult time, and I think we came out the other side. And I think I'm I'm hoping that we have more of an understanding of each other and of what's going, what's going on and hopefully more buy in, and I know that not everybody made it through, but I think that those that did are more on board than they may be even more when we started.
feelings	confidence	Post interview: EPD	it's given me a new goal for myself and like, like I said personally and professionally, it's given me not the tools yet, but it's given me a way, I think, to obtain the tools to do this job the way I really think it should be done.
feelings	positive	Post interview: EPD	mean it was just it's just what my thoughts so totally with that, yeah, I mean it was just how do you feel? Three questions: boom, boom, boom next week, do it again. It was not not at all stressful or anything, just kind of this week I felt this way and this week I felt that way.
feelings	confidence	Post interview: EPD	I think, watching each other and our growth, ah just how seeing other people kind of go through in some ways the same process I was going through, seeing things maybe in a different way. Gaining tools that I don't know if they had before, but I could see them utilizing those new tools and just doing that as a group. I'm not. Like I said before, most meetings tell you what to do in your job, but these meetings I feel as a group we really learn how to do our jobs better together.
feelings	empathy/responsiveness	Post interview: MM	Honestly, I think that it changed my perspective of how to handle things with other people, especially like volunteer pool, just taking the time to reflect and think about it and see in other people's viewpoints.
feelings	confidence	Post interview: MM	So it's just being able to reflect a little bit better throughout all of those and understanding a better workflow and mentality for myself.
feelings	New models	Post interview: MM	So it's definitely it's something I need to work on I think a little bit more. To be able to fully step into that ability to have enforced and I feel like I can lead new changes and new models.
feelings	New models	Post interview: MM	So this kind of really brought it to the forefront in a good way, of course, to be able to work on that.

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feelings	Change Management: Volunteers	Post interview: MM	It's like, I know, like at the beginning of all of this, like I was very much at like wits end with a lot of things going on, and so it just took allowed me to take time to like reflect and look at the whole process and shift gears of how to approach things, especially with like making changes, everything and just being able to take the time to get to know them properly and like hear them out and understand back and forth.
feelings	Change Management: Volunteers	Post interview: MM	I'm sure there's spotty stuff here and there that I miss or I know, like we still a little clustered, but for the most part I think it's a lot better.
feelings	Change Management: Volunteers	Post interview: MM	But like in this kind of situation, suddenly we're able to work and talk together and feel like we can actually communicate, which is a lot nicer than probably what it could have been.
feelings	Mission related program/services	Post interview: MM	Well, it's how do we combine, like the people that are just so very historical society based, to like the innovative base, like where is that middle ground, to slowly start integrating it towards that?
feelings	confidence	Post interview: MM	So it's it's nice because, like I follow the mission very well but at the same time I love the history and all that kind of portion, and so it's easier for me now to be kind of shifted, a little bit nicer. And so a lot of like the change management techniques have helped me be able to move that over to kind of change, like the wording in posts, or in different research things and trying to weed out like what should I actually be researching and what shouldn't I. It really helps me like kind of set up to like start thinking of like what do we want in our collection and what shouldn't we need in our collection? So it's been nice to think about.
feelings	Paired reflection	Post interview: MM	obviously walk and talks, but I think just like looking through the FYI. And being able to understand where I need to work on as myself, as well as just be able to have that cohesion with our core group here and being able to come together a lot easier and closer to be able to tackle all these problems and rise above everything.
feelings	Individual reflection (gibbs or jounaling)	Post interview: MM	Definitely the journaling. Just because our time finding the ability to. I've felt like very watched and it's hard for me to like... I'm so used to that. Probably like that retail like aspect has been drilled and to me so long where it's like I have to constantly be working, I can't take breaks. I always have to seem like I'm working and doing stuff like sitting down isn't allowed, and so that's still kind of ingrained in my mind that like no, I need to work on like actual stuff. And so in my head, like I know that's still like work, and things to do but also like it's the judgment of everybody else being like you're just sitting around like writing and whatever, and that's something that I just need to work on for myself.
feelings	confidence	Post interview: MM	I think it it was like perfectly timed to like help solve bigger problems for the museum as well as like personal problems for everybody, and I think that helped us get over a big hurdle at the end of the year and into the new year.
feelings	Change Management: Volunteers	Post interview: OD	I mean gosh, so I think with change management what was really helpful with the training was helped identify different ways, different reactions from people, you know, and it really helped kind of for me to kind of just make the connections of who within our volunteer base might be a little bit more resistant to some of the change that had happened and then the stuff that is continuing to go through.
feelings	Change Management: Volunteers	Post interview: OD	It's definitely help me. I've always tried to be diplomatic just in life, but I think that there's more of a weight now associated with it. If that makes sense, and then you can say one thing, but it doesn't necessarily solve something. It's a. It's a process, guess, really change management.

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feelings	positive	Post interview: OD	But it really was great because it helped me not only work through some problems but also kind of see the positives that have come through the whole process. You know it's so easy to dwell on, you're not doing your job right, or you could have done this better, but when you really think about it, things are happening no matter what, and there are even some small victories along the way. And and I think that's super important just because people, we all need that kind of positive reinforcement too, and that could be part of the reflective process for sure.
feelings	Internally focused	Post interview: OD	I would say I'm probably less hard on myself. I mean a little less. I've always been really hard on myself, but I mean again just being able to reflect and see that.
feelings	positive	Post interview: OD	there has been a lot of movement forward and it's so easy to get stuck, especially when you're reflecting in a negative way. To get stuck that we are still phase one or or something like that. And really I mean, when you take the whole thing in, things are getting a little easier. I think people are working together more. There's more integration happening. So I do think it's given me a little bit more confidence, the work that I do. Just that positive you now it's helping, it's pushing me forward, but again I still can reflect more. You know, to keep that that momentum going. But yeah, no, I think overall, just reflection was important to make me feel more integrated as a staff member, as part of the organization, and really just a team to be part of the team. That that's been super great.
feelings	empathy/responsiveness	Post interview: OD	Programs really need volunteers to kind of move forward so that it's not all landing on just PD or just EPD. Same with me, you know, not all landing on just me. If we don't have somebody covering downstairs, I don't have to do it, you know. So the fact that we found some common ground was really great and I do think PD and I, and there's some humor there. We can bounce ideas to each other, have fun, and I think that is like one of my favorite things about any work atmosphere is when you you can make those connections with another person because it just makes things fun and fast.
feelings	empathy/responsiveness	Post interview: OD	I mean that was kind of really what opened my eyes the most was it's not necessarily a departmental issue, it's it's kind of like again... There was a lot of crossover stuff where we both had very similar needs for different reasons.
feelings	Change Management: Volunteers	Post interview: OD	But for there was point where I felt like I was kind of being used also. You know, I don't think I don't now it was intentional or anything, but I mean they were coming to me wanting me to do things and it's like that's I can't. You know, because I believe in what we're going and when I finally like kind of put the line there, things have really calmed over and that's it's I don't know. I think we're in a much better place now. I think boundaries are always great and I feel like now there's there's been some established boundaries, like my relationship with volunteers, and it's it just made things work now. It's really made things work
feelings	Mission related program/services	Post interview: OD	That's the weakest, I think. For me, you know I'm not a resident of Folsom, so it's. Not about. It's hard for me sometimes to connect the like. I find the history of Folsom, the innovative history of its, fascinating, but I don't have as much a direct connection to the community as people who live here, who who have worked here, you know, I'm still building that. So I think I sometimes forget to to make the mission front center. And again it's super easy to get caught up in everything else and just forget to step back and just remind yourself what our mission is and what our vision is. And I mean I know it, but need to bring that into the reflective process. I think and how? How? How does the work I do reinforce both of those?
feelings		Post interview: OD	They were ok. They were just kind of another thing, but it was easy to forget about them because they did go to span a lot or my junk folder.

Code Category	Sub category	Transcript	Snippet
feelings	confidence	Post interview: OD	I guess I feel like I'm fully integrated in now. Because it was, there was.. it was kind of a culture shock
feelings	Cycle intervention topics	Post interview: OD	But ultimately I think this was actually it was good. I feel like I got a lot out of it and again brought people, it brought us together as a group and and and I don't no, I don't have too much negative to say about the actual process of the program that you put us through and all that.
feelings	Change Management: General	Post interview: PD	because since that was our first topic, it was also when I was really new here, so I sort of felt like I was dealing with a lot at that moment. But now that I've gotten better reads on a lot of the people, I feel like I can kind of categorize them better on how to manage them through changes. So it was. it was nice that I got that information right at a time where I knew I was going to be a disruptor in a lot of things.
feelings	frustration/ tension	Post interview: PD	And it's like it could be very exciting to put a lot of resource into this. But realistically, how much resource do we have, and how much can we put into this right now and not neglect other things? So it's it's kind of frustrating too, because I feel like we have some finite resource and want more. So that's you know, I don't want to be discouraged, but it's frustrating.
feelings	New models	Post interview: PD	With the program side of things it's like that I don't know, catch 22 or cart before the horse like, how much do we build up programs without people? All right, but how do we get people if we don't have programs? You know we want to be able to market cool things for people to come and do with us. Right, but how much time and resource do I put into cool things if I don't know if I have the people coming to do them. So that's kind of always going back and forth in my head and you know, at some point we have to bite the bullet on one or the other
feelings	Cycle intervention topics	Post interview: PD	I would say the professional development aspect and just helping me get new tools and insights on how I could be a stronger member of the organization or how I can move in the organization with more confidence, knowing that... I like knowing that there's a right way to do things. They might not be, it might not be black and white, but I like knowing that there's reason behind stuff.
mentoring	Change Management: General	Cycle 1.2	This explains a lot of your management style. So I would say that this is insight to RMH. Hmm, I'm like oh, she has a real method, so that was fun. RMH through the years
mentoring	Externally focused	Cycle 1.2	Like, is it me? Am I the crazy one or is it this? And I mean that's something that you grow over time, but like not to name names. But there are people that i'm like oh. This is not going to work. This is just not going to work. The question is: how far along do you take it?
mentoring	Mentoring	Cycle 1.2	That's a personal kind of thing and that some people really spend. I know people have spent too much time and I'm just like cut your losses. You're not going to make this happen with this person. You need to figure out another path.
mentoring	Externally focused	Cycle 1.2	That's why, when I think about how I framed my vision with them, talk to what was important to them. If you let people know that and don't be inauthentic, figure out what that thing is that you care about and they care about and that will help you find the commonlity find the commonality, take them somewhere else. You know, like yesterday we talked to those teachers. What I said to them was completely different. There was plenty of similarity, but completely different than I would have talked to a board or city council, because they were educators, so they needed to be acknowledged for the work that they do with kids and how hard and difficult that is.

Code Category	Sub category	Transcript	Snippet
mentoring	Change Management: General	Cycle 1.2	So you have to create a new structure where they feel like their expertise is part of that and they're feeling valued, and we're getting something useful out of it that it's different than. What it was before.
mentoring	Change Management: General	Cycle 1.2	I think that's and that's probably the hardest thing sometimes, is to just shut up and just be like actually just going to listen to you.
mentoring	Mentoring	Cycle 1.2	So you give them something, then you follow up. You have to do two things. You have to be comfortable with them. You don't have to say it's okay if you fail completely at this task right, but you in your head have to have that as something that could be and then to work with them to figure out why, rather than say you mess this whole damn thing up, i'm never handing you something again. right now so that you're like ok I'm going to work with you to figure out how we can do a better job next time
mentoring	Change Management: Volunteers	Cycle 1.3	Like the whole point of introducing all of this change management is, we're changing into something else right. It's not just to manage the volunteers, which is a task in itself, but it's to manage them through this change. we're asking for different things.
mentoring	Mentoring	Cycle 1.3	It's funny because, as educators like when I went to Bank Street, you're like trained to be reflective. You're trained to be reflective practitioner. But then there's a huge overlap with what you need to do when you're in management and leadership right. So you also have to be reflective, the educators don't always get how similar the leadership techinques are. But to me they're like they're like this. It's like like the zone of proximal development. You have to know where people are and then you give them a little exercise and they get a little further. It's the same thing you have to do with taking people along, and then you have to say what would do this work. Do this not work? You know what. Can I do differently?
mentoring	Mentoring	Cycle 1.4	You know it's it's hard, because all of this is very personal. It is very frustrating. You know, and you just want to yell, but that's not for me at least not very helpful. So like to kind of contextualize this and be like: okay, what's happening? How do I move the pieces?
mentoring	Mentoring	Cycle 1.5	You know, somethings I think the volunteers forget that the staff are human beings. Staff have feelings too. Your (volunteers) feelings get hurt, guess what their feelings, get hurt too. It's one of those things, you know it's a boss like it's one of those things that, like whoever you report to you, assume that they are not going thru anything and it's you that are suffering, and that's just not an helpful way to look at it. But everybody is guilty of doing it at times
mentoring	Mentoring	Cycle 1.5	Everybody has a different personality, they work in different ways. I think you complement each other really well and I think we're not all going to have the same way of doing. Think it's almost like we're just bringing a little more awareness to all of this, so like, if you read like you know. This was said to me the leadership thing I did- people all have their gold right? They all have the stuff that makes them be great at what they do and it's all different things for different people. And then you have this other stuff that gets in the way of you being the best version of yourself. So no one wants you to change and become like a different person, because you can't and that's stupid. But you can realize how you might be tripping up yourself, so, like whenever people say like, well, so and so..they're their worst enemy. Like you don't want to be that person, you want to be your best friend, you want to take care of the things that are kind of getting in the way. So if there are obvious things that you can do, that make it you know, like, if you become more reflective or you kind of pause before you do something, it's not to say you should not move with the gut or the instinct and the things you enjoy doing. It's just figure out how to do it in a way that might be a little more open than you would normally be to it.

Code Category	Sub category	Transcript	Snippet
mentoring	Mentoring	Cycle 1.5	because many years ago I did this 360, which was hell. We had like 15 people do a little questionaire on me, like like, how am I doing? And so I had to go to my boss, I have to go to my peers and I have to go to my staff. And you get this 70 page report about, like what you do well, which you ignore immediately, and then it's like what you do horribly and you dwell on that. And you are like my god, everybody hates me, but like in the process you're like, oh damn, maybe I should like get better at this, like it's not, it's going to be a little painful. I'm going to have to think about things differently, but if, if I did these things differently, I wouldn't piss off people in this way, that I'm pissing them off or you know I wouldn't whatever the thing is that you know comes up as a red flag. So I think about your actions should just be a way of kind of centering some of this stuff rather than changing who you are and what you do, because I don't think we can do that like I feel like everybody still needs to be themselves. They just need to get to be a little better at handling some of these difficult situations.
mentoring	Mentoring	Cycle 1.5	Because I used to be a really really crappy listener like I didn't know how to do it, I don't know how to do it. It was causing trouble, so I was like ok I have to get better. I'm probably not as great as a lot of like people that are just good at it, naturally, but I think i'm a lot better than I used to.
mentoring	Mentoring	Cycle 2.1	You know, and and again it's really funny because people reflect as educators, like they're like what worked with all our kids, like if you're you now set aside time for that sometimes and then you reflect. You're taught to reflect as leaders, some of us. Some of us are, but I kind of feel like professionally, it's really helpful thing and it helps you get out of it, won't mention names, but we all know people who get sucked up in their own little machinery and they can't just pause and think about what's going on,
mentoring	Mentoring	Cycle 2.3	You all know this analogy, I've used it with you. So if you have a jar and you're like got to put rocks and sand in it, and the rocks are the important things and the sands just the sand that accumulate. If all the sand gets put in first, you're never going to be able to stuff a rock in and if you stuff a rocks in first, can put a lot of the sand in. You're never going to get it all in. But guess what it's sand everywhere, it's not the important stuff.
mentoring	Mentoring	Cycle 2.3	Because I think that nobody really wants to do this stuff because they feel like they're kind of alone and they feel like they're going to be bad at it, because that's a whole point right. You're thinking something that you think you're bad at. So they don't want to be graded at it and they don't want to be noticed for it. We do kind of have a safe space right now, so we could use that as an opportunity where you could look through that book and you could say: hey, I want to have a conversation about this, so like first, is it just me? Have you noticed this too? Have other people noticed this? What are some things I could do?
mentoring	Mentoring	Cycle 2.3	Like when I did my 360, it was like Rita comes across as really reactive when she does not like the idea that somebody is... You might see some shades of this.. but it was a lot worse 10 years ago I've come a long way. I have a long way to go, but I know, like I'm aware, I'm aware.
mentoring	Mentoring	Cycle 2.3	And they said She has a great passion for her ideas. We like that. But it has to be tempered around this way of talking to people, you know, to not tweak them. So for me it was very much like: how do I, how do I say yes and and acknowledge and validate people and not be upset when they don't see it?
mentoring	Mentoring	Cycle 2.3	We've all had experiences over time that have made us who we are. Some are good, some are bad people who have had more problems in their past, I think have a harder time as adults, and that's just like. But I feel like if we have the grace to be able to kind of acknowledge that about each other and just say: okay, let's figure out ways of getting better at what we do, then I think I would say that transcends any job that we would do here for the next year.

Appendix G Frequency of Coded Snippets

Table 7 Frequency of Coded Snippets over Course of Intervention

number of snippets

Code Name	Cycle 1.1 Preintervention	Cycle 1.2 Discussion After Change Management Intro readings/videos	Cycle 1.3 Reflection of Change Management	Cycle 1.4 Reflections on Change management, intro to change resistance	Cycle 1.5 Final reflections change management	Cycle 2.1 Reflection of reflecting (after one week)	Cycle 2.2 Reflection on reflecting (after 2 weeks)	Cycle 2.3 Final reflection of Reflecting (after 3 weeks)	Cycle 3 Final discussion after paired presentation	Post intervention interview: Exhibit/program developer	Post intervention interview: Museum Manager	Post intervention interview: Operations Director	Post intervention interview: Program developer
Cycle intervention topics									5	1	1	2	3
Change Management: General	9	14	2	1	3					2	3		3
Change Management: Volunteers	2	7	11	2	3					3	3	9	4
Individual reflection (gibbs or jounaling)						1	3	3		2	1		4
Reflection FYI Book								5		1	1		1
Paired reflection							11	4	4		2	5	3
Mission related program/services		2	1		7	2			2		2	2	2
New models						2			9	2	4	4	7
Score Cards									1	1	1	1	1
Reflections							1	1	4	1		4	
Externally focused	1	5	1	2	2	2			2		1	2	
positionality		7	5		4					1	1	1	1
communication	2	3	2	1						1		1	
team work/working together		3	3	1	6	1	4		2	1	3	4	2
Internally focused	1	5	1		6	3	2	2	1	3	6	2	
Mentoring		10	2	2	4	1	1	5					
Staff Feelings/Perceptions													
positive					2		4	2	5	8	7	6	2
empathy/responsiveness			3		4		6			1	1	2	
frustration/tension					1			1	2			1	1
confidence		1	1		1				4	9	4	3	
uncertain/ confused	2	1						1	2	1	1	2	1
safety	2	1			1	1	2		1				
scary	2				1				1				

Appendix H.1 Presentation 1: Increasing inclusivity in exhibits, programs, collections, archives

What did I find?

Reframing History

Amid ongoing national controversy, it is more important than ever for the history community to be able to clearly explain what history is, how we come to understand the past, and why it matters to society.

Reframing History is the result of a two-year research project involving over 5,000 individuals. It is an attempt to understand how Americans think about history and how historians and educators can use evidence-backed principles to communicate the value of history to all of us.

THE INCLUSIVE HISTORIAN'S HANDBOOK

The Inclusive Historian's Handbook

Museums must a useful service for all the people who live within their borders, not just an elite few.

In order to achieve a more productive public conversation about history, the report has four recommendations as a strategy to reframe how history is presented.

THE INCLUSIVE HISTORIAN'S HANDBOOK

The Inclusive Historian's Handbook

1.   Talk about critical thinking to shift perceptions about what history involves.
2.   Compare historical interpretation to detective work to deepen understanding of historical practice.
3.   Emphasize how history helps us make progress toward a just world to increase recognition of history's importance.
4.   Use concrete, location-specific, solutions-focused examples to build support for inclusive history.

Reframing History Report and Podcasts

Compare historical interpretation to detective work to deepen understanding of historical practice.

The International Exhibition of Sherlock Holmes by EDG (Exhibit Development Group)

Historians gather evidence and interpret meaning, much like a detective gathers and interprets evidence in order to build a case.

Reframing History Report and Podcasts

However, whereas a detective might find the "correct" solution, history is always subject to change based on new information, discoveries, perspectives, and interpretations.

Reframing History Report and Podcasts

The history of white males is often seen as the default, neutral, depoliticized history, the stories that should be learned and tested on.

Narratives about historically oppressed groups are then seen as supplemental, optional, unnecessary for people outside of those specific groups to know.

What next?

GOLD MOUNTAIN: CHINESE CALIFORNIAN STORIES

Discover the history and contributions of Chinese Americans to California from the Gold Rush to the present day in "Gold Mountain: Chinese California Stories."

This signature exhibition explores how Chinese immigrants came to California in search of a better life, then stayed and helped to build the modern state. In so doing over the last 150 years, they triumphed over racism and other obstacles with ingenuity and perseverance.

In their stories, visitors will see the contributions that Californians of Chinese descent have made to our state's economy, governance, and culture, and recognize the strength that comes from the state's rich diversity.

AASLH 2023 Annual Conference:
I, Too, Am America

September 6 – 9
Boise, Idaho

In the countdown to country's 250th anniversary, we are forced to wrestle with our collective identity. Our 2023 conference is a call for an engaging examination of identity through creativity, innovation, and compelling discussion.

Made in Folsom
opening Fall 2023

Featuring Products of the City of Folsom, California

Kikkoman soy sauce, Gekkeikan sake, Sutter Street Taqueria, other ideas?

An Inclusive Collection

REMAKING THE CONTENT
FOLSOM HISTORY

NATIONAL INITIATIVES

- *Reframing History* by the AASLH
  - From truth to critical thinking
  - From abstract debate to concrete engagement
  - From winning the debate to progress towards justice

- Excellence in DEAI by the AAM
  - Diversity, equity, accessibility, and inclusion
  - Creates sound stewardship of the collection
  - Excellence in DEAI = accreditation

A TOTALLY INCLUSIVE MUSEUM

At the conclusion of a long and productive workshop about inclusion, a museum employee asked:

"How will we know when we have reached our goal of being fully inclusive?"

It was a great question, but I'm not sure anyone liked the answer.

Everyone likes to know that their programs are measurable, and that they're progressing towards a satisfactory completion.

"We won't," I answered.

I wasn't trying to be a smart alec. I really wasn't. I was serious.

"No, seriously! When?"

"Never." I replied. "We will never be fully inclusive, and never be able to measure that on anyone else's behalf." I smiled.

- Cecile Shellman; Museum DEAI Consultant; Chair, DivCom; article

SUGGESTED TIPS & EXAMPLE LOCATIONS

- Involve all stakeholders possible in the process; they give a fresh eye to the collection as well as bring ideas that may not be thought of otherwise

- There is no uniform, across-the-board standardization to the practice of inclusivity

Smithsonian Institute's Museum of African American History and Culture

Museum of Fine Arts, Boston

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MILWAUKEE PUBLIC MUSEUM

- Creation of the European Village to commemorate the European immigrants to the United States celebrating each culture's folk art, costumes, food, music, and dance.

- The exhibit *Indian Country* represents contemporary American Indian life on reservations and in urban settings in conjunction with a life-size display of a powwow representing the state's seven tribes.

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ROCKLIN AND ROSEVILLE HISTORICAL SOCIETY

- *Rocklin Historical Society:* A small town museum located in a home setting and working to revitalize "Old Town" on Front Street

- *Roseville Historical Society:* A similar small town focused on pioneer culture and railroads

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SHARLOT HALL GOLDEN HISTORY MUSEUM

- Two out of state museums very similar to FH

- Sharlot Hall hosts many pioneer living artifacts as well as preserves historic buildings

- Golden History has put an upfront focus on their collection, their policy, and scope available to the public

NEXT STEPS

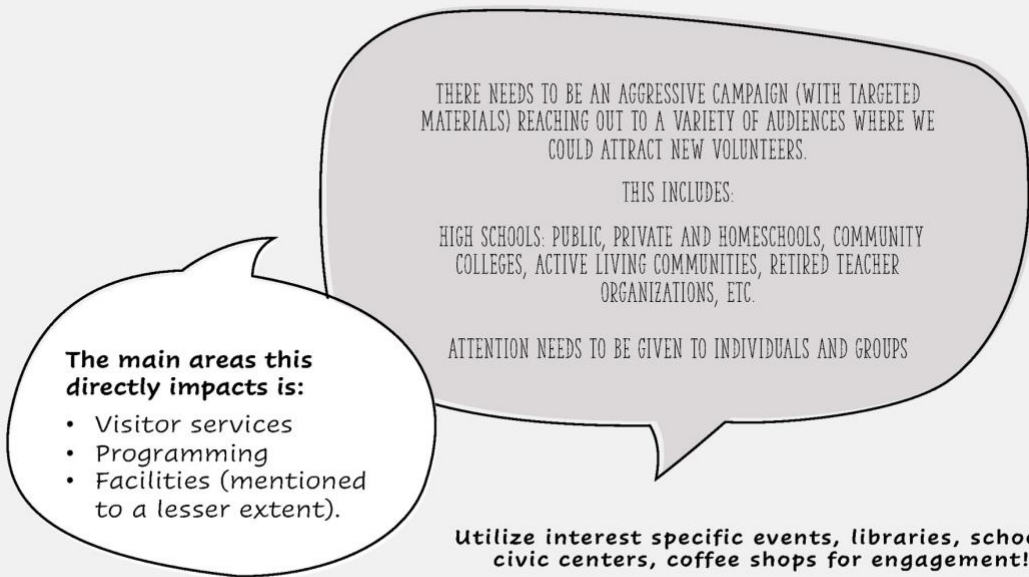| VISIT & CONTACT	ATTEND	ACTION
• Milwaukee Public Museum • Golden History Museum • Sharlot Hall Museum • Locke Museum • Maidu Museum • Rocklin Historical Society • Roseville Historical Society	• AAM • SCA • Collection care course	• MAP Assessment • Collection inventory • Preservation wishlist • NAGPRA compliance • Find the gaps • Organize documentation

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Appendix H.2 Presentation 2: Improving the Visitor Experience

THERE NEEDS TO BE AN AGGRESSIVE CAMPAIGN (WITH TARGETED MATERIALS) REACHING OUT TO A VARIETY OF AUDIENCES WHERE WE COULD ATTRACT NEW VOLUNTEERS.

THIS INCLUDES:

HIGH SCHOOLS: PUBLIC, PRIVATE AND HOMESCHOOLS, COMMUNITY COLLEGES, ACTIVE LIVING COMMUNITIES, RETIRED TEACHER ORGANIZATIONS, ETC.

ATTENTION NEEDS TO BE GIVEN TO INDIVIDUALS AND GROUPS

The main areas this directly impacts is:

- Visitor services
- Programming
- Facilities (mentioned to a lesser extent).

Utilize interest specific events, libraries, schools, civic centers, coffee shops for engagement!

MOVING FORWARD - WHAT'S NEEDED?

VOLUNTEER RECRUITMENT	CULTURAL INDOCTRINATION	PROFESSIONAL TRAINING
• Programmatic	• Who we are	• Procedures / Policies
• Visitor Services	• What we do	• Mandated Requirements
• Facilities	• Why we do	• Shadowing of Opportunities and/or Programs
• Teens	• Channels for buy-in	• Awareness of Institutional Happenings
		• Identify / Utilize Volunteer Leaders

USE AVAILABLE RESOURCES - OBSERVE AND LEARN

IN PERSON

- Sacramento History Museum - Given a comprehensive overview of their onboarding process and training structure (materials included)
- Folsom Zoo Sanctuary - Attended an intro training class, made contacts with coordinators, provided 2023 training materials

PROFESSIONAL COMMUNITIES

- CAM 2023: On Common Ground -
  - Emerging Museum Leadership: New Initiatives and Perspectives
  - Strategies for Teen Volunteers in Small Museums
  - Re-Imagining Docent Training to Achieve "RAD" Docents
  - Changing Times for Museum Volunteers (Dialogue Lunch)

(continued)

- AAM (AAMV)
  - 2023: Annual Meeting & Expo
  - *Volunteer Voices* podcast
  - Webinars
  - Toolkit: cost of $30
- MAVA: Race Equity in Volunteerism

CALL TO ACTION - ENGAGE

IN PERSON

Leverage each interaction as an opportunity to advocate volunteerism w/ Folsom History

- Onsite - Pioneer Village, the Folsom History Museum, the Sutter St. District
- Offsite - local high schools, colleges, active living communities, etc.

ONLINE

- Recruitment sites -
  - Ads featuring volunteer positions
- Social Media -
  - Curated content - Volunteer merit, stories, and milestones.
- Website -
  - Integrated platforms - volunteer applications, social media spotlights, blog landing pages

RESOURCES

- Volunteers: feedback, "allstars"
- Staff: we can all recruit! tips/tricks
- JustServe.org, LinkedIn, etc.
- Facebook, Instagram, (others?)
- WIX.com
- VolunteerMatch
- VolunteerImpact
- City of Folsom
- Handshake (Los Rios CC)

ONCE SOMEONE SHOWS INTEREST IN JOINING OUR VOLUNTEER TEAM, IT IS ON US TO MAKE SURE THEY ARE PLACED IN A SUITABLE POSITION AND HAVE THE CORRECT TRAINING FOR WHAT WE ARE ASKING THEM TO DO.

All volunteers should espouse our mission and values.

WHO WE ARE

Mission: Inspire an innovative future together by connecting Folsom to its inventive roots.

Vision: To strengthen the social, intellectual, and connective fabric of Folsom, CA.

IF THE EXCITEMENT TO FOCUS ON INNOVATION,
PAST/PRESENT/FUTURE, IS NOT THERE, THEY DON'T BELONG.

WE WANT CHEERLEADERS, NOT NAYSAYERS!

INCREASE BENEFITS AND REWARDS FOR VOLUNTEERS

o Specific titles for higher demand positions, especially effective for youth to list on applications/resumes (ex. Team Lead, Coordinator, etc.)

o Increased program offerings for them to receive a discount on

o More educational opportunities: tour other sites, "first looks" of exhibits with guided tours, pertinent literature on relevant topics

o Fun social opportunities to help them feel part of a larger community and appreciated

o Focus on communication skills, allowing for professional growth

OD's GOALS

- Relieve pressure on our existing pool of volunteers by doubling volunteers in each department
- Volunteer Handbook / Training Guides (paper, video, quizzes, etc.)
- Identify / Develop Volunteer Leads - Volunteer led programming (schools, public, etc.)
- Text
  Quarterly Trainings - Visitor Services, Students, Programmatic, Blacksmiths
- Quarterly Educational Opportunities - Field Trips, Outside Trainings, etc.
- Utilize key staff / volunteers to help develop / grow the program

PD's GOALS

- Form a strategic plan for volunteer recruitment
- Develop thorough training material for all volunteer positions (paper and videos)
- Build a group of dedicated/skilled volunteers to take lead roles
- Once there is an adequate pool of volunteers, increase programming that can be volunteer led
- Educate myself on best practices for volunteer use and retention, specifically at museums and history centers

IN THE END...

Having a larger skilled pool of volunteers would allow for a higher quality of visitor experience. Every person that walks through our door should leave with knowledge of who Folsom History is and what offerings we have. They might not be able to visit us immediately, but will know what we can provide for them in the future. For our guests that do visit, having positive/high energy experiences with volunteers will leave them happy to return for future programming and to share about their experience with others. Lastly, the more volunteers we have for programming, the more we can have on the floor and in the community to attract different guests. This includes increased maker activities, cart programs/interactions, deeper dives into the exhibits, and more larger scale programs. In addition, flexibility of school programming could increase (not be limited on days) and a larger selection of offerings could be made to teachers (not be constrained to only doing a few program models).

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Having a larger pool of skilled volunteers allows for a higher quality visitor experience.

Every person that walks through our door should leave with knowledge of who Folsom History is and what offerings we have. They might not be able to visit us immediately, but will know what we can provide in the future. For guests that do visit, having positive/high-energy experiences with volunteers will leave them happy to return for future programming and to share about their experience with others.

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