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The Documentation and Analysis of a Change Initiative at the  
Buffalo Museum of Science

A Project In Creative Studies By

Kristin E. Daley  
Buffalo State College

Submitted in partial fulfillment of the requirements for a  
Master of Science degree  
International Center for Studies in Creativity  
Buffalo State College  
Buffalo, New York

The Documentation and Analysis of a Change Initiative at the  
Buffalo Museum of Science

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Buffalo, New York

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## **Abstract**

The Buffalo Museum of Science has been a part of the Western New York community since 1861. On November 1, 2001, the museum faced a \$400,000 deficit and was forced to eliminate 25% of its staff. The director of the museum called on the services of an organizational coach affiliated with Organizations Are People, Too, a change model that combines personality profiles with the identification of an institution's values to create a decision making framework. The organizational coach facilitated a select number of staff through the process of creating the decision making framework. This project documented the process that the staff and director of the Buffalo Museum of Science and organizational coach experienced from January, 2002 through May, 2002.

## Acknowledgements

There were many individuals that played a vital role in the completion of this project.

I would first and foremost like to acknowledge the staff of the Buffalo Museum of Science for their willingness to participate in this project. Thank you for taking the time from your busy schedules to help me create a better world by helping future creative studies students to explore and understand the complexities of change.

I want to acknowledge the continual support I have received from my parents, Donald and Joann Daley who encouraged me to pursue my educational interests. Even though the “what I do” is hard to explain, know that you’re the reasons why I can do it so well.

I am eternally indebted to my advisor, Dr. Gerard Puccio. Thank you for your unwavering confidence and guidance while this project was completed. It was an honor to work with you and to serve as a representative of the department in the Western New York community.

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## **Section I: Project Purpose**

### **Introduction**

This section describes the Buffalo Museum of Science, the reasons for change and the purpose of documenting the change initiative. The participants in the change initiative are also introduced. The underlying questions of the study are presented, as well as the reasons why change was necessary at the museum.

### **The Buffalo Museum of Science: An Overview**

The Buffalo Museum of Science, first known as the Buffalo Society of Natural Sciences, was founded in 1861. The society had its first museum building in 1915, located on Elmwood Avenue. In 1929, the museum moved to its current home on Humboldt Parkway in Buffalo's East Side. In 1982, the museum acquired the 264-acre Tifft Nature Preserve, a habitat for environmental education and conservation. The museum was the first in the nation to have an elementary school both physically and programmatically linked with the opening of the Dr. Charles R. Drew Science Magnet Elementary School in 1990. The museum has a wide variety of permanent collections in the fields of anthropology, entomology, botany, paleontology and zoology (<http://www.buffalomuseumofscience.org/info.html>).

The year 2000 brought a new director to the museum. The board of directors of the museum was looking for change and sought out the current director as the person to bring that about, due to his reputation as a change agent. Momentum was gathering when the tragic events of September 11<sup>th</sup> occurred, sending economic shockwaves throughout the state of New York. Especially hit hard were the cultural arts, including

the museum. As a result, the Buffalo Museum of Science experienced a 20% decrease in attendance and faced a \$400,000 deficit when the institution laid off 15 employees, approximately 25% of its work force, on November 1, 2001. The director of the museum contracted an organizational coach with whom he had worked with in the past to lead the staff of the museum through a change process.

### **The Change Process**

The director of the museum always had intentions for the staff of the museum to go through this particular change process. The events of both September 11<sup>th</sup> and November 1<sup>st</sup> inspired the timing. The chosen process was Organizations Are People, Too, a model that examines an organization's personality and creates a decision-making framework based on the strengths and weaknesses of the personality. The intention of going through this particular process was for the staff to have a clarity of core regarding why the museum existed, and also to have a common language upon which to base decision-making.

This process, conducted in a series of five workshops, ran from December 2001 through April 2002. The process was facilitated by an organizational coach who was a well-known museum director before turning to a career in consulting. Beginning in January and running through May 2002, this project documents and analyzes the process facilitated by the organizational coach.



### **Statement of Significance**

Change is a process that may be initiated by the intervention of a facilitator, consultant, organizational coach or the like. Change processes have been documented in the past, but by that interventionist. This study is valuable in that it is one of the first to document change from a 360° perspective, being that of the organizational coach who guided the change, the director of the museum who requested the change and the staff, who must live the results of the change. The role of the staff was two-fold. Half of the staff were involved in molding the change initiative. The other half participated in meetings where information regarding the progress of the change initiative was shared.

This study has the potential to become a tool for facilitators to better understand change and the impact it has on all involved parties. As a result, future facilitators will have a better understanding of how a group experiences change and how a facilitator's process decisions can influence the dynamics of a group and the eventual acceptance of the change method brought to that group.

The purpose of having a third party document this process was to provide feedback to the museum's directors in regard to staff reactions, from both those that participated in the workshops and those who did not, to the change process. Future use by The Buffalo Museum of Science of this project may be as a record of the process to reflect upon during the future implementation of the framework and also as evidence of the museum experimenting with processes to ensure continuous improvement and the longevity of the institution.

### **Methods of Data Collection**

The researcher assumed the role of participant observer while collecting data. This role allowed for the experiences to be perceived from the perspective of one going through them, access to various meetings and events, and the manipulation of minor events (Yin, 1994).

Data was collected through the use of surveys, observations and interviews. Surveys were distributed to the entire staff at the beginning and end of the change process. Observations were made of all but the first workshop, meetings regarding the development of the framework, and various planning meetings. Interviews were conducted with the director of the museum and the organizational coach at the beginning and end of the process. A representative sample of staff members, consisting of 5 workshop participants and 5 general staff members, were interviewed after the third and fourth workshops.

### **Research Questions:**

This study attempts to answer the following questions:

- ❖ How is change facilitated within an established institution?
  - What are the methods for disseminating knowledge regarding the changes?
  - How are future decisions impacted by the change?
- ❖ How is change accepted within an established institution?
  - How is the acceptance of change impacted by whether or not an employee participated in the workshops?
- ❖ What barriers exist when implementing change?

- How will the identified barriers differ between employees who participated in the workshops versus those who did not?
- How will the barriers change over time?
- ❖ How has the change initiative impacted the museum to date?
  - What positive effects has the change initiative had on employees?
  - What negative effects has the change initiative had on employees?

### **Summary**

This project documents and analyzes a change initiative that took place at the Buffalo Museum of Science from December 2001 through April 2002. The change was necessary due to a lack of clarity of core on behalf of the staff, and the timing of the change initiative was due to recent lay offs and economic challenges.

## **Section II: Literature Review**

### **Introduction**

This section examines literature pertaining to museums and the change model used at the Buffalo Museum of Science. Museums are discussed in light of what it means for a museum to go through a change process, whether that process is chosen or forced upon the institution due to uncontrollable circumstances. The initial research that inspired the change model used at the museum will be discussed. This section concludes with a description of the possible reasons why a change process would not be accepted in an institution.

### **Issues Associated with Change in Museums**

The museum is defined by Webster's New World Dictionary as "a building, room, etc. for preserving and exhibiting artistic, historical, or scientific objects" (Guralnik, 1982, p. 494). What Webster's neglects to mention are that museums are also comprised of staff that have a habit of encountering unique circumstances related to job security. Robert Janes, director of the Glenbow Museum in Calgary, Alberta, Canada, described the current state of museums:

Museums cannot escape accelerating rates of change occurring in contemporary society, contributing to political and economic uncertainties. There is, as a result, increased pressure on museums for results and decreased resources to achieve them. All levels of government are likely to decrease financial support for the cultural sector and at the same time increase their control over policies and

operations through the imposition of various regulations and administrative procedures (Janes, 1997, p.3).

How does an institute, already under pressure, engage in a change that results in effective outcomes?

Common themes of the museum-based literature were the consideration of the staff's feelings, the role of the executive staff, creation and implementation of a mission, methods of communication between the staff and executives and the challenges encountered while embarking on a change initiative.

Museum professionals are unique individuals. They are driven by the desire to help the community by teaching about culture, science, art and/or history and the impact it has on society. This is fueled by a desire to give something back that translates into educating the community (Stewart, 1995).

There are several reasons why a museum would be facing change and as many methods to facilitate it. Change can be invoked by uncontrollable circumstances such as a natural disaster, the unexpected death of a director, or a grant or source of funding suddenly lost. Other reasons include a change of location, unionization, and mergers with other cultural institutions. A popular solution to deal with change was to hire a consultant. Some institutions created teams or task forces among the staff, each with a specific assignment within the greater change initiative (Gurian; 1995).

Before any change initiative can be effectively implemented, the feelings and reactions of the staff must be taken into consideration. Staff will be affected by change and react as they would to any trauma, that is they will go through a collective emotional grieving for a long period of time. Emotions may include, but are not limited to anger,

fear, vulnerability, relief and uncertainty about the future. The executives and managers of the museum must devise ways to help a staff cope with change, or the results could lead to a major disruption of work (Gurian, 1995). Even if one is excited about the possibility of change, there are still tendencies to hang onto the past due to a fear of the unknown future.

Staff will be able to face any difficulty optimistically if they feel as if they are being dealt with honestly, have access to both good and bad, but timely information, are respected and recognized for their production and devotion, believe that non-performance is dealt with consistently and fairly, understand the mission and objectives of the organization, believe that leaders are advocating on behalf of the staff and trust that the management is doing whatever it can to regain control of the situation. It is also important that the executives of a museum pay attention to the expressions of disgruntlement as well as suggestions from the staff during a change initiative (Gurian, 1995).

The cultural executive is described as one who "must operate complex organizations with inadequate resources, while motivating underpaid staff and unpaid volunteers to perform to high professional standards. He or she must answer to governing boards whose expertise lie outside the not-for-profit sector, while answering to a number of unknown publics" (Janes, 1997, p. xv). Additionally, the executive or manager plays a role working with staff to initiate and accept change.

The line drawn between staff and management comes in many colors. Sometimes communication or lack thereof may tint this barrier. Sometimes it may be decision-making, goal setting or development of mission, vision and strategic planning that may

add hue. The success of any change initiative lies in the way that the executives handle these situations, choosing the level of staff involvement and the implications of that decision.

The executive director will feel more positive about change than the employee whose job has just been reduced to part-time. Change can be interpreted in as many ways as an institution has staff members, but as long as the executives and staff members share a common purpose, this variety can be considered healthy (Janes, 1997).

The first step that many of the museums took before embarking on an adventure of drastic change was to re-define the mission of the institution. The staff should be intimately involved in the definition of a museum's mission and/or vision. Staff will be more apt to agree with what they had a hand in creating. If staff members are not included in the planning process, negative reactions can be expected to the most sensible of changes (Janes, 1997). The literature is littered with examples of how a staff, with complete or near complete representation, reasoned and argued through the development of a revised mission and vision, or involved in brainstorming strategic plans, or even giving individual feedback to the director, would agree to all elements of the final decision. A feature of the total staff representation was an element of teambuilding and understanding of the diverse group that made up the museum staff.

Maintaining staff morale was also key in the acceptance of change. Many museums would establish short-term goals for their staff members and celebrate their accomplishment. Executives realized the power of saying thank you to staff members, before donors and trustees. Staff could hold resentment for long periods of time if not

recognized publicly for their hard work and dedication. Independent decision-making was also encouraged and rewarded (Gurian, 1995).

Executives found a variety of ways to create a sense of teaming among staff. One such method was through shared decision-making. Executives learned that by relinquishing power, trust and faith in other's abilities began to grow (Stewart, 1995). Other institutions found that the rituals of teambuilding, such as preparing all night before the opening of an exhibit, were central to building trust amongst staff and the directors (Norris, 1995). The key element was teaming. Some executives created it by allowing staff to be involved in decision-making. Others created it by the shared pressures of museum life.

Robert Janes stated that "the biggest challenge in a complex organization is the fostering of full, open and continuous communication, regardless of rank and power, and that everyone must assume responsibility for this" (Janes, 1997 p. 119). During the change process at the Glenbow, formal measures were taken to keep staff abreast of all initiatives. These measures were:

- All-staff meetings held at key points of development.
  - Voluntary staff workshops to discuss and evaluate existing structures.
  - Soliciting and reviewing written comments by staff unable to attend the workshops.
  - Circulating a report that summarized staff comments.
  - Two voluntary workshops to discuss potential organizational models
- (Janes, 1997, p. 45).



Also, the executive staff of the Glenbow developed ways to keep the change process moving forward by identifying potential barriers and devising ways to deal with the resistance.

Robert Janes offered these comments regarding his experience as an initiator of change:

Everyone must have a clear understanding of their collective purpose and this purpose needs to be continually revisited and reclarified to test its relevance. The shared purpose must be translated into specific results under complex changing conditions. There should be a flexible arrangement that encourages experimentation. Also, don't ignore the past. Celebrate it. The executive role is to create conditions which enable those who do the work to work more efficiently (Janes, 1997, p. 130).

### **Theory behind the Change Model used at the Buffalo Museum of Science**

The change model adapted by the Buffalo Museum of Science is based primarily on the work of James Collins and Jerry Porras. Collins and Porras authored the book *Built to Last* (1997), which examined companies that have been in existence for, on average, 100 years, and gives common language to the concepts that separate these companies from their less successful competitors. James Collins wrote a follow up text, *Good to Great* (2001), which is actually considered to be a prequel to *Built to Last*. These books are based on research and are not training manuals to create a great company. Methods have been developed based on the research to aid companies in becoming "great". One organization that developed such methods is "Companies Are People, Too", based out of Columbus, Ohio. It is from this company that the

organizational coach hired by the museum is affiliated. When an individual is brought into an institution to implement a change initiative, there are various conditions that must be taken into consideration in order for the new method to stick.

Collins describes in his book, *Good to Great* (2001), the ingredients of a great institution. The first of these concepts is called Level 5 Leadership. The Level 5 leader is considered one who can maintain the paradoxical blend of personal humility and professional will, and whose ambitions are for the success of the company over the success of the individual.

Once leadership is established, one must recognize first “who “ is involved before “what” can be accomplished. Collins used the metaphor of taking a bus on a trip. Typically, one would plan the destination first before figuring out who would be on the bus with you. Collins suggests to get the right people on the bus, the wrong people off of the bus and then, with an effective team in place, together decide the destination.

As a leader, you must confront the brutal facts of your situation. Have unwavering faith that success is in your future, but be able to examine the brutal facts of your current reality. In alignment with this, Collins also states that a company must determine what it can be the absolute best at and stick to that no matter what. He refers to this as the Hedgehog Concept, based on a fable in which a hedgehog used the same tactic over and over to fend off attackers, and was successful, no matter what form of invasion his enemy took.

Collins went on to state that a leader must promote a culture of discipline. This means that employees should be given a framework to structure themselves and their work by, but be allowed freedom within that framework to take risks. He also stated that

the careful selection of new technology is used by great companies to enhance their success, but is never the foundation of it.

The final concept discussed by Collins is the flywheel versus the doom loop. The flywheel represents the great company, willing to exert great effort in the beginning of their existence and build momentum, until breakthrough is inevitable. The doom loop represents the not-so-great company, jumping onto fads and never achieving longstanding success (Collins, 2001).

These concepts are the basis of what made great companies great. There are lessons to be learned from those companies that broke away from being great, to being considered visionary. These institutions are included in the book *Built to Last* by James Collins and Jerry Porras (1997). The vocabulary and theories from this text are prevalent in the model used at the Buffalo Museum of Science.

Collins and Porras defined the visionary company as “a premier institution with a track record of making impact on the world around them. The vision continues long after charismatic leaders are gone” (Collins & Porras, 1997, p.1).

The key to becoming visionary is the belief in one’s core ideology. The core ideology is not a mission or vision statement. These items, though a step toward becoming visionary, are not at the heart of the process. The core ideology fills that role.

The core ideology is a combination of a company’s core values and core purpose. The core values are a small set of essential and enduring qualities that exist within the company regardless of profit or loss. The core purpose is the original fundamental reason for the existence of the company (Collins & Porras, 1997, p.73). Collins and Porras state that there is a yin and yang relationship between the preservation of the core while

stimulating progress. Both concepts must be kept and mind and never sacrificed for the sake of greater profits. The core ideology is formed by asking what values would remain important to a company regardless of industry, if those values became a competitive disadvantage or would be equally valid 100 years from now (Collins & Porras, 1997). Creating a core ideology is never a word-smithing exercise. The example was given of David Packard, of Hewlett and Packard, who drafted the "H&P Way" several times and distributed several versions over time, but the key concepts never changed (Collins & Porras, 1997). The authors suggest that a minimal amount of time be spent on developing the core ideology, and the majority of time spent on bringing the organization into alignment with the core ideology, deciding what, or who, stays and goes.

There is a difference between core values and strategic values. If, say, 10 years from now, would the values still be as meaningful as they are today? If the answer is yes, then that would be a core value. If not, it becomes a strategic value, which will flex over time (Collins & Porras, 1997).

Collins and Porras (1997) offer the following comment about how the core ideology works in a visionary company:

The essence of a visionary company comes in the translation of its core ideology and its own unique drive for progress into the very fabric of the organization...A visionary company creates a total environment that envelopes employees, bombarding them with a set of signals so consistent and mutually reinforcing that its virtually impossible to misunderstand the company's ideology and ambitions.

p. 201

So, we now have an idea what change can be like and how change should be initiated within the complicated realm of museums. We have explored the theories behind the change model to be applied. Now, we'll meet the infuser of change and also learn a few lessons on how a new initiative can soar or sink when implemented.

The parent organization of the change initiative facilitated at the Buffalo Museum of Science is Companies Are People, Too. The firm is based on the theory that companies have personalities of their own and are free functioning beings. Companies Are People, Too distributes a test called, appropriately, Companies Are People Too. This test combines the theories of the Myers Briggs Type Indicator, the principles of psychoanalyst Carl Jung, and insights from William Bridge's book *The Character of Organizations* (Consulting Psychologists Press, 1993). Once a company has completed the test, they are guided through a process based on the above stated theories of Collins and Porras by a consultant (<http://www.companiesarepeopletoo.com/applications.html>).

Companies Are People, Too is one of many management and change initiatives that have come and gone. There are events within an organization that will lead a new training process to turn into a fad. Before implementing a change process, there are important questions that need to be asked.

- Is the program driven and sponsored by key senior leaders?
- Is the program attached to a strong set of corporate objectives, including clear mission, vision and values?
- Are the key lessons transferable into the organization?
- Can the concepts be communicated effectively?
- Can you measure what you are doing?

- Are employees held accountable?

How does one prevent a training or initiative from becoming a fad? After the above questions are answered, the majority of skill for acceptance lies with the trainer. In any given group, 10-15% will always be resistant to change (Caudron, 2002). It is important that the trainer allow for the resistance of change to be voiced, acknowledged and then make efforts to bridge the gaps. It is also important for the trainer to deliver the initiative in the language of the organization. If the employees do not find personal relevance in the process, there is greater likelihood that it will be labeled a fad and discarded (Caudron, 2002).

### **Summary**

In order for a museum to be successful in implementing a change initiative of any magnitude, there must be ample two-way communication with staff. To create change by use of a third party consultant, be aware that the eventual acceptance of the changes will be due to his or her ability to promote communication between him or her and the staff.

## **Section III: The Change Initiative**

### **Introduction**

This section describes in detail the process that the Buffalo Museum of Science went through in creating their Decision Making Framework. The organizational coach began work with the museum in early December 2001. My documentation of the process did not begin until January 8, 2002 with the start of the second workshop. The initial meeting of the museum's director, my project advisor and myself to discuss the possibilities of this project occurred on December 18. I was invited by the director of the museum to attend the second workshop on January 8 and 9 to get a taste for the process. This project was given final approval by the director and my advisor on January 15, 2002.

This story of change begins with my observations of the second workshop on January 8 and 9, 2002. The other workshops occurred on January 31 and February 1, March 14 and 15 and concluded on April 29 and 30. Between workshops, I gathered reactions from the staff, the director and the organizational coach. All of the information described was gathered through a series of observations, interviews and surveys. I also spent two afternoons per week at the museum, becoming familiar with the staff and procedures of the museum.

The language of the framework may cause some confusion for the reader, but the purpose of a process of this magnitude is to create a product that is personally meaningful to the staff of the museum. The process that the staff went through, their relationship with the organizational coach and each other are the true stars of this story.

# **The Story of the Museum and the Change Initiative**

## **Workshop #2**

My experience as a participant observer at the Buffalo Museum of Science began on January 8, 2002 as the second of a series of four workshops was about to commence. The participants of the workshop decided, as I waited outside of the room, that I would be allowed to observe the workshops, as long as I did not sit at the table with the rest of the group. I grabbed a folding chair and took my place near the door of the room, far enough from the group as to not be actively noticed, yet close enough to hear the discussions that would ensue.

A man took his place at the front of the room. This was the organizational coach that would lead this select group of individuals through this process. The group consisted of 23 associates of the museum, including one museum volunteer. The participants, known "opinion makers" of the staff, were selected to represent every department and aspect of the museum, experienced employees and new hires. The directors of the museum as well as the organizational coach selected the participants. They were seated around tables set up in the form of a horseshoe.

The organizational coach initiated conversation with the group by asking what had happened since the last workshop. As stated above, I started working with the museum at the onset of workshop #2. Workshop #1 had occurred in early December. Details regarding workshop #1 will be revealed throughout this report, as I learned of them. Each workshop participant had partnered up with a general staff member to discuss the goings-on and implications of the first workshop. Responsibility for contact, though, was placed with the general staff member. Conversation traveled around the



horseshoe, with each participant commenting on his or her discussion with the general staff member, or indicating that the general staff member did not make the contact. Comments from the general staff included a concern for what would happen during and after this process, how the participants were chosen, and a general wait and see attitude. There were also questions regarding the validity of personality profiles. Profiles?

I started to assume that the group had done the Myers Briggs Type Indicator, or a test similar. Everyone had a four letter code like the MBTI, even the museum as a whole. What I discovered was that the staff of the museum each took a computerized test from an organization called Companies Are People, Too, with whom the organizational coach is affiliated. This test looked at the individual profile, but had an additional portion dedicated to the personality of the museum as a whole. The museum's profile was ESFP, meaning extrovert, sensing, feeling and perception. The museum's complete bio can be found in Appendix A. The conversation regarding partner reactions drew to a close with the realization that the responsibility for contact should not have been put with the general staff member. The process of creating a profile was an interesting one, but application and purpose were still ill defined.

The organizational coach flashed a transparency onto a screen of the model that the group would follow. A copy of this model can be found in Appendix B. He went on to explain the process as follows.

The group would first develop a core ideology. This is a brief statement, roughly 3-5 words, that describes the aspiration of the organization for the next 100+ years. Next, they would identify the core business, which is the vehicle by which the organization will pursue that aspiration. Following that, the group would develop its core values and

strategic values. The core values are those that already exist within the organization, while the strategic values are those that determine how the organization will do what it will in order to achieve its aspiration over the next 3-5 years. For each set of values, signal behaviors were to be identified. Finally, strategic objectives would be developed to determine what should be done to best pursue the aspiration and specific strategies would be developed into an 18-month plan of action, allocating resources and tying the strategic objectives and values together. With that explained, the group began work on developing the core ideology.

The organizational coach explained for the group that when one starts a business, they start it because they care or believe in something, not just for profits. This reason for caring or believing is the core ideology. It differs from the traditional mission statement because the mission statement is for the audience of the business, where the core ideology is what we represent to ourselves. The core ideology is what the organization will base its decisions on. The group was then shown a transparency of sample core ideologies from popular businesses such as Nike, 3M and Disney. Taking about 5 minutes process time, the organizational coach asked each participant to jot down his or her initial conceptions of the core ideology for the museum. He went around the horseshoe, asking each person to state what he or she had written down. They were also given the option to pass if what they had written was already stated. Common themes in this first round of ideology-storming were heavy use of the word "science", the samples were applicable to many institutions, not just museums and that the museum does more than just science. Some questions that arose were what the overriding emotion was and if what was being written was about the museum or the museum's leader.

The group then discussed briefly the history of the museum and why the founders turned their private collections into the Buffalo Museum of Science. The organizational coach paced up and down the length of the horseshoe as the group continued their conversation. The group asked if they could see examples of core ideologies from other museums. The request was denied, with the reasoning that if examples were given, the group would “shop” for their ideology from what was created by someone else, instead of creating their own. Another round of ideologies soon followed, this time with more people opting to pass.

The history of the museum was brought into question once more and the coach commenced pacing the length of the horseshoe, not saying a word. One more round of potential core ideologies was shared before the day came to a close. The group was given a homework assignment to come in with their best take on a core ideology and core business using this formula: We aspire to (core ideology) by (core business).

Day 2 of this workshop began with my receiving documents from the first workshop regarding the personality profiles, the core ideology and business of popular companies and other museums around the country. I was finally up to speed with the rest of the group. The coach assumed his position once more at the front of the room. The “homework assignments” were shared and the group was asked to identify the common threads. These involved a focus on learning and environment, similarity in verb choice and a theme of discovery. There was lengthy conversation on the part of the curators in the room about the importance of collections and research. After a few hours had passed, the coach gave the instruction that we were looking for why the organization existed, not how it existed or what it did. One more round of ideologies ensued. As the group

entered its fifth cumulative workshop hour focusing on core ideology, the coach pressured the group to "find the why". As conversations would heat up, he would intervene and ask why. Reviewing the core ideology/core business sets that had been stated that morning, the group selected the elements of each that were most appealing. The group quickly narrowed their choices down to 2 possible core ideology/core business sets. Through a bit of massaging, the core ideology and business were chosen. The final product: To create a better world by helping all people explore and understand it. A collective sigh of relief filled the room.

After a well deserved lunch break, work began on identifying the core values of the Buffalo Museum of Science. The core values represented the "how". All actions and behaviors are a reflection of the values of an institution. There has to be strong pervasive evidence in order for a value to be considered core. Each participant was asked to identify a core value. One by one the group responded as the organizational coach collected the potential core values onto flipchart. The list was checked for any redundant comments. Those that were considered redundant were crossed out. Each participant was then given three red dots. They were instructed to select those values that they felt were truly pervasive throughout the museum. Questions flew from the participants regarding how many different values they had to pick. The coach gave no parameters regarding use of the dots.

The core values that received the most dots were science, sharing knowledge and authenticity. The group then wrote down what they thought was a signal behavior for each core value. The coach collected this information by asking each participant and writing down his or her response on flipchart. The dots were used once again to narrow

down the behaviors. At the completion of the dot exercise, a participant commented on how they observed that who ever put their dots on the flipchart first, everyone else seemed to follow suit. He continued by asking if there was any way to prevent that from occurring. The coach paced the length of the horseshoe and did not respond.

When looking over the final results of the core values, the group decided that science and authenticity were not, in fact, core, but a representation of what the museum wanted to be. The group appeared to have a difficult time accepting the fact that these items were not core, but eventually realized the truth in the argument. These values were set aside for revision during the selection of strategic values.

This workshop concluded with the completion of the core ideology, core business and core value. The framework can be found in Appendix C.

It was now the responsibility of the workshop participants to share this knowledge with the rest of the staff. A few comments on this process:

At the first workshop, a group of 8 of the workshop participants volunteered to be part of the Steering Committee, in charge of the dissemination of knowledge to the rest of the staff. They decided how and when the information would be shared. After the first workshop, information was shared through a partnering of a workshop participant and a general staff member. At the start of the second workshop, it was decided that an alternative means would be needed to more effectively disseminate information to staff not present at the workshops. The Steering Committee set up meetings, referred to as Widening the Dialogue sessions, to be the vehicle by which information would be shared. The Steering Committee divided into pairs, and each pair designed their own session independent of the others. Approximately 4 meetings would occur at different times and

locations to give as many staff as possible the opportunity to learn about the content of the workshops.

After the second workshop came to a close, I distributed a packet to all museum employees via their office mailbox. This packet contained a letter explaining my purpose at the museum, a survey, a consent form and a letter size envelope for the consent form. A copy of the packet materials can be found in Appendix D. The survey asked the staff about their reactions to the fact that the workshops were taking place, the content of workshop #1 and workshop #2. They were also asked to rate their confidence level of this initiative having a positive impact on the future of the museum. A different survey was created for the workshop participants versus the general museum staff, using the same questions but changing the language to each group's point of reference. A box was placed at the security desk of the museum where the surveys were to be dropped off.

Approximately 64 surveys were distributed. Twenty-eight were returned, 17 from workshop participants and 11 from general staff members. The following themes emerged from the surveys. The themes are divided into two groups, those of the workshop participants and those of the general museum staff. Examples of responses are also included.

#### Workshop Participants:

**There were concerns whether the amount of time invested in attending the workshops would yield a useful result.**

The participants would be spending a total of 11 hours per workshop away from their day-to-day responsibilities. Would the results of this time investment really be worth the results?

#### Some sample statements:

- Will the time invested yield a useful result?
- This process would be too time consuming.

- Would be a waste of time.

**There was a sense of positive anticipation regarding the outcome of the workshops.**

The participants are looking forward to this process of identifying who the museum is and what direction it is headed in.

Some sample statements:

- Hopeful something positive can be accomplished
- Looking forward to being a part of a process that will answer who we are as an institution
- Open, eager, optimistic and curious

**There was a feeling of excitement to be taking part in the workshops.**

There existed a high level of enthusiasm amongst those who would be participating in the workshops. This enthusiasm can find its roots in one's excitement that they were chosen to participate, or that they would have an active role in this process of self-discovery for the museum.

Some sample statements:

- Grateful I was chosen
- Excited to be part of such a process
- Flattered to be asked

**There was a feeling of hesitancy regarding selection and participation in the workshops.**

Some reactions took a more cautious approach to the workshops. Concerns regarding ulterior motives and the ultimate results of the workshops were prevalent.

Some sample statements:

- Uncomfortable, hesitant, concerned
- Will anything happen?
- Why me?

**The personality profiles proved to be an enlightening and beneficial activity.**

The staff took away from this activity a better understanding of who they were and an ability to appreciate the personality styles of others. There was no specific mentioning of the museum's personality profile.

Some sample statements:

- Great appreciation and respect for differences
- Surprised at my own results
- Very interesting
- It was really neat to know more about ourselves
- Fun and informative
- Interesting, enlightening and helpful

**There was concern about the reliability, delivery and application of this process.**  
The participants were trying to figure out how this activity fit in with setting goals and objectives. Also, the level of acceptance, from staff up through the board, was questioned.

Some sample statements:

- Is this an accepted or accurate method?
- Questioned the process
- Will the board really buy into this?
- Programmed and impersonal

**The participants were feeling dissatisfied with the delivery of the process and were concerned regarding acceptance of the results.**

Some sample statements:

- Rushed to consensus
- Inadequate time for and challenging to examine our historical roots
- Lost in the concepts and confused
- Will this be accepted and implemented?

**The participants realize the benefits of the workshops and experienced feelings of progress.**

The group started to see the foundation of the museum come to life and they had a clearer picture of the future of the museum.

Some sample statements:

- Impressed with the core ideology, etc
- More satisfied and hopeful there would be results and action
- Could see who we were and where we were going
- Felt like we were starting to move ahead

**There were concerns regarding how the core ideology was formulated.**

There was a great deal of time and energy spent by the workshop participants creating the core ideology. There were concerns regarding the usefulness of time spent, as well as how on target the core ideology actually was.

Some sample statements:

- Took too long to set the core ideology
- Don't like ending sentences with "it"
- Don't think we nailed down what the core ideology is, just what we'd like it to be

**The participants saw that this was hard work.**

Some sample statements:

- I was exhausted
- Tired
- This was a bit rough
- Drained



Feelings that this process would have a positive impact on the future of the museum:

On a scale of 1-10, 1 meaning no impact and 10 meaning very positive impact, the mean was 6.65, the median rating was 7 and the mode was 8/9.

General Museum Staff:

**There were many perspectives of concern regarding the impact that results of the workshops would have on the future of the museum.**

The level of concern ranged from job security to the ability of the workshops to get the museum where it wanted to be in the future.

Some sample statements:

- Skepticism
- Would my position be maintained or would I be reassigned
- Hope the money we're spending is worth the results

**There was anticipation for change within the organization.**

The staff could see the need for the workshops and were open to the results that the workshops would yield.

Some sample statements:

- Excited to be part of an organization acting in an innovative manner
- Excited, about time, much needed
- This was long overdue

**There was a sense of cynicism in regard to the fact that the workshops would be taking place.**

These reactions could be due to a "workshop weary" crowd, or the fact that if they were not going to be taking part, the level of personal importance decreased.

Some sample statements:

- Not a big reaction
- Didn't care
- Been there done that
- Waste of time

**There was a level of interest and accuracy regarding individual personalities as well as the personality of the museum.**

The comments from the general staff were very similar to those of the workshop participants. Both groups found the workshop to be interesting and informative.

Some sample statements:

- Interesting to learn about myself
- Results were interesting
- Museum profile made sense

**There was a lack of understanding regarding the purpose of completing a personality profile for oneself and for the museum.**

Once again, as was stated by the workshop participants, there was a level of skepticism regarding the accuracy and benefit of the personality profiles. There was an underlying theme of wondering where this activity would take the staff and how it would fit with the rest of the process.

Some sample statements:

- Not sure about the benefits
- Is the benefit worth the time and money?
- Skeptical regarding the accuracy
- How close to the truth are the profiles?
- Waste of time
- Been there done that
- This has little bearing on what we do day to day

**The information shared from the first workshop was accepted and made sense to the rest of the staff.**

Some sample statements:

- Interesting to see how other's thinking is much like my own
- I am in agreement with them
- Agree with the results
- Made sense

**The general staff were discouraged and dissatisfied with the results of the second workshop.**

There was a lack of clarity for the general staff as to why the workshop yielded the results it did. The accuracy of these results was also brought into question.

Some sample statements:

- Ideology is somewhat vague
- Discouraged by lack of core values
- Angered that science didn't appear in any of these ideas
- Core business reflected what we should be doing, not what we are doing

In regard to this process having a positive impact on the future of the museum, 1 meaning no impact and 10 meaning very positive impact, the general staff had an average rating of 4.18, a median score of 3 and a mode of 0/3/5/7.

Detailed responses can be found in Appendix E.

There is a lot of similarity in responses, both positive and negative, regarding reactions to the workshops taking place. Reactions to the first workshop also yielded similar results.

The staff did mention the disappointment that science was not considered a core value, and that there was only one core value. The workshop participants had to decipher between what they did versus how they did it. Science was what they did. Would the museum always be doing science? If the group could not say yes, then science was not a core value. The group could not say yes, thus, science was not a core value. The difficulty in acceptance came with the fact that the word "science" is in the name of the institution.

The staff's education was dependent upon the Widening the Dialogue sessions, and there was no control over how the information was delivered. There was no way to know how much information or explanation went on during those sessions. We do not know if the instructors explained that they were trying to define the museum's process, that is, how they did things, and not the museum's products, being the things they did.

The difference between the average scores for confidence level could be due to the newness of the process or the fact that the general staff were taught in one hour what the workshop participants went through in eleven hours. The workshop participants have more vested in the process, thus are more confident in it's success."

Interviews were conducted with the director of the museum and the organizational coach. The transcripts of those interviews can be found in Appendix F. Some highlights from the interview with the director of the museum were that a reason this process was occurring was due in part to the fact that the staff had multiple visions of what a museum

should be. This process was to clarify the museum's core. Also, the director wanted conversations about decision making to take place from the same point of reference, thus, the creation of a decision making framework. The director of the museum had gone through this same process in the past with this same organizational coach. An interesting comment made by the director was that he was intentionally giving more "air time" to the minority groups in the room, specifically, the curators. He was well aware that some staff would not be thrilled by his decision. He made this choice due to the curators being underrepresented. The director's level of confidence for these workshops having a positive impact on the future of the museum was 8.

The organizational coach revealed that the key to this particular change model was that in order to change who you are, you had to understand who you are. That is why this process starts with the personality profile. The end result of this process has varying levels of impact, depending on the institution. Some use it to completely restructure the organization, while others find it to be a useful tool to make decisions. Also, he had stated that the museum would decide how they would keep the momentum going, due to the fact that they know themselves the best. Effectiveness would be lost if the coach would tell the employees what to do with what they had created.

### **Workshop #3**

The third workshop began in the early afternoon of January 31. I took my position once more in the back of the room, propping my legal pad on my lap as I mapped out a strategic location on the floor for my cup of coffee. The organization coach took his place at the mouth of the horseshoe, calling the participants to take their

seats. The conversation began same as before, with a review of reactions made by the general museum staff in regard to the Widening the Dialogue sessions. The comments started with a concern that we weren't reaching everyone. It came to light that the staff did not realize that participation in the Widening the Dialogue sessions was mandatory, and that some e-mail problems had occurred. To deal with these results, the participants decided that they would help those who wanted to be helped.

Other comments in regard to staff reactions were that some people got a sense of what was happening and that they understood the process of creating the framework, but not the content. The session was small, informal and casual, all compliments for the hosts of the session. Other reactions included that everyone was engaged, good conversations occurred and the opportunity was given to ask questions. Please realize that these comments were the result of four different Widening the Dialogue sessions, not all the same session. Other comments included if the staff could trust the workshop participants to do this right, and if enough trust existed amongst the workshop participants to do this right.

Conversation began about the museum's lone core value and how this was a concern for general staff. The organizational coach reiterated that in order for something to be considered a core value, it has to be pervasive throughout the organization, it had to be there all of the time. He also said that it's not unusual to have just one core value, that there was even the possibility of having none.

The topic of the core ideology came into play. About four to five individuals began debating about the wording of the core ideology. "Create a Better World" was seen as being too broad; everything could lead back to create a better world. The

organizational coach responded with the comment that shoes that are too loose can still feel okay. This small group continued to debate, arguing that there was something missing between the core ideology and business. At this point, someone else in the room asked if the core ideology could be revisited and revised, if the group was allowed to take steps backwards in the process. The organizational coach shook his head no.

The debate continued, now in regard to how on target they were with the core business and value. The original four to five members of the conversation were still the only ones involved. The topic shifted again to “Create a better world” being too broad but close to the target. The organizational coach stepped in at this point, stating that it was typical to get connected with “what” we do and not “why” we do it. He went on to say that application was the truest test of whether or not it (the core ideology) was right.

An hour had past since we gathered. It was now time to focus on that day’s activities. Today, the workshop participants would be developing strategic values and their signal behaviors. These were defined as those values that if the signal behaviors were more pervasive, the museum would be closer to its aspiration of creating a better world. The organizational coach asked everyone to write down what they taught a strategic value of the museum would be. After a few minutes had passed, beginning at one end of the horseshoe, he asked for the responses and wrote them on a flipchart. Once everyone had a chance to respond, the list was checked for any redundancies. The organizational coach pulled out the now famous bag of red dots and once again, distributed three red dots to each participant. The group migrated to the flipchart, placing their dots next the values that they liked best. When the group took their seats, the top three responses were “customer service”, “interest in science” and “dialogue not

monologue". This same process was used in developing the signal behaviors for each strategic value. Write it down, share it, eliminate redundancies and dot the best choices. This process took the remainder of the day. See a copy of the framework in Appendix E for the new additions to the framework.

Day number 2 of the workshop began with a weather-weary group, having faced a severe wind and ice storm the night before. The start of the workshop was delayed by an hour to allow for everyone to make his or her way to the museum. Once the group was in full force, the coach took his place at the mouth of the horseshoe. He initiated conversation by asking what had happened since yesterday, excluding the ice storm. The comments started with a wish that "environmental concerns" was a strategic value. Another participant wanted the concept of authenticity to be a part of the strategic values. Authenticity was on the list of choices for strategic values, but did not receive enough dots to move on to the next round. Now, recall that authenticity was originally selected as a core value, was rejected, and pushed to strategic values. Now it faced rejection from the list of strategic values as well.

Other comments included where the collections would fall in the strategic values. Would the collections even have meaning or did the museum just have a lot of "stuff"? A select group of participants wanted to take steps backwards and make addendums to the strategic values list. The group questioned if the process could be trusted to reveal what needed to be included in this list. Of course, needs are determined by the group, and the group was extremely diverse. The collections were not important to everyone, for example, but very important to the curators that were in the room.

The organizational coach intervened, stating that the purpose of this was to explore for understanding not for rightness. The group immediately continued with the conversation regarding authenticity and the collections. An individual spoke up, outside of the group debating, stating that the personality profile of the museum indicated that, as a group, they did not have a preference for closure, so, was there anyway we could bring this to closure, since the group would not be allowed to take steps backward in the process anyways. The organizational coach did not respond to the comment.

Tensions began to grow as the discussion about the collections continued. The organizational coach kept his continual pace, walking up and down the length of the horseshoe. The morning concluded with "authenticity" and "environmentally responsible" being added to the list of strategic values.

It was at this time an interesting event occurred. While in the restroom, I struck up conversation with one of the participants. She went on to tell me that part of the staff, namely those not involved with collections or directing the museum, were feeling left out of the process. The organizational coach was not giving them an opportunity to talk, so a majority of staff were not as willing to participate at this point as they were in the previous workshop. It appeared to her that the organizational coach was placing more focus on the curators and "smarter" staff. The process was losing momentum. She also said that some participants didn't want to come to the workshops anymore because of the obvious preference.

The group reconvened to discuss the strategic objectives for the museum. These were 3-5 "whats" that the museum would do over the next 3-5 years. The organizational coach broke the group into three smaller groups for this discussion. Each group was to



write their top choices for possible strategic objectives on a piece of flipchart paper and report back to the group.

After an hour passed, the group began gathering once more around the horseshoe. While the other groups finished, the organizational coach started a conversation around ways to disseminate knowledge to the general staff. Some suggestions were to keep the small group format, give the materials to be discussed to the groups a head of time and to set up new presentation partners. Other comments included the Widening the Dialogue sessions being made mandatory, finding a way to keep people actively engaged and to extend the session time from one hour to two. By this time, all groups were back at the horseshoe, ready to move forward.

Each group had elected a representative spokesperson to share the data. After all of the groups had a chance to speak, the organizational coach called everyone to the front of the room to circle around the flipcharts. The common themes of the suggested strategic objectives were to create some kind of plan, financial strength, reworking experiences, community connections and being who we are and where we are. Discussion then began regarding the exact wording of the strategic objectives.

After 20 minutes had passed, the majority of participants had drifted back to their seats. Some had started other conversations, some had even put their heads down. The group remaining at the front of the room were the four-five individuals that were known for dominating group conversations. The organizational coach would write down suggestions made by the director, but rarely the suggestions made by anyone else. Consensus was not checked before moving from the completion of one strategic objective to the creation of the next, nor was the engagement of the group checked. The

wordsmithing of the strategic objectives continued for another 15 minutes or so, before the final list was created.

Those still standing returned to their seats. The organizational coach asked the group for their reactions to this particular workshop. The comments included: a greater appreciation for consensus, this will help me to do my job more effectively, taught me patience and the us, them and it are coming together. To see the additions to the framework, turn to Appendix C.

Between workshops 3 and 4, I was allowed the opportunity to peak behind the curtain. It was during this time that I observed my first Widening the Dialogue session and received detailed descriptions about how the presenters of the sessions were chosen. I also interviewed 10 staff members consisting of 5 workshop participants and 5 general staff. First on the order of events was the planning of the Widening the Dialogue sessions.

Recall the Steering Committee described during workshop #2. These individuals set forth to once again lead the Widening the Dialogue sessions. The Steering Committee members decided that this committee shouldn't be doing all of the "heavy lifting". It was suggested that 8 other workshop participants be responsible for the dissemination of knowledge. So, 4 teams of 2 were selected by the Steering Committee from the list of workshop participants and sent an e-mail message about their upcoming task. The procedures for hosting a Widening a Dialogue session were given, including the length of the workshop, how to reserve space and recruit participants and even a reminder to serve a snack. Keep in mind, this e-mail was the only means that these 8 individuals were

informed that they were chosen to host a Widening the Dialogue session. No one volunteered for the task.

Shortly after this message was sent, the Steering Committee received a response from one of the chosen workshop participants, stating that he felt that he was not the right person for the job. He also inquired how the teams were selected. A Steering Committee member responded that the teams were chosen with departmental overlap in mind so it would be easy for the presenters to plan their sessions. The selection of new people to present was justified by the fact that there would be more representation by workshop participants to the staff explaining the material from the workshops. The final comment of the message was that everyone was the right person for the job. Eventually, the chosen workshop participant and his partner backed away from leading a Widening the Dialogue session, stating they were both too busy.

The Widening the Dialogue session I observed was held in the old boardroom, appropriately named due to its early twentieth century décor. Approximately 15 people filled in around a large dark wood conference table. Any latecomers sat around a card table that was home to the beverages and snacks.

As the presenters waited for everyone to arrive, the group began sharing ghost stories of the museum. One employee would always ask the spirit of one of the previous directors to ask her find things, having them appear minutes later in places she had already checked. Another employee told the tale of a Girl Scout troop who spent the night at the museum. The next morning, a few of the girls asked who the men were talking outside of the room during the night. Not a single man was in the museum after

lockdown the evening before. Stories like this gave personality to the large granite building and demonstrated the camaraderie amongst the group.

At the start of the session, a handout of the framework was distributed. The presenters went over all of the steps of the framework, answering questions as they went. The purpose of identifying behaviors for the strategic values was explained as by doing these things, it will, for example, increase customer service, thus creating a better world. The session was lecture formatted, with the presenters doing almost all of the talking while the group looked over the framework. The staff took note of how broad the strategic values and objectives were. They started asking questions about where specific elements of the museum will fit in, such as the collections. The presenters demonstrated for the staff exactly how everything would fit. The staff were reassured that everything was in there, it just required a bit of digging and massaging to find it all.

The presenters were questioned by a staff member in regard to the great amount of time spent in the workshops, 11 hours per two days, and the small amount of work that was coming out of it. The presenters went into detail about the length of the workshops and how much work it was to create each of the levels of the framework. The amount of wordsmithing involved was also mentioned.

Another staff member asked how the presenters got to lead a Widening the Dialogue session. The presenters looked at one another and smirked. A workshop participant who would be conducting a Widening the Dialogue session later that week was in attendance, taking notes to be used in planning her session. She answered for the presenters, telling how they were drafted to run these sessions and not asked. She told the group her reason for being there. She also stated the reason why she didn't originally

volunteer to be part of the Steering Committee was because she didn't think she could accurately teach a group about 11 hours worth of work in just 1 hours time. What points were more important than others? What exactly should I be telling the staff about this framework? How do I answer the staff's questions? All of these were questions raised by this workshop participant. The presenters agreed with her. The presenters asked if the staff had any more questions regarding the framework. There were none. This concluded the Widening the Dialogue session.

I conducted interviews with the staff, randomly choosing 10 staff members, 5 of which were workshop participants and 5 that were general staff. I asked each person what they liked so far about this process, what they didn't like or were concerned about, and what they thought could be done about it. The questions were put into each person's frame of reference, the workshops for the workshop participants and the Widening the Dialogue sessions for the general staff. The following are the themes and some sample statements from the interviews.

### **Workshop Participants:**

**All levels of the museum and new and experienced employees had similar feelings regarding who the museum is and where it is going.**

#### **Some sample statements:**

- The people taking part in the workshops represent all levels and departments of the museum
- I liked that when we broke into groups and came back, seeing that we were pretty much on the same page.
- New employees are working with old employees

**The museum was looked at as one unit, not several different departments.**

#### **Some sample statements:**

- I like that we are looking at the museum holistically
- There is representation from all over the museum

**The materials that had been developed, specifically the core ideology and the core and strategic values, were too vague to have meaning for the museum.**

Some sample statements:

- The core ideology still isn't right
- Values are too vague
- The core ideology is too broad

**There was skepticism regarding how all of the information developed during the workshops tied together and how it was going to be used.**

Some sample statements:

- Workshop #1 was too separate from the rest.
- I'm a bit skeptical of how this is going to work.
- How is this going to fit in with our jobs?

**It would have been nice if there were a way to separate departments from sitting together during the workshops.**

Some sample statements:

- I would like for us to sit in different seats for the workshops

**There needed to be a better understanding of how the results of these workshops was going to affect day-to-day job performance and responsibilities.**

Some sample statements:

- Come up with a plan on how this is going to affect the day-to-day so that everyone can understand what is going on.
- We need to know how this is going to fit in with our jobs, as well as the rest of the staff.

**The organizational coach did not check for consensus from the group before moving on to another activity, leading to disengagement in the process.**

Some sample statements:

- The organizational coach would write down the statements of the higher-ranking employees and not check with the rest of the group for consensus.
- Key people in the museum have more of a voice than the rest of us.

**The organizational coach did not respond to questions regarding his choice of methods and the reliability of those methods. Examples: the use of dots for voting.**

Some sample statements:

- I would ask the coach questions about the steps or activities we were doing and I wouldn't get a response
- Who ever put his or her dots on a statement first, everyone else would follow suit. There had to have been a better way of coming to consensus.

**It would have been nice if there was a way to identify the key points, possibly with the organizational coach's assistance, from the workshops in order to have known what to focus on while conducting the Widening the Dialogue sessions.**

Some sample statements:

- It is hard to try and teach eleven hours worth of work in just one. I don't know what is most important to tell the group.

**There needed to be an alternative means of recruitment to increase the number of available presenters.**

Some sample statements:

- I felt like I was railroaded into doing a presentation. I didn't mind doing it, but I would rather have been asked then told I had to.

### **The General Staff:**

**The Widening the Dialogue sessions were bringing people together from all levels and departments of the museum, creating an opportunity for old and new employees to meet.**

Some sample statements:

- I'm meeting new people
- I like that people are coming together from all levels and areas of the museum

**The material developed thus far in the workshops was understandable and adaptable to everyday tasks.**

Some sample statements:

- I can relate to everything on the pages and adapt it to what I am doing
- I like that we're combining the old with the new

**Breaking the staff into small groups and presenting the materials was preferred to presenting the material in one large staff meeting.**

Some sample statements:

- I like that we're broken into small groups
- Not enough space in the room where I attended. I felt disjointed.

**It appeared that the workshop participants were growing tired of attending the workshops.**

Some sample statements:

- It seems like the workshop participants are getting tired of doing this.
- Too lengthy- it seemed like it took too long to reach a simple answer

**It was difficult to determine, without a job description, how this was going to relate to what is happening at the museum.**

Some sample statements:

- I don't know who's doing what. What about job descriptions about how this is going to relate?
- Make a plan of action and start delegating

**It was difficult to determine where specific items such as collections and research fell into the material created thus far.**

Some sample statements:

- I can't tell where collections fall into the plan
- Where is research listed as a focus?

**The sessions would have been more effective if other presentation methods besides lecture and Q and A were used, such as role-play, visual aides or using space besides a board or conference room.**

Some sample statements:

- The information is losing value in the delivery
- Make the sessions more interactive
- More visual aides, even putting the information on flipchart paper
- Help us to experience the workshops more (role play)

**Due to some people being intimidated or shy, it would have been nice if there were a non-intrusive way to encourage everyone to ask questions during the Widening the Dialogue sessions.**

Some sample statements:

- People are sometimes afraid to ask questions
- Find a non-intrusive way to get people to ask questions

The majority of employees interviewed were pleased with the fact that this initiative was bringing people together from all levels and departments of the museum.

There was an opportunity for people to gather that would normally not exist.

There were concerns regarding enthusiasm in taking part in the workshops. The general staff were noticing that some of the workshop participants were growing tired of the process. This was coming through during the Widening the Dialogue sessions. The workshop participants did express their dissatisfaction with the process. There were concerns regarding the responsiveness of the organizational coach, the validity of his



methods and the application of this process in the workplace. The workshop participants also expressed the need for assistance in planning the Widening the Dialogue sessions to increase their effectiveness. Detailed responses can be found in Appendix G.

During this interview process, I received a great deal of information in regard to what happened during workshop #1. During workshop #1, the personality profiles of the staff and of the museum were debriefed. At the time this workshop took place, one month had passed since 25% of the museum's workforce had been laid off. When the staff had the option to take the personality profile test (this was open to all staff, not just workshop participants), they were told that their scores would not be revealed and everything would be kept confidential. At the workshop, however, the staff were asked to discuss their profiles with one another. At one point, the organizational coach had the staff line up according to how much preference there was for each category, for example, the staff lined up from high preference for introvert to high preference for extrovert. The group was still sensitive from the lay offs, and some thought that the reason for defining one's personality would be selection for the next round of lay offs. This caused a great deal of anxiety for some of the participants, and a lack of trust for the organizational coach and his process.

There was mention during these interviews how the coach used corporate examples and not not-for-profit examples. The packet of information that I had received from the first workshop contained information from both sectors. Upon showing this to one of the workshop participants I interviewed, he stated that he had never seen those documents, and what help they would have been in developing the core ideology, core business and values. Now I was up to speed with workshop #1.

#### **Workshop #4**

It was officially decided that the organizational coach would return for a fifth workshop to be held at the end of April to check on the progress of integrating the framework into the fabric of the museum. It was now March 13<sup>th</sup>, 6 weeks since the last workshop had come to a close. This workshop would focus on developing the strategies, the final piece of the decision-making framework. The organizational coach defined the strategies as those pieces that were most important to complete over the next 12-18 months. Before work on the strategies began, updates were given in regard to what had happened since the last workshop. Someone that helped lead a Widening the Dialogue session stated that a lot of new people were in attendance.

Discussion began around how to apply the strategic objectives. The topic of environmental responsibility was brought up, specifically in regards to how the museum should take a stand on environmental issues in the community. Another member stated that in order for this framework to be accepted and used, it had to be in front of the staff at all times. Posters of it should be hung on the walls or at least handouts should be distributed to everyone. The organizational coach then stepped in, giving the staff a homework assignment. He asked that they all revisit the museum's personality profile and create a mechanism to support and sustain this work. This was the first mention of the profile since the second workshop.

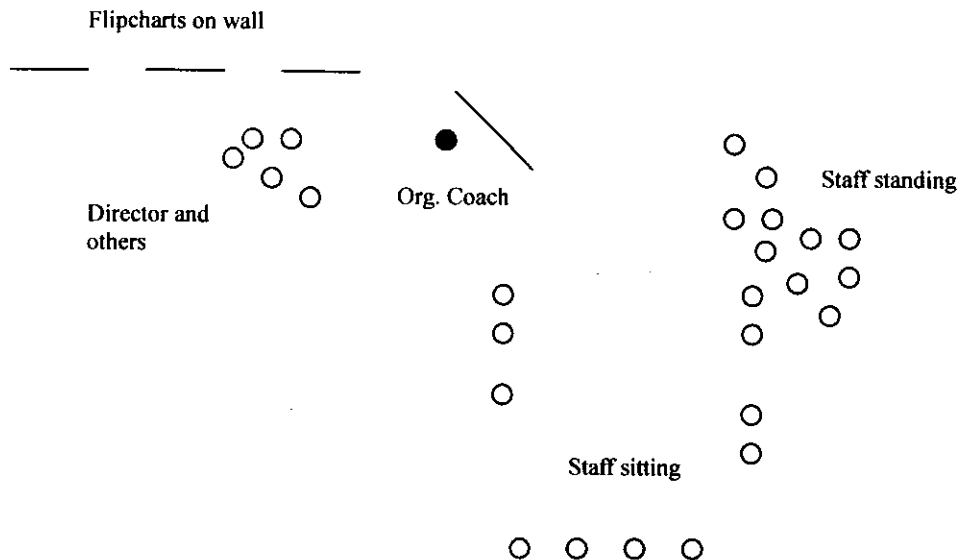
It was now time to delve into the development of the strategies. The strategies were considered, by the organizational coach, to be the stepping stones to get to the strategic objectives and values. The strategies were a list of how the museum could achieve its strategic objectives and values. The group was divided into three smaller

groups and told to start developing what they saw as important strategies. The organizational coach would come around to each group with flip chart paper for them to write their final results on. Each found space to work and commenced brainstorming.

I followed one group and observed them while they diverged. The majority of the strategies that were developed were very broad and general, focusing more so on what to do instead of how to go about it. For example, it was suggested to use information as our ammunition. What information? And how are we going to use it? After about 20 minutes, the group started creating suggestions geared more towards the how, such as using recycled materials in the office and creating presentations that could travel to schools. The group was starting to slow down once 45 minutes had passed. About 10 minutes after that, the organizational coach handed out flipchart paper and markers. The groups chose a representative and reported the information back.

Once all of the flipcharts were hung in the front of the room, the organizational coach called all of the participants to their feet to circle around. The group of four to five individuals, once famous for dominating conversation, stood in the front of the group. Once conversation began on how to narrow the three lists to one, people began drifting to one side of the room. The layout of the room at this point was actually quite interesting. The flipchart easel that the organizational coach was writing on was standing at a diagonal. In front of the flip chart were the director and the group of four-five individuals. Behind the flipchart was everyone else, either standing or sitting, involved in conversation.

The following is a visual representation of the room:



Consensus was not checked as the strategies found their way onto the flipchart. The final strategies were attached to the end of the framework. The final framework can be found in Appendix C.

The next day began with an executive board of directors meeting. The organizational coach was there, along with the director of the museum and 8 of the workshop participants. The purpose of this meeting was to explain to the board why the workshops were occurring and to hear from the key players, namely the organizational coach and participants, in regard to how the process was going. The organizational coach spoke first, explaining the process and why it was beneficial. The board was then divided into 4 small groups, 2 workshop participants going with each group. I followed one of the groups and observed the interactions.

The workshop participants brought some flipchart papers with them from a previous workshop. The flipcharts were littered with red dots. The board members asked

what all of the red dots were for. One of the workshop participants explained that the dots were for voting. He went on to say that he and a few of his colleagues noticed that whoever got up to the flipchart first and put their dots next to a suggestion, everyone else followed suit. So, they decided what suggestions they wanted to appear in the final framework. Each would take a suggestion and put all of their dots next to it. Like clockwork, the rest of the group would put their dots next to the suggestions that already had dots. He went on to explain that the suggestions that had the most dots were the only ones that were accepted. The group was not allowed to take steps backwards, so there was a need to get it right the first time. He and the other workshop participant also discussed that not enough dialogue was taking place in the workshops, with 23 participants in the room, all activities were driven by time. When asked about satisfaction with the process, the workshop participants collectively stated that they were getting through it. The workshop participant's final comment on the subject was "I'm satisfied because I swerved the vote".

The board had a few questions in closing. Was the rest of the staff caught up? The response was yes, everyone was aware of everything except for the previous days events. If this works, what will be different one year from now? The response was that we will be choosing projects in a more focused way. These things are really broad. A workshop participant gave an example of how she was able to apply the framework to help her solve a problem. The board meeting ended due to time expiring. The board members gathered their trench coats, briefcases and day-planners and exited the room. The remainder of the workshop participants shuffled through the doors, ready to begin the final workshop.

As of yesterday, the framework was complete. Today's work would focus on testing the framework. The workshop began with a review of the homework, which was ways to support and sustain this work based on the personality of the museum. The themes of the responses were that the framework had to be "in their faces" at all times, whether in the form of posters or frequent meetings regarding its use. The conversation traveled around the horseshoe. Other participants requested staff training in regard to soft skill enhancement and that timelines be established for the strategies and other plans that existed.

Once the last participant responded, it was time to test the framework. The organizational coach described the process as "pouring in the suggestion at the top of the process and see how it shakes down". The framework would serve as the set of criteria, based on the values of the museum, to make informed decisions by. Before the group got started, a participant questioned the broadness of the strategies. He was told by the organizational coach that one must plan a little then do a little. It was important to try things.

The suggestion that would be run through the framework was the possibility of the museum hosting an AIDS awareness event. After all of the data surrounding the event was shared, the group began to run the event through the framework. Would hosting this event create a better world by helping all people explore and understand it? Yes, it would. The group jumped away from the framework at this point, discussing where in the museum to set up the event and other logistical details. After about 15 minutes of discussion, the group caught themselves deviating from the framework. The event continued its way through the framework, successfully fitting through the core

value of sharing knowledge, but got caught in the strategic values and objectives. It was decided that more data was needed to determine the impact an event of this subject would have on the community.

The workshop ended with a discussion of ways to integrate the framework into everyday life at the museum. The themes of the discussion were to increase open dialogue and to listen with an open mind. Others suggested that the framework would be used in daily planning and in the selection of and implementation of projects. The workshop ended with the announcement that the organizational coach would be returning at the end of April to check on progress thus far with the use and integration of the framework.

With the framework now complete and given its first road test, the staff needed to be updated on the progress. For this round of Widening the Dialogue sessions, I was involved in the planning of the sessions, as well as given the opportunity to observe two of the four sessions that would be run. I conducted another interview with the director of the museum and the organizational coach, as well as 10 more interviews with staff members, once again, 5 having taken part in the workshops and 5 being general staff. Within this group, 5 of the individuals were a part of the first round of interviews and 5 had not been interviewed before.

My role in planning the Widening the Dialogue sessions was to share my data in regard to staff reactions from the previous set of Widening the Dialogue sessions and to make recommendations to the Steering Committee. The group began by discussing the framework, trying to figure out how the strategies fit in with the rest of the framework. There appeared to be a bit of a speed bump in the flow from the strategic objectives to the

strategies. It was difficult to compare a suggestion to the strategies due to the wording of the strategies and the fact that they were meant to be action steps. The strategies were too specific to be used as a part of the framework.

It was then my turn to discuss my data. I presented all of the themes from the general staff interviews. I also made recommendations on how to make this set of Widening the Dialogue session more effective. I suggested that all of the presenters plan their session together, thus the same information would be presented at all of the sessions and the presenters could pool all of their perspectives and interpretations of the framework together. I suggested that the presentation methods should vary, using flipchart paper or role-play instead of straight lecture. I also suggested that the presenters could bring a small jar or box with them for staff to put questions in during the session. At the end of the session, the presenter could answer all of the questions, preventing any anxieties from staff members to raise their hand during a session.

One of the most important recommendations I made, in my opinion, was to ask other workshop participants if they wanted to assist in presenting, not telling them that they had to. If someone was forced to present a session, the results could have serious impact on the material being presented and on how it was being presented to the staff. I was immediately told that if the staff were asked, they would have all said no. So, there was no other way then to tell them they had to. It was at this point the Steering Committee shared with me their story on how they came to existence. When all 8 of them volunteered during the first workshop, the group was under the impression that they would be leading the sessions once, then another group would take over. They did not think that this committee would be in charge of presenting the material for all of the



workshops. That is why they wanted other people to do the workshops, they were simply tired of doing them.

The group returned to discussion about the framework, realizing that almost anything could be run through it. It was decided that the organizational coach would be sent an e-mail as to how to best use the framework to weed out good versus bad decisions and if any real life examples of the use of a framework like this existed. The dates for the Widening the Dialogue sessions were set and the group departed.

I observed two of the Widening the Dialogue sessions, both of which were handled very differently. The first session had about 6 general staff members present. Each was told to bring an idea with them to run through the framework. The first part of the session was spent reviewing what was new to the framework since the last Widening the Dialogue session had occurred, which was the creation of the strategies. The vagueness of the strategies was discussed, especially the overuse of the word "experiment". Someone had asked what a Museum Experience Plan and Personal Professional Development Plan were. An accurate answer for each one could not be given. This was interesting because you could see how certain individuals had influence on the final product of the framework by how unfamiliar people were with the terminologies used. The biggest downfall of the strategies, according to one of the presenters, was that no one knew who was doing what by when. "

At this point, the group was asked to give their suggestions of ideas to be run through the framework. Both of the suggestions given ran through the framework perfectly. Seeing that this framework would help in getting new ideas implemented created a positive buzz in the room, more so than was felt in any workshop or session

amount of conversation that took place, according to the director was frustrating and some facilitating should have been done to control the conversation.

The organizational coach thought that the framework was right for the museum. He stated that he had a sense for when people had dug deep enough to develop a framework that has meaning. He also said that the key to being an effective organizational coach was allowing for enough "white space" for people to think in new ways. Listening and communication were also key. He also explained the difference between a facilitator and an organizational coach. The facilitator would allow people to hide behind anonymity (recall my suggestion of having a question jar at the Widening the Dialogue sessions?) and not speak up, or just focus on using dots to get one right answer. The organizational coach, on the other hand, was a guide on the side, encouraging conversation to occur and holding people accountable for the creation of the framework.

The coach also stated that any challenges that the museum may face include the fact that they had gone through several change processes in the past that had failed. It was important for the staff to realize that change starts with themselves, then the organization as a whole. The important issue was to live the framework and integrate it into everything that was done at the museum. That was the key to success. I thanked the coach for his time and concluded the interview.

I also interviewed 10 staff members. The themes from those interviews are as follows:

**Workshop Participants:**

**The organizational coach was well versed in the process and had many skills that were appealing to the group.**

**Some sample statements:**

- He was on top of the process

thus far. It was discovered that the framework would help in justifying new elements to be added to the museum, and also justify changes to the current protocol.

The other Widening the Dialogue session I observed had only two staff members in attendance. The presenters handed out the framework to the staff members a head of time, hoping that they would review it before the session. The staff members said that they had glanced at it briefly. The presenters then tried to run existing programs through the framework, including the strategies, which the previous group did not. The presenters then asked each of the staff members to run one of their own programs through the framework, but the staff members kept interchanging the actual programs with how they do their work on a daily basis. The presenters were also interpreting the framework as they went through the process. At the conclusion of this session, the staff members said they understood how the framework was supposed to work. The level of positive energy was less than in the first session I observed, more so like the Widening the Dialogue sessions from the previous workshop.

I also interviewed the director of the museum and the organizational coach. The transcripts from the interviews can be found in Appendix F. The director gave the overall process a B rating, stating that the final framework lacked items such as trust, respect and communication. He felt that the strengths of the process included the fact that everyone within the museum was thinking about the museum and felt connected to the framework. He also felt that the organizational coach was very patient at letting the process rule. Some shortcomings, though, were the hands-off approach taken with the Widening the Dialogue sessions and the lack of structure and facilitating during the workshops. The

- Remembered names
- Excellent listening skills
- Knowledgeable about the museum industry
- Very good speaker

**The Decision Making Framework was a unique tool that had given the staff a snapshot of who the museum is, thus allowing for informed decision making on behalf of the staff.**

Some sample statements:

- We have a useful tool
- Good, it makes us accountable
- Clearly states who we are and what we want to do
- Solid structure

**Questions were raised regarding the integration of the framework into the workplace.**

Some sample statements:

- We don't know how to use it yet
- Nothing about employee interactions (Human resources? Innovation? Teamwork?)
- If we wait too long to make a decision, we could miss opportunities
- We need a mini guidance counselor to guide us on how to use this
- If it is used, will it be used?

**Lack of turn-taking during group conversations and voting methods were the major shortcomings of the workshops.**

Some sample statements:

- Red dots-unclear on directions
- Didn't like the dots-I found I was influenced by quantities of dots
- People dominated and twisted the conversation
- People went against their true feelings in order to expedite the process

**Visions were being developed, unofficially, regarding future use and potential of the framework.**

Some sample statements:

- Use it as a guide for growth and development
- We will have a trademark of activities that will follow a pattern
- We will brand our style of education
- We will have clearer goals

**The workshops were a vehicle for networking and teambuilding opportunities amongst the staff.**

Some sample statements:

- Staff from all levels were there
- Everyone was involved

- It brought everyone together from all levels
- It built a spirit of togetherness

**The finished framework appeared to be effective in guiding personal decisions and influencing how previously established initiatives should be handled, but fell short in determining what new ideas should be implemented.**

Some sample statements:

- We used it to have the Afghan slides shown, but that was rejected
- We're using it on the Hiscock team; we decided to bring people in at the beginning of the process during excavation instead of just at the end, for the display.
- We used it on Soup Day, we were environmentally conscious

**Some staff were having reservations regarding the effectiveness of the framework.**

Some sample statements:

- Good for the short term, I have reservations regarding long term systems change
- Everything can go through the framework

**Staff admitted to not using the framework. Some were quick to add reasons why.**

Some sample statements:

- I haven't, but I can see myself using it
- I haven't, but it's subconsciously in my head, I'm waiting for a good copy

**There were certain actions either taken or that should have been taken by the organizational coach that hindered the success of the process.**

Some sample statements:

- Not flexible in his method
- Should have taken a role in sharing information with the staff-staff might have been more invested
- Used corporate examples instead of non-for-profit

**There was a sense of exhaustive relief that the process was complete.**

Some sample statements:

- Happy it's complete
- I was optimistic in the beginning, tired in the middle, glad at the end

### **General Museum Staff**

**The final Widening the Dialogue session was most effective due to the participants being able to experience the final product of the workshops.**

Some samples statements:

- Something to show for all of that effort
- Understandable
- Got to see the end point
- I didn't feel like this was a waste of time at the last meeting

**Staff members were involved in demonstrations of the decision-making framework, but have not used it personally.**

Some sample statements:

- Haven't used
- No, but I have seen examples
- Not personally, but it's been used on the Hiscock team
- I've been thinking about it
- Saw how it worked

**The conclusion of this process brought about many questions regarding how the framework would be used and how it would affect life at the museum.**

Some sample statements:

- Is this going to be implemented and who do I take my ideas to?
- Sounds good, but how practical is it?
- Nothing explains how to use it, there are no instructions
- Bosses have to be bosses and staff have to be staff; how much teamwork can there really be?

**The framework went beyond its primary purpose of decision-making and has inspired new ideas and a sense of purpose amongst staff.**

Some sample statements:

- It will help to filter programs
- Thinking about things more in depth, more conscious of things
- I feel like there is a sense of purpose
- New things are coming up that sound interesting

**The Widening the Dialogue sessions provided staff with the opportunity to learn about the workshops and provide feedback to the participants.**

Some sample statements:

- Discussed what we thought
- Made us come up with suggestions
- Reiterated information to us

**The staff identified the ambiguity of the framework and see that this framework will need to be modified in the future.**

Some sample statements:

- There is always room for improvement
- Too ambiguous
- This is going to take time, not instant

**There were shortcomings regarding the way information was disseminated to the staff.**

Some sample statements:

- Would have liked to have observed a workshop
- Widening the Dialogue sessions 2 & 3 were poorly organized

- The leaders complained about how long this was taking

**The final framework had a positive effective on the attitude of the museum.**

Some sample statements:

- Feel pretty good
- Positive attitude in the air

**This process brought staff members together and will continue to encourage more diverse groups of people to work together in the future.**

Some sample statements:

- Bringing people together
- Makes department heads and staff think together

A unique aspect, when comparing the first set of interviews with the second, is that the first comment was usually that this process was bringing people together from all over the museum, new hire and experienced veteran. Commonalities between the reactions of the workshop participants and the general museum staff include the essence of teambuilding, a recognized usefulness of the framework and many questions regarding its use and implementation.

The workshop participants felt that the organizational coach had excellent soft skills, but lacked ability in regard to controlling conversations and implementing an effective voting method.

The general museum staff found the final Widening the Dialogue session to be the most beneficial, due to the ability to finally see how the framework would work. However, all staff wavered as to how effective the framework would be in the future.

The fact that almost any idea can be run successfully through the framework is inspiring idea generation amongst the staff. The acknowledgment of the museum's core and strategic values has identified for the staff who the museum is and has provided a glimpse into the future of the institution. A system has not been created to foster the development of ideas or to provide a means to submit ideas for approval. If a system or

structure is not provided, this momentum could be lost at a rapid rate. Detailed responses from the interviews can be found in Appendix H.

During one of my afternoons at the museum, one of the directors asked about the progress of my project, not an unusual question for me to be asked. He went on to tell me that when the museum laid off all of those individuals back in November, it was done in such a way that those people that brought negativism to the museum were let go. Those positions were now being filled with individuals that were excited about their jobs and to work at the museum. He went on to say that the framework was appearing in the agendas of the meetings he was attending. It was nice to hear that the framework was being used and to have a clearer picture of the events of November 1<sup>st</sup>.

### **Workshop #5**

Even though this is referred to as a workshop, it was more like working with the staff on process management. The purpose was to check on the implementation of the framework and to have the organizational coach present to answer any questions or provide guidance in regard to implementation. The workshop participants gathered only during the morning of the second day to discuss what has been done and what could be done to further implement the framework.

The first day involved a meeting with the museum's directors to bring the Senior Leadership Team to the next level of understanding their roles relative to one another and relative to working with the decision making framework. I had the opportunity to present a portion of my data to the directors, fulfilling my role as the primary feedback loop between the directors and the staff. In the room was also the organizational coach, who



would be leading the directors in implementing the framework. As I presented, the topic of the use of the dots came up, and how dissatisfied the workshop participants were as a result. The organizational coach's response was, "So what? They were only picking behaviors."

I was asked a few questions regarding what I thought the directors should do to best implement the framework. I reiterated some of the comments I had heard from the staff, such as displaying the framework on posters and creating a way to manage the possible flow of ideas the framework would inspire. The directors were thankful for my comments and then sent me on my way.

The next morning, the workshop participants gathered into the meeting room for the final time. The workshop began as every workshop began, with a review of what had happened since the last meeting. The presenters from the Widening the Dialogue sessions spoke first, describing the reactions of the staff to the finished framework. The total number of staff that attended the Widening the Dialogue sessions was 11. The presenters from the first session I observed spoke first. They spoke of how they entered the session expecting skepticism from the staff and to leave with a sense of defeat, but got the exact opposite. The session had generated good conversation and there seemed to be a high level of excitement, pride and ownership. The presenters added that this was the most rewarding experience for them thus far. This was the most successful of any of the Widening the Dialogue sessions that was conducted. Another presenter commented how her participants found the session to be redundant. The presenters from the second Widening the Dialogue session that I observed spoke and commented that the strategies were a bit intimidating and how the group had no problem fitting anything through the

framework. The final group of presenters commented that the participants in their session were a bit anxious to contribute ideas to run through the framework.

To provide an example for the group on how all of the levels of the framework already existed in the museum, one of the curators, using an exhibit that was installed a few years ago, ran it through the framework. The end result showed the group how the elements of the framework were always in existence, it was just a matter of identifying them.

Another event that occurred since the last workshop was a suggestion made by a workshop participant, using the framework, to show slides of Afghanistan that were taken during the 1970's. The suggestion was rejected. Debate ensued as to why this suggestion was rejected since Afghanistan was in the news now. The reason for rejection was that it did not mesh with what the museum was doing now and that the slides were not new. The argument from the participants was that opportunities would be missed if the museum did not become more flexible. The argument continued, with managers debating with staff. The director jumped in, stating that just because a suggestion fits the framework doesn't mean that the museum has to do it. The point of having the framework was to be brutally focused when it came to decision making. The organizational coach stepped in, adding that ideas had to maximize the framework, not just get through it. The staff did not appear satisfied with the response.

Moving on, the organizational coach distributed a copy of the museum's personality profile to all of the participants. The participants were to divide into small groups, each taking a strategic value and connect the personality of the museum to how

the identified signal behaviors of that value could be made pervasive throughout the museum. Four groups were created and I joined one to observe their interactions.

The group broke down each behavior and identified what the museums could do to make that behavior more pervasive. The profile was rarely used as a reference in the creation of each suggestion. The workshop was close to conclusion once the group work was complete. The organizational coach advised the group that whatever suggestions based on the behaviors could not be done now, should filter down to the strategies and be tied in there. That was the extent of planning for action. That also concluded the final workshop.

My time at the museum was drawing to a close. I distributed a final survey packet to all staff members. The packet consisted of a survey, a consent form, a letter size envelope for the consent form, a copy of the framework and a sheet describing how to complete the survey. Separate surveys were created for the workshop participants versus the general museum staff, changing the point of reference from the workshops and the organizational coach to the Widening the Dialogue sessions and the presenters. Copies of the surveys can be found in Appendix I. A box was placed at the security desk of the museum to collect the completed packets.

The surveys focused on three areas, the final draft of the framework, general questions regarding the process and the future of the museum and the strengths and weaknesses of the framework and change process. Of 64 surveys distributed, 26 were returned. Only 8, 4 general staff and 4 workshop participants, of those 26 commented on the strengths and weaknesses of the framework and process. Due to the minimal

response, the comments will be presented as is and not grouped into themes. The responses were as follows:

**Workshop Participants:**

**Strengths of the Framework**

Clearly stated ideology, business and values

Inclusion of all input

Tried to get to look beyond the day-to-day of our jobs and to understand how all of the institution fits together

**Weaknesses of the Framework**

Vague strategic values and strategies

Insufficient discussion of input

Driven by a corporate identity vs. a museum one

Core value too vague core business is clearer BUT combination of core ideology + core business + core value is insufficient to define us as a museum. Nothing here really focuses on the essence of museums. Could relate to any type of educational or even religious institution. It is almost impossible to find any decision or idea that can't be fit into this framework, making it either useless or a tool for ad hoc or post hoc justification for decisions made despite the existence of the framework.

**Strengths of the process**

Shared experience, huge investment required

Made us feel like a team no matter how weak the future of the institution is

Brought people together from all departments to discuss the future of the institution.

**Weaknesses of the process**

Open voting skewed result, organizational coach permitted employment rank to dominate discussion

Too lengthy for core group who had to sit through it, red stickers upon deciding a museum's future is ill-slighted, departmental amalgamations at the workshops

Implied a democratic process for decision making that may not match the administrative style of the institution. Lots of talk at the end not much action suggested in the strategies to move towards the "big" goals implied in the core elements. Group discussions often turned into monologues by senior staff about decisions that were already made and that seemed to violate the spirit of valuing dialogue not monologue.

### **General Museum Staff:**

#### **Strengths of the Framework**

Great tool if it continues to be used as in the last Widening the Dialogue session

Better understanding of the museum's direction

It is a way to get all involved in the process of change

Great goals, everyone's input was valuable. Making decision with a basis is always helpful.

#### **Weaknesses of the Framework**

Don't feel that we are doing dialogue yet, despite it's importance

Some aspects are too general

Everyone does not want to be involved in the process of change.

Goals may be too lofty

#### **Strengths of the process**

Everyone seems so friendly and helpful. Museum connections to community seem to have increased.

#### **Weaknesses of the process**

Took too long

Staff come and go so quickly!! Long time hard working staff have left-loss of institutional memory and valuable assets. New hires seem overwhelmed and confused as to their job descriptions and role and job security.

The quantitative data took an interesting twist. Previously, the general staff had a much lower level of confidence that this process would have a positive impact on the

future of the museum than the workshop participants did, with an average of 4.18 versus 6.65. On the final survey, when answering the same question, the general staff had an average rating of 6.58 versus 6.21 for the workshop participants. Now that the confidence level is about the same for both groups, the museum will be able to introduce the framework into the daily routine and be met with a common audience.

The questions regarding the final draft of the framework can be divided into two sub categories, if the framework is an accurate representation of the museum and where it wants to go, and if the framework will be effective in guiding the museum in the future. The general staff gave higher ratings for each category than the workshop participants by approximately one point. All values are out of a possible high score of 10, 1 meaning strongly disagree and 10 meaning strongly agree. The general staff rated the accuracy of the framework with an average score of 7.8, and rated the framework as an effective tool to guide the museum in the future as 8.01 out of a possible score of 10. In this instance, 1 represented not effective at all and 10 as very effective. The workshop participants rated the accuracy of the framework as 6.77, and its effectiveness in guiding the museum in the future as 6.49. The part of the framework that received the lowest rating for each category and for both workshop participants and general staff was the core ideology.

The general museum staff rated the museum's ability to make consistent decisions, 1 meaning not at all and 10 meaning absolutely, (7.58) and understanding of itself, with 1 meaning not at all and 10 meaning much clearer understanding, (7.08), approximately one point higher than the workshop participants, 6.71 and 6.21, respectively. When asked if feelings had changed about working at the museum, the general staff gave a rating of 6.25 and the workshop participants rated at 6.5. For this

rating scale, 1 represented more negative feelings, 5 represented no change and 10 represented much more positive feelings. Whether that feeling was due to this change process, the general staff rated at 5.25 and the workshop participants at 6.57 with 1 representing not at all and 10 representing absolutely.

The same topics were prevalent throughout all of the data collected. The change process brought people together, the framework was too vague, and the use of dots to make choices was definitely not preferred. What is interesting, though, is how the opinions of the general staff improved over time and those of the workshop participants seemed to mellow out. I attribute this to both groups being happy to have the process complete, the general staff because it is a method to encourage idea generation and provides for independent decision making, the workshop participants out of sheer exhaustion.

The number of surveys returned in both instances they were used provides for interesting discussion. Were the staff too busy to complete the survey? Or could they simply not be bothered? When the final survey was being collected, two were returned to me by general staff members, stating that they did not feel familiar enough with the framework to be able to accurately answer the questions. How could that be, when everyone had the opportunity to attend the Widening the Dialogue sessions?

On June 25<sup>th</sup>, I returned to the museum for a final data presentation. I was told that nothing had been done with the framework since the conclusion of the last workshop two months ago, except for it's use in hiring new employees. The director was working with a staff member hired post-workshops on the physical presentation of the framework.

The framework may find its way onto coffee mugs for the staff, or turned into a mobile for the main conference room.

### **Summary**

Over the course of 5 months, a select number of staff from the Buffalo Museum of Science were facilitated through the process of creating a decision making framework by an experienced organizational coach. The perspectives of the director of the museum, all of the staff and the organization coach were taken into consideration during the documentation process.



## **Section IV: Conclusions**

### **Introduction**

This section, using the experiences of the Buffalo Museum of Science from January, 2002 through May, 2002, will answer the questions originally posed in Section

I. The four questions that provided the foundation to this project were:

- How is change facilitated within an established institution?
- How is change accepted within an established institution?
- What barriers exist when implementing change?
- How has the change initiative impacted the museum to date?

Answers to these questions were drawn from the experiences of the staff with the change process and the organizational coach. The reactions of the organizational coach and the director of the museum to the change process and to the staff's comments will also be commented upon. Each question is answered by first reflecting on positive aspects followed by any concerns regarding how that particular issue was handled. The section concludes with lessons of how the concerns could have been overcome and also what the Buffalo Museum of Science needs to do to continue the momentum of this change initiative and ensure its success.

In the beginning of this process, the director of the museum told me that part of his reasoning in choosing *Organizations Are People, Too* as the model for this change process was that it would result in clarity with respect to the organizational core. The organizational coach described the model as a basis for a dialogue about setting priorities and making decisions. Using the original questions that drove this project, we explore if

this goal was achieved (ie: a consensus view of the organization's core) and also discuss perceived limitations in regard to the process that might limit successful implementation.

### **How is change facilitated within an established institution?**

There were two levels of facilitation at the museum, the organizational coach to the workshop participants and the workshop participants to the rest of the staff. We will first discuss the organizational coach.

As the owner of the change process, it was the role of the organizational coach to teach the workshop participants about the change model, coach them along in their creation of the framework and manage the environment of the workshops to ensure full engagement from the participants. The organizational coach discussed each component of the framework briefly at the start of the second workshop and as each component was being created. He encouraged participation from the staff by asking questions and giving everyone the opportunity to answer. He used both small group and large group formats and provided opportunities for staff to voice their opinions. He stuck to the process and would not deviate even if pressured by the staff. He would frequently display the change model on overheads and continually distribute handouts on the group's progress in creating the framework.

The connections between each piece of the framework, especially between the strategies and the rest of the framework, were at times confusing. The interconnectedness of the pieces was not realized until the workshop participants had the opportunity to test a suggestion through the framework. Throughout the process of creating the framework, staff frequently asked how this initiative would affect their jobs

in the long run. This question highlights an underlying theme of anxiety in regard to what the future would hold for the staff and the institution as a whole. This comment regarding job security was made in the first survey and both sets of interviews with the staff.

The communication of the change process between the workshop participants and the remainder of the staff was done primarily through the Widening the Dialogue sessions headed up by the Steering Committee. This was where staff had the opportunity to learn about the results of the workshops from their peers. The Widening the Dialogue sessions occurred after workshops 2, 3 and 4 with a decrease in attendance over time. Staff had commented on the disorganization of some of the Widening the Dialogue sessions offered from workshops 2 and 3. This could have discouraged staff from attending. Also the question of how jobs would be affected was never accurately answered.

The organizational coach and the director of the museum took a hands-off approach regarding the planning of the Widening the Dialogue sessions. This initially made the workshop participants responsible for planning their own sessions and relying on their own creativity in how the information would be presented. The information told to the staff members was not being controlled and was based on the interpretation of the presenters, which often differed. Plus, at one point, some of the presenters felt forced into this role. This effected the dissemination of knowledge by the possibility of the presenter's bitterness being reflected in the information shared.

The facilitation of the process also included one more layer, of all workshop participants' interactions with the rest of the staff. Some of the workshop participants

would review the materials from the workshops candidly with their co-workers, spreading a sense of understanding. Others would mock the process or complain about having to go to the workshops, leading their co-workers to believe that the process was just another workshop series that would fail. These casual expressions of enthusiasm or negativism impacted the staff's perception of the change process, possibly leading to the decline in attendance at the Widening the Dialogue sessions.

### **How is change accepted in an established institution?**

This change process was always met with some level of skepticism. At the beginning, a number of individuals representing both workshop participants and general museum staff had a feeling as if this was just another workshop and frankly, a waste of time. Enthusiasm built up and faded away. At first, the workshop participants had more of a positive attitude in regard to the change initiative and its possible impact on the museum. At the conclusion of this study, it was the general staff that had a more positive attitude.

In the midst of the workshops, the participants made several comments in the first survey in regard to how exhausting the process was. At the conclusion of the 4<sup>th</sup> workshop, there was a sense of relief on behalf of the workshop participants that the framework was complete. During that final Widening the Dialogue session, the staff had an opportunity to test the framework. The general staff were encouraged when they saw how the framework would allow for new ideas. The workshop participants had gone through a lot in creating each step of the framework; intense conversations, the disputed dot method, the lack of control of conversations, the list goes on. The environment of the

workshops was discouraging to some of the participants, thus decreasing their level of acceptance for the final product. Many workshop participants felt that they did not have a say in the final draft of the framework. If staff, as a whole, do not feel as if they have contributed to the final product, they will be less likely to accept it.

### **What barriers exist when implementing change?**

As was stated in Section II, approximately 10-15% of any group will be resistant to change. In the case of the Buffalo Museum of Science, resistance ran deeper than just the workshops. One month before the workshops began, the staff said goodbye to 15 of their friends, colleagues and co-workers. Staff carried resentment and bitterness because of this, and also fear in regard to who would be let go next. It was the duty of the director of the museum in combination with the organizational coach to calm such fears. When people were being lined up according to how introverted or extroverted they were, there was a great deal of resistance with respect to the process and the organizational coach. One of the barriers that existed for the workshop participants was a lack of trust for the organizational coach and his process, and this concern increased over time.

Another barrier was the fact that this initiative occurred so soon after the lay-offs. The director did state that if he could do it again, he probably would have waited for the "dust to settle" before starting the initiative.

There was an interesting split between young and old at the museum. The more experienced staff, in years at the museum and age, were "workshop weary" having gone through several processes that would make things better or run smoother, all of which did not last. These staff felt the same towards this process. The younger staff members,

however, showed a great deal of enthusiasm for the process, lauding the director for doing such an initiative and looking forward to the results.

The Buffalo Museum of Science is in its most critical moments as far as acceptance of the framework is concerned. Action needed to be taken as soon as the final workshop concluded in order to work the framework into the fabric of the museum. Any barrier can be overcome if the staff realize that this is a serious process and has the potential to be an integral part of the museum for a long period of time.

### **How has the change initiative impacted the museum to date?**

I had gone back to the museum at the end of June for a meeting with the directors. I had asked what had become of the framework since the last workshop. The director stated that the framework had been used in the hiring of new employees, but had not found its way to the existing employees. People were being hired based on a framework that not many were using.

The framework did prove to be useful on the level of personal decision making for the employees. For example, to be more environmentally responsible, the employees were conscious to use mugs instead of Styrofoam cups. Pieces of the framework were effective in aiding in informed decision making, but the framework as a whole, to be used as a set of criteria to judge future museum initiatives, had many holes. The director mentioned the need for a "director's addendum" to make up for the over-flexibility of the framework.

As far as reactions to the framework, the workshop participants and the general staff are on a similar level, according to the final survey data. If the museum would want

to take action on the framework, the time is now. There is still enough positive energy on behalf of the staff to accept and implement the framework. Timing is what will be critical now in determining the staff's acceptance.

### **Overarching Observations**

When I reviewed my notes to write this project, I had a bit of a laugh over how my note-taking style transitioned over the course of my observations of the workshops. The first few pages were my usual neat, feminine script, with a few bullet points and arrows sprinkled throughout the text. As time progressed, the script shifted to a feverish print. I noted facial expressions and the energy level of the room. At the end, harsh capital letters, underlined and starred, graced the pages. Looking at this, I had an experience similar to what the majority of the workshop participants described throughout the surveys and interviews.

At first there was excitement. This was something new that was going to change the institution as we knew it. We would set goals, make better decisions and do it all together. That quickly changed as the first day of the second workshop drew to a close. The group was exhausted. The organizational coach did not allow everyone the opportunity to speak and allowed a few select individuals to continually dominate the conversation. A workshop participant might think, "Why should I voice my opinion when it is only going to be ignored?" Because the organizational coach did not set up any rules or provide any type of training for the group, those who always spoke did and those who rarely spoke did the same.

Frustration began to mount. Workshop participants would ask questions and not get a response. If the reason for not answering questions was an "the answer lies within" approach, it was not stated. If a group member asks a question and is ignored, the likelihood of him or her asking any more questions is greatly reduced, as is his/her faith that this process is going to be as accurate as it was originally advertised.

This change process dealt with two groups, the workshop participants and the general staff members. Each workshop always began with feedback regarding the comments made by the general staff members. Nothing was ever done with this feedback. To clarify, the organizational coach would travel around the horseshoe asking for reactions from the Widening the Dialogue sessions. There were usually positive comments intermixed with concerns and questions. As soon as the last person spoke, the day's activity would begin. There wasn't any attention given to the feedback. The process was not revisited to integrate the concerns from the general staff. What was the point of gathering feedback if it was not going to be used to improve the process?

During the final workshops, the mood of the group had changed drastically since that first day. Laughter no longer filled the room. Eyes would roll as certain individuals spoke. This was not a team effort. It could be compared to a Darwin-istic experience, in that he who speaks loudest and longest has the final say.

Looking at the framework for what it is, it has the potential to become an effective decision making tool on both individual and institutional levels. The identification of values can be a powerful experience, especially when the criteria for future decision making is based on those identified values. The identification of values, though, is a sensitive experience. If the group does not feel comfortable to discuss all aspects of the



institution, the end result could be seriously flawed and only take into consideration the opinions and feelings of a few instead of the majority. The initial involvement of a diverse group was a great first step to assure accuracy in this process. But, not everyone was allowed the opportunity to share his/her experiences. The room may have been filled with a rich mixture of individuals, but the final framework is filled with the narrow perspectives of a few individuals.

### **Lessons Learned**

At the conclusion of this process, I was able to take away a few key insights in regard to facilitation and the role of the change agent.

- When entering an organization as a facilitator, trainer, leader, organizational coach or whatever title you may choose, it is important to have a basic understanding of the environment you will be entering. Also, gaining and maintaining the trust of the group you would be working with will determine the success of your methods.
- It is also important as a facilitator to be in tune with the needs of the audience and to speak their language. Make sure everyone has an opportunity to speak, consensus is checked before moving forward in your process and you are able to address any resistance to your methods. Work with the group to find middle ground so effective communication can take place.
- When a new way of thinking is introduced, such as this framework, it is important to reward its use, versus reinforcing it. Use of the framework in any form should be celebrated.

- When those who experienced a workshop or presentation first-hand are teaching information to small groups, the information being taught should be consistent. Encourage teaching groups to plan sessions together so all information that is taught is uniform, and, the presenters will not be struggling to figure out the material while trying to teach it.

### **What Should Be Done Now**

The organizational coach has gone home and the museum is now the proud owner of a process with some noticeable flaws. In order to prevent this framework from drifting off to where the results of all of the other workshops have gone, it is important that it is woven into the fabric of the museum. Flaws and all. Some options are to create an additional set of criteria to judge ideas by. The framework, as it exists now, is used by staff to make personal decisions, but is falling short on larger, institutional decisions. Stating that the degree to which an idea fits the framework will decide implementation is not concrete. This framework should be able to provide an obvious yes or no response when suggestions are being considered for implementation. Since the first suggestion given by staff (the showing of the Afghan slides) was rejected, and the reasons for that rejection could not be referenced in the framework, there is the potential for an "us versus them" relationship between staff and directors. The "degree" must be defined and staff must be made aware of what it is.

Another possible solution is to create a decision-making board that would decide what suggestions would be implemented. Each department would elect a representative, or representation could shift after a certain time span. That group would gather and

review the suggestions, deciding how appropriate they would be for the museum to implement. Thus, it is the peers of the ideators that will have the final say if an idea is to be implemented, not just the directors.

It is recommended that a system be created to allow staff to submit new ideas for possible implementation, already run through the framework. A form could be created that outlines the framework and allows the individual submitting the idea to give examples of how their idea fits into each component of the framework. This will give decision-makers a clear view of the individual's idea.

The framework has to be completely visible at all times in order for it to be woven into the fabric of the museum. Employees should be rewarded and celebrated for using the framework, encouraging other staff members to do the same. Also, I suggest that mixed groups of workshop participants and general museum staff gather to discuss the framework, its implications, shortcomings, and ways to overcome the shortcomings. All of this data should be given to the directors, who will modify the framework and its uses accordingly.

Overall, the framework can be an effective tool. The key is in its reinforcement.

### **Summary**

Change can be a very delicate and difficult experience. It is important that the individuals that are experiencing the change have a vested interest in the process and are informed in regard to the results that the process will yield. Not doing so can result in distrust of the process and slow or even halt implementation.

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## APPENDIX A

# "We Aim to Please"



## Snapshot

- Focuses on information that is factual, real, and current.
- Makes decisions based on values and their impact on people.
- Is energized by the outer world of people and activity.
- Prefers a flexible, spontaneous, and changing environment.

This organization, taking care of customers' wants and needs is paramount. Whether it delivers a product or a service, an organization like this is very good at reading and knowing what the public wants and at responding to trends and opinions. With its zeal for performing, it will meet the customers' needs with a sense of fun and entertainment, always presenting its best public face. It knows how to present a good image and is outstanding at public relations.

Perhaps the most generous of all the organizational types, this organization will be helpful and supportive to customers and staff in practical ways. It will try to provide its employees with a pleasant work environment, as well as good benefits and just plain fun. Warm and gregarious, it is energized by group gatherings and personal interactions. Interactions may even include a little playful competition.

This organization doesn't handle stress well. Since it avoids dealing with tension for as long as possible (this type has the lowest tolerance for stress and anxiety of all types), problems can build up and blindsides the organization.

The organization thrives on a frantic pace. It's almost as if it's afraid to slow down, because that might allow time for self-evaluation. This fast pace may become too frantic for some staff members, especially those who need time to slow down and evaluate things. In addition, due to its lack of interest in planning and schedules, follow-through may be a problem.

Although this organization likes to have all the details before making a decision, it may delay making decisions because it also likes to keep its options open.

This type of organization is very vulnerable during times of change because of its orientation to the here and now. In addition, it is very tied into its public image, and it will regret any loss or changes to that image. Due to its people orientation, it will mourn any loss of personnel or changes that hurt the company's family atmosphere. It may rush through a transition period trying to "get back to normal." Its goal during change will be to get back to the point where it can reestablish relationships with customers and find a place for the people in the organization to belong.



### **Characteristic Strengths**

- Excels at customer service
- Sensitive to subtle market signals and to customer needs and motivations in the short-term
- Capable of concentrating attention and resources in the moment for quick and powerful impact
- Fearless risk-taker, filled with optimism
- Thrives in the spotlight and enjoys a good public image
- Acts quickly to marshal human resources effectively during time of crisis
- Creates a harmonious workplace that draws the best from people
- Knows how to present a good image
- Resourceful and efficient
- Can find a quick fix for anything

### **Characteristic Weaknesses**

- Its natural optimism and flair for risk may blind it to impossible situations
- May use a quick fix when a long-term solution is needed
- Not uncommon for feelings to overrule good business sense
- Could be so absorbed in action that it loses sight of goals
- Often lacks follow-through and attention to planning and schedules
- May confuse action with data gathering
- May find it difficult to set or keep to priorities
- Propensity for action and over-confidence may propel it to disaster

- Often lacks strategy and long-term plans for its tactics
- May over rely on image
- Juggles too many balls and may drop some
- May become distracted by people problems, forgetting the task at hand

### **Work Environment**

- The company is a stage and work is a place to perform and create an impact
- Impulsive and spontaneous
- Sensitive to the well-being of people
- High interactivity with frequent meetings
- Conversations abound, are light and entertaining
- Harmonious: people place, warm and friendly, supportive and appreciative
- Work is an adventure
- Focused in the moment
- Fun, socially interactive, exciting, even hilarious
- Comfortable and attractive, stylish
- Action-oriented, even frantic, and hands-on
- Minimum of structure, bureaucracy, and office politics

### **Values**

- Customer
- Spontaneity
- Fun
- Excellence
- Equality

- Harmony

### **Communications Style**

- Centers on the present and on people
- Language is concrete and specific and may be colorful
- Prefers to give information rather than directives
- Factual, detailed, friendly and contains personal examples
- Prefers face-to-face
- In meetings seeks connection with people first, expressing points of agreement
- Begins presentations with details first
- Thinks "out loud" and the pace is rapid

### **Sources of Energy**

- Opportunity to perform, especially in crises
- Action, movement, and a fast pace
- Constant flow of problems to solve
- Engaging and serving people
- Personal affirmations

### **Signs of Stress**

- Becoming emotional
- Decision-making capabilities erode
- Becoming excessively pessimistic, especially about the future
- Becoming mired in details and unimportant facts

### **Behavior During Conflict**

- Prefers to avoid or deny conflict

- as long as possible
- Will determine if the company is meeting people's needs
- May seek to remedy the pain and discomfort being experienced
- Will react viciously if a value has been trampled



### **Approaches to Managing Change**

- Welcomes internally developed change
- Will seek information and advice from all sources
- Will ask if the change is practical, has worked before, and is socially acceptable
- It will consider the human aspect and whether all will benefit
- If the change honors company values, it will try to persuade everyone to change

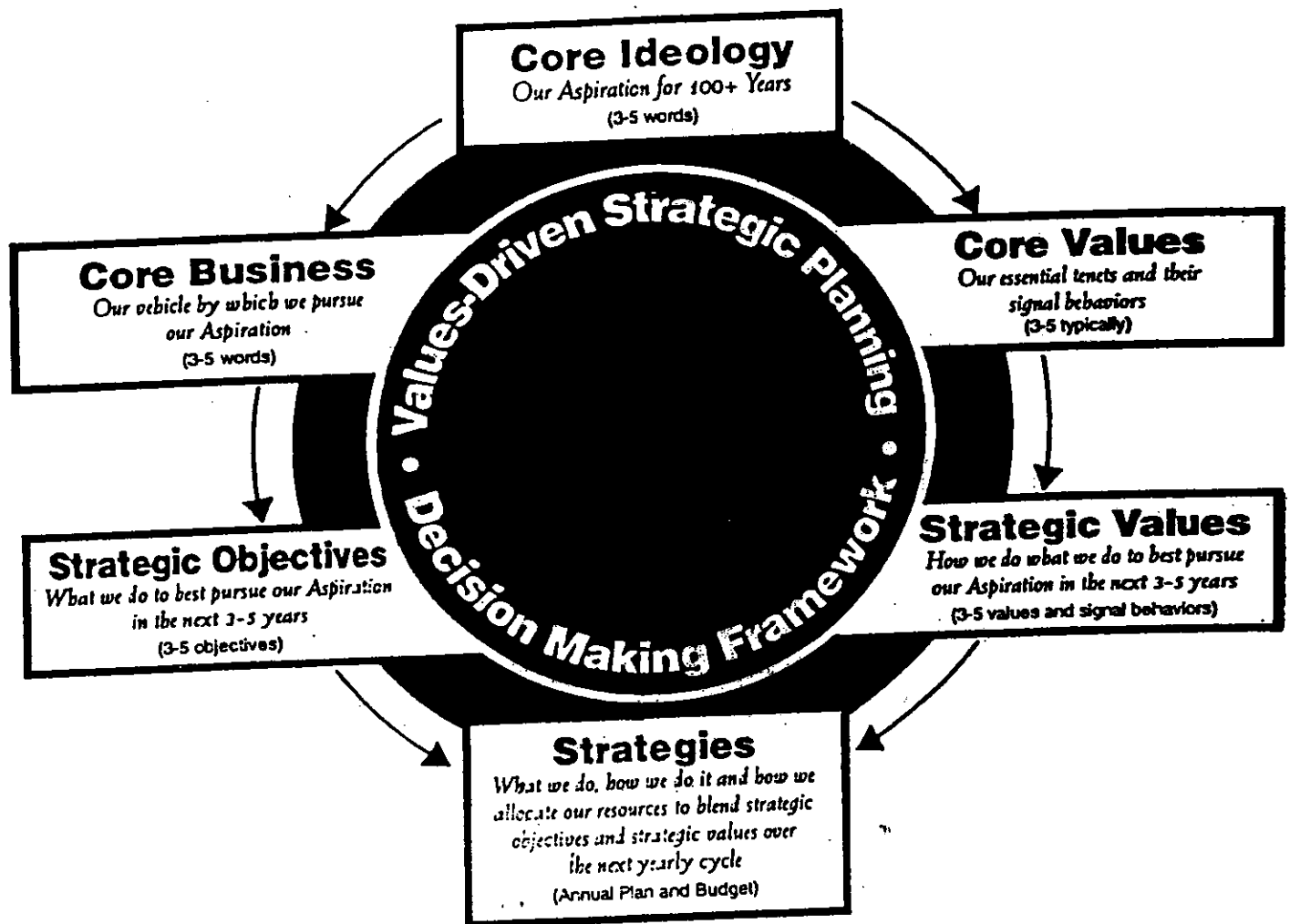
### **Ideal Clients**

- Wants the best possible customer service
- Produces a product or service that contributes to the benefit of all
- Appreciates showmanship and is sensitive to public image
- Needs immediate, though not long-term, solutions
- Desires to capitalize on emerging trends with quick, focused effort
- Appreciates and enjoys lots of personal and social interaction
- Thrives on a demanding and quick pace



## APPENDIX B

# It's Not Just a Planning Model — *It's a Doing Model*



## APPENDIX C

# **Buffalo Museum of Science**

## **DRAFT Decision Framework**

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### Workshop #2

*We Aspire To...*

Core Ideology

(Our Aspiration for 100+ years)

**Create a Better World**

*By*

Core Business

(Our Vehicle by which we Pursue our Aspiration)

**Helping All People to Explore & Understand It**

*Valuing*

Core Values

(Our Essential Tenets and their Signal Behaviors)

**Sharing Knowledge**

**Creating Informative Exhibits**

**Public Programming**

**Engaging Experiences**

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### Workshop #3

Strategic Values

(How We Do What We Do to Best Pursue Our Aspiration in the Next 3-5 Years)

**Customer Service**

**Having a Positive Attitude**

**Responsiveness**

**Being Knowledgeable**

**Being Flexible**

**Interest in Science**

**Encouraging Inquiry**

**Showing an Appreciation for Science**

**Wanting Evidence**

**Inspiring a Sense of Wonder**

**Dialogue NOT Monologue**

**Using Feedback to Get Better at What We Do**

**Sharing Information**

**Listening**

**Respecting Differences**

**Valuing the Learner's Experiences**

**Authenticity**  
**Asset(s) Preservation**  
**Using Real Stuff**  
**Using Knowledge from Research to Reinforce Our World**

**Environmentally Responsible**  
**Being Green**  
**Having a "Face" in the Regional Environmental Dialogue**  
**Being Supportive Scientifically in Environmental Research**

**Strategic Objectives**  
**(What We Do To Best Pursue Our Aspiration in the Next 3-5 Years)**

**Develop Master Experience Plan**

**Aggressively Grow Staff Capacity**

**Achieve Financial Strength**

**Expand and Engage Our Community Connections**

**Walk the Talk Environmentally**

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**Workshop #4**

**Strategies**  
**(What we do, how we do it and how we allocate our resources to blend Strategic Objectives and Strategic Values over the next 12-18 months)**

**Develop and Experiment with a Personal and Professional Development Plan for Every Staff Member and Volunteer**

**Experiment to Define the Stepping Stones to Developing the Museum Experience Plan**

**Experiment to Develop an Environmental Operations Plan**

**Drive Planning & Decision Making with Research and Data**

**Expand and Broaden, Internally and Externally, Our Connections with scientific Knowledge Supportive of Our Experiences**

**Develop Resources Sufficient to Change and Grow the Business**  
**Begin the develop Overall Collections Strategies Consistent with the Museum Experience Plan and AAM Accreditation Standards**

## APPENDIX D

The International Center for Studies in Creativity  
Chase Hall 244  
Buffalo State College  
1300 Elmwood Ave  
Buffalo, New York 14222

January 22, 2002

To the staff of the Buffalo Museum of Science:

I would like to take this opportunity to introduce myself. I am a graduate student working towards my Master's degree in creativity from Buffalo State College. David Chesebrough has allowed for me to come into the museum in order to complete my Master's project, the final step and major research initiative before I am to graduate in August. Let me explain in further detail the reason for my presence at the museum over the next five months.

For my Master's project, I am conducting a case study. This case study will document the process that you, the staff of the museum, go through during this change initiative. As a result, I hope to answer the following questions:

- How is change facilitated within an established institution?
- How is change accepted within an established institution?
- What barriers exist when implementing change?
- How has the change initiative impacted the museum to date?

In order to ensure accurate and thorough data, I am asking for your cooperation during my time at the museum. Included please find a consent form and a survey. The survey will be a means for me to document your personal experiences and impressions of the process that is currently underway. The purpose of the consent form is to document your agreement to take part in this research initiative. Due to my affiliation with Buffalo State College, the consent form is necessary. Please be assured that your confidentiality is of the utmost importance. When you have completed the survey, please put it back in this manilla envelope and seal it. Put the consent form in the white envelope, separate from the survey, and seal that, also. Both envelopes can be placed in a box that will be kept at the security desk labeled "surveys".

This project will provide the museum with an accurate documentation of the change initiative as it occurs. It will provide my classmates and I with the perspective of an audience undergoing change, giving us the opportunity to become better facilitators of change in the future.

Once again, I am grateful for this opportunity. If you have any questions regarding this project, I can be reached Wednesdays, Thursdays, and Fridays at 878-6222 or e-mail at [cre8daley@msn.com](mailto:cre8daley@msn.com).

Sincerely,

Kristin Daley  
Master's Candidate  
International Center for Studies in Creativity

# **"Documentation and Analysis of a Change Initiative at The Buffalo Museum of Science"**

## **Consent Form**

**Introduction:** You are being asked to participate in a research study about the facilitation and acceptance of change within an established institution.

**Procedure:** If you decide to participate in this study, I will ask that you complete a survey regarding your impressions of the change initiative. The survey will take approximately 15-20 minutes to complete.

**Risks/Side Effects:** There are no risks or side effects to you as a result of participating in this research study.

**Benefits:** There are a number of benefits associated with this survey. One, it will document the change process used with the Buffalo Museum of Science. Two, it will capture how the change process has impacted the Buffalo Museum of Science. Three, it will provide feedback regarding reactions to the change process.

**Voluntary Participation:** Your participation in this study is completely voluntary. You may quit at any time without penalty.

**Confidentiality:** All information that is obtained from you is strictly confidential. At no time will the surveys appear in their entirety in this study. The results reported from this information obtained from you will not identify you in any way.

**Please note:** You must be 18 years of age or older to participate in this study.

**Consent to Participate in Research Study:** If you wish to participate in this study, please sign below:

**Signature:** \_\_\_\_\_

**Name (Print):** \_\_\_\_\_



# Documentation and Analysis of a Change Initiative at the Buffalo Museum of Science

## Workshop Participant-Survey 1

The following questions pertain to the change initiative currently underway at the Buffalo Museum of Science. Please be candid in your responses. *Do not* put your name on this document.

1. In order to document the impact of the change initiative that the Buffalo Museum of Science is currently engaged in, it is important to begin by understanding what the organization was like before conversation regarding change started. I would like you to use the attached pink form (The Adjective Checklist) to select adjectives you feel describe the museum prior to September, 2001. Your opinions are important, so I encourage you to be candid. You may select as many adjectives as you wish. Please remember, you are not describing yourself, but the organization as a whole. Again, this is confidential, so please *do not* put your name on the pink form.

2. How would you describe your initial response when asked to participate in these workshops?

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3. How would you describe your impression of the first workshop (personality profiles)?

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4. How did you feel at the conclusion of the second workshop (core ideology, etc.)?

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5. By the conclusion of the second workshop, the participants identified a core ideology, core business and core values for the museum. Please rate the degree to which you feel confident that these outcomes will have a positive impact on the future of the museum (circle one).

1	2	3	4	5	6	7	8	9	10
not confident at all					moderately confident				highly confident

This concludes the survey. Please put this document and the Adjective Checklist back in its original envelope and seal it. Put the envelope in the "Surveys" box located at the security desk at the entrance of the museum by January 30<sup>th</sup>.

Thank you for your time.

# Documentation and Analysis of a Change Initiative at the Buffalo Museum of Science

## General Museum Staff-Survey 1

The following questions pertain to the change initiative currently underway at the Buffalo Museum of Science. Please be candid in your responses. *Do not* put your name on this document.

1. In order to document the impact of the change initiative that the Buffalo Museum of Science is currently engaged in, it is important to begin by understanding what the organization was like before conversation regarding change started. I would like you to use the attached pink form (The Adjective Checklist) to select adjectives you feel describe the museum prior to September, 2001. Your opinions are important, so I encourage you to be candid. You may select as many adjectives as you wish. Please remember, you are not describing yourself, but the organization as a whole. Again, this is confidential, so please *do not* put you name on the pink form.
2. When you first learned about the workshops to be conducted, what was your reaction?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. From what you learned regarding the outcomes of the first workshop (personality profiles), what were your reactions?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. What were your reactions to the core ideology, core business and core values that were developed during the second workshop?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
5. By the conclusion of the second workshop, the participants identified a core ideology, core business and core values for the museum. Please rate the degree to which you feel confident that these outcomes will have a positive impact on the future of the museum (circle one).  

1	2	3	4	5	6	7	8	9	10
not confident at all					moderately confident				highly confident

This concludes the survey. Please put this document and the Adjective Checklist back in it's original envelope and seal it. Put the envelope in the "Surveys" box located at the security desk at the entrance of the museum by January 30<sup>th</sup>.

Thank you for your time.

## APPENDIX E

# Survey 1 Results

## Workshop Participants:

Reactions to the fact that the workshops would be taking place:

- I've felt for a long time that we don't know who we are as an institution. Therefore, I looked forward to being involved in the process of answering that!
- Pleased to be included, concerned about amount of time involved, wondering what organizational will mean
- Open, optimistic, hopeful, eager
- Excited to be involved in such a process-looking forward to the outcome
- Hesitant-will it be wasted time? Will anything happen?
- I did not want to attend workshops, felt it was too time consuming
- Hesitant
- Surprised and grateful that I was chosen
- Flattered, as I am a relatively new employee. I thought perhaps I was asked to join due to educational and background experience in museums.
- I felt it was a waste of time. Over the past 6 years I have participated in 3 workshops and nothing came of any of them.
- Curious and optimistic
- Uncomfortable
- Concerned. Mostly, a bit worried that the time invested would produce a useful result.
- Why me
- Excited
- Wasn't initially asked. Took the place of a former employee who accepted another job. I was excited to take their place.
- Hopeful that perhaps something positive can be accomplished

Reactions to Workshop #1:

- Felt programmed and impersonal. The organizational coach used a call and response approach to other corporate personalities that turned me off. He pushed ahead with disclosure of confidential profiles in the face of the director's assurances.
- It was a good icebreaker. The profiles were interesting, somewhat on target not always though. Is it considered as an accepted or accurate method?
- Very pleased with the direction-intrigued as to where it's going
- Great appreciation and respect for differences in personalities amongst staff
- Surprised at my own results and "museum profile". Reassured with "everyone has a part to play"
- I was honored to be invited. It was a very interesting workshop.
- Questioned the process
- I thought the personality profiles were really neat to know more about ourselves. Quite exciting and different.

- Long and scratchy. We were all aiming to the same area, but it took hours to agree.
- I liked it very much. It reminded me of a game show.
- Interesting, enlightening and helpful
- Frustrated at first, then as barriers came down relieved.
- I was energized by the focus on a common language with which to discuss preferences.
- Fun
- It was fun and informative
- Pretty consistent with other profile workshops I've participated in. Always very interesting to learn the results.
- What, again?? Will the board, administration and staff really "buy into" this

#### Reactions to Workshop #2:

- Will the board, administration and staff accept all this and look for ways and means to react to what is shown needs to be done
- A bit confused. Found it very challenging to interpret the founders objectives back in 1861
- I felt like we were starting to move ahead
- Confused
- Drained. It felt good to be on the other side of that work.
- Hopeful.
- Comfortable and productive
- I don't think we really nailed down what the core ideology is, just what we would like it to be.
- A bit rough. I don't like ending sentences with "it" and our core ideology ends with "it"
- I could see where we as a museum were going, who we are and our sense of purpose and identity
- Lost in concepts
- It was fascinating and full of surprises
- More satisfied and hopeful there would be results/action. More comfortable with people in the museum I hadn't known very well before.
- Tired! Took too long to arrive at core ideology. Was surprised so many staff did not see that science was not a core value before that.
- Exhausted-amazed that we only had one core value-could understand things better if I thought from that perspective.
- I was favorably impressed with the core ideology, etc. methods. Again as with any process there are discrepancies in the approach.
- That this would not happen. The organizational coach promised a more decentralized approach in the 2nd session-more breakout groups but never followed through on it. Used techniques which rushed us to consensus with inadequate time and materials for examining our historical roots and their meaning.

### **General Museum Staff:**

Reactions to the fact that the workshops would be taking place:

- Excited, but then disappointed I wasn't invited!
- I was uncertain if my position would be maintained or if I would be re-assigned to a non-desired new position.
- Excited to be part of a new organization acting in an innovative manner
- Been there-done that already. Why don't they use the knowledge gained from previous evaluations? Plus, I felt lousy because we lost our institutional history and scientists with the last bunch of layoffs.
- Didn't care
- Waste of time
- Curiosity, skepticism
- Hope that all the money we were spending on the consultants and participants time would produce worthwhile results
- Excited, about time, much needed
- I thought they were long overdue and that there was hope that the museum would be back on track before too long

Reactions to workshop #1:

- I thought the results were interesting, more a novelty than anything...I also felt the profiles were very personal and not necessarily something to share with everyone.
- True to form, seemed logical
- It was interesting to learn about myself, heard from workshop participants that they were mostly pleased with the process, but I am not sure how beneficial it is yet.
- This has little bearing on what we are expected to do on the job day to day.
- Waste of time-we all know that people are different and react to things differently and we all need to be flexible when dealing with others.
- How will it help the museum?
- Been there-done that already. I've been through this several times at this museum. Just make a decision about what direction to take and go for it. Stop running around in circles.
- When I read about the organization profile, it made sense to me. I am new, but have gotten a feel for "how things run"
- I was skeptical of the overall accuracy of the profiles and wondered if the benefit was worth the time and money the museum spent on this part of the change initiative.

Reactions to workshop #2:

- I was angered that "science" didn't even enter any of these ideas, in an organization founded to enhance "our mutual improvement in the natural sciences"

- I was glad that a large group was initially prodded to identify these. I think that they are critical foundation questions. I think that the ideologies are somewhat vague and need to be given life through our everyday action.
- Where are the scientists? Make a decision already! Decide if this museum is a collections based Natural History museum or a science amusement park. And stick to it. We are being pulled in too many different directions with no staff to handle the work load.
- Made sense
- Not informed to answer this.
- I am in agreement with them
- They were well done but said a lot about what we are not doing that we all believe is what we should be doing-mostly this is in reference to the core business aspect, i.e.: sharing knowledge etc.
- Pain-staking process discouraged by lack of core values, though agreed with results
- From what I know, I like the way things evolved (Personally, I wonder what the outcome would be in a few years with different staff) I hope that this will give us a workable mission statement acceptable to both staff and visitors

## APPENDIX F



INTERVIEW 1  
Director of the Buffalo Museum of Science

1. Why do you feel you were hired to be the President and CEO of the museum?

*The board of directors actually knocked on my door. They were looking for change and knew that I had a history as a change agent.*

2. What was the condition of the museum when you started?

*Stagnated. There was a lot of friction between the staff and the managers.*

3. How do you think you have affected the environment at the museum?

*I feel that I have raised expectations. Also, I would say that communication is a lot better.*

4. Describe for me what the museum was like before Sept 2001.

*We were starting to create momentum and were thinking bigger. The museum was livelier and we were connecting better with each other. The staff each had a different vision of what a museum was. We had no clarity of core. I was going to have the staff go through this process anyways, it was just a matter of when. When the events of September 11 occurred, and we had the series of cut backs in November, that was as good of time as any. That is why we are doing the workshops now. But they would have occurred whether or not these events took place.*

5. What is your experience with Organizations Are People, Too?

*I interviewed with the organizational coach in 1989 and was impressed by the culture of his institution. He is one of the top known and respected museum directors in the world. When you would attend a conference, you just knew exactly who worked for him. Eventually, he left his position of director and now does consulting. He was recommended to me by two other directors of outstanding institutions. I also have previous experience with this method through work with this particular organizational coach.*

6. What were your perceptions of how the staff worked together during the workshops?

*I can see that some barriers are starting to come down. There is a real cross section of people in the room and by setting up that environment, they are more apt to work together. Everyone has a voice. I am, though, consciously giving more "air time" to the minority groups, like the curators. It is very important that they share their opinions because they are so underrepresented. Some people aren't going to be thrilled with that.*

7. Were there any high lights for you from the meetings thus far?

*The clarity. And that everyone has a hand in creating this.*

8. Were there any low points or do you have any concerns from what has occurred thus far?

*I am noticing that there are knee jerk responses by some of the staff.*

9. On a scale of 1-10, what is your level of confidence in regards to the momentum the core set will cause for the museum?

8.

10. Let's say it's 2003 and I'm fresh out of college looking for a job. Why would I want to work here?

*You would want to work here because there will be a sense of excitement. We will be a future oriented, growing institution.*

INTERVIEW 1  
Organizational Coach  
January 17, 2002

1. I see that this process of identifying core ideology, business and values is a multi-staged process. What should the employees of BMS be doing between workshops to keep the momentum going?

*It is up to the professional team to decide how they will keep the momentum going. They know what works best for them, instead of me saying, "Okay, now do this, this and this.". The trick is to get them (the professional team) to start using the tools, to get them to think and create their own mechanisms for disseminating their new found knowledge. After the first workshop they partnered up with a non-participant. After the second workshop, they organized four separate sessions that the non-participants could sign up to share the results of the second workshop.*

*Everyone had the opportunity to take part in the Personality Profiles workshop. Everyone had the opportunity to better understand how they work with others get insights into their and others personalities and better understand the preferences of the Buffalo Museum of Science in deciding and doing things.*

2. What is the theory behind the process that you use, meaning the Personality work combined with the Collins and Porras work?

*When Collins did his work, he set out to answer a question with data driven research and that was it, just answer a question. What I have done with Jim is to develop the tool set so organizations can work on it.*

*In regards to the Profile work, you have to understand WHO a Company is and understand its inspirations. You can't change who you are until you understand who you are. See, it's all about behaviors. When you realize your Personality Profile, you have choices as how you want to behave in the future. That's what the first workshop is about. Preference and choice. The key to going through a process like this is to have high self-esteem and to know who you are. Then you have to decide how badly you want to change, and have strong mechanisms to support the change effort.*

3. What is the ultimate goal of going through a process like this?

*To understand and choose to be more of who you are everyday. This offers the best opportunity for sustainable success. After going through this process, you would be able to determine who you are; your passion, what you're best at and what economic model would work best."*

4. What were your impressions of the energy of the BMS staff toward their ideology, business and value?

*They kept gaining ground and then giving it up, so they were quite fatigued by the time they got to what they identified their core ideology to be. Groups have different levels of energies. It's what you do with this after the fact that counts. It's how they apply it that matters.*

5. I see that you have worked with other museums. What was the difference in their performance before and after identifying their core ideology?

*Some institutions became more focused and phenomenally more successful; attendance, economically, everything. Others just found it to be a useful tool on how to make decisions.*

6. What barriers do you think could possibly exist to the success of implementing the core ideology, business and values for BMS?

*They have to overcome inertia as any organization does. They have to get used to a different way of thinking and doing. They have to stay focused. Implementing this will effect everybody, everyway, everyday. It will effect how they hire people, how they pay people how people are reviewed – everything!*

## Director of the Buffalo Museum of Science, Interview 2

April 19, 2002

1. What is your overall reaction to this process?  
*I would give it a B rating. I think it went pretty well. There are other institutional issues going on right now, so it has been difficult to focus. But, it has been useful for our managers. They are no longer shooting from the hip.*
2. How do you feel about the outcome of this process (the framework)?  
*Pretty good. There are a couple of things that I'd like to see that I'm not seeing, though. You can't find things like trust, respect and communication in the framework. They are implicit but not explicit. I think there will have to be a "Director's Addendum"*
3. What do you think are the strengths and weaknesses of the framework?  
*Strengths: all of the people within the organization are in the process of thinking about the organization. Staff can feel connected to the framework.*  
*Weaknesses: Trust, respect and communication are missing. There needs to be some action steps for the strategies. Another concern I have, looking back, is that we shouldn't have been so hands off with the Widening the Dialogue sessions. There should have been more control there.*
4. How do you believe the framework will influence activities at the museum?  
*We've been pushing the framework around the management table. Starting with me, I've used it in hiring new staff. This needs to be institutionalized. This will take time and reinforcement.*
5. How have you used the framework since the last workshop?  
*Hiring, decision-making and initiatives with the staff, such as the summer dig planned at the Hiscock site.*
6. What do you feel will inhibit the full impact of this work, or, inhibit the museum in taking full advantage of this work?  
*We have so many things on our plate right now. We're just shifting from focus point to focus point. It's hard to keep consistently focused and promote aggressive institutional change.*
7. What do you think were the strengths and weaknesses of the organizational coach during this process?  
*He was great at letting process rule, and patient at letting process rule. I was getting frustrated at how conversation was dominated by a few in the room. I know he says that he is a coach on the side and not a facilitator, but I think that there are times when you do in fact need to facilitate. I also think that the group needed more up front structure on how this process might go. See, I've been through this before, so I tried to point things out and ask him to explain things as*

*we went. But I think explaining that up front would have calmed a few anxieties held by the participants.*

8. How do you plan to continue the momentum?

*We need to keep this document in front of us. It has to be a reference point. We need to internalize it and get it into our vocabulary. Processes like this tend to be faddish, and I don't want everyone to slip back into their normal way of doing.*

9. What is your vision for the framework?

*I want evidence of its use by behaviors.*

Organizational Coach – Interview 2

April 17, 2002

1. What are the strategies that you use to get a group this diverse to come to consensus?

*I try to listen very carefully to the group. I look for threads of connections. I'll say something six different ways if it will help people to connect. I try to leave enough "white space" to give people time to think in a new way. I'll only have a group dot stuff for frequency, never voting. The process is just as important as the outcome. The journey is just as important as the answer.*

*In part, that's the difference between a coach and a facilitator. It's not about getting the answer. It's not about voting. It's about capturing what we all know using the best set of language. I'm not going to let a group hide out from talking. I will go around the table and ask each person to respond to the same question. It's the coach's job to make sure people speak up. People need to talk.*

2. What obstacles, if any, are you noticing as the Buffalo Museum of Science goes through this process?

*Typical ones- too much quantitative information in their past. They haven't looked at behaviors before. Things haven't worked in the past. In order to change anything, the professional team has to start with themselves. They are working at the business instead of on the business. And, having a Ph.D. doesn't make you smarter than the rest of the group.*

3. How do you feel about the quality of the output?

*It feels right to me for them. I have a sense for when people have gone deep enough. There has to be enough strength and validity. It feels like they have done that.*

4. How would you rate BMS thus far in comparison to other museums that have gone through this process?

*They worked hard, they were thoughtful, engaged, spirited and tenacious. The hard part is now living it. The important thing is alignment with everything they do everyday.*

## APPENDIX G



## **Workshop 3**

### **Staff Interviews-Workshop Participants**

#### **What did you like about the last workshop and or the workshops thus far?**

- Liked working in small groups-I feel more comfortable
- The fact that Roy has a background with museums
- Interesting to see the development
- Getting people from all over the museum to participate
- Enforcing/requiring communication
- Looking at the museum holistically
- Organization of the workshops
- David is participating but not dominating
- We have faced up to the fact that our name is not what we do (science)
- That when we broke into groups and came back, seeing that we were all pretty much on the same page
- There is representation from all over the museum
- That new employees are working with the old employees
- New employees and old employees are on the same page

#### **What didn't you like about the last workshop and/or the workshops thus far?**

- The core ideology still isn't right, any organization could have our ideology
- There isn't a focus on our collections
- Roy wasn't always clear with his directions
- Workshop #1 was too separate from the rest.
- Values are too vague
- I'm a bit skeptical of how this is going to work
- The core ideology is too broad
- Too much time spent on discussions, but I understand that this is a tedious process

#### **What would you like to see done differently?**

- How is this going to fit in with our jobs? We need to know, as well as the rest of the staff.
- I would like for us to sit in different seats for the workshops. Departments are sitting together.
- Get to more specifics. Create a description that will allow you to do your job based on this information.
- Come up with a plan on how this is going to affect the day-to-day so that everyone can understand what is going on.

## Staff Interviews: General Museum Staff

### **What do you like about the Widening the Dialogue sessions?**

- Bringing people together from all levels and areas of the museum
- I'm meeting new people
- I liked the "hands on" style of presentation versus being talked at
- People are coming together and getting things down on paper
- I can relate to everything on the pages and adapt it to what I'm doing
- Starting to see that the collections are being brought to the forefront
- I like that we're combining the old with the new
- I like that we're broken into small groups
- The presenters are doing a good job

### **What are some dislikes or concerns you have about these workshops?**

- Too lengthy-it seemed like it took too long to reach a simple answer
- It seems like the workshop participants are getting tired of doing this
- People are sometimes afraid to ask questions
- There's too much focus on customer service, we do that anyways
- I don't know who's doing what. What about job descriptions about how this is going to relate?
- Not enough space in the room where I attended a session. I felt disjointed.
- I can't tell where collections fall into the plan
- Where is research listed as a focus?

### **What can we do to make this better?**

- Focus on updating
- Help us to experience the workshops more (role play)
- Can the workshops be done in less time?
- Find a non-intrusive way to get people to ask more questions
- Focus more on Environmentally Responsible
- Take a stand in the community
- Make a plan of action and start delegating
- Start environmental responsibility within the museum
- More visual aides, even putting the information on flipchart paper
- Make the sessions more interactive
- The information is losing some value in the delivery
- More communication with MEP teams
- Bring each other together more to discuss information

## APPENDIX H

Staff Interviews  
Workshops 4-5  
(*italicized responses are new interviews*)

WORKSHOP PARTICIPANTS:

1. How do you feel about the outcome of the process?

- *We have a useful tool*
- *It built a spirit of togetherness*
- *This was a win/win situation*
- Good, it makes us accountable
- Use it as a guide for growth and development
- It's flexible
- Clearly states who we are and what we want to do
- *Good for the short term, I have reservations regarding long term systems change*
- Happy it's complete
- There were a lot of kinks-the dot method
- I was optimistic in the beginning, tired in the middle, glad at the end
- I'm glad David took the initiative to get this
- *It brought everyone together from all levels*
- *I thought that the core ideology was too loose, but it grew on me. We are here to create a better world*

2. What do you think are the strengths and weaknesses of the framework?

Strengths:

- *The framework is starting to show up in our meeting agendas*
- Solid structure
- Gauge if we are heading in the right course
- *Everyone was involved*
- *This is a plan that is written down, we know the intent*
- Finally have a method to go by
- *Dots were efficient, though*
- *It has an environmental focus*
- *I like all of the issues in the framework*

Weaknesses:

- *It's new*
- *We don't know how to use it yet*
- Values: what will and will not be tolerated
- Nothing about employee interactions (Human resources? Innovation? Teamwork?)
- Our mission statement-now that we have this, what about our old one?
- *People dominated and twisted the conversation*
- *People went against their true feelings in order to expedite the process*
- Everything can go through the framework
- Who is going to okay things

- If we wait too long to make a decision, we could miss opportunities
- *Didn't like the dots-I found I was influenced by quantities of dots*
- *If you were shy, or didn't speak up, 4-5 people dominated the conversation*

3. How do you believe the framework will influence activities at the museum?

- *We will have a trademark of activities that will follow a pattern*
- *We will brand our style of education*
- Significantly. This is the first time anything like this has taken place
- *We will have clearer goals*
- *We will work with other teams of people; institutional vs. individual*
- I can see it being use for big projects
- Programs are engaging anyways, so how will things be judged
- This isn't hanging on the bulletin boards, a copy has not been placed in our "in" boxes
- The board members need to be brought up to speed
- We need a mini guidance counselor to guide us on how to use this
- *If it is used, will it be used.*
- *How will it be enforced? Administration should enforce it*

4. How have you used the framework since the last workshop?

- *We used it to have the Afghan slides shown, but that was rejected*
- *We're using it on the Hiscock team; we decided to bring people in at the beginning of the process during excavation instead of just at the end, for the display.*
- I haven't, but I can see myself using it
- *I haven't.*
- I haven't, but it's subconsciously in my head, I'm waiting for a good copy
- *We used it on Soup Day, we were environmentally conscious*
- *The Afghan slides fit perfectly, but it was rejected*

5. What do you think were the strengths and weaknesses of the organizational coach during this process?

Strengths:

- *He was on top of the process*
- *He would clarify things for us*
- Remembered names
- Revisit comments
- Excellent listening skills
- Felt comfortable with him there
- HE was funny
- Organized
- Knowledgeable about the museum industry
- *Effective*
- *Allowed many people to voice their opinion*

- *This was a process that could only be done by an outsider*
- *Very good speaker*
- *Ability to help understand and convey thoughts*
- *Kept us on track*
- *Enforced that everything had to be pervasive, everyday, every way*
- *Staff from all levels were there*
- *Made sure that at some point, everyone spoke*

**Weaknesses:**

- *Not flexible in his method*
- *Should have taken a role in sharing information with the staff-staff might have been more invested*
- *(none)*
- *Red dots-unclear on directions*
- *Used corporate examples instead of non-for-profit*
- *Should of asked for everyone to speak more frequently*

## GENERAL MUSEUM STAFF:

### 1. How do you feel about the outcome of the process?

- Widening the Dialogue sessions 2 & 3 were poorly organized
- The leaders complained about how long this was taking
- Is this going to be implemented and who do I take my ideas to?
- *Sounds good, but how practical is it?*
- Feel pretty good
- Something to show for all of that effort
- It's understandable
- *Makes department heads and staff think together*
- *More responsive attitude*
- Positive attitude in the air

### 2. What do you think are the strengths and weaknesses of the framework?

#### Strengths:

- Any idea can be run through it
- *So much of it is on paper*
- *There are a lot of details*
- Vague
- Understandable
- *(none)*
- Bringing people together

#### Weaknesses:

- Too ambiguous
- *Nothing explains how to use it, there are no instructions*
- Vague
- What do the strategies mean?
- *Bosses have to be bosses and staff have to be staff; how much teamwork can there really be?*
- This is going to take time, not instant

### 3. How do you believe the framework will influence activities at the museum?

- My personal work-won't change my job much
- Holistically, help to weed out ideas, may slow down process of implementation
- *It will help to filter programs*
- Depends on how and if people use it
- *People will work together better*
- Thinking about things more in depth, more conscious of things

### 4. How have you used the framework since the last workshop?

- Haven't used
- *No, but I have seen examples*
- Not personally, but it's been used on the Hiscock team
- *I've been thinking about it*
- I haven't

5. What do you think were the strengths and weaknesses of the Widening the Dialogue sessions during this process?

Strengths:

- Got to see the end point
- I didn't feel like this was a waste of time at the last meeting
- I feel like there is a sense of purpose
- *Discussed what we thought*
- *We were able to get our thought out*
- Conducted well
- Made us come up with suggestions
- Saw how it worked
- *Interesting points of view*
- *New things are coming up that sound interesting*
- Reiterated information to us

Weaknesses:

- (mentioned in question1)
- *We had no feedback in the process*
- *Would have liked to have observed a workshop*
- (none)
- *there is always room for improvement*
- same as before



## APPENDIX I

**GENERAL MUSEUM STAFF-SURVEY 2**  
**PART 1: THE FINAL DRAFT OF THE DECISION MAKING FRAMEWORK**

1. To what extent do you feel that the Core Ideology truly represents the Buffalo Museum of Science?  

1	2	3	4	5	6	7	8	9	10
strongly disagree									strongly agree
2. To what extent do you feel the Core Ideology will be effective in guiding the museum in the future?  

1	2	3	4	5	6	7	8	9	10
not effective at all									very effective
3. To what extent do you feel that the Core Business truly represents the Buffalo Museum of Science?  

1	2	3	4	5	6	7	8	9	10
strongly disagree									strongly agree
4. To what extent do you feel the Core Business will be effective in guiding the museum in the future?  

1	2	3	4	5	6	7	8	9	10
not effective at all									very effective
5. To what extent do you feel that the Core Value truly represents the Buffalo Museum of Science?  

1	2	3	4	5	6	7	8	9	10
strongly disagree									strongly agree
6. To what extent do you feel the Core Value will be effective in guiding the museum in the future?  

1	2	3	4	5	6	7	8	9	10
not effective at all									very effective
7. To what extent do you feel that the Strategic Values truly represent the desired future state of the Buffalo Museum of Science?  

1	2	3	4	5	6	7	8	9	10
strongly disagree									strongly agree
8. To what extent do you feel the Strategic Values will be effective in guiding the museum in the future?  

1	2	3	4	5	6	7	8	9	10
not effective at all									very effective
9. To what extent do you feel that the Strategic Objectives truly represent the desired future state of the Buffalo Museum of Science?  

1	2	3	4	5	6	7	8	9	10
strongly disagree									strongly agree
10. To what extent do you feel the Strategic Objectives will be effective in guiding the museum in the future  

1	2	3	4	5	6	7	8	9	10
not effective at all									very effective
11. To what extent do you feel that the Strategies truly represent the desired future state of the Buffalo Museum of Science?  

1	2	3	4	5	6	7	8	9	10
strongly disagree									strongly agree

CONTINUED ON BACK

12. To what extent do you feel the Strategies will be effective in guiding the museum in the future?

1 2 3 4 5 6 7 8 9 10  
not effective at all very effective

## PART 2: GENERAL QUESTIONS

1. Do we understand ourselves better as a result of going through this process?

1 2 3 4 5 6 7 8 9 10  
not at all much clearer understanding

2. Are we better equipped to make consistent decisions?

1 2 3 4 5 6 7 8 9 10  
not at all absolutely

3. Have your feelings about working here changed since January 1?

1 2 3 4 5 6 7 8 9 10  
more negative no change much more positive

4. In regards to your response to question 3, to what degree are your feelings due to this process?

1 2 3 4 5 6 7 8 9 10  
not at all absolutely

5. How confident are you that this process will have a positive impact on the future of the museum?

1 2 3 4 5 6 7 8 9 10  
not confident at all very confident

Please feel free to make comments regarding the framework and the process of its development, as you were taught during the Widening the Dialogue sessions.

The Framework

Strengths Weaknesses

The Process

Strengths Weaknesses

Thank you for taking the time to complete this survey. Your input regarding this process is very valuable to this research initiative.

## WORKSHOP PARTICIPANT-SURVEY 2

## PART 1: THE FINAL DRAFT OF THE DECISION MAKING FRAMEWORK

- 1.To what extent do you feel that the Core Ideology truly represents the Buffalo Museum of Science?

1 2 3 4 5 6 7 8 9 10  
strongly disagree strongly agree

2. To what extent do you feel the Core Ideology will be effective in guiding the museum in the future?

[illegible]

3. To what extent do you feel that the Core Business truly represents the Buffalo Museum of Science?

1 2 3 4 5 6 7 8 9 10  
strongly disagree strongly agree

4. To what extent do you feel the Core Business will be effective in guiding the museum in the future?

1	2	3	4	5	6	7	8	9	10
not effective at all								very effective	

5. To what extent do you feel that the Core Value truly represents the Buffalo Museum of Science?

[illegible]

6. To what extent do you feel the Core Value will be effective in guiding the museum in the future?

1 2 3 4 5 6 7 8 9 10  
not effective at all very effective

7. To what extent do you feel that the Strategic Values truly represent the desired future state of the Buffalo Museum of Science?

1 2 3 4 5 6 7 8 9 10  
strongly disagree strongly agree

8. To what extent do you feel the Strategic Values will be effective in guiding the museum in the future?

1 2 3 4 5 6 7 8 9 10  
not effective at all very effective

9. To what extent do you feel that the Strategic Objectives truly represent the desired future state of the Buffalo Museum of Science?

1 2 3 4 5 6 7 8 9 10  
strongly disagree strongly agree

10. To what extent do you feel the Strategic Objectives will be effective in guiding the museum in the future

1 2 3 4 5 6 7 8 9 10  
not effective at all very effective

11. To what extent do you feel that the Strategies truly represent the desired future state of the Buffalo Museum of Science?

1 2 3 4 5 6 7 8 9 10  
strongly disagree strongly agree

CONTINUED ON BACK

museum in the future?

not effective at all

## PART 2: GENERAL QUESTIONS

1. Do we understand ourselves better as a result of going through this process?

He is you

2. Are we better equipped to make consistent decisions?

ne ze jou

3. Have your feelings about working here changed since January 1?

more negative

4. In regards to your response to question 3, to what degree are your feelings due to this

process?

the re you

5. How confident are you that this process will have a positive impact on the future of the museum?

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Please feel free to make comments regarding the framework and the process of its

development.

The Framework		The Process	
Strengths	Weaknesses	Strengths	Weaknesses

Thank you for taking the time to complete this survey. Your input regarding this process is very valuable to this research initiative.