
Organizing for Equity-Oriented Change in Museums

Insights, Practical Suggestions, and Stories
From the Science Museum of Minnesota



March 2021

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The authors gratefully acknowledge current and former Science Museum of Minnesota staff who participated during the life of the Race Forward project: Ife Adomayi, Ben Amel, Kim Anderson, Josey Balenger, Roger Barrett, Ray Bernard, Keith Braafladt, Ian Brunzell-Looney, Liesl Chatman, Zan Christ, Mark Dahlager, Laurie Fink, Yen Fostervold, Janet Groenert, Kathryn Guimond, Ronda Hamilton, Gretchen Haupt, Choua Her, Charlie Iverson, Ana Kaveh, Brian Kennedy, Zeta Kilbride, Stephanie Long, Aiyana Machado, Julie Marckel, Paul Martin, Christina Martinez, Shannon McManimon, Kelly Meyer, Linda Mullerleile, Rebecca Newberry, Jenny O'Neill-Englund, Emily Poster, Shona Ramchandani, Kim Ramsden, Christy Randall, Doug Raney, Michelle Richardson, Quentin Rouhoff, Farzad Sadjadi, Daniel Samuelson-Roberts, Travis Sandland, James Satter, Sierra Scheet, Aki Shibata-Pliner, Marcia Simning, Sara Spiess, Erin Strauss, Larry Thomas, Marie Tuhy, Andrew Urch, Andy Vang, Je Vang, Kalia Vue, Richard Walker, Lyncy Yang, Kara Zetzman, and Sarah Zwier. Our thanks to all staff working at SMM during the project period, who contributed in many ways to our collective work.

Our NSF co-investigators, Noah Weeth Feinstein, and Cecilia Garibay, were our learning partners and critical friends throughout this work. Cori West and Esther Hsuborger provided key insights from their simultaneous research work. We also are indebted to our advisors in this work: Emily Dawson, Sue Allen, Gloria Ladson-Billings, and Laura Huerta Migus.

Citation: Jones-Rizzi, J., Bequette, M., Ronning, E. Francis, J., Tillman, S., Schreiber, R., Lawson, S. Schmit, B., O'Connor, E., Imholte, J., Causey, L., Garibay, C. and Brown, A. *Organizing for Equity-Oriented Change in Museums: Insights, Practical Suggestions, and Stories From the Science Museum of Minnesota*



This material is based upon work supported by the National Science Foundation under grant AISL#1516255 called *RACE Forward: Understanding and catalyzing equity-oriented change in museums and science centers*. Any opinions, findings, and conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the National Science Foundation.

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INTRODUCTION

The work described here was completed before 2021. The devastating and disproportionate effects of COVID-19 do not need to be described by us, nor does the murder of George Floyd in our metropolitan area, and the resulting nationwide uprising in response. But we acknowledge these, because final edits to this document were made after these events happened. They have absolutely shaped our perspective in finalizing this work, and prove the urgency of this work. Science museums, like ours and others, can play a role in creating a more just world. But strong internal work to examine our own role in perpetuating or breaking down inequities is needed for our organization to fulfill its potential.

The Science Museum of Minnesota and its staff are sharing our trajectory in moving towards being a more racially equitable institution over several years of work. This work was known internally as the *RACE Forward* project - an action research project designed to empower cross-organizational groups to spark sustainable change in practices, policies, and dispositions across the organization. Our work was not easy, and our work is not done. We learned from others as we worked, and we hope that in sharing our experiences we can help other organizations as well.

FOREWORD

Context-setting from Dr. Cecilia Garibay

Embarking on the *Race Forward* project required a leap of faith. While we were very clear on the goal of creating organizational change to advance racial equity, and had a set of principles and theory to guide the work, we were less clear on the process and what SMM could ultimately achieve. We were sure that SMM would be able to create change, but how and to what extent were open questions. While work to achieve equity is never truly done, SMM efforts point to a possible path toward aligning museums with more equitable practices.

One challenge in sharing this case study is balancing the need to share details of the change process with the need to tell a cohesive story that can be useful for others. This means it was not possible to relate in detail the evolution of the team's thinking and growth over five years, the emergent nature of the process, the moments of frustration and doubt, the adjustments needed along the way, or the amazing breakthroughs. But these were all very much part of the landscape of transformational organizational change.

Although some in the museum field have argued for the importance of taking an organizational-level approach to equity efforts,¹ such practice is not yet prevalent (Garibay & Olson, 2020). Equity and inclusion are only sustainable through change at the structural level. *Race Forward* offers a glimpse of a racial equity initiative with an organizational change focus, offering several insights that can be useful to the field.

1. Taking an organizational-change approach can reframe the way equity efforts are conceived in the museum and can open multiple avenues through which equity issues can be addressed.

From the onset, the project positioned racial equity work as the responsibility of the entire organization, which led us to explicitly link the Museum's efforts to specific functional areas of the Museum. The SMM team considered how specific areas of the organization, such as human resources, exhibits, marketing, and visitor services, were attending to and could further advance racial equity. Once the team started considering its equity practices from this perspective, many possibilities opened up to experiment with different strategies across various parts of the organization.

¹ See for example, the *Cultural Competence Learning Institute*, Garibay & Huerta Migus, 2014, Jennings and Jones-Rizzi, 2017.

^[1] See for example, the *Cultural Competence Learning Institute*, Garibay & Huerta Migus, 2014, Jennings and Jones-Rizzi, 2017.

While not everything that each working group tried succeeded, and some groups progressed more than others, SMM's collective efforts created organizational momentum to advance racial equity—more than is typically possible through traditional approaches, in which diversity and inclusion are positioned as the purview of specific individuals or a single department. These combined efforts strengthened the “driving forces” for change (compared to the “resisting forces” that hinder change); driving forces create more traction toward advancing equity.

2. You have to operationalize equity in order to make meaningful progress toward it.

Equity is a slippery word. We all likely have a general, albeit perhaps vague, sense of what it is, but reaching agreement on an exact definition—much less how to achieve it—can seem impossible. But creating at least a working definition, and operationalizing it, is critical in galvanizing action toward equity-focused work. SMM's efforts to operationalize racial equity involved linking equity goals to specific organizational functions and having working groups identify specific, concrete practices on which to focus. For example, the HR group looked at existing policies, job descriptions, recruitment, and annual review processes. This careful self-assessment of internal HR operations helped the team identify policies and practices that created barriers or that did not align with creating safe and equitable spaces for people of color. Having each team operationalize equity in its respective area of focus pushed these working groups to look at specific practices and act on them. Some working groups developed specific goals and metrics and began to build accountability toward further progress. In areas where equity was not clearly operationalized, however, it was much harder to get traction.

3. Establishing an effective vision for equity efforts requires working at both the micro and the macro levels of the organization.

On one of my visits to SMM, about a year into the project, we brought together the different working groups to share their teams' work with each other. It was the first time since these teams had been formed that staff had come together to hear about their various efforts—and it was an “a-ha” moment. While teams had been diligently working on their specific areas and activities, it became clear during this session that they were struggling to see the connective tissue between the various groups' work. It was a good reminder that organizational change efforts require us to continually move from 10,000 feet up to ground level and back up again.

In organizational development, we often talk about this in terms of the importance of intentionally linking the micro and macro levels of the organization to create a cohesive vision for a specific change, which creates feedback loops. In other words, SMM needed to build ways for teams to see the connections between the various working groups' efforts, better articulate the Museum's vision, and build in more moments to come together as a whole and reflect. Ultimately, this moment led SMM to develop a theory of change and build in more specific ways to communicate with and engage staff across the organization to support this change.

4. *Race Forward* illuminated the necessity of both vertical and horizontal leadership in an organization's equity efforts.

Advancing racial equity at the organizational level requires the CEO, board, and senior leadership to commit to and support these goals as well as to develop processes and mechanisms that engage and support staff in leading change. *Race Forward* is particularly instructive in showing how vertical and horizontal leadership work in concert. The Learning Leadership Group (LLG), comprised of senior leaders, developed an initial strategy and gave working groups (composed of staff from various departments and different levels) control of leading their efforts. Most of the decisions, strategies, and day-to-day work, in fact, took place in the working groups. This structure created a kind of distributed leadership model (Spillane, 2005) and power-sharing in which everyone was asked to help shape the work and share responsibility for the organization's racial equity efforts.

At the same time, the need for unwavering top-level support, especially from the CEO, came into sharp focus. Two events described in this report—SMM's response to the 2016 murder of Philando Castile and, a year later, its process for developing a racial equity statement—provide powerful examples that underscore how executive leadership can either hinder or champion efforts to substantively address racial equity in an organization. This is also a good reminder that there isn't a "master blueprint" for racial equity work, which is often messy and requires openness and willingness to learn and shift.

5. It's essential to engage and support staff in connecting equity to their job responsibilities.

One of the more instructive aspects of SMM's work was the way the team considered, and proactively worked to engage, staff across the organization in its racial equity efforts. This engagement included offering professional development opportunities, creating space for conversations about white supremacy and systemic racism, and transparently communicating changes in policies so that staff understood the reasoning behind them. Creating multiple opportunities for involvement—both voluntary and required—provided varied avenues where staff could encounter and engage in equity efforts. Of course, that doesn't mean that there was no discomfort or resistance or that every staff member engaged equally. But over time, these efforts helped center and “normalize” racial equity as part of the Museum's everyday discourse and work.

6. Discomfort and tensions have to be understood and embraced as part of the process.

Experiencing tension and discomfort is an inherent aspect of undertaking any meaningful racial equity work. After all, these efforts seek to disrupt dominant patterns and systems in order to forge more equitable practices. Rather than work to avoid these tensions for fear of causing discord, acknowledging them and considering how they can inform the change process can be useful. Reviewing notes from my many meetings, interviews, and visits with SMM teams was a reminder of the fact that this is all part of the experience. Several members of the LLG, for example, reflected on how they struggled for some time to become comfortable using terms such as “white supremacy” or “white privilege.” Questions of process and group dynamics, particularly when discussing issues of race, also surfaced. In the work of the One Museum One Book group, for example, questions emerged about who should facilitate meetings, whether conversations were inadvertently over-burdening staff of color, and how to create space where individuals—regardless of where they were along their own personal cultural competence journey—could participate. Tensions also surface regarding accountability. What is the balance, for example, between making space for staff to learn at their own pace while also not allowing racial equity work to be optional? How does the organization adequately support a working group that doesn't appear to be taking substantive action? How does the team navigate and work cohesively, given the varied experiences,

identities, and positionalities of team members? There were, of course, no quick answers, but the willingness to lean into these tensions was critical to SMM's positive progress.

7. You cannot outsource the museum's equity work to outside experts, but museums can benefit from external guidance and support.

There is no shortcut, of course, to creating more equitable organizations. The work requires a sustained, intentional effort and unwavering commitment. However, while there is no one roadmap toward racial equity, and every organization needs to define the territory for itself, external support can help advance organizational change efforts. The report has described in some detail the ways that an external project co-PI, working alongside the SMM team as a coach and advisor for the duration of *Race Forward*, proved important to the process. Adopting a "learning organization" mindset, being open to new ideas and constructive criticism, and being accountable were important elements of the process. The team also reached out to peers, intentionally sought opportunities to deepen its teams' own learning, and engaged in local and national conversations or initiatives that informed their work.



Equity and inclusion are no longer optional

Is equity work optional? For our institutions? For individuals within institutions? What does it mean for a museum, science center, or other cultural organization to commit to the idea that working on equity means treating equity as seriously as something like budgeting: it is part of every project, and it is necessary to the functioning of the organization? These are questions that we have asked repeatedly at our own organization, and that we respectfully suggest every museum and science center consider deeply. We have come to understand that when we work with existing museum-audiences, and follow the usual practices, we are continuing the status quo of differences in who has easiest access to science. When we do not make equity work central, we are increasing inequities with science engagement. There is no “neutral” choice.

The *RACE Forward* project allowed the Science Museum of Minnesota (SMM) to grapple with these questions through a sustained, reflective, documented process. This report is designed to share productive lessons and concrete examples from the project, which was an exploration of how to address questions of equity, particularly but not exclusively racial equity, in our work. Near the end of the project, Science Museum of Minnesota (SMM) staff created a board-approved **Statement of Equity and Inclusion**, which serves in many ways as a culmination of the project work, and also an ongoing reminder to continue to challenge ourselves to grow, and to be accountable to our ideals. This statement articulates, and makes part of our mission, work that SMM has been doing for decades.

Through our youth development program (the Kitty Andersen Youth Science Center), through the creation of the ***RACE: Are We So Different?*** exhibition, as well as numerous other projects, SMM has been engaging in discussions about equity for years.

The nature of this ongoing conversation however, has changed over time. In this report we reflect on our efforts to change our own culture by putting equity at its center, all the while grappling with a social context where race and racism lurk just below the surface.

How can you use this report? The answer, of course, is “it depends”—specifically on your intent and your organization’s history. Throughout this report, we have tried to explain what SMM staff were attempting in a given moment, and how that work took place. Often, it seems, organizations can have good intent with respect to equity work, but not be sure where to start.

We offer our experiences as a way to help you imagine what would happen if you tried something similar. We believe readers will appreciate and be able to utilize the practical, nuts-and-bolts examples that the case sample of the *RACE Forward* project provides, in order to move equity initiatives forward in their own institutional work.

Prompting change: the long-term impact of *RACE: Are We So Different?*

There would never have been a *RACE Forward* project without the exhibition, *RACE: Are We So Different?* Developed in collaboration with the American Anthropological Association, the exhibition that opened at our museum in 2007 has traveled to over 60 museums across the country. The exhibition prompted reflection, hard conversations, and change at SMM, continuing to this day.

The exhibition is frank and honest about race and racism in the United States. Race is an idea not supported by science, however, the exhibition was created, in part, to address anthropology's complicity in perpetuating the construct of race. The exhibition poses a complicated juxtaposition for visitors, in that race is not biological or real, and yet race and racism are real. The exhibition explores the science, history, and lived experience of race, including how it is still ever present within our institutions and social environment. In 2007, *RACE: Are We So Different?* was perceived as risky internally and externally: what would our visitors think? Would others beyond SMM want to host it? Would we have protesters? Would SMM be able to navigate the discomfort visitors and staff experienced with the topic?

Our concerns did not materialize. We had no protests, and other museums decided the exhibition was important to host. The *RACE* exhibition proved influential across the country.

Three copies of the exhibition toured over about ten years to approximately 60 science centers, museums, libraries, universities and community centers. Over 2.5 million people across the United States have experienced the *RACE: Are We So Different?* exhibit. This exhibition became emblematic of who we wanted to be: a museum that would do the right thing, take a stand, and speak our truth.

Creating and hosting the exhibition prompted some changes at SMM. Many staff became more knowledgeable about issues of race and racism; the project stimulated new external relationships and new practices for reflective conversations. Those external ties and the internal learning pushed us towards a more explicitly anti-racist approach in some of our language.

Some new visitors came to see *RACE* and then kept coming. The experience of hosting and touring *RACE*, however, did not prompt widespread, systemic change that made every person in the institution incorporate equity into their museum practice. Equity work was still seen as something that was the responsibility of particular departments—for example, those who staffed SMM’s youth development program, or the work of individuals, particularly BIPOC staff (black, indigenous people of color) who were especially committed to the topic.

Since the fall of 2015, the exhibition has been on semi-permanent display at SMM. We have leveraged external funding from the State of Minnesota, The Saint Paul and Minnesota Foundations, the Institute for Museum and Library Sciences (IMLS), and the National Science Foundation (NSF) with internal resources, to maximize its impact internally and externally. Since first developing *RACE* in the early 2000s, we had come to realize that if we wanted to engage the public on issues of racial equality we had to examine and unpack this issue broadly and deeply with our staff. And this work had to focus not just on understanding racial inequity or uncovering implicit bias—it had to examine how these issues were embedded in internal policies and procedures that determine how we work with the public, and how we work with our colleagues at the museum. And then we had to take action to change these policies and procedures.

Movement toward systemic change

The *RACE Forward* project took this challenge head on, recognizing we couldn’t hope to see systemic change around racial equity at SMM just by osmosis and proximity to the exhibit.

We needed to take a concerted, collective effort with staff from all levels of the institution to:

1 Understand our complicity in perpetuating racist views and actions within the museum.

2 Examine anti-racist views and actions.

3 take action to center racial equity throughout the organization.

Funding from the National Science Foundation allowed us to form groups that worked to adjust policies, procedures, and staff supports to center equity. Each group had, as its charge, a review of and attention to a particular aspect of the organizational structure. For instance, the *Human Resources* group took on the charge to examine all aspects of an employee’s lifespan, from recruitment to retirement, through an equity lens. The *Visitor Facing* group was charged with identifying opportunities to better support staff who spend most of their time interacting with visitors.

We wanted these staff to understand the basic content of the *RACE* exhibition, and we also wanted visitor-facing staff to exemplify the underlying racial equity themes of the exhibition so that they would be equipped to treat all visitors in a welcoming manner—not just white or middle class or English-speaking visitors, and not just visitors who match the historical demographic pattern of science museum visitors. Other groups are described below.

And now? Policies and practices across the organization, in a wide range of areas, have changed. We aren't done, but we have made a start on changing our organization.

The necessity of new vocabulary

Throughout this project, especially because racial equity and inclusion was at its core, we examined, questioned and reflected on terminologies and definitions to clarify and guide our work. In many ways, this began with the unflinching language of the *RACE* exhibition, where experts and scholars clearly describe the stark reality of race and racism in the United States. Everything we aspired to, and everything we continue to work on, is conveyed in the words we use. These words provide us with a kind of historical lexicon of how museums perceive, value, construe, and communicate about equity. We have found that surfacing and utilizing terms like "*white supremacy*" and "*decentering whiteness*" are useful and necessary, despite the fact that they cause discomfort among some of our colleagues.

Legal scholar Frances Lee Ansley explains the term *white supremacy* as follows:

By 'white supremacy' I do not mean to allude only to the self-conscious racism of white supremacist hate groups. I refer instead to a political, economic and cultural system in which whites overwhelmingly control power and material resources, conscious and unconscious ideas of white superiority and entitlement are widespread, and relations of white dominance and non-white subordination are daily reenacted across a broad array of institutions and social settings (1989).

Our use of the words *white supremacy* in internal documents and discussions, and the disquiet it continues to arouse, exemplifies the deep and often uncomfortable work organizations need to do around racial equity.

We have come to recognize that the discomfort concerning terminology about *white supremacy culture* and *decentering whiteness* often accompanies an absence of a contextualized narrative history of the racialized hierarchies, both in our broader society, and within institutions like museums. Rather than discount the discomfort of our colleagues, we have paid attention to it so that we can move towards a shared goal of organizational growth. This is often the challenge to equity work: we avoid conversations about the complexities of organizational change around equity because they are hard; people may feel threatened and don't feel comfortable or know how to have a conversation about it. We have attempted to use the discomfort inherent in equity/change work as a resource to build a culture of learning and understanding.

And at the same time that we plan for discomfort and resistance, we also want to note positive outcomes of using these words and concepts. We believe that direct language was instrumental in developing new relationships with external partners doing work rooted in anti-racism, during and beyond the original installation of the *RACE* exhibition. In addition, using exact, and commonly understood language helped us to have greater transparency across our institution about the work we were trying to do, as a well as a shared understanding of the work.

RACE Forward: Action research as a framework for transformative change

The *RACE Forward* project was an NSF-funded national study on the practices that build capacity at museums and science centers to create and sustain equity-related organizational change, comprising two strands: the first strand, a cross-organizational comparative study of the impact of hosting *RACE* at museums and science centers, and the second strand, an in-depth case study on organizational change around equity.

At SMM, this second strand of the study was conceived of as an action research project that jumped off from our re-installation of the *RACE* exhibition, focused on practitioner action to advance organizational transformation, with reflection and documentation built in. This work was grounded in historical and ongoing work in the museum field, particularly around organizational change. We drew on varied kinds of expertise within the organization, and drew on external expertise as well.

Internally, our project leadership included staff with both practical and theoretical experience in organizational change, organizational learning, and anti-racism work. Collectively, we had lived through dozens of organizational changes, and some of us had led these efforts, large and small.

Some of us had studied, and many of us had worked in organizations that were thoughtful about learning from experience and setting up systems to support this learning (and also organizations that were less intentional about doing so). And some (but not all) of us had engaged in equity work and anti-racism work in museums, in educational systems, and more. All of this lived experience was a part of how we developed and carried out this project.

Two theoretical frameworks for organizational change influenced the project in tangible ways. First, a model developed by John Kotter (1995, 1996) is intended to guide organizational leaders in developing, communicating, and executing change by building a sense of urgency among staff and building intentionally on that urgency through several intentional stages of work. This model has been widely shared in museum leadership programs, and was known and used in various ways by project leadership. Second, some project leaders were familiar with complexity theory, a model which shapes insights into how complex systems like organizations operate, and how those systems can be organized in thoughtful ways into groups that are given responsibility for learning and for action in order to produce change (Eoyang & Berkas, 1998; see also Haggis, 2008; Hargreaves, 2010). These two areas of study on organizational change—one focused on intentional change towards a common goal through small steps, the other focused on real world change that can be intentionally guided through carefully assembled working groups—provided a framework for our work, though we suggest other organizations interrogate any framework for change using an equity lens.

As part of the larger NSF research study, SMM's strand of work was supported by co-PI Noah Weeth-Feinstein of the University of Wisconsin, and co-PI Cecilia Garibay of Garibay Group in unique ways.

Cecilia, a well-known expert and leader in the field of museums and equity, served as a coach/advisor to the SMM team and was a vital resource. Through monthly conversations and yearly visits, she prodded the groups to experiment, think harder, and clarify their goals—her work will be evident throughout this report. Noah and his colleagues, Cori West and Esther Hsuborger, were simultaneously studying what happened at museums who hosted the *RACE* exhibition across the country; our regular project discussions provided a fieldwide context for the project work at SMM, and the specific examples coming from SMM's case study informed the data collection and interpretation in the fieldwide study as well.

No other museum had hosted *RACE* for as long as SMM, nor tied its installation to deep transformational change, and yet the insights from other museums provided ideas for the working groups at SMM throughout our strand of the work.

From theory and experience to practice

As we began the project, there were two questions we considered:

1 How should our work be documented and our insights gathered? (our approach to research)

2 How should the change process be organized? (our approach to practice)

We were focused on the practice of equity as it is reflected in current SMM structures and museum culture, as well as equity-centered organizational change and adaptation as evidenced by institutional language and action. We considered a traditional research approach; however, we worried that this approach would put the research team in the position of being “outside” the rest of the museum, risking that our SMM colleagues would see the researchers as judging them, and that the research team would not be expected to change along with the rest of SMM. None of these were acceptable or appropriate.

Instead, we took an action research approach. Some staff at SMM had experience with a form of action research called team-based inquiry (TBI) that had been developed to support museum practitioners in action research practices (Pattison et al., 2013). By using the TBI framework loosely, we were able to ask each group to focus on what they saw as their area of concern, and what they wanted to change. We encouraged them to take action, and to collect data on how that action went.

The project co-PIs, Marjorie Bequette and Joanne Jones-Rizzi, in consultation with others at SMM, identified people in leadership roles, people who had been thinking deeply about racial equity and SMM’s work, and people in roles likely to be critical to any large-scale effort around racial equity, and asked them to join the Learning Leadership Group (LLG). This group varied in size through the project, but in general was about a dozen people or a little less.

The LLG began to consider how the larger work of doing intentional organizational change, and aligning it with existing SMM work, would happen. In early meetings, we spent time looking at the existing SMM strategic plan and looking for areas where racial equity was already explicit.

From this process, we identified four high-priority working groups for immediate action (and also identified a fifth group, which was added a year later).

The five groups and their charges were:

Human Resources: how can equity inform all aspects of an employee lifecycle, from hiring through onboarding, retention, advancement, and eventual departure from the organization?

Content: in SMM content (including but not limited to exhibits, programs, and marketing), how can an equity lens inform how content is produced and shared?

Visitor Facing: how are the staff that spend the most time with visitors supported in delivering an equity-informed experience?

One Museum One Book: how can a regularly offered voluntary opportunity (a monthly book club) increase staff understanding of equity issues and sense of urgency around racial equity?

Data (added midway through the project): how are museum data practices for staff and visitors, particularly around demographics, aligned with each other, and used in ways that can support the entire museum in taking action toward greater equity?

The robustness of these working groups was maintained over the life of the project by adding members, some of them in leadership roles, when staff changes invariably occurred, or when leaders felt that fresh perspectives were needed.

The elephant in the room: how was this work funded?

As part of an NSF project, this work was funded with significant external dollars. We were really fortunate to have that funding, and want to acknowledge and describe the role that funding played in moving the work forward. We also want to talk about funding in real ways: it isn't a magic bullet, it didn't do all the work for us, and some of the work that we did could be done with little or no funding at all.

First, let's get real. SMM received over half a million dollars for the project, which is a lot of money. Not all of that went to equity work directly, though.

A significant portion went to indirect costs, and another large chunk went to things that we were doing because of the grant: meetings with our grant partners, reporting to NSF, holding advisor meetings, reading and re-reading the grant to make sure we were doing what we had promised, and more. We also did work that was focused on documentation for others (rather than creating change for ourselves): writing this report, traveling to and presenting at conferences, contributing to journal articles.

The rest went to creating actual change, as described later in this report. Mostly funds went to staff salaries: people could charge the grant for their time. Some went to food, some went to books, and some to external consultants at a few key points. We also believe that some of these funds went to making mistakes, which this document is designed to help other organizations avoid.

Dollars provided time, and they also provided urgency. Because of the funding, we didn't get to take a break. Dollars also reflected our own urgency: we applied for this funding because we thought this was important work to do. We firmly believe that how you allocate your budget (whether operating dollars, grant funding, or whatever source) reflects your values.

Describing what was specifically funded by NSF and what was not is actually not useful, because what we want to do is share examples of what was *helpful* in moving us forward. But everything we describe here was in some way connected to this project.

People who were doing this work developed new ideas for what to do and moved ahead on them; this was really important for helping to gain momentum and in fact was what we wanted to happen.

Our funding is done, in fact before we had finished documentation, but we are still doing the work, because we believe in ongoing attention to equity and inclusion. If you look at SMM's history, you'll see continued investment of SMM dollars, and of grants, to support equity work. We think this work can be funded in multiple creative ways.

Organizing our work

Three broad principles shaped our work and informed decisions we made as we set up and executed the project.

These were not a set of steps to follow, but they were framing ideas that helped us to keep on track and moving ahead:

1 Setting and resetting a shared *vision*.

2 Creating change through *action and reflection*.

3 Intentional *distribution and redundancy* of work across staff, departments, and experiences.

A shared and ever-evolving vision

Our goals were not set by one person or even by the co-PIs, and they shifted as the project progressed. A shared vision or goal was initially created by a leadership group. This group refined that vision over time, informed by their and others' work across the museum, and also informed by events that happened externally. At the beginning, we said we were working "towards racial equity at SMM," and built consensus around what equity meant to us in our context. Later, we developed a *project theory of change* (see Appendix A) as a stronger iteration of that initial goal. Our eventual museum-wide equity statement (Appendix B) provided further views/support of what equity means to us at the museum for communication externally.

Distribution and redundancy

An explicit goal was that everyone in the museum, over time, would feel connected to the project in some way. In a large institution with over 400 full-time staff, we knew that wouldn't happen quickly, and so we were intentionally thoughtful about participation to help the work grow more quickly.

The LLG was made up of the leaders of the working groups, and each working group had two leaders whenever possible so that leaders could share the responsibility and provide continuity to their working groups. The fact that leaders often came from different departments in the institution also allowed more areas of the museum to participate in leadership. This *redundancy* was repeated in group membership, when possible, since more than one person from a specific department could be in a working group. Thus we embedded our equity work: we weren't dependent on one person to bring a message back to a department, and everyone had backup forms of communication and sharing. In identifying people for group participation, we also wanted to cast a wide net for *distribution of work*. Most importantly, the group was not just people of color, or people with equity in their job titles or responsibilities.

We had no litmus test for participation—members didn't need to be deeply experienced in racial equity work, they just needed to be willing to participate. We planned tactically for broad reach, inviting group members across multiple levels in the organizational hierarchy, who represented departments across the organization. When staff left the museum, we invited others to join, and also shared open invitations as needed.

It is important to note that even though we attempted to have distribution and redundancy within groups, we didn't want redundancy between groups' areas of focus. Working groups each had a charge for the area they were to work on, and when more than one group started thinking about the same topic, we asked groups to be aware of what each other was doing and consider the overlaps in their focus. Usually one group would step back and refocus their attention on other areas of concern, if that happened.

Reflection and action

Working groups engaged in both *reflection and action* throughout the process. Both were highly valued; one alone was not enough. Individual group members were encouraged and supported to bring specific actions back to their areas of work. Groups developed action plans guided by their theory of change work. The reflection process involved vulnerability and openness to change, the ability to reflect on what was working and what was not working, at many levels. Sometimes when vulnerability was clearly evident, it made conversations very difficult (as when work of a department was the topic of a meeting and was criticized openly). Sometimes vulnerability emerged when an individual or group reflected on their current practice and worked to change it without direct suggestion.

The action process generally did not focus on planning a single event or one time way of doing things. Instead, as described more fully below, action plans generally focused on what we do (operationalizing practices) or on what we think (creating or maintaining urgency around racial equity).

Each group spent significant time making meaning of their charge in their own way. Groups were not expected to accomplish a predetermined set of deliverables—they were given permission to experiment, with the only expectation being that they document their results. The overall priority was to do work that felt organic to our organization, respected our peers' autonomy and knowledge, and allowed for success and failure to both be learning experiences.

SETTING UP FOR SUCCESS IN CROSS-ORGANIZATIONAL PROJECT GROUPS

In this section, we outline the group process and relationship-building that laid a foundation to do cross-organizational work. From the intentional set-up of groups based on specific areas of need and influence across organizational workflow (e.g. content, human resources, visitor-facing), to the thoughtful norm-setting, these groups were designed to be the backbone of project work throughout the course of the project. In order to facilitate productive work around equity, groups engaged in collective meaning-making around their purpose, the organizational objectives concerning equity, DEAI (Diversity, Equity, Access, and Inclusion) language that they could employ for common understanding, and a reflective practice to be used to further their group cohesiveness and functionality.



Getting started in groups: establishing trust and willingness to talk

In order for groups to work effectively towards organizational change with respect to equity, staff needed to be able to *talk* about equity. Staff members also needed to think personally and professionally about what equity meant to them in their role at the institution. They also needed to get to know each other a little better, especially in groups where membership came from across departments in the museum. Groups encountered difficult conversations frequently during project work—suggested change to the organization or to strongly-held professional practices invariably brought these on; having a common language to discuss these challenges made moving through difficult conversations, towards our goals, possible.

An initial exercise in every group was designed to give groups practice talking to each other, and support in developing their own definitions. Every group member wrote their own definition of equity, and these were typed up and shared in a later meeting in a single document, without names attached (see Appendix C for an example from one group). In that second meeting, non-judgmental conversation about what people noticed in the definitions, including similarities and differences, was designed to help group members get to know each other better, feel more comfortable talking about equity with each other, and understand what a joint definition of equity might look like.

The goal was to have rich conversation about the similarities and differences in how people perceived equity work, using words generated from the groups themselves. In the long run, we hoped these definitions would support the groups in working collectively, by really considering multiple perspectives, and reframing institutional structures along the way. It was also useful to begin to show vulnerability and self-reflection through this activity, and set the tone for the work of each group—the activity allowed for some level-setting whereby ideas from leadership and from those support roles were considered with the same depth. It was also an excellent first step towards ultimately defining terms, such as equity, within our own organizational context, and using them to operationalize our work through action plans.

Moving from a group charge to group questions

At the project's outset, working groups were broadly defined but not given specific instructions on how to concentrate their work. There was no shortage of work to be done, with no roadmap on

how the work should be accomplished. We took a working draft of the museum's strategic plan, and read through it for areas that explicitly addressed equity, or perhaps more generally seemed related to equity work.

Five areas of focus across the institution—human resources, content development and presentation, visitor-facing services, data practices and integration, and One Museum One Book (an internal book club focused on equity) were identified through that process, though only four working groups began at the start of the project.

These groups were not told specifically what to tackle first. Instead, they were given a broad set of questions (see page 12) and asked to consider: What do we want to work on? What feels like it would make a difference and is worth trying? Throughout the process of outlining their work, leaders reminded their group members that learning is more important than choosing the perfect thing to do. It would have been possible for each group to spend a great deal of time investigating the challenges in their area of work, and trying to conceptualize the perfect solution. In *RACE Forward*, though, groups were asked to make changes relatively quickly, and see how those worked (using evidence from beyond the group, if possible), and be ok with quickly getting to small wins and potential losses, rather than hold out for a perfect big win. Each group included a staff member from the Research and Evaluation department, sometimes as a leader, sometimes as a supporter and advocate for use of data. Some groups did begin their work by gathering information, but even these groups moved towards action soon after analyzing the information. Here, we briefly describe the big picture of what each group did during their work together.²

The *Human Resources* group included staff from the Human Resources department, and from across the museum. Together, this group examined existing policies (including filling in non-HR staff on what current policies were), starting with recruitment, but moving beyond that. They discussed personal experiences with HR departments at SMM and beyond. The subsequent revisions to policies were made by the HR department staff members, but they were shared with this group for review and feedback. By the end of the project, multiple aspects of the HR work at SMM had been revised with an equity lens.

The *Content* group included staff from exhibits, education, marketing, and special programs, and worked early on to define its precise charge and related activities. Pinning down answers to some

² More detail on the work of each group, and where they ended up, is in Section 4.

big questions was key: What counts as content? Who are content creators at SMM? How do content creation processes function (or not) across SMM to support and increase equity?

The group decided to define content broadly, recognizing that nearly every museum representative is at times called upon to “create” content, formal or informal, that is shared with visitors, museum stakeholders, community members, or even other staff. Defining content in this way was valid but complicated the group’s ability to make cross-cutting, tangible changes in policies and processes. Data compiled from focus groups with several content development groups informed the Content Group’s action plan for continuing the RACE Forward work as the grant came to a close.

The *Visitor Facing* group identified three challenges initially: how to support floor staff (often part-time, often paid hourly) with training and information about equity work, how to hire more diverse staff, and how to approach equity work with staff with a sense of humility. By the end of the first year, the first question about training and support became the top priority. Responsibility for the second went to the *Human Resources* group, and the third became an overall approach, rather than a question to be answered through experimentation. By the end of the project, this group had supported visitor facing managers in developing ways to raise the profile of equity work with floor staff using online training and reflection, and had shared these resources with security staff and education staff in the museum.

One Museum One Book was a pre-existing book group (by about 6 months) to the *RACE Forward* project. The project supported growth for this volunteer book group by buying books and a cart, moving the cart around the museum, hosting events with various formats, and considering how these different efforts supported staff participation in equity work through multiple entry points.

The *Data* group inventoried places where demographic data was gathered or not gathered across the museum, including *Human Resources*, *Membership*, *General Visitors*, *Educational Programs*, and educational *Evaluation and Research*. The group identified how race and ethnicity, in particular, were documented (or not) in different ways, leading to gaps in how the museum understood visitors, staff, stakeholders, and more. While total consistency was not the goal, this process allowed for better understanding of the different ways that these questions could be asked, supported alignment of some questions, and identified areas where more data could be

collected and shared. *Human Resources* began sharing data about staff composition more broadly, and data collection began for some programs that had not traditionally done so.

Groups had greatest success when they took on manageable chunks, ones that were the responsibility (in whole or in part) of group members, and when they took chances. Some groups achieved more action on change than others, though all group members felt they learned through the process. While there wasn't always a direct link between organizational change and individual growth concerning equity, we believe that both are necessary to creating sustainable change in institutions.

Group composition and interconnectedness

As described in the Introduction, groups were assembled from across the museum, with a goal of both distribution and redundancy in their membership. In this initial process, the leaders looked for people who either had to be there because of the job they did, or should be there because they would bring energy and new ideas. That meant that in many cases, a group would include some people who worked together frequently, and some people who were joining this group for the first time. There was, intentionally, no “wokeness” test, no baseline level of knowledge of equity work, but we were looking for leaders and participants who had responsibility in an area, and also would be willing to work in new ways.

Using a museum wide organizational chart helped to inspire ideas about ways to include many people. Throughout all the groups, we were hoping for representation from across the museum, so that every division, and almost every department, would have at least one person who was on a *RACE Forward* group. It was also important to have participation across levels in the organization.

Over time, group leaders nominated staff to add to the list, and staff nominated themselves as they heard about the project and wanted to be involved. Each group lost people as staff moved on to other jobs, and occasionally people stepped off a group to focus on other work even as they stayed at SMM. Groups ranged in size from about six to more than twenty. Both small and large groups encountered successes and challenges in their size and membership; there was no “perfect” size.

Once groups were built, each was charged with exploring, through a reflective process, what equity meant in their area, and how they would make change. We noticed quickly that more than one group sometimes wanted to work on the same issue—for instance, hiring practices. When this happened, the leadership group worked to identify one group which would take the issue on, allowing the other group to focus on something else.

Some groups were essentially centered around the work of one, or a few, departments; in these groups there was already some clear direction towards change and the processes needed to get there. For these groups (the HR and Data groups specifically), departmental vulnerability—the willingness to have their work criticized, and still work towards change—was key to making progress. In other groups, where members were dispersed across museum departments, work to break down departmentally-specific silos of routine practices, policies, or behaviors was paramount to progress. One example of this is the Content group, whose members came from a wide array of museum departments who each had distinct policies and practices around the development and facilitation of museum-created content. In these cases, departmental procedure can function as a drag on the kind of unified organizational change that our institution needed to become more equitable.

The reflective process: group documentation for planning, learning and sharing

Reflection may be overlooked in cross-organizational equity work in the interest of “getting it done,” but reflecting on key moments and activities can be a vital opportunity for both individual and institutional growth and learning—to collectivize and share an ever-evolving vision. As a routine practice, reflection can lead to “Aha!” moments of discovery and give deeper and sustained meaning to the ongoing work of groups. As part of *RACE Forward*, we committed ourselves to doing new and internally important equity work. Additionally, we always planned to tell our story in the hope that it would be valuable to other organizations who want to start or are already doing equity work. By reflecting and documenting through meeting memos, annual reports, and action plans, we can now provide—not just the final outcomes of our story, but all the different learnings along the way—learnings to share within our institution, with the field, and our community.

Meeting memos

Leaders from each group were responsible for taking *memos* on the big ideas of a meeting. The note-taking document also included the following questions:

1 How did race and racial equity come up?

- 2 How is this group challenging underlying beliefs, values, assumptions, or norms? (This can be on multiple levels, e.g., personal, organizational, field-wide.)**
- 3 Are people working in their usual ways or are there shifts?**
- 4 Why or do we expect change to last? What might be difficult about it?**
- 5 What unintended or surprising consequences or impacts have arisen as a result of this initiative?**
- 6 Where did we get stuck or where did we have a breakthrough?**
- 7 How are we using data?**
- 8 How is what we are doing at SMM related to what happens in informal science education in general or to work you know is happening in other places?**

There wasn't an expectation that each question would always have an answer. Instead, the questions were designed to keep the groups focused on project goals even as they were deep in the nitty gritty work.

Annual summary

At the end of every year, we asked groups to write a summary of their work. Before they started writing, we designated one person to go through the group's memos and artifacts to identify key themes and take note of moments during the group's work that stood out to them, such as: key decisions that influenced the direction of the group's work, conversations that clarified ways of working together or increased group understandings, or examples of how their group used equity practices and what happened when they did. The groups then collectively identified 3-4 moments that felt important to their group and organized their reflection around these, using prompts (the full list is located in Appendix D) to spark reflections:

- 1 Share some thoughts about how key moments supported racial equity at the museum.
- 2 What was the thinking behind your group's action plan? Describe the process. What was useful along the way? What kinds of resources, if any, were used to create your plan?
- 3 What are some things you're especially proud of?
- 4 What are some strengths of your group? How does your group utilize its strengths to do racial equity work?
- 5 What has happened at the museum as a result of your group's work around racial equity? Who or what will see a benefit?

We encouraged groups to collectively discuss and decide on the reflection process and writing that seemed appropriate for their group. Some groups preferred to write as a large group, some decided to break into smaller groups focused on specific ideas. A key goal for these reflections was to both collectivize and document the evolving vision for organizational equity work. Thus, these yearly reflections were shared across groups in order to reveal a collective vision of the larger organizational change that groups were contributing to. We also shared our annual summaries with our project advisors and co-PIs, and trusted colleagues from across the museum field, in order to guide both our evaluation of our progress and our future planning. It was crucial to invite feedback from those we had relationships with, who had knowledge about our museum and/or about our project goals, or who are recognized leaders in organizational culture change or equity practices in museums.

Accountability

Groups were also asked to create a yearly *action plan*, with big ideas and goals for what they would work towards in their group going forward. These were relatively short, designed to identify an area of work, not map out every small step to get there. The action plan framework is located in Appendix E.

Groups also reflected on their work with our project co-PI, and expert in DEAI initiatives across the museum field, Cecilia Garibay. Having a consistent, long-term advisor who knew our organization, had deeply studied the organizational structures of museums and could bring a fieldwide lens to the efforts of our working groups, and with whom we could be vulnerable, was vitally important to our perseverance and progress. Cecilia visited us four times during the course of the project, during which she supported hard conversations (including a pivotal conversation about collectively defining the terms we would use together), provided an outsider perspective (which was highly valued by group members embedded in the internal politics of our organization), and pushed us to create accountability measures to ensure our intentions towards change were realized and sustainable (more on how we embedded accountability in our work is in Section 4). One of the things our working groups appreciated most was hearing from Cecilia about the DEAI work of other institutions, and knowing we were not alone; this helped us to stay aspirational and focused.

ANTICIPATING SURPRISES, RESPONDING TO EXCLUSION, AND MAKING INFORMED DECISIONS

Progress towards equity, including racial equity, requires both careful planning and a high level of responsiveness so that staff feel prepared for what's ahead and supported in their decision-making. Planful responsiveness, rather than reactivity, requires transformation across the personal, professional, and institutional roles of organizational staff. We noticed that resistance to equity work often arose where individual staff or whole departments felt ill-equipped to respond when challenges to the existing status quo produced discomfort. In this section, we describe the mixture of strategies we employed:

- 1 Increase the level of personal engagement of staff by connecting their work at the organization to their life experiences**
- 2 Empower staff within their departmental roles by professionalizing the work of racial equity;**
- 3 Support staff work on the structural changes necessary for a sustained organizational commitment to equity.**

We also reflect on what got in our way—practices that seemed to impede progress, across groups.



Personal engagement: connecting equity work with life experiences

An entry point for many staff can be personal engagement and learning. We believe that making equity personal can often provoke a greater sense of urgency for organizational change -- once an individual recognizes and internalizes inequity, it is hard to ignore it. Our staff engagement initiatives that focused on personal learning included *One Museum One Book* (OMOB), as well as an Intercultural Development program designed to assess and enhance individuals' abilities to communicate and function across cultural differences. We weighed the benefits of asking staff to voluntarily participate in the museum-wide efforts towards a more equitable institution, rather than mandating their participation, which we felt could have increased resistance. Both these initiatives started as voluntary experiences; only the book club stayed voluntary. After launching two successful voluntary cohorts of the Intercultural Development program, the senior leadership at the museum decided requiring all managers to participate in order to become more aware of their biases and thus, be better able to support their existing staff, address their biases in recruiting new staff and better help the institution as a whole unravel its historical biases.

The goals of the *One Museum One Book* program included selecting particular books or films to expose staff to life experiences from a variety of perspectives and experiences, as well as religious or ethnic identities and gender orientations—to encourage staff to broaden their perspectives through both the reading of the book or watching the film, as well as hearing the diverse perspectives of their colleagues in discussion afterwards. Staff who were not comfortable discussing ideas with others could choose to participate in the discussions, or not; they could simply check out a book from the mobile library cart that circulates the books around the different work areas in the museum.

Staff have reported on the powerful impact of conversations among co-workers—both formally in the OMOB discussions, as well as during informal “water cooler” discussions—on their learning and understanding about the importance of equity. Participating staff and OMOB group members have talked about a new awareness of others' perspectives and how that has influenced their interactions with their fellow staff, as well as influenced the products of their work. By routinizing conversations about racial equity in particular, we believe that the book club model has dispersed the vision of the organizational equity work, and made change from the ground-up possible—through voluntary participation and curiosity.

Since this time, we have also seen an increase in the formation of affinity groups, perhaps sparked by the example of OMOB in creating safe spaces for discussions around racial/ethnic, gender, socioeconomic status, and other identities.

Later in the *RACE Forward* project, we integrated an Intercultural Development program into our work with staff out of an awareness that while equity work had become part of our organizational DNA and supported by all levels of the organization—board, leadership and staff, individuals within our organization still had more to explore, learn, and share in order for us to achieve an urgently needed organizational culture shift. An Intercultural Development Inventory (Hammer, 2012) training and mentorship program was a way to provide staff with as many resources as possible to think deeply about theirs and others' experiences and how these may influence their daily interactions.

We worked with a local external consultant³ to develop a baseline cultural competence for staff from across the museum, and to conduct a gap analysis that would inform future strategies. The program provides a cohesive strategy for staff to have a clearer understanding of the importance of these institutional equity efforts, and how it relates to their role in the museum—all through the lens of an individualized, personal learning and growth plan.

We recognize that these two efforts may appear to be very different. One is organically led by volunteer staff, and centered in books and movies and personal stories, including fiction and non-fiction, while the other is a formal program, led by *Human Resources*, with a curriculum and structure. But both are centered around personal growth and understanding, specifically to create greater awareness around issues of diversity, equity, access and inclusion in historical and current perspective.

Professional empowerment: connecting equity work with institutional roles

We recognized that many staff needed help connecting equity to their jobs, and that if we didn't support them to make this connection, they might resist change. By professionalizing equity work, and embedding it in the structures that frame job roles and responsibilities, we empowered staff to act on the behalf of the organization.

³ DeepSEE Consulting is a strategic diversity training organization focusing on individual and organizational cultural competence. They can be found at: <https://www.deepseeconsulting.com/>

Three examples show how we encouraged this kind of professional empowerment:

- 1 Prioritizing professional development centered around equity that aligns better to the routines and practices of visitor-facing staff.
- 2 Staff-focused equity discussion space—essentially an internal exhibition that allowed for reflection and discussion of equity issues occurring both within our museum and beyond our walls.
- 3 A series of systemic changes to *Human Resources* policies across the employee lifecycle meant to radically transform the expectations of staff roles across the institution, to better integrate equity practices in recruitment, hiring, and retention practices, as well as in employee self-reflections and performance reviews.

Prioritizing visitor-facing professional development

Like many public-facing institutions, the Science Museum of Minnesota employs many part-time, hourly staff to work in its exhibit galleries. Our existing model for training these staff had been to conduct large group, in-person instruction several times a year. Because of the structure and requirements of their jobs, these staff could not easily participate in other DEAI-focused trainings offered to staff across the museum.

We knew that learning about the concept of race, racial equity, and equity more generally, requires ongoing study, conversation and reflection. Yet we did not have the capacity to meet regularly with our hourly staff to provide opportunities for growth in these areas. Recognizing that such practices around aligning professional development opportunities to the schedules of some staff over others are in themselves inequitable, we developed a remote learning program with online resources for visitor facing staff. We provided a curated list of resources such as articles and videos for staff to choose from and review on their own—paying them for their time (typically 30 – 90 minutes) if they sent managers a short email about the resources they read or viewed (see Appendix F for an extensive list of the resources we have used). Some of the online resources were tied to specific events, such as Martin Luther King Jr. Day or the release of the film *Hidden Figures*. Others were more general, such as multiple resources from different perspectives on the topic of microaggressions or implicit biases. In addition to offering these electronic resources, managers led discussions on racial equity as part of regular visitor facing group check-ins, during which anywhere from 4 to 20 visitor-facing staff shared their individual experiences or discussed ways that equity connects to their work with visitors at the museum.

Some visitor-facing staff continued their collective learning by sharing additional online resources with their peers, or by asking to lead conversations with visitor-facing staff—one staff member even started a blog about his experiences. These multiple opportunities for learning, growth and reflection led some staff to report an increase in awareness, empathy and their sense of urgency in regards to racial equity work at the Museum.

As one staff member explained:

"The impact of these articles and related content has made me change the way I thought about race and racial equity both at work and in my personal life. Having to read content that's not so geared toward changing my beliefs makes you more aware of how you had been viewing or understanding it overall. At work specifically I find that both my coworkers and work environment are very racially unbiased and have a high tolerance. It is quite educational when you are able to engage in a conversation with a coworker or museum visitors about race related videos or the RACE gallery content and both can walk away enlightened."

Embedding equity in the employee lifecycle

The *Human Resources* working group envisioned equitable practices becoming embedded across the entire employee lifecycle as a means towards substantive and sustainable organizational culture change around equity.

Figure 1: SMM Employee Lifecycle



In order for our staff experience to align with our expectations of creating safe spaces for people of color, we needed to remove historical barriers within our internal HR practices. This included how and where we recruit for talent, an emphasis on lifelong learning, and transforming how we assess performance.

SMM was not unique in our approach to job descriptions and what we considered to be minimum requirements for jobs within our institution. A “good” candidate was assumed to have a college degree along with multiple years of experience. Through research, and honest conversations about job expectations, we challenged this assumption. We realized having a college credential did not translate to higher performance and in many cases, excluded a large population, primarily individuals of color, who were highly qualified through work and volunteer experiences. With this realization, we removed educational requirements from the majority of job descriptions within the organization.

Once the barrier of educational attainment was removed, we needed to ensure we were recruiting in a way that was positioning SMM to reach populations that historically have not considered our organization a welcoming place to work. We took steps to hire a dedicated recruiter who could intentionally build relationships with underrepresented communities and create ever-expanding networks through outreach.

We also wanted to ensure our employees could be successful in an organizational culture where all can bring their full selves to work and easily connect their experiences to their experiences to their job roles. To this end, we added a competency to our annual performance reviews for all staff called *Fostering an Inclusive Community*. In demonstrating this competency, staff show that they are committed to contributing to an organization that reflects and responds to the diverse needs and cultures within our internal and external communities. This could mean staff are:

- Open, welcoming, inclusive, and respectful of differences
- Aware of and manages their own bias(es)
- Aware of and respect cultural and individual values
- Taking action on behaviors that diminish SMM as an inclusive and caring community

However, implementing changes to the performance review process was only a first step; we realized that many staff were changing their behaviors based on assumptions grounded in past HR policies. Thus, we needed to not only communicate the current HR practices, but discuss the

reasoning behind the changes—these communications were as important as changing policy in that staff more fully understood how they could be supported in shifting their work practices to to build equity into ongoing work.

There were other initiatives that we put in place to move the Museum towards being an inclusive organization, including: a gender neutral staff bathroom, freely available gender pronoun buttons for staff to pin on their work shirts/lanyards, and quiet/prayer spaces for staff to utilize whenever needed.

Through these initiatives, we have seen steady growth in the number of staff of color. This growth includes applicants, new hires as well as retention of existing staff. There will continue to be barriers to remove, but with the intentionality and focus on the lifecycle of the employee that this work has created, we will keep challenging assumptions and challenging assumptions to continue to retain and increase diversity moving forward with cross-functional collaboration.

Organizational transformation through data-driven decision-making

As the *RACE Forward* project took off and each group's work began to move from theoretical to concrete actions, the need surfaced for accurate data to support group decision-making, as well as to support a collective vision about what changes were urgently needed, and which changes would make an impact (and how we might measure those impacts). We began to get more requests from project working groups to conduct data collections for particular areas of work that they wanted to focus on for the remainder of the project—we needed more information to effectively engage our fellow staff and visitors in our equity initiatives, workshops, and discussions. We used data to become better at planning for the inevitable gaps in our equity practices and policies, and to become more nimble at responding to the issues these gaps produced. Two efforts had particular salience for supporting our project groups: the creation of a *RACE Forward* Data Group to look at and create a vision for unifying standards of the collection and sharing of demographic data from our staff and across our programs, as well as the production of an all-staff equity survey to analyze staff- and organizational culture-focused initiatives.

***RACE Forward* data group**

Data analysis and sharing is critical to understanding the context of and the perspectives needed to support equity work in any organization. Midway through the *RACE Forward* project, we

committed to critically examining the data-supported narratives the Museum was telling about its visitors, programs, and experiences. In order to do this, we also had to examine our internal data collection practices and sharing. To begin this process, we added the *Data Group* to the *RACE Forward* project to inventory, compare, and analyze both our Museum's current internal data practices as well as recommended best practices for gathering, storing, and sharing out data across an institution. *Data Group* members were active collectors and analysts of data across the Museum, including staff from the *Evaluation and Research, Human Resources, Exhibit Development, School Programs, Youth Science Center, and Mission Advancement (Development)* departments. By forging an inventory of the Museum's data collection practices as a key step towards a more equitable institution, the group was both actively acknowledging and also giving weight to the impact of our data collection activities on our staff and visitors.

The *Data Group* quickly found that demographic data, in particular, was being collected inconsistently across the Museum, and that these data had rarely been shared outside of particular programs or departments with the intent to influence policies and practices. The *Data Group* worked to identify where and how race and ethnicity data was being collected—who was collecting it, how were they asking, and for what purpose. This initial investigation uncovered several challenges:

Unease with asking or answering demographic questions

For some staff, asking visitors/program participants about their race or ethnic background seemed too personal or intrusive. Some museum staff, too, were hesitant to answer questions that related to race and ethnicity demographics and initiatives. This is problematic when considering the important role data plays in targeted decision-making; if we don't know the current demographic make-up of a program or of our staff, our actions are based on assumptions and have the potential to be ineffective.

Inconsistently compiled and non-comparable data

To create a baseline moving forward, we tied demographics to the US census categories, as required for the I-9 forms that employees complete during the hiring process. Communicating transparently about the makeup of our staff, and connecting our equity initiatives to the need for better staff diversity highlighted the importance of collecting this data from staff. Communicating about the lack of comparable program data collected over years of using different methods and databases made the case for consistency in data collection across the Museum much more persuasive.

Resistance to data sharing and transparency

For many Museum staff, there was little benefit to collecting demographic data if it was not shared out appropriately; thus, data often stayed within a department. For example, even though the *Human Resources* department used fairly complete records on staff demographics on a quarterly and annual basis, many staff from other departments had never seen this data, and thus made assumptions about the demographic distribution of staff across the institution. Prior to the *Data Group's* work, many departments held a defeatist perspective on asking for and sharing their own demographic data, leading to missed opportunities to make this data available for institution-wide policy and decision-making.

To create a baseline representation of data practices and to invite conversations about unifying data practices and purpose, particularly around race and ethnicity data across the Museum, the *Data Group* made its inventory available to the RACE Forward working groups. The *Data Group* also supported and empowered other groups to understand how data can strengthen a story as well as reveal gaps. Through the example of the *Human Resources* group (above) and the staff equity survey (below), we began to introduce our staff race and ethnicity data regularly in internal communications and presentations, modeling how to work best practices around data collection and sharing into our job duties. This has increased our data literacy and paved the way for better data analysis to fuel future initiatives.

All-staff racial equity survey

A key part of the reflective process we used among the *RACE Forward* project groups is data use; in order to develop objectives for their work, project leaders wanted a deeper understanding of how museum staff perceived racial equity work, and to better grasp of some of the barriers to participation some staff may feel. The Racial Equity Organizational Survey was collectively developed across project groups in order to produce usable and actionable data through a single ask of staff (instead of multiple surveys from multiple working groups).

Our goal was to better understand our internal culture concerning equity, to gather data that could be used to support intentional action to transform our institution.

In order to construct the survey, we engaged project groups to develop questions about the issues, practices, and/or policies around racial equity at the Museum that concerned them the most. We carefully chose the demographic categories by which we would ultimately analyze the

data: length of tenure at the Museum, work status (Full-time/Part-time/Volunteer), department or role in the Museum, gender identification, and self-identified race/ethnicity. Throughout the process of developing, gathering data, using, and communicating about the survey, the confidentiality of staff responses was the highest priority. We decided to contract an external evaluator to do the initial data analysis so that SMM staff could only see responses combined in ways that were designed to protect individual identities (e.g. identifying responses by racial identity and department might allow for a respondent's identity to be figured out).

After the survey closed, we began a multi-stage process to analyze the data, and then to communicate the data in various formats to constituents across the Museum. All survey data, including data tables and open-ended responses were then analyzed by the *RACE Forward* leadership group to determine key themes that emerged from the data. These themes helped us to analyze the data across the different survey items and to create broad "stories" about the data to guide our work. Data was shared in brief visual displays we called "placemats."

We also shared data in a summary report to leadership, in presentations at all-staff and departmental meetings, and a binder of all of the data was made available to any staff who wished to see it. We have since repeated a second year of the all-staff equity survey, which gave us useful comparative data—to see what, if any, impacts we could see by looking at the emergent responses and perspectives of our staff. A summary of our process and learnings from developing and conducting an organization-wide equity survey is included in Appendix G. We have also shared our equity survey, and our process for developing and conducting it, with museums from across the field, and have worked closely with several institutions on conducting their own equity research with staff.

Without attention to data collection, analysis, and sharing, the *RACE Forward* project may not have resulted in action items that became embedded into our organizational structure. There would not be an accurate sense of where we started and how our actions are impacting what we'd like to accomplish. In the time since *RACE Forward* started, there have been many actions taken on behalf of the project. In order to bring the work into the DNA of the Museum, data collection and comparison must remain a core part of this work.

Creating a shared vision to guide organizational transformation: our theory of change

The *RACE Forward* project engaged staff from across the institution with the expectation that they would bring learning, activities, and information back to their work areas. Each group developed and executed an action plan. However, during the first full year of the project, group members were often unclear about how each *RACE Forward* group's efforts combined and led to institutional transformation. Additionally, group members had varying degrees of power within the organization, and some were unsure about the autonomy they had to enact their action plans. Out of this need for some mooring of our work to our institutional structure, we developed a Theory of Change (TOC) mid-project to connect the work of the project groups and to promote the vision we had for the institution (the full description of our TOC can be found in Appendix A).

We sought out consultants⁴ to guide us in developing our TOC because external facilitators can often encourage a leveling effect in organizational group work. We wanted each member of every group to be able to participate fully, and participate regardless of the status hierarchies within the organization. We were also worried that core project group members, being so embedded in the work, might hold us back from achieving a truly collaborative and aspirational vision for a more equitable institution. The process of constructing the TOC was a valuable way for groups to both develop a shared vision for our organizational equity work, as well as map out how individual and small actions, combined with larger institutional goals, could move our organization towards a culture and environment that actively promotes and supports diversity and inclusion. Since we had already been engaged in equity work, and had solidified our resolve for equity in our institution, the process of developing the TOC was a deeply unifying and meaningful experience for our entire project group. We ended up with a clear and simple way to communicate what had become a shared vision among the working groups:

The result of having a theory of change was a foundation for conversation about change across levels and roles within the institutional structure. Group members understood where their group's work fit into and supported the larger project goals.

Group members also had a roadmap that they could use when going back to their groups to explain the purpose and power of equity work in an institution like ours. The theory of change also

⁴ *Aurora Consulting's principals - Al Onkka and Sarah Cohn - support strategic planning and organizational leadership development across the non-profit sector. They can be found at: <https://www.auroraconsult.com/>*

became a great way to engage senior and management-level staff in how they could support the structural change we sought.

What got in our way

A report on what worked is never complete without an honest accounting of where we struggled. This project involved challenges throughout. Here, we want to focus specifically on things that *stalled* groups from taking action, rather than on actions that, in retrospect, we might not repeat. The former was a far bigger problem than the latter, and was in fact a real issue to be managed in our work.

The first challenge are the staffing changes that affected group composition, familiarity and established routines; these were hard to manage, especially at the beginning of the project. A group would hit its stride, with shared language and purpose, and then a key member would step off the project, leave the museum for another position, or go on a leave of absence. Because most people cared deeply about the project, they would find a replacement, who would then need onboarding, which diverted the attention of the group. We prioritized participation across organizational levels, but often entry-level positions in museums have higher turnover rates; this was reflected in and problematic for the membership of the project groups. Over time, groups developed systems that planned for turnover instead of treating it as a surprise. For instance, in the Visitor Facing group, one of the leaders developed a set of key documents to review with each new member, and would invite that person to a one-on-one orientation to the project, which seemed to provide more context for the work and an easier entry path. Throughout the duration of the project, it became evident that a full group which was aligned on their objectives was more able to take action and make progress.

An additional set of challenges we faced was around resistance to equity work with the intention of getting it perfectly right. “Analysis paralysis” is a familiar-enough concept, but we saw it arise frequently with groups who felt like they needed one more piece of elusive information before they could act. We note, obviously, that data is important to informing the work of projects, but at the beginning of our work, some groups weren’t sure whether it would be better to have more data, or be a little short on data, in order to make an action plan.

Looking back, it feels like the ongoing search for more data often turned into nervousness and delay, rather than resulting in a better plan.

Similarly, some groups stalled over worry about process—for example, spending a lengthy amount of time trying to find the exact right way to make decisions together, or to hold conversations with each other that valued everyone’s perspective. We acknowledge that such attention to process is key, and that entirely ignoring process can result in some voices not being heard, or decisions being made in inequitable ways. And yet, extended conversations about how to run meetings, how to decide on projects, and the like, kept groups from trying actions that could have been learning moments, for them and for the museum.

It’s important to note that the biggest problems for the project were not wrong moves, but *no moves*. No group had a crashing failure, and a few tried things that didn’t take off. Looking back, our biggest areas for concern were groups that seemed to be in patterns of meeting without action. We drew from this a bigger lesson—that we probably should be actively taking action towards equity far more frequently than we currently are, even without sufficient data or a perfect process in place.

ENGAGED EQUITY: STRATEGIES FOR SUSTAINABLE ORGANIZATION CHANGE

We consider our work to be incomplete; there is always more to be done. A public-facing institution's intention towards full participation and inclusion among its staff and its visitors/participants is not enough, in some cases, to avoid moments of exclusion and harm. However, an institution that can: 1) leverage its strengths to support equity work, 2) respond directly and with openness when experiences of exclusion occur, and 3) plan for challenges and resistance to equity work is better positioned to do the work of organizational transformation around racial equity. *RACE Forward* has allowed us to experiment with strategies for organizational transformation; sometimes, we fell short. In this section, we provide some examples of an “engaged equity” at our organization that center equity work as “regular” work—we believe this is essential to long-term success. We begin this section with a deeper discussion of a particular historic moment at SMM that has informed the approach we have taken to our long-term equity work. We offer these examples in a continued spirit of humility and honest disclosure.



Local history informs our practice: Philando Castile/Race exhibit sign

SMM has long facilitated engagement with the *RACE* exhibition among members of the broader community. In addition to encouraging corporations, faith based groups, higher education leadership, foundations, school district groups, and community-based organizations to use the exhibition to provoke conversation and understanding, we have also established a formal relationship with the City of Saint Paul to leverage the exhibition to support the city's on-going racial equity work, including within the police force. However, after the official project work concluded, the murder of George Floyd in Minneapolis in the spring of 2020 prompted (and renewed) questions among SMM staff from across the museum about policing and institutional white supremacy, and about the museum's relationship with local law enforcement. For context, the museum employs several off-duty Saint Paul Police Officers as part of its safety detail. Up until the pandemic closure of the museum in March of 2020, we had a police officer stationed in the museum lobby. Currently, many staff are advocating for removal of the police presence from our institution permanently, pointing out that police presence in the museum lobby does not communicate a welcoming environment for audiences and staff of color. With the murder of George Floyd, this ongoing discussion has taken on new and heated urgency. Senior Leadership and museum safety staff have been working to find a solution that addresses both the safety and security concerns of a large institution in a busy downtown sector, and our stated commitment to equity and inclusion. Leadership has given consideration to eliminating the overt symbols of policing: uniforms, a lobby podium with an emblem of the Saint Paul Police Department behind which the officers sit, and a police squad car parked in front of the building. This solution, which initially appeared to be viable, was not well-received by many staff. Reconciling those two opposing perspectives has been a challenge and at this writing we do not have a satisfactory resolution. We feel it is important to be transparent in this document about the many ways in which we continue to struggle over the equity implications of our existing policies and practices. (This work, and this struggle, is important enough to add this section to our existing document during our fall 2020 review of this document.)

Even with this deep engagement with our broader community, societal events can test us profoundly when we least expect it. In July 2016, when Philando Castile, an African-American motorist, was shot and killed by a police officer just miles from the museum, our leadership grappled with understanding what was happening in our broader community, to discuss the implications for the museum, and to determine how to best respond to staff, many of whom were

visibly shaken by the killing, as was SMM's new president and CEO Alison Brown. Staff engaged in impassioned discussions about what we could do as an institution to provide our local community with support and healing around Philando Castile's killing. We again offered the museum as a place where community groups could use both the *RACE* exhibition and the museum as space to process the events. In addition, leadership drafted and installed the statement in the entrance to the *RACE* exhibition:

Image 1: Philando Castile Sign



After 5 days, the wife of a local police officer objected in person and through social media. There was a subsequent uptick in public comment about the sign, through phone calls, social media, and comments made to staff during visits which our staff felt unprepared to address visitor concerns.

Because of staff discomfort and inadequate training on how to deal with visitor response to the statement, our president made the decision to remove the sign.

A number of staff voiced concerns about the removal of the statement; in particular, staff that work with communities of color and staff of color felt that the mutual trust that supported the Museum's collaborations had been compromised, and that communities should and do hold us accountable outside of the Museum. Yet there were individuals on staff too who were not in support of the museum taking a stand on this issue, and felt it was "too political." Many in the institution spoke about the incident as an example of what happens when we don't follow proper procedure, and don't involve key staff in the decision-making.

We wanted to provide a catalyst for continued conversation and reflection among staff. Eventually we developed a "dialogue station" with the original statement in a staff only area. It included the chronology of events surrounding the Philando Castile shooting, the Pioneer Press article, and a published editorial about the killing from a prominent community member. Staff members viewing the dialogue station are asked to respond to the following question: "*Why do you think this sign elicited such a strong reaction?*". We then ask staff to write their comments in a notebook. In the days, weeks, months, and years since the removal of the sign, many staff have reflected on the impact of these events within and outside the museum. During this time, leadership began work on a formal statement about the museum's commitment to racial equity. This became our Statement of Equity and Inclusion, described in more depth below. In some ways, this statement is designed to mitigate risk: it would provide front-line staff with backup if a visitor contested ideas about racial equity on the museum floor.

As we come to the end of this project, and reflect on our experiences within and beyond it, we believe that museums are playing it safe. As majority white institutions, we are undoubtedly much more aware of the risks of our decision-making to white people than to people of color. In the case of the sign, we were aware of the risk to front line staff and to the visitor who complained; we focused less on what the removal of the sign would communicate to staff and visitors of color. Additionally, what was the most challenging was the institutional inability to recognize the subtle racism imparted in how we spoke about the incident: we disproportionately talked about the decision-making around putting up the sign, and then taking it down, as a procedural issue and the root cause of what went awry, when in fact, internal racism and white supremacy contributed to the narrative.

We can't blame the problems of the world on social media; however, for some museums the proliferation of social media and the notion of risk and taking risks has resulted in an additional caution. This restraint within museums all over the country can be seen and felt in public program content, exhibition content and curricula. As many institutions rely on audience attendance to meet financial goals, we as a field have become leery of presenting content that might ruffle feathers, be overtly offensive or appear that as an institution are taking sides. The notion of museums as being neutral sites or safe space is being examined and challenged across the field. However, the idea that people of varying ethnicities, beliefs, values and aesthetics can come together to interact with and respond to content that addresses societal concerns or brings to light societal inequities is unrealistic.

Suggesting that museums can be neutral or safe spaces where content appeals to every visitor and no one is offended or questions the content is an affront to our mission, visions and values.

In general, what we have learned through this experience is that talking about race and racism as something historically-based and universally-present, abstractly located across society, is different than talking about race and racism as something that is very specifically about present day Minnesota, and about our own Museums. But pushing to our edges is where we make progress. What we now believe, and have worked with others to enact at SMM, is that when staff think, "the group down the hall thinks about how to do anti-racism work, I'm so glad they do that," or "I don't see how worrying about that would change what I do," or "if I think about people's backgrounds, I might be inadvertently racist," they may mean well, but they are slowing down our progress to make our museum the change-maker that we want it to be.

LEADERSHIP IN EQUITY

Reflections from SMM President/CEO Alison Rempel Brown

Sometimes, we don't understand the moments where we stumble; we may learn from our missteps, but we don't realize how long it takes to both learn and internalize the meaning. This is especially true for newly initiated CEOs, and generally true for people in our society who are privileged because we are white. I had such a moment early in my tenure as President and CEO of the Science Museum of Minnesota, and I'm still learning from that experience four years later.

A police officer in an adjacent town murdered Philando Castile in July 2016, two months after I started in my position at the Museum. I watched the video Philando Castile's girlfriend, Diamond Reynolds, took as he died in their car, which impacted me, and our community greatly. What follows is my record of my journey along a path of understanding towards what podcast producer John Biewen refers to as "Seeing White." This four-year journey is not about me, but I'll use me as an example of America trying to get it and just being *so dang white* (as he says) that *we continue to stumble*. Sometimes, I wonder if instead of helping to dismantle racism, merely by being in my role and being white, I perpetuate it. I also understand, though, that by being in my position, I have power to create change, and as a white leader, I have power to influence other white leaders to start their journey.

First, some background about the Science Museum: I can spin most of it to cover the actions I took after Philando Castile's murder that make me cringe now. These challenging moments are the best places to learn from as they can change us and our behaviors and actions in the future. There were people, initiatives, and programs at the Museum, doing deep and hard work to break down systemic racism and create racial equity. Then other parts of the museum were much like the rest of America and not too woke. I did not wholly understand the dynamic of being a CEO nor understand the dynamics for the staff of color involved in this situation—both of these factors played a significant role in the evolution of what happened after his murder.

Even though I was a new CEO at a museum, I knew enough to get Board approval when I decided to put a statement acknowledging the tragic killing of Philando Castile at the entrance to the *RACE* exhibition. I didn't understand and prepare myself for my own whiteness and the staff's whiteness when we got pushback from a visitor for putting the statement up. What is whiteness? It's valuing avoiding conflict over seeking truth, the status quo over change. It takes many forms, but you really know it when a white person gets uncomfortable in a conversation involving race, especially one that makes other white people uncomfortable. As a white person, I've learned that I need to be the one to bring up what's happening in a room and not expect staff of color to do so or expect other white staff who don't understand their whiteness to see it suddenly. I know I can't force other white people to start learning or force them to move farther along their path, yet I've developed some tools to help that supported me through my own reflections and training.

Sometimes I think back on when I was a little girl and first thought about air. I couldn't see it; I took it for granted. Then someone, probably a teacher, pointed out that fish breathe water. The first time I thought about that as a kid, my brain had to shift. I could almost feel my neurons moving. Now I just get it. It's similar to learning about being white. We swim in whiteness every day in America, so we don't think about that until we stop and start to learn. It's a lifelong lesson of learning, and as we do, we have a fuller life experience with so many more opportunities for relationships and understanding.

For reasons I now understand as made up, I directed staff to take the statement down five days later. Who was I protecting when I took the statement down? I protected the white supremacy culture that thrives in the United States, in the Science Museum, and in the vocal advocacy for white supremacy, such as Bob Kroll, a Minneapolis police officer and president of the Police Officers Federation, who called me during this time. He called because the visitor who became upset about the statement was a police officer's wife from the suburbs. Yet, the stark fact is that protecting white supremacy culture has mired the Twin Cities in the nation's worst racial disparities across multiple factors—income, poverty, homeownership, and education.

Seven months later, I started a year-long professional development program that the Science Museum created to support leaders to improve their efficacy, both in articulating the meaning and value of improving the equity and inclusion culture within our institutions, and in adapting knowledge, norms, and practices for shifting that culture. That program started my journey of understanding my whiteness and power, but that was just the beginning.

It's taken a lot of personal work to see I retreated to protect whiteness and preserve the status quo. What has that similar retreat gotten America? It's gotten white people in the United States, particularly men, almost all of the wealth and power. You may say: *but Alison, you're a female and President and CEO of a Science Museum!* Yes, but while affirmative action has helped white women in the last 40 years, it hasn't helped Philando Castile, Breonna Taylor, Trayvon Martin, and many others whose lives have been cut short by systemic racism. There are many who could have striven to be leaders in an America without racism and racial inequities. First, white Americans have to start seeing their whiteness and how it contributes to systemic injustice. I did not see that four years ago, and ever since, I have been dedicated to learning and using the influence I have to effect change.

Public accountability in this work: writing an equity statement

In the months following our discussions of the ways the museum acknowledged, then removed the acknowledgement of Philando Castile's killing, we began work on a statement about our commitment to equity for internal and external use. We wanted this statement to be on par with the museum's existing statements on [evolution](#) and on global climate change [global climate change](#). These two statements were created over a decade ago and serve as indicators to our staff and stakeholders that these large-scale societal concerns are SMM's concerns as well. With a newly approved strategic plan that emphasizes equity and inclusion, museum president and CEO Alison Rempel Brown and the Board of Trustees directed us to create our own equity statement. The process of drafting the statement and receiving board approval took almost two years and brought varying degrees of risk and opportunity.

A core group of statement authors, representing a range of program disciplines and departments as well as age, gender, ethnic and class identities, took the lead in drafting the statement. All were experienced and advanced in their knowledge of equity and inclusion, but also embodied a wide range of experience within the museum field, with some members with decade-long careers to others just beginning. We began the process from a relatively naïve perspective that a draft would be fairly quickly written, submitted to senior level staff and then moved to the board of trustees for their approval. We underestimated the passion embedded within the governance of exposing our vulnerabilities, holding ourselves and others accountable for and making a public commitment to using the mission of the museum to use *STEM as a tool to advocate for justice and equity*. We found support and guidance for our work on the equity statement from among our project advisors and in community convenings of the collaborative project MASS Action⁵; these friends across the museum field helped embolden our language and our resolve to create a strong statement.

Leadership and staff understood that to not have an articulated statement that affirmed our commitment to equity and inclusion was a non-response to the daily individual and institutional racial injustices present in our local communities. But beyond our comprehension was the complexity of the language around equity, the varying levels of understanding the trustees had, and the meaning and risk in a bold and powerful statement that acknowledged the ways

⁵ The MASS Action project continues to be a space for working towards equity and inclusion across the museum field. You can find out more at: <https://www.museumaction.org/>

museums have been complicit in maintaining systems that have fed societal inequities. The process for approval immersed the board in a practice that was self-reflective and challenged them to articulate their hesitations, to share concerns, questions, reservations and limitations around equity and inclusion work. The trustees had to come to terms with what endorsing the statement would mean for the organization, for them as trustees and for the future of the museum. They had concerns about publicity or that the language we used would be too politicized, too strong, or too inflammatory. Some of trustees were supportive and pushed us further on our language. Some questioned the reason for the statement. Some had concerns that the public announcement of the statement would place individuals in awkward situations where they might be asked to speak “officially” if this became a media story. None of these concerns were expressed in the absence of good will. In the midst of this challenging time, Alison Brown worked with Board’s executive committee to choreograph a statement approval process that culminated in the board voting to approve the statement.

Many trustees mentioned that these conversations were some of the hardest they had experienced on the board and also some of the best. Many said that the board should be having these kinds of conversations despite the challenges they placed on the dynamics of the group or on individual members.

All of the current senior (executive) leaders at SMM were involved in and committed to the board approval of the Statement on Equity and Inclusion. As these leaders continue with instantiating equity work within our organization, they continue to work together and individually to operationalize equity and inclusion. They have a dedicated bi-monthly discussion about white supremacy culture, during which one leader leads the discussion on a rotating basis. Leaders use a catalyst for the discussion, such as a feature length film, article or project of their designation, and the rest of the leadership team must read, watch and reflect prior to meeting. The heightened disparities and disproportionality within BIPOC communities are a constant source of discussion. Senior leadership and trustees are continuing to seek opportunities to address these disparities, including taking part in the *Facing Change Initiative*, a program sponsored by the American Alliance of Museums to support museum governance in Diversity, Equity, Access and Inclusion work.

The *Statement of Equity and Inclusion* (See Appendix B) was approved in March 2018, and is now publicly available to view in the museum’s lobby along with the two other positional statements on Evolution and Global Climate Change.

The fact that the statement exists is a testament to the role that leadership plays in driving equity forward in institutions—the commitment of Alison Brown, the museum’s senior leadership, and the board of trustees who all had to reflect and push themselves towards greater understanding and risk-taking.

Operationalizing work

As previously mentioned, having an external coach/advisor in co-PI Cecilia Garibay was a critical aspect of our progress. In this capacity, In addition to on-going conversations as part of the Race Forward project, came to SMM at critical points, meet with the LLG and facilitate sessions with the working groups, and help to push us forward—for example, by recognizing and supporting group cohesion, and by suggesting that creating a theory of change could be an important tool both to unify groups around our overall goals and to communicate about work across our institution.

Groups looked forward to Cecilia’s visits because she maintained both an insider perspective—someone who knows museums and knows our museum in particular, as well as an outsider perspective—someone who is above the day-to-day work around equity and inclusion in our institution, but with a stake in the outcomes of our efforts.

Cecilia also pushed us to be accountable for our aspirations and goals. In the short-term, we prepared to have summaries of our progress, and difficult issues to discuss with Cecilia when she came to visit. Over the course of the project, Cecilia helped us think critically about how to operationalize our work in our daily work roles, and assign varying levels of accountability for our initiatives and ongoing work. Because of her focus and expertise in equity and organizational change, she worked with us to consider how our efforts addressed various dimensions of equity and inclusion across the museum and how these were interconnected (for more on this, see Garibay & Olson, 2020). In order for equity initiatives to be sustainable, there must be an institution-wide accountability plan, with regular collection and analysis of data. We had made some progress across many areas of our institution, and little or no progress on others. However, operationalizing the work and building in accountability seemed the best way to ensure that the work would continue beyond the life of the project.

As the *RACE Forward* project came to a close, working groups identified how their work would be carried forward. It was important to plan for this, so that the new practices would not be abandoned, perceived as part of a project with an end date.

Each group answered the same set of questions:

- Who would do the work of the group moving forward?
- Where (which department or departments) would house the work?
- What work would be prioritized?
- What are opportunities that should not be missed in doing this work?
- What are concerns about this work?
- What is the communication plan for this work?
- What is the accountability plan for this work?
- Which partners are essential in this work?

This process let each group consider how the questions they had discussed, the lessons they had learned, could inform ongoing work at SMM.

A few examples show how this happened. The HR working group identified the most pressing next steps, and formally shifted responsibility back to the HR department, which in turn pledged to continue to have some form of an organization-wide employee feedback process. The Evaluation and Research group took on the charge of consistent, improved demographic sharing for all audiences, and included it in their FY19 report to the museum, and committed to doing so moving forward. The One Museum One Book group became an official SMM affinity group—a structure that gives it a small budget and formal structures.

Writing just less than a year after these plans were made, we can also see that some are already out of date. Standing meetings change, personnel leave, and structures change. Whenever possible, the work moves to another formal structure. One success we note is that several aspects of the *RACE Forward* work made it into both the Museum's Strategic Plan dashboard (a bimonthly report to the staff and Board of Trustees on key metrics), and the Three Year Business Plan (a tactical document that provides a road map for executing the strategic plan). This move makes it clear that equity work is important work, daily work, and shared work.

Key lessons: this is everyone's job, and it's about our internal and external work

In this operational process, we have kept a few key lessons in mind. When we look back before *RACE Forward*, or we consider work within the project that hasn't gone as far, we see two common themes. Looking ahead, we use these to inform how we continue to make progress.

First: when equity work is up to one person, a few people, the staff of color, the educators, or any subset of museum staff, it will be unsuccessful and/or unsustainable. There are many ways that biased practices and structures both visibly and covertly undermine equity initiatives. Everyone within an equity-focused institution must be vigilant and think carefully about how equity informs their work. We often use the metaphor of budgeting: some staff need to be experts at budgeting, but all staff need to have enough awareness of how job priorities are planned for with a budget that they can be responsible with their time and with any funds they need to spend. In the same way, all staff need to be conscious of how their role contributes to equity and inclusion at the museum, all staff need to bring up equity work at times, and all staff need to see their contribution to the whole effort.

Second: we have found, time and again, that museum staff focus more on how equity work affects visitors than on how equity work infuses their internal work with each other. As museum workers, we feel deep responsibility for ensuring that all visitors find a way to connect with the museum, feel welcomed, feel heard.

It's not that staff don't want that for themselves and their co-workers, but they think of it less readily than thinking of visitor needs. And yet—an organization that is white-centered internally, that assumes middle class (or higher) resources from staff, that only accounts for heterosexual or cisgendered staff in its practices, will have a much, much harder time considering the needs of varied visitors. The change needs to start internally.

Conclusion

Over the course of writing this document, the world has changed, and museums have changed - we're still not sure of the implications of all of these changes. Here in Minnesota, we experienced the murder of George Floyd and the outpouring of sadness for the loss of his life and the demands for change in the uprising that followed. Museums and other public-facing institutions have again been called on to re-examine our structures founded on white supremacy and consider how we reflect the entire community, rather than a privileged few. Many institutions have made statements in support of Black Lives Matter in the wake of this latest act of violence against communities of color.

We must move beyond statements.

We say that having created our own equity statement, recognizing the power and the responsibility of having that statement, at the same time we recognize where we have failed to be accountable for our words. We acknowledge that we have been in a unique position in terms of the size of our organization and the funding we pursued to support our goals towards a more equitable institution. We still believe that the process and examples we have provided in this document could provide some inspiration and guidance for other institutions who recognize that we must urgently move towards equity in order to truly be places that live out our missions as public-facing institutions. Just as we have attempted to maintain an approach based in humility throughout the *RACE Forward* project described in this document, we submit this document to the museum field in the hope that others will find some use for the strategies, activities, and ideas contained within. We have to start somewhere.

When we began the *RACE Forward* project in 2015, our world and museum were very different places. We have worked hard to make significant changes in our institutional structure, our organizational culture, and the policies and stances with which we engage our community. We have a strong equity and inclusion statement to guide our work and hold us accountable to our intentions. We have an organizational strategic plan focused on science, equity, and education.

We have an HR system that has embedded equity in job descriptions, recruitment strategies, and ongoing training. And still we continue this work to change more. Some of the changes to our structure have helped us to embed equity in our work, and continue to make progress on equity, even during our present crises.

Since we started to measure SMM staff perspectives on our equity work at our museum through our equity surveys, we have seen shifts in staff urgency around doing internal work – the work of making our culture more equitable—as equally important to the equity work that is focused on our community, visitors, and partners. We have seen important shifts in staff awareness regarding the actions SMM is taking towards greater racial equity, and we know that staff are much more likely to change their work practices the more strongly they agree that racial equity is relevant to their work.

The data has helped SMM see our progress as well as recognize that our work is far from complete, and focus our attention on priority areas to improve our practices and policies, and also bring more staff (and newer staff) into the conversation around what equity work looks like in our organization.

As part of operationalizing our work and paying attention to equity in our systems, we have not only continued to employ a staff equity survey, but are sharpening our focus on demographic data. We are paying attention to our staff composition and watching the scale of the gap between the experiences of our white-identifying and POC staff members at work. We are paying attention to our visitor demographics in conjunction with our audience research, monitoring our overall experience and other measures for key demographics to ensure we are truly a community-focused organization. Because we are holding ourselves accountable through data collection and analysis, we know we have much more to accomplish around staff wage equity, and our visitor demographics—specifically we are looking at how we build relationships and welcome in groups with differential access to wealth, education, and status.

Change has come: will we align ourselves with those changes?

Museums are often in a precarious position with limited funding streams and highly dependent on public revenues from their experiences and programming.

Yet in order to address the persistent issues concerning equity in our institutions, we have to align ourselves with societal change and find ways to push back against the resistance of our structures.

Yes, we rely on leaders to create the space for sustainable changes and empower staff to think and act differently, and as the examples from this project show, **leadership** can be distributed and emerge from many places.

Yes, museums are typically under-resourced and the **funding** we will have to accomplish this work inadequate, and as soon as equity is envisioned as a key priority of an organization, it will think and act strategically about directing, scaffolding, and procuring resources to support it.

Yes, a structured plan is generally a good approach for accomplishing a goal, and **responsiveness** is a critical component in progress around equity in organizations. As we wait to develop a nearly perfect plan for addressing equity, our structures will have continued to do harm to our community, and we will lose momentum on making sustainable change. Equity is not a project to be completed, but a process to engage in.

Yes, training and professional development are essential aspects of an equitable organizational culture, and ongoing and productive **communication** within the organization is essential too. Sharing in multiple ways about the organizational ideals, priorities and activities around equity is the best way to saturate the organization with these ideas, motivate staff to move forward in the same direction, and support those who have been and continue to struggle to make progress on equity within our institutions.

Yes, we know our organizations best, and we must recognize the many leaders in this work across the museum field, particularly leaders of color and those from marginalized communities, and **learn** from them.

Yes, aligning our mission with, or including equity work as part of our mission, is an important way to make any progress permanent. But it's OK if our **vision** isn't perfect at the beginning: it will gain refinement as we collaborate with each other, and it will become stronger as more staff within our institutions engage with and help adapt our vision over time.

And lastly, yes, it is important that we include our entire organization in the effort to make progress towards a more equitable institution. Above all, our organizations must be **willing to take practical steps**.

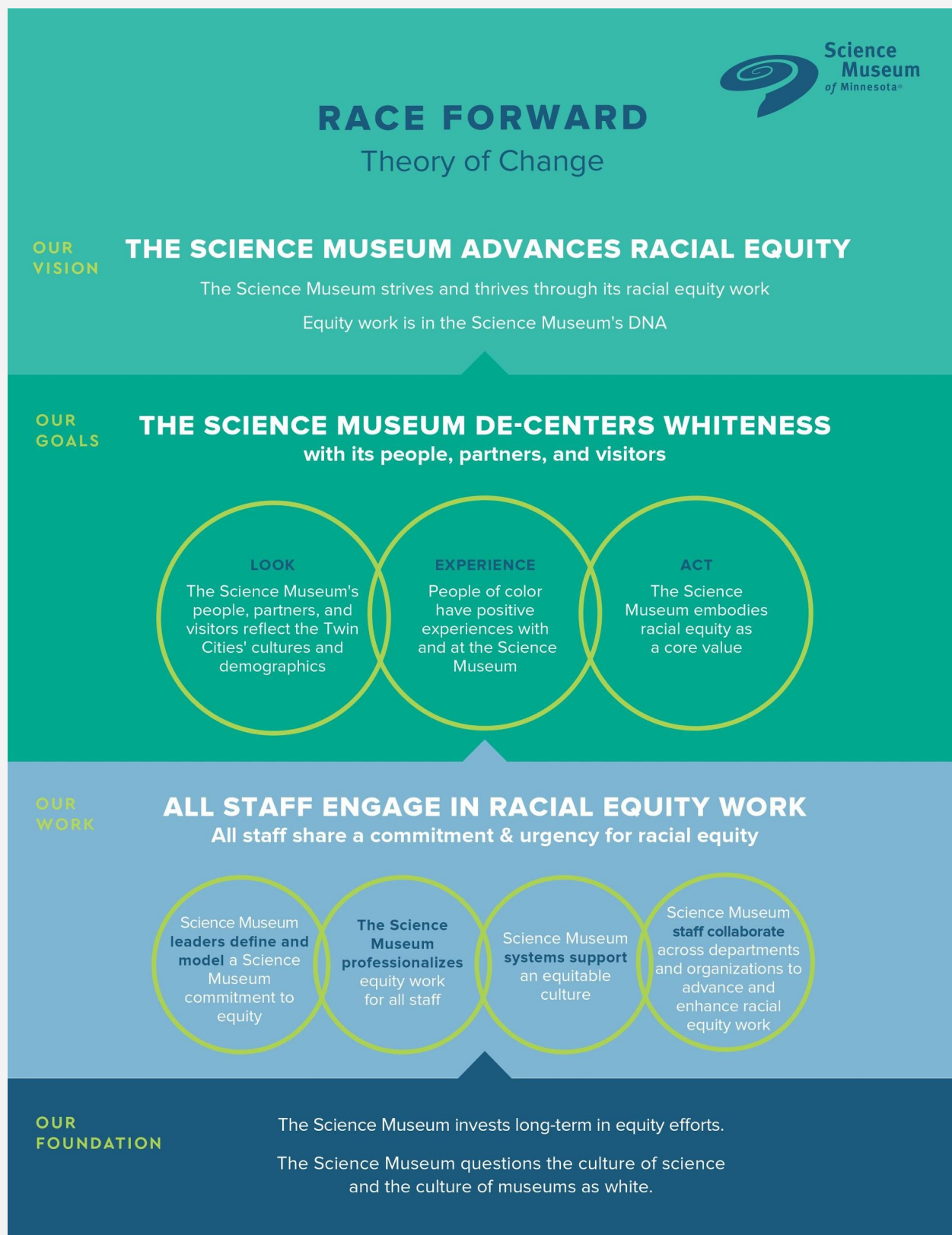
At the Science Museum of Minnesota, we think we were able to make the progress we did because we tried things out and were OK if they failed. If we wait to act until everyone in the organization is ready to participate, we may lose key staff who get tired of waiting. This is perhaps the most important lesson we have learned through our work on *RACE Forward*.



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Appendix A: Project Theory of Change





RACE FORWARD

Theory of Change Narrative

The Race Forward project brings staff from across the Science Museum of Minnesota together to work towards a common goal: de-centering whiteness at the museum. Our racial equity work begins with a question and a commitment. It ends with transformative change at our museum.

Race Forward questions the culture of science and the culture of museums as white. We believe that by committing the time, energy, and resources necessary to examine this question as a museum, we can improve ourselves, improve our museum, and improve our community.

We strive so that our efforts contribute to racial equity, a defining social issue of our time. Museums, as scientific, cultural, and public institutions, must engage. We started by looking inward. We have four areas to work on in the Science Museum. First, we must model our commitment to racial equity at the highest levels. Next, we must professionalize equity work for our staff and ensure our systems for working support it. Finally, we must leverage our staff's abilities and expertise through collaboration internally and externally. With these actions, we believe all staff will engage in racial equity work with shared commitment and urgency.

This work won't be easy. We will know we have made progress when people of color have positive experiences with and at the Science Museum of Minnesota; when our people, partners, and visitors reflect the Twin Cities' cultures and demographics; and when the Science Museum embodies racial equity as a core value.

Our work has only begun but our vision is bold. We want the values and work of racial equity to be in the very DNA of the Science Museum of Minnesota.





RACE FORWARD

Theory of Change Process

One in ten Science Museum staff members from across the museum are currently working on Race Forward. This theory of change is the product of their work together. The project staff created it using a consensus process. Aurora Consulting facilitated workshops to develop the theory of change from the experiences and expertise of the staff.

Participation and engagement was substantial. Thirty-three Science Museum staff members participated in one or more of the six half-day workshops. Even more participated in reviewing the results and creating action plans from them. Fifty-five people are working on the Race Forward project at this time.

Theory of Change Development Team

Aiyana Machado	Janet Groenert	Marcia Simning
Ana Kaveh	Je Vang	Marjorie Bequette
Andrew Urch	Joanne Jones-Rizzi	Richard Walker
Bette Schmidt	Joe Imholte	Ronda Mauer
Brian Kennedy	Julie Markel	Sara Spiess
Choua Her	Juliette Francis	Sarah Lawson
Christina Martinez	Kalia Vue	Shona Ramchandani
Christine Randall	Karen Fostervold	Sierra Scheet
Ellen O'Connor	Kim Ramsden	Stephanie Long
Evelyn Ronning	Larry Thomas	Suzanne Tillman
James Satter	Lauren Causey	Zan Christ

Appendix B: SMM Statement of Equity and Inclusion



Statement of Equity & Inclusion

Science, Technology, Engineering and Math (STEM) are valuable for communities to thrive and live in a global society. Equity, inclusion, and access to STEM are critical to the ongoing work of the museum.

THE SCIENCE MUSEUM OF MINNESOTA is actively working to undo systems of injustice and inequity. We will create an inclusive, equity-based institution that empowers people to change the world through STEM. Aspects of political, cultural, and economic systems maintain injustice and inequity through the control of power and resources. Most museums and scientific practices, including our own, have supported these systems. As a result, access to and engagement with STEM learning and practices has been limited for some.

The museum commits to using STEM as a tool to advocate for justice and equity. We will:

- INSPIRE LEARNING** by including, collaborating, and lifting up the voices of people who have been overlooked or excluded
- INFORM POLICY** by illuminating unfairness, inequality, and power imbalances
- IMPROVE LIVES** with productive dialogue on topics related to equity, inclusion, and public access to STEM

By prioritizing equity and inclusion, we re-imagine the scientific enterprise and continue to seek opportunities that support and encourage full participation in the vital work of connecting STEM and society through our areas of impact— our exhibitions, public programs, teaching, research, collections, operations, management, Board of Trustees, policies, and practices.

3/28/2018

Appendix C: Sample group equity definitions from initial project activities

Equity by definition means to be accessible and inclusive to all; not the same as equality. We like to consider that we are accessible to everyone when in fact there continue to be barriers for some. Barriers like language, cultural and social beliefs and our understanding of them as a whole staff, the experiences we don't offer (other-language text, on-site interpreters, tour guides or custom group facilitators, online educational video/demos to reach into classrooms) could help us open the doors further to those visitor groups. The ideas for inclusion can go on and on. Where we are today at the Science Museum, and our discussions and actions around inclusion and equity, makes me excited for the future. For my role, it would be exciting if we could hire staff with multiple talents and blend roles (sign language, bi-lingual, facilitated tours) to help us attain some of these goals, in turn growing SMM in the area of equity and inclusion for our visitors.

Within the context of this museum project, I am defining equity as Racial Equity. Racial Equity is an institution goal with a clear and coordinated outcome that aligns all aspects of the organization, from the governing board to the front of the house staff, with values that focus our respective work towards the goal of dismantling institutional racism.

The idea of equity is based on recognizing that we live in an unequal world and that the social construction of race contributes to advantage and disadvantage. Equity means access and opportunities for people and communities of color (as well as white people) to engage with and participate in SMM learning and work experiences in ways that reflect multiple interests, experiences, and languages/ways of communication. Equity is built on inclusion and requires a broad definition of science that recognizes how people from all backgrounds use and identify with the practices and concerns of science. Equity is a goal that is always unfinished—we move toward it but there is no final stopping point.

Equity in general means a level playing field where individuals are treated fairly. In the workplace, it means all customers receive fair and honest treatment and a baseline of good customer service; and all employees are regarded and evaluated based on their skills and performance, rather than favoritism or personal bias.

Equity means taking responsibility to ensure that opportunities are provided for all based on fairness and inclusive practices. To identify equity practices, I leverage history and best practices, individuals' life journeys, environmental influences, and so much more.

Racial equity is what would happen if everyone were treated as though they were white males. We're a long way from racial equity, and may not see true equity in our lifetimes, but work done today will help move us towards that goal. While we are working on equity today, it is important to remember that there is a distinction between equity and equality. Similar to the difference between #blacklivesmatter and #alllivesmatter, "equality" does not acknowledge the disparity in our museum/community/country the way that equity does.

Two dictionary definitions I found are: Fairness or justice in the way people are treated and the quality of being fair and impartial. Actually two very different perspectives, the first very external and quantitative and the second very personal and qualitative. Both are useful but require judgment and are subjective and this is what makes equity a problematic word and I think the root of why you're asking this question.

To me equity means a lot of different things related to fairness, justice and impartiality. How I think about equity (and more importantly correcting for inequities) is different depending on the scale. I think there are three useful scales to look at, societal, institutional/organizational and personal. The race exhibition does a good job of pointing out societal inequities and change over time. Black Lives Matter seeks societal and institutional equity. As an organization, insights the museum can gain and has gained from various perspectives on how equitable we are as an organization is important and useful. We all have our own personal perspectives on equity and our perspectives and actions can be changed as we consider the perspectives of others (for both good and bad).

In this community, we talk a great deal about how to provide resources to all. We currently do this in a number of ways but I want to separate these into two groups.

Ensure equal opportunities to everyone to make sure that everyone (regardless of language, culture, ethnicity, income, background, etc) can have access to what we do at SMM.

We do this through access programs and scholarships, offering translations, building programs that don't assume that everyone is an expert scientist, making sure that all visitors are treated really well when they visit, and more.

Look at who is currently coming, think about who isn't coming, and work extra-hard to reach communities that aren't engaging now whether with STEM in general or with SMM-specific work. This might include special programs like our youth development program or summer camps just for girls where enrollment is limited, programs that anyone can participate in but where particular groups are called out (Fusion is a good example)

For me, equity includes all this work: working hard to make sure that we are here for everyone, but also in particular working to overcome differences in engagement and opportunity that have grown and developed over years and years—not the fault of SMM, but SMM can work to make sure these don't get worse, and in fact get better.

Appendix D: Writing prompts for group reflection

Key Moments

- What happened? Describe the moment. Include details that give insight into the context.
- Why was this moment significant? How did your group realize this was important? What kinds of shifts happened as a result of this moment?
- What did your group learn from experiencing this moment? How did you apply that learning?
- How did your group handle this moment? What did it feel like? What were group interactions like?
- In what ways did this moment impact your group's experience? Did it change any group dynamics? Did it open up any opportunities?
- Share some thoughts about how these key moments support racial equity at the museum.

Action Plan

- What was the thinking behind your group's action plan? Describe the process. What was useful along the way? What kinds of resources, if any, were used to create your plan?
- What has been done since generating the action plan? List out any decisions that were made about how to implement the action plan.
- Have you worked on things laid out in this plan? How did that happen? Who was involved? List out what steps or items from the action plan were accomplished and your thoughts about why they were successful/challenging.
- Have you changed your action plan in any way? Why? What were the results?
- Are there any action items that still need to be put into action? How will that happen?
- What questions do you still have about your action plan? Who can answer those questions?
- Share some thoughts about how your action plan supports racial equity at the museum.

Theory of Change

- What was the thinking behind your group's theory of change? Describe the process. What was useful along the way? What kinds of resources, if any, were used to create your theory of change?

- What has been done since generating the theory of change? List out any decisions that were made about how to use it.
- Have you worked on things laid out in this theory of change? How did that happen? Who was involved?
- What was successful/challenging about your group's theory of change?
- Have you changed your theory of change in any way? Why? What were the results?
- What questions do you still have about your theory of change? Who can answer those questions?
- Share some thoughts about how your theory of change supports racial equity at the museum.

Overall Writing Prompts

- What are some things you're especially proud of?
- What are some strengths of your group? How does your group utilize its strengths to do racial equity work?
- What does it feel like to be in your group? How would you describe your "group culture?" What kinds of norms or assumptions/expectations guide your group's work?
- What has worked really well? Why was it successful? What has been challenging? How did your group work through these challenges?
- What are you excited about for the future of your group's work?
- What is the 10-year vision for the future of your group's work? For the museum?
- If you had a magic wand, what would you change about your group's work? About the museum? What do you imagine would happen as a result of these changes?
- How has your group put its overall goals into action? What has helped your group move forward? Why do you think your group has been able to achieve its goals?
- What has happened at the museum as a result of your group's work around racial equity? Who or what will see a benefit?

Appendix E: Action Plan Framework

Plan for Operationalizing Work of RACE Forward _____ Working Group

(Each working group completed an action plan using the following framework as a template)

Who is involved:

Who is our executive sponsor/senior level leader?

What are our goals? (taken from Theory of Change work)

What is our course of action for each goal? Why take these actions?

How will we complete this plan? What do we need?

What is the problem being solved?

What are we worried about?

What are the opportunities?

Organizational Structure Considerations

What other departments/divisions/efforts might this work connect with? (high level, mutual reinforcement)

What is the plan for accountability? (We used an ARCI framework)

Who should we pick up along the way (that maybe haven't been as involved)?

What is the plan for communicating about our work with others across the Museum?

Appendix F: Resources for staff development

The following are electronic resources that we have used with our visitor-facing staff as prompts for conversation, professional development activities, or follow-up activities. Our frontline staff have reported these as being particularly informative. We also included a sample email that we sent to staff, introducing the professional development opportunity around equity.

Videos on Race, Racism, Diversity, etc.

Under Our Skin: Who do we mean when we talk about race? Website and video series

This *Seattle Times* video series interviews a variety of people about topics such as: Institutional Racism, Microaggressions, Color blindness, Safe Space, White Privilege, and White Fragility.

[Under our Skin](#)

What Is Privilege? (4 min) and Race & Privilege: A Social Experiment (7 min)

Instead of doing a privilege walk exercise, we asked staff to watch and reflect on these videos that demonstrate that exercise—without causing any staff to feel singled out.

[What is privilege?](#)

[Race & Privilege: A Social Experiment](#)

Tim Wise Tells CNN’s Don Lemon The 5 Things White People Should Know (5 min)

Staff resonated with the message that even someone with diverse friends can hold prejudices.

[The 5 Things White People Should Know](#)

Cracking the Codes: Joy DeGruy “A Trip to the Grocery Store” (4 min)

This video describes a double standard faced in a customer service situation.

[Cracking the Codes](#)

StoryCorps video series

We have used several videos from this animated series inspired by people’s real-life stories about a variety of experiences about diversity that staff responded to especially well.

Eyes on the Stars (4 min)

About the childhood of African-American physicist and NASA astronaut Ronald E. McNair.

[Eyes on the Stars](#)

Traffic Stop (3 min)

About an African-American man pulled over by Denver police officers.

[Traffic Stop](#)

A Story About Race - Neil deGrasse Tyson (12:20)

Being staff at a science museum, we often liked to use stories of scientists to communicate content around equity. Neil deGrasse Tyson was such a well-known figure to our staff.

[A Story About Race](#)

Implicit Bias

[Check Our Bias to Wreck Our Bias](#)

Videos That Supported Other Activities Around the Museum

We regularly had supplemental material to the museum-wide staff book and video-club selections. For example, when One Museum One Book read Clint Smith's book *Counting Descent*, we offered this video viewing opportunity to visitor-facing staff:

[How to Raise a Black Son in America](#)

When we opened the *RACE* exhibit, we included this video overview of the exhibit for visitor-facing staff training.

What is Race? (27 min)

[What is Race?](#)

And we offered a video about the challenges for white people in talking about race:

[A Conversation with White People on Race](#)

Videos on Gender, Gender Inequality, etc.

The surprising neuroscience of gender inequality (12:38)

This video talks about gender inequality, including the role of unconscious bias.

[Neuroscience of Gender Inequality](#)

Gender Identity and Pronouns (3:42)

[Gender Pronouns](#)

Articles

How Diversity Makes Us Stronger

This article describes the benefits of a workforce that includes a wide variety of individuals.

[How Diversity Makes Us Smarter](#)

Why Think about Equity and Museums?

[Equity and Museums](#)

Beyond Starbucks: How Racism Shapes Customer Service

[Beyond Starbucks](#)

We regularly curated materials concerning equity around themes that were particularly relevant at a certain time of year, or after key events in society. Here are a couple of examples of those materials that we used after the movie "Hidden Figures" came out:

The Forgotten Black Women Who Helped Send Astronauts to Space

[Black Women Who Helped Astronauts](#)

Meet the Black Female Mathematicians Who Helped America Win the Space Race

[Black Female Mathematicians](#)

Here are some materials we used during professional sports seasons:

The 15: Racial Barriers Broken in Sports

[Racial Barriers Broken](#)

Remembering Jackie Robinson: Racial Equity in Sports

[Remembering Jackie Robinson](#)

How Sports Can Bridge America's Racial Divide

[Sports and America's Racial Divide](#)

Owner of Miami Dolphins Stephen Ross Creates Non-profit, RISE to Fight Bullying and Racism

[RISE to Fight Bullying and Racism](#)

U.S. National Anthem Protests (2016 - present)

[National Anthem Protests](#)

Sample Email Sent to Visitor-facing Staff to Describe the Equity Professional Development Opportunity

Please see the invitation below about upcoming showings of the film Hidden Figures. You are all welcome to see this film at the museum at a time when it does not overlap with your existing work schedule.

Although I cannot pay you to see the film, I can pay you for 30 minutes of time if you email me by the end of April your thoughts about how Hidden Figures addresses the topic of equity. If any of you would like to talk with me in person to discuss the museum's equity movement, just let me know. I would be happy to meet with you to hear your perspectives. -Manager of Public Operations-

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Appendix G: How-to Document on Conducting Staff Equity Surveys

Conducting Staff Equity Surveys

Considerations and Practices from the Science Museum of Minnesota

The Science Museum of Minnesota has conducted a staff survey around equity twice over the past three years. We've also worked with and learned from other sites who have done the same. We share this in the spirit that others have shared their experience with us: in the hope that it will help others to do the best work they can.

Preparation

1) Consider the institutional culture and how equity is embedded into the structure of the organization: are equity initiatives top-down, grassroots, or do they represent the institution cross-departmentally and across levels of status (full-, part-time, volunteer, etc.). What factors will influence staff's reception of the survey? If the survey is following a different path than other initiatives, extra explanation or support might be needed. How will you frame the survey and place it within the context of your organization's purpose, goals, mission, vision, etc.?

2) Consider how staff might interpret language around equity before using it on a survey. People don't have to be "on board" with equity initiatives, but there should be some shared understandings of what equity means, and common terminologies as appropriate to the context (e.g. white privilege, bias, transgender/non-binary). If most people won't recognize a word, consider not using it, or defining it carefully. If you decide to use a certain term, be clear/transparent about the reason(s) for doing so.

3) Develop and share the purpose and intention for the survey. Perhaps the survey is meant to be a "temperature check" to see where staff members are at in terms of their understandings of equity; perhaps the survey will point to areas where administration can focus its human resources, training, and/or public-serving programs.

4) For the team who is driving the survey implementation, take time to discuss and identify the strengths, challenges, and any other important factors of the makeup of your team as it relates to overall equity work within the organization. Who is part of your team and what are their roles/expectations when it comes to equity work?

How will your team respond to existing power/status dynamics within the organization when administering this survey? How will your team handle resistance or indifference to the survey?

5) Identify the kinds of “asks” you are making of staff within the organization and how that impacts their role and position in the organization. What might be perceptions of staff within the organization who are viewed as “responsible” for equity work, whether formally as part of their job description or informally as part of their identity, background, and/or experiences? Who is usually thought of when it comes to equity work in the organization and will they be expected to become involved, and if yes, in what ways? Where is it appropriate to push for support and where may you need to provide support instead so as not to further exacerbate marginalization of certain groups? How will your team distribute the work so that no one person or a particular group of people are unduly burdened with moving this survey and overall equity work forward within the organization?

6) Carefully consider the demographic categories you hope to ask about: are they necessary? Does examining the data through certain demographic characteristics have the potential to reveal the identities of participants? How should these questions be structured to reflect current equity-focused terminologies? Should certain demographics not be linked to other items during analysis? How will this data be used?

7) Consider where you want support and messaging about the survey to come from within the institution and the resources you expect to put behind that push. Does this require coordination with managers or additional budget to support staff time to participate?

8) Carefully consider who within the organization you want to participate in the survey. Will you invite staff who are under the age of 18 to respond? If needed, do you have the resources to gather and track consent from parents/guardians? Will you be reaching out beyond paid staff to volunteers, or to contractors and partners who also work in your institutions’ space?

Survey Development

1) Use models from other institutions. Many cultural institutions have produced equity surveys; use these for inspiration and guidance, but always contextualize the survey to your cultural institution to ensure questions align with strategic goals or organizational values.

2) Consider vesting cross-departmental groups with informing or developing the survey; the more equity work is diffused across the institution, the more unified and engaged the institution is in applying the results to practices across the institution.

3) Document differences and similarities that arise among different groups while developing the survey. Is the same question or concern present in multiple parts of the organization? Are some questions or concern unique to certain groups? These insights can guide interpretation of results by providing a contextualized basis for analysis and help focus attention on findings when reporting.

4) Practice the questions with staff representatives from different departments and roles, engage in-house or external evaluators (if available) to help refine question/survey structure, and follow best practices in survey design. Ensure that questions make sense for varying staff contexts -- using logic or instructions to skip certain questions may be necessary.

5) Consider the platform and process for taking the survey that considers the needs and daily routines of ALL staff. Not all staff have access to computers to easily take a survey during their workday; not all staff work 9-5pm; and not all staff will be comfortable taking a survey in English.

6) Create and follow a timeline for developing, socializing, and proctoring the survey, as well as for analyzing and sharing the survey results.

7) Carefully consider the potential vulnerability of staff - particularly if there is a potential for identification through open-ended responses on the survey, or in how the data is analyzed (e.g. if analyzing the data both by ethnicity, gender and role in the institution and there are few individuals who have these same characteristics). Key questions include: how can we ensure the confidentiality of staff participants in both the taking of the survey, and in the analysis of the results? How should the data be restricted? Should the data be analyzed offsite?

8) If you plan to use an online platform to collect your survey (e.g., Alchemer, Survey Monkey, Qualtrics), plan to have paper versions available, along with plans to enter and store responses collected in that way.

Communication

- 1) Communications about the survey should be both targeted and general. Everyone who is participating should receive advance and ongoing communications that encourage their participation. Consider a weekly “thermometer” that tracks progress.
- 2) Consider dedicating time during an All Staff meeting (or whatever format makes sense in your setting) to clearly articulate the purpose of the survey, reinforce the survey’s connection to the organization’s goals, and answer staff questions in an open forum. This time can also serve as an opportunity to explain the steps taken to ensure anonymity and to preview what it will be like to actually take the survey.
- 3) Consider a special information session for managers to help them determine the easiest ways (and those ensuring confidentiality) that they can support staff to take the survey. Managers can support methods that work best for their groups and can continue to encourage participation according to staff needs. Most importantly, always communicate that the survey is optional; do not coerce staff to take it. All leaders and managers need to reinforce this message.
- 4) Participants should know who will analyze the data, where it will be stored, and when they can expect to hear back about the results and potential action steps that have emerged (and/or are being considered by leadership) BEFORE taking the survey.

Data Collection

- 1) Open the survey for a minimum of two weeks; step up communication about the survey during this time.
- 2) Consider the needs for translation, computer support, “open lab” sessions, and time during a regularly scheduled workday during the data collection period to ensure access and engagement in the survey. Consider special processes needed for particular roles (e.g. volunteer, part-time) in the institution.
- 3) Continually check on the functionality of the survey during the data collection period. It may be helpful to establish a person or team responsible for fielding questions or concerns about the functionality of the survey. This person’s name and contact information should be clearly associated with this role during initial communication and throughout the data collection period.

Data Analysis

1) Initial analysis of the raw survey data will ideally happen outside of the institution, or if occurring internally, restricted to a couple of individuals if absolutely necessary. There is great trust built by having analysis happen outside. There are often small evaluation or research groups that can be hired for a job of this size at reasonable rates. They would take the raw data and aggregate it according to guidelines developed by the museum team, so that no person within the museum could look at a single response or set of responses.

2) Consider the benefits of a core group of leaders, an institutional equity team, etc. doing a group analysis of the results from this analysis. This group can identify a common narrative that they see emerging from the data.

3) Revisit notes and documentation from the survey development process to help align analysis and reporting efforts. Considering which questions or concerns arose consistently among groups in the organization vs which were specific may be helpful framing for collective meaning-making and share out.

4) Do NOT analyze close-ended and open-ended data within individuals, but aggregate this data within a response. Consider all the open-ended responses within an item together, don't consider an individual's response to close-ended and open-ended responses; the chances for identification of individual identities increases. For example, it is appropriate to look at open-ended responses filtered to be only female-identifying respondents. It is inappropriate to look at a person's response and also see that the respondent is female-identifying, a manager, and 25-34 years old.

5) Roughly code open-ended responses into categories or buckets that are representative across responses; use the data analysis group to check that these categories or buckets work, and that the items chosen fit in them.

Sharing Results

1) Share results as soon as possible after the survey is taken.

2) Consider the chain of sharing that should take place in the institution to ensure unity and engagement in the survey process and results.

3) Share results in a variety of formats, including brief, graphic snapshots, as well as longer reports and question and answer sessions.

Consider having a reference binder that staff can check out to view and consider the more detailed results. Consider working sessions with managerial staff to discuss application of the data to their work.

4) Presentations of results should include some reflection by administration, working groups, or leaders about the priorities they see in the data, and what action steps they have taken/are considering taking in response to the data.

5) Presentation of the data might be a brief summary of the themes that emerge from the data, with visuals (graphs, charts, graphics) to aid understanding, and a few representative quotes to give nuance and voice to the types of responses observed. Think about these presentations as a narrative about the current state of equity in the institution.