A Model for Deep Audience Engagement
Suggestions for Cultural Organizations

Do you want your programs to be relevant and engaging for your audiences?
Do you want to expand your audiences in terms of number or diversity?
Are you ready to relinquish control of the outcome to achieve these ends?

The Historical Society of Pennsylvania and Taller Puertorriquenõ believed that they were ready to go on this journey together when, in 2017, they applied for a grant from The Pew Center for Arts & Heritage for audience and program development. The process they envisioned was complex, but they committed to evaluating it throughout the grant in order to suggest ways that other organizations might benefit from their experiences. This section of the website provides advice garnered through written reports by the project evaluator as well as surveys, interviews, and observations with the project staff, the audience advocate team, and the technical advisors. [Because the audience advocate group in this group was called the PAZ, it will be the short-hand here for those individuals.]

In no way was the process perfect, but it was positively impactful for the PAZ members and the two organizations. A key element discovered by the organizations was the need for equilibrium. The establishment of structure in order to lead the project to completion had to be adequately balanced with providing the PAZ with ample agency to shape the outcome of the project. Guidelines based upon this experience are offered below, in hopes that they might help you undertake similar hard—but rewarding—work. [For a quick visual, see this diagram created for the AAM 2019 meeting.]

Be prepared
Key things to consider:
- The process is as important as the final project. The way the process is "wrangled" allowed for the outcome to be bigger than expected because more perspectives are involved.
- Everything will take longer than expected.
- If collaborating with another organization, both organizations have to be ready to learn something and to give away something.
- When looking for funding, help funders see that the most important "deliverables" are likely to be in process, not product. Prepare for how to document those deliverables, e.g. hire an evaluator.
- If you can't be prepared, be aware that unexpected events will happen. (We had many staff changes during the grant period that could not have been foreseen and adversely affected ability to complete project on time).

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- Find the best people to be part of the project team – committed, skillful, good listeners, and flexible.
- Realize that PAZ members may value different from project staff in the process and outcomes.

Have realistic expectations of the process and outcomes

Again, the project will take longer than expected. PAZ meetings will run long as discussion gets flowing, additional meetings will be needed in order to reach a consensus, and the more people involved in program implementation (while improving the program) ultimately slows down the process. It is also hard to get the process and the product "right." Where does one begin and one end? The personal outcomes for each person involved are the major successes. This project changed what people knew about the "other" and their own community, altered how some people thought about their own work, and created new personal and professional relationships.

How to choose audience advocates

The diversity of the PAZ membership is essential for the success of the grant.
HSP has created two audience advocate groups. The different models reflect different goals. No matter which model is chosen, develop a clear rubric for determining the kind of people to be involved (e.g. gender, age, race, psychographic interests relevant to project, etc.).

PAZ model:
- Goal: To build a more diverse audience through tapping into the audience of a sister organization whose audience shared similar interests in community, history, and culture but would not typically attend the other organization.
- Creation: Each organization identified constituents to invite to the program. These people were ones who might be very close to the organization (e.g. on the board) but also people who had attended programs that seemed as if they might have an interest in the project. For the PAZ, letters or phone calls solicited 29 people, of which 20 signed contracts. Later the group become 18 when two people did not meet the "attendance rule" (see below).

Artist Embedded Model:
- Goal: To obtain the advice of people who were not currently audience members but whom HSP wished to cultivate.
- Creation: A wide call was made through emailing to HSP lists and through an ad on Craig's List. Over 200 people applied. These people were sorted by the qualities on the rubric and

then specific individuals were invited to join. The group began with 16 people and, through attrition, dwindled to about 8 at the end of two years.

Contracts: To ensure that both parties had clear expectations, PAZ members signed a contract outlining the time commitment, duties, and rules for attendance. Based upon the Artist Embedded experience, the PAZ members were told upfront that if they missed two meetings without advance notice to the project director, they would be suspended from membership.

Payment: Paying people for their time indicates that you value their expertise. Create a sliding scale for honoraria, with attendance at later meetings bringing a higher stipend than earlier ones. Bookkeeping is a bit tricky, but the sliding scale works as a good incentive. Thanks to being grant-funded, both projects allowed for honorarium for audience advocate members. Seventy-nine percent of the PAZ indicated honoraria made it possible and pleasurable for them to participate in this project (35% "Somewhat Important" and 43% "Very Important.").

How to keep PAZ members involved through the process, or the care and feeding of the audience advocates?

Grant leaders need to be flexible, open, and nurturing, allowing for group cohesion and mutual trust to be built. One of the members indicated that the PAZ process was different and better than most charettes where, as a member, you later feel you were led to one pre-set conclusion. Here the PAZ believed that they were going to make a difference.

The most crucial step for the PAZ success is in the choice of an able facilitator. This person sets the tone in each meeting, carrying the values set out by the project team and being someone who is open, flexible, and a good listener. In addition, common-sense good practices include:

- The meetings are held on a regular schedule, with not too much time between them. PAZ members had the opportunity to meet monthly for ten months. While not planned in the grant, due to requests from members, they then had an option to continue into the second year.
- Ask members about their needs. For example, in this project, we had to determine up-front the need for language interpreters.
- Give PAZ members a chance to research something of their own interest. The PAZ's enthusiasm for the project and archive work was actively cultivated with early opportunities to touch, read, and investigate.

- Provide PAZ members with any needed background. No one likes to feel "dumb."
- Field trips are widely successful. They provide chances for PAZ members to make connections with each other and to learn subject matter and experience programs formats beyond what could happen in classroom. The three optional trips occurred over the summer, with PAZ members reporting on what they learned at a September meeting. Due to the universally positive reactions of those who did attend various trips, it is distinctly possible that non-participating PAZ would have been motivated to sign up for trips as a result of this conversation. A suggestion for the future would be space trips throughout the first six months of audience engagement.
- Be sure to feed people!

Add technical advisors to the project

The personal narratives of these professionals provide a frission of excitement and inspiration for the PAZ and create a sense of confidence in the value of its work. In the grant, the project included a team of six technical advisors, who were historians, scholars, artists, archivists, and public historians. According to PAZ members, the technical advisors were crucial to the learning experience, Some advisors brought lived experience; some brought ideas on how archival material could come to life through a variety of programming. These outcomes fulfilled the original goal set for the technical advisor corps.

In using technical advisors, consider when the experience they have would be most useful for the PAZ members in their education and work processes. For example, the general pattern of this grant was to introduce the archives, then the history, and then concepts of public history and programming. Had the last been introduced earlier it might have helped the group better understand the deliverables.

Likewise, be sure to give the advisors specific tasks to be accomplished so that they can serve the project well. The role of the technical advisor morphed during this project as advisors became a crucial part in helping to shape the project itself by becoming a "kitchen cabinet" for the project team. For future projects, this new role should be codified as it was essential to the functioning of the project. Because these individuals were asked to attend a set of meetings, they

became observers who could "read the room," helping PAZ members and the grant team reflect on what was happening and shape direction. Often, they could explain why an idea might not work based upon their own professional experiences, making it so that the project staff did not have to be the ones saying "no" to ideas from participants. Additionally, they joined project staff on conference calls after each meeting to reflect on what had happened and to plan next steps.

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Start off on a good foot
Do not skimp on time for introductions: Personal introductions at the first meeting empower the PAZ participants to feel "known" by a group of strangers and turn up helpful backgrounds about individuals that staff were not aware of—for instance, how many of the group were school teacher—that helps with group bonding.

Define project goals: Share grant goals early and often. Address any concerns PAZ members may have on why they are involved and what they are working toward as soon as possible to manage expectations (specific parameters like budgets or dates might come later). For example, if there are parameters about possible audiences for the new program, such as "over 18" or some other demographic, have the group focus on these defining limits early in the project so that all work can be geared towards that audience. While the staff were eager to ensure that the PAZ were invested in the process, PAZ members were eager to know from Day 1 what their final deliverables were.

How to structure the meetings
With so many people involved in this new kind of project, here are specific suggestions to make the project run more smoothly.

- Provide more time: Managing timing for these meetings is difficult, but essential, to the outcomes of this project. Always leave plenty of time for sharing conversations if participants are asked to have them. Several respondents and staff suggested that more time be allotted for individual meetings, for getting to know each other, and for researching. While staff plans for timing were thoughtful and well laid out, they were frequently derailed by the PAZ using extended amounts of time to query staff and debate each other about deliverables. Consider one long work day of 6-8 hours instead of the usual 2- hour meeting to really dig into research topics or provide for in-depth discussion.
- Ensure clear communication: Make sure that everyone can hear (perhaps use a microphone). Use name placards on tables instead of or in addition to nametags, since they are usually too small to read across conference tables. Consider when it might be best to demonstrate things visually – on a PowerPoint, for instance, or a Google Drive demo – to make sure all participants understand processes.
- Have clarity about each step of the process: Remind the PAZ at each meeting of the end goal, but also give clear directions and expectations for intermediary tasks too, such as the personal research.
- Prep PAZ members for presentations: Have members write our short summaries of reports they are to give to help them manage their time. If running out of time in a meeting, ask PAZ members to submit their questions in written format, with answers provided at the next meeting by the speakers.   Once the group has been together a few meetings, help the facilitator identify who tends to be long-winded and who quiet, so that they can call on people in an order that manages time well and ensures all are heard.
- Create ways to communicate beyond the meetings: A shared drive (e.g. Google) is a great way to share resources during the project. PowerPoints from presentations, readings, etc. can be posted there. In addition, PAZ members can share their research and thoughts as the project progresses. Small groups of participants might choose to self-organize around individual programs/content streams.

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- <u>More personal contact with the community for whom and about which the project is being undertaken</u>: Help PAZ members get to know the people involved in the story. The project was about the experiences of the Puerto Rican community. PAZ responses to field trips and personal anecdotes always elicited a strong, passionate response from the group - as did turning up archival material that referenced the lived experience of a member of the PAZ group specifically.

How to (try to) reach consensus, shifting from ideation to program development
The most challenging part of the project will be coming to consensus on the specific programs to develop. The number of ideas grew rather than narrowed (as we had hoped) during the process of this project. Suggestions to make it work more easily in the future are:

- <u>Provide time:</u> Consensus is not a fast process.
- <u>Reiterate the goals</u>: Again! Using the grant language can be helpful.
- <u>Be sure to provide the knowledge the PAZ members need:</u> The division of subject from format in program development is a professional one the PAZ members may not grasp - experience with program evaluation and audience definition too. Realize that the project team brings an expertise that sometimes blinds them. It is important to share the team members underlying assumption and definitions explicitly and check for understanding<u>.</u>
- <u>Project team should be prepared to take some control:</u> As the process moves from PAZ members learning and researching to planning programs, a switch in role of the project leadership becomes necessary from focusing on ensuring that everyone can share and be creative to providing more structure and enforcing decision-making. Rather than the project team feeling guilt that they are straying from the grant process by being "top-down," the team should realize that leaders need to provide structure to allows individuals and projects to flourish. There are times in the project where the PAZ needs information and direction to move to the next level.

Overall, remember:
Respect, flexibility, and transparency are key to building trust!