



# Innovation Lab for Museums

## Case Studies in Innovation and Adaptive Capacity

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**Featuring:** Levine Museum of the New South  
The Atlanta History Center  
The Birmingham Civil Rights Institute

**Project:** Latino New South

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## **ABOUT EMCARTS**

EmcArts works alongside people, organizations, and communities as they take on their most complex challenges. Through rigorous workshops, coaching and labs, we create space and conditions to test innovative strategies and build adaptive cultures. Our practice is deeply influenced by the artistic process, which we believe unlocks entrenched beliefs and opens up new ways of seeing.

[www.emcart.org](http://www.emcart.org)

## **ABOUT JAMIE GAMBLE**

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# Foreword

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One cannot discover  
new lands without first  
consenting to lose sight of  
the shore – for a very long  
time.

— Andre Gide

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EmcArts launched its *Innovation Lab for the Arts* to support organizations in incubating innovation projects – conceiving, designing, and testing new strategies to achieve public value. Now, after seven years and 49 participating organizations, we are stepping back to reflect on the longer-term impacts of the *Innovation Lab*, in order to better understand how and where it has had identifiable impact and to appreciate more fully the productive messiness of what adaptive change is actually like in practice.

In 2014, we released two case studies investigating the journey of Woolly Mammoth Theatre Company and Denver Center Theatre (DCTC)’s innovations. Woolly Mammoth’s *Connectivity* initiative began as a submerged big idea at the heart of the organization and evolved into its current state as a fully integrated strategy across the entire enterprise, while DCTC’s *Off-Center*, a disruptive project that started on the periphery of this large organization is now finding its way toward the core. To read the full case studies on Woolly Mammoth and DCTC and learn more about the Lab, [click here](#).

Now, we are pleased to release the next two studies in this series, featuring COCABiz, a project of the Center of Creative Arts (COCA), which is available [here](#), and the *Latino New South* project, which follows in this document.

*Latino New South* is an initiative of the Levine Museum of the New South (Charlotte, North Carolina), the Atlanta History Center (Atlanta, Georgia), and the Birmingham Civil Rights Institute (Birmingham, Alabama) that is creating relevant ways to engage the burgeoning Latino community.

These three museums, sensitive to the demographic shifts taking place locally in the U.S. South and nationally on a larger scale, wanted to find meaningful ways to help all members of their respective communities learn more about population shifts and the resulting impacts. Their innovation created a learning network among the three institutions that is growing in its ability to be receptive and making newcomers feel welcomed.

*The Lab* is a catalyst for an organization’s journey in adaptive capacity building, helping that organization question core assumptions, engage in intense planning around a practical innovation project, create a sense of organization-wide investment in change, and test new strategies with the support of change capital grants. *The Lab* provides a framework for making adaptive change across the organization and its community.

We hope these two new in-depth case studies will become rich resources for the field because they focus on innovation as a process, one that achieves its effect as leaders negotiate unexpected twists and turns to reinforce their sustained commitment to “next practices.”

## Richard Evans

President, EmcArts

# Case Snapshot



## The Context

The Pew Research Center reported in December 2014 that the U.S. Hispanic population has grown 592% since 1970, and between the 2000 and 2010 census, the percentage of people identifying as Hispanic or Latino made up more than half than U.S population growth.<sup>1</sup> These shifts are part of a larger demographic change for Latinos in the United States. Immigration is no longer driving Hispanic population growth.

Most newcomer stories in this country begin with the hustle and bustle, awe, and over-stimulation of dense urban metropolises like New York City, Chicago, or San Francisco, but today that story is changing. While large cities still serve as gateways for many new Americans, cities in the U.S. South are providing a different sort of opportunity. For many Latinos and their families, the South has become an attractive place to live because of plentiful jobs, the relatively low cost of living, and access to social and political networks.<sup>2</sup>

## The Innovation

As leading cultural institutions in their respective cities, the Levine Museum of the New South (Charlotte, NC), the Atlanta History Center (Atlanta, GA), and the Birmingham Civil Rights Institute (Birmingham, AL) entered the Innovation Lab for Museums with the goal of creating relevant ways to engage the burgeoning Latino community. Using the arts as a tool, they felt, would help all members of the community learn more about population shifts and hasten the community's integration. Their innovation, *Latino New South*, created a learning network among the three institutions that aims to be responsive to community needs, desires, and feedback.

## The Impact

The Innovation Lab for Museums provided the three institutions with a container for exploring new ideas as well as the space and time to engage them fully. The Innovation Lab, a program of EmcArts, was created to assist nonprofit organizations in designing and prototyping new ideas and to launch real-life projects that address complex challenges facing their organizations and the arts and culture field at large. Since developing *Latino New South*, each institution has learned that their ability to better engage with the community and have meaningful dialogue through listening has helped them expand their impact in critical ways, including:

- **Creating the “Listening Session,” a Structured Process For Gathering Community Input**

The Latino communities of Atlanta, Birmingham, and Charlotte have different settlement patterns, and finding a way to acknowledge the unique circumstances of each city was important. By building a framework around a specific issue, being strategic about whom to include in each conversation, encouraging participation, and creating ways for participants to continue engagement, *Latino New South* streamlined a process for dialogue.

- **Improved Programs And Activities**

In 2015, the community-generated exhibition iNuevolution!: Latinos and the New South, will travel to the three museums. The exhibition, an exploration of the demographic, social, economic, political and cultural impacts of Latino population growth in the American South, is a direct result of the *Latino New South* initiative.

## The Lab

*Latino New South* created a set of techniques and insights that can guide museums in genuine outreach to Latino populations and other marginalized cultural communities. From their participation in the Innovation Lab, the Levine Museum, Atlanta History Center, and Birmingham Civil Rights Institute learned how to be more effective stewards of their communities' diverse cultures.

# Case Study: Latino New South

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Museums should not ask, ‘What can we get from our communities?’ They should ask, ‘How can we use the resources of the museum to help the community tackle its pressing challenges?’

— Emily Zimmern  
President and CEO, Levine Museum

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The Museum of the New South is not a traditional, passive museum. It is a vibrant, relevant place to gather that raises difficult issues, and challenges Charlotte to dialogue on them. You don't go to it to 'see' exhibits. You go to it to be engaged and to have courageous conversations.

— Mike Rizer

Director of Community Relations,  
Wells Fargo

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*“We are somebody. We are here to raise a family.”*  
At the Cocina Latina restaurant in Charlotte, North Carolina, a small group of people from Charlotte's Latino community engaged in a dialogue about their experiences, their challenges, and their dreams as Latinos living in Charlotte. In the next two days, many similar conversations were held as part of an intensive two-day interaction with Charlotte's Latino community that included meetings at a community center, a radio station, and a credit union. These sessions were part of an exploration led by the Levine Museum of the New South, Atlanta History Center, and Birmingham Civil Rights Institute into questions of relevancy and role. They wanted to understand the question: *If we, as museums, are to remain relevant cultural and educational resources, how do we effectively serve our changing communities?*

The growth and influence of Latinos in the United States South may be the biggest story in southern history since the civil rights movement. Southern U.S. cities have made a rapid transition into a new role as gateway communities. Many cities echo what is happening in Charlotte, where the city's Latino population grew from 1% to 12% in the last 20 years. The response in these cities has been uneven: welcome and unwelcome, inclusion and exclusion, integration and segregation. The Levine Museum of the New South, Atlanta History Center, and Birmingham Civil Rights Institute were convinced that they could help their communities to be a better receiving community.<sup>4</sup> and influence their community's integration. They wanted to explore issues such as: How do we use museum resources to help the Latino community to adapt and thrive? How can our institutions bring Latinos and non-Latinos together to learn about one another? How do we all work together on common community challenges?

The two days of dialogue were repeated in Atlanta and Birmingham in the months to come. Called “listening sessions,” the dialogues were intended to give a core team of museum staff and community representatives insight into how Latinos experienced these institutions, how their stories could be told, and explore ideas for how their institutions could change to better connect with and represent the Latino community. There



The **Atlanta History Center** is the region's leading general history museum with the mission to preserve and interpret Atlanta's history. Operating for 85 years with a staff of 140 full and part time employees, and annual budget of \$7.5 million, they are the oldest and largest partner in the *Latino New South* project.

The **Birmingham Civil Rights Institute** promotes civil and human rights through education programs and exhibitions that depict the country's racial struggle and progress from post-World War I to the present day. Since its opening in 1992, this state-of-the-art museum has grown to a staff of 19 and an operating budget of \$2.1 million.

The **Levine Museum of the New South** explores the history and culture of the American South since the Civil War. Established in 1991, it is nationally recognized for ground breaking exhibits and programs. With its full-time staff of 16 and annual budget of \$2 million, the Levine Museum "connects the past, present and future by evoking emotion, sparking conversation and facilitating dialogue."

was tremendous risk in this. What if this process excluded communities instead of including them? What if the process only exacerbated their community's tensions? Could relationships be formed with the Latino community in a way that bridges understanding and builds the trust for exploring potentially contentious issues?

The Levine Museum was the first of the three museums to grapple with these questions, and in doing so, they recognized that engaging with other museums would enhance the exploration. Levine reached out to the Atlanta History Center and the Birmingham Civil Rights Institute with an invitation to make a joint application to the EmcArts *Innovation Lab for Museums*. These organizations were familiar with one another, but had not yet built the strong spirit of reciprocity needed for a collaboration of this intensity. The Lab helped them to uncover their common interests through shared experiences. Choosing to work together introduced a new set of possible risks to the initiative. While collaboration can generate new ideas and bring new resources to the table, collaboration can also prove difficult. Transaction costs of time increase with the demand for meetings and communications. Conflict can ensue from differences in priority, expectation, and ways of working.

The risks, however, have paid off. The listening sessions have led to a stronger bond between the Latino community and these cultural institutions as well as an enhanced understanding of how to authentically engage with the Latino community. The Levine Museum of the New South, Atlanta History Center, and Birmingham Civil Rights Institute continue to draw upon one another's insight and expertise in what remains a vibrant and healthy collaboration.

The space created by the *Innovation Lab for Museums* was vital to this success. This platform allowed for the careful development of the listening session concept and supported rapid progress in building a collaboration that has sustained even after the *Innovation Lab* concluded. The experience of the Levine Museum of the New South, the Atlanta History Center, and the Birmingham Civil Rights Institute developing this

initiative gives us insight into what it takes to build an effective collaboration and how cultural institutions can cement an approach and an idea in a community through listening.

### ***The Innovation: Latino New South***

In 2015, the museum exhibition *iNUEVOlution! Latinos and the New South* will open at the Levine Museum of the New South in Charlotte, North Carolina. This same exhibit will journey to the Atlanta History Center and the Birmingham Civil Rights Institute, and many other museums across America. *iNUEVOlution!* is the watershed creation of this larger, multi-year, multi-institutional and multi-layered exploration into the demographic, social, economic, political, and cultural impacts of Latino population growth in the American South. This exploration is referred to as *Latino New South*.

The innovation of *Latino New South* is the learning network created between these three history museums. *iNUEVOlution!* is a product of this innovation, as are the many smaller initiatives and practice changes emerging at each museum.

These organizations all had experience in collaborating on projects within their communities and were part of museum field-building organizations and initiatives, such as Welcoming America, the American Alliance of Museums, and the International Coalition of Sites of Conscience. *Latino New South*, however, is a collaboration unlike any in which these organizations had previously participated. They were openly exploring their role as museums in support of changing communities and developing techniques for authentic engagement. To do so meant deviating from their usual creative process, further challenged by limited face-to-face interaction. Through this effort, they developed a new understanding and practice about how to effectively partner at a distance and how to sustain this collaborative work in a highly emergent situation that involved multiple stages.

In creating a learning network, the collaborators equipped themselves to build upon a set of techniques for community engagement and

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— **Jamie Gamble**  
Developmental Evaluator

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dialogue that Levine had pioneered. The intent was to collectively share in the exploration and creative development of a potentially risky topic. In designing and implementing two-day “listening sessions” in each city, the Innovation Team not only learned more about Latinos, their communities, and the local dynamics of integration among Latino and non-Latino populations, but they also advanced their understanding of this emerging practice. Their experiments with the listening sessions would test the resilience of their collaboration, and provide a specific opportunity for each museum to engage with their local Latino community.

*Latino New South* developed a set of insights that can guide museums in a sincere and authentic engagement of Latino populations as a result of the Innovation Lab process and learning gleaned from conducting the listening sessions. Out of these listening sessions, the three institutions summarized the key points that museums could apply to strengthen their work with Latino populations. An internal document called *Working with Latino Partners: Seven Insights* highlighted the following:

- 1 Latinos are a significant presence in the American South, and many Latinos counted in the U.S. Census are U.S. Citizens.**
- 2 Latinos are from many cultures, and tend to identify with their country of origin, rather than the American terms “Latino” or “Hispanic.”**
- 3 Bi-culturalism is growing as young people raised in the U.S. are English-proficient and embracing of American culture, while retaining their Latino identity and culture.**
- 4 Latinos tend to experience cultural offerings as an extended family unit.**
- 5 Bridging Latino and non-Latino communities involves multiple introductions including Latinos to other Latino groups, Latinos to the receiving community, and Latinos to Southern (especially African-American) history.**

**6 The use of Spanish in posted signage and interactions with museum staff signals welcome and, especially for older Latinos, is essential for them to fulfill a culturally important role of teaching their children.**

**7 There are a lot of misperceptions about the realities that Latinos face, especially related to documentation and convoluted regulations that often make legal immigration difficult.**

## ***The Innovation Lab***

In December 2011, the joint application from the three organizations was accepted into the first round of the *Innovation Lab for Museums*. In January 2012, the three organizations started working together in the first phase of the *Innovation Lab*. In this initial phase, they selected who would participate on the Innovation Team, started to refine their focus for the *Innovation Lab*, and provided input into the design of the Intensive Retreat. There were a couple early challenges. The process to select the full Innovation Team was slow, and what exactly the three organizations would do together was not yet clear. The initial calls had only one staff person from Atlanta and Birmingham participating via teleconference with three staff from the Levine Museum. This made the group very Charlotte-centric, and this was compounded by the fact that all meetings were convened in Charlotte. They would need the time together at the Intensive Retreat in May 2012 to build trust and their idea.

The Innovation Team that attended the Intensive Retreat included the lead staff from each organization, community representatives who were recruited from each city's Latino community, and an urban geography professor from the University of North Carolina who brought expertise on the changing demographics of the South.

The Innovation Team moved slowly but systematically through two parallel processes: learning more about one another and building the appropriate prototype that would advance their

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— **Jamie Gamble**  
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work in the next phase of the Lab. The facilitation of the Lab, by EmcArts facilitator John McCann, was crucial. The group needed space and time for team members to share their experiences, unearth what each organization hoped the learning network could accomplish, and better understand what each organization was able to commit to the process. The facilitation also supported the group to move toward a clear project that would allow them to advance the core questions underlying *Latino New South*, harness the shared intellect of the learning network, and serve the unique interests of the three organizations. They decided to focus on listening sessions.

In the Innovation Team's planning, research and outside perspective was consistently integrated. Two content experts were invited to participate in the Intensive Retreat. Susan Downs-Karkos from Welcoming America provided examples of how community organizations were enabling local populations and migrating populations to develop common ground, and Clarissa Martinez De Castro from the National Council of La Raza provided insights into pending immigration legislation and how communities, states, and regions were organizing in response. Heather Smith, the urban geographer on the Innovation Team, provided data about the demographic developments in the three cities over the past 30 years. The Team also collected research on grassroots efforts in other communities that helped prepare the receiving community for the rapidly emerging Latino presence.

Using data and other research was influential on the design of the listening session prototypes. This input started to challenge some of their assumptions; for example, after initially framing around Latino immigration, the partners realized the importance of broadening their scope to include the many U.S.-born Latinos. In recognizing that Latino population growth in the South is now driven more by birth than by immigration, another dimension to integration and the role of receiving communities was added to the listening session. Their research about new gateways gave them insight into common patterns of limited infrastructure and mixed receptivity for newcomers, revealing the potential role for cultural

and educational institutions in supporting the transition to a welcoming community.

They also began to understand how each of the three cities was quite different in its settlement patterns, countries of origin, and the date of arrival of the Latino population.

The Innovation Team came out of the Intensive Retreat with:

- Enhanced familiarity and trust between individuals and institutions
- Knowledge of emerging practices in immigrant integration, relevant legislation and demographic data
- A concept for listening sessions and agreed-to dates for conducting these in each city
- A framework for reporting and updating one another on progress throughout the prototyping phase
- A process for assessing each prototype and integrating what they learned into the next iteration

### Listening Session Approach:

- 1** Build a framework around a central issue or idea
- 2** Think strategically about whom to include
- 3** Format a session to encourage participation
- 4** Enable use and further engagement

### Prototyping the Listening Sessions

Prior to the *Innovation Lab*, Levine had already started experimenting with the ideas and practices for what they were now calling listening sessions. For example, in the development of the 2009 exhibition *Changing Places: From Black and White to Technicolor*, Levine held discussions with various groups in the community. The listening session process was entirely new for Birmingham Civil Rights Institute and Atlanta History Center.

The objective in the listening session is to create a safe space where the community input is honest, open, and unfiltered. This sometimes means hearing things with which the hosts are not comfortable. More than a focus group, the listening session is the start of a two-way exchange of ideas and perspective that empowers a museum's constituents to provide input into exhibit

development, program design, and the way the museum interacts with the community. Listening sessions are structured events where museums invite stakeholders to share ideas, insights, and information in an open forum. The process of listening yields insights otherwise inaccessible to museums and demonstrates to these constituents that their ideas and presence are valued. Through the listening sessions, museums can build long-term relationships with new groups and glean advice that helps the museum's daily practice be more aligned with a community. The goal is a long-term relationship that contributes to creating more culturally relevant programming, a chance to address issues, and build new practices that help museums serve as a welcoming space for their community.

In prototyping the listening sessions, all three organizations were able to refine an approach to authentic engagement and to develop an understanding of listening sessions' important elements:

### **1 Building a framework around a central idea or issue**

The partners found that the listening session needed to be built around one central idea. For *Latino New South*, their core question was: "Will our cities be welcoming places, creatively involving newcomers, or will our communities fragment?" The use of a core question sets the direction for all other questions, and serves as a framework for analyzing the content of the session.

### **2 Thinking strategically about whom to include**

The *Latino New South* listening session sought to include a broad group of internal stakeholders, such as other staff, board, members, and donors, so that the discussion and input is received first-hand by a diverse set of people. The same consideration is brought to the community members that the museum wants to engage, in this case the Latino community. The research into the unique demographic and settlement patterns for each city was helpful in shaping with whom to engage.

### **3 Formatting a session to encourage participation**

The Innovation Team thought about ways to create the conditions for rich participation. This requires careful and thoughtful consideration of a variety of locations in the community, at times that suit those whom you want to engage. Where to host? What questions to ask? How will language be addressed?

### **4 Enabling use and further engagement**

The Innovation Team planned from the start their strategy for recording and sharing the input from the listening session. In each session they would communicate expectations of continued engagement, and followed through on their commitment to share what they found out and how they were using the learning. Fundamental to the listening session is the commitment to respond to what is heard. It is not enough just to listen; the listening must lead to action.

What became very clear to these organizations is that an authentic engagement is built from a place of reciprocity. Sometimes when organizations seek community feedback, the orientation is "what can we get from you," rather than "how can we help one another." In approaching the engagement with curiosity, respect and a genuine interest to hear people's stories, these organizations were willing to be open and vulnerable. Doing this is not necessarily easy; sometimes what they heard was difficult or uncomfortable.

At the Birmingham Civil Rights Institute (BCRI), one of the key lessons learned from the listening session was more unexpected than difficult. BCRI staff was focused on creating a travelling display that drew parallels between the social justice struggles of Latino immigrants and African Americans. The Latino participants said, "No, tell us your story." They felt that their community needed to learn about the historic African American civil rights movement so that they could better understand the issues that Latinos face today and how committed citizens can create change.



Following each listening session, the Innovation Team would initiate a review process where they would ask a series of questions. Immediately following the event, the Team would ask: What did we intend to happen at this listening session? What actually happened? What did we learn from the experience? What might we do differently in the future? These responses would be summarized and circulated, and after a week of reflection, the group would submit a response to the following: What is the most critical process improvement (if any) that you would suggest be considered by the network to assure continued success with the listening sessions?

With each debrief and follow up reflection, the Innovation Team confirmed some elements of their design, learned new lessons, and identified additional ideas to be tested in the next city's listening session. For example, after Charlotte's listening session, the Innovation Team was confident in the mix of people and places they engaged, and they learned that they should be better prepared to reframe questions if they are not understood. After their experience in Charlotte, they also wanted to improve on how to integrate non-Latinos into the process.

The unique context of Birmingham, Atlanta, and Charlotte meant that the listening sessions had to be adapted for each city. In Atlanta, the Latino community is more established, and so the listening process aimed to connect with activists, scholars, and middle- to upper-class Latinos by hosting sessions at the Latin American Association. Participants to these sessions also received a tour of the Plaza Fiesta mall, and a formal dinner with Latino business and community leaders was also organized — a strategy that would have been less suitable in Charlotte or Birmingham.

In June 2011, Alabama signed HB 56 into law, a harsh anti-illegal immigration bill. This bill, of which several provisions have since been blocked, had far reaching implications for Latino newcomers, for instance, prohibiting access to public benefits and approving a 'show-your-papers' mandate for routine traffic stops. The Birmingham listening sessions examined many aspects of the bill. One

session was held in a public school because of the issues related to the requirement for public schools to report suspected undocumented immigrants, a provision that resulted in a significant drop in the number of Latino children attending public schools.

## THE BENEFITS

In sharing information, knowledge, and better practices amongst themselves, these museums have improved programming, extended their connection to their local Latino community, and contributed to the community's understanding of being a welcoming community. Atlanta History Center, BCRI and Levine have each utilized the findings to shape their institution's programming and practice in order to create meaningful, sustainable relationships with Latino communities in a way that builds common ground and better serves the Latino community.

### *Atlanta History Center*

The Atlanta History Center (AHC) has hosted two annual events in partnership with the Institute of Mexico for over twelve years: Atlanta's *Day of the Dead* and *Three Kings Day*. Since *Latino New South*, each of these activities has experienced higher attendance.

They have also developed new programming. In September 2013, AHC worked with Welcoming America on two events for National Welcoming Week highlighting the courageous stories of immigrants to Atlanta from Mexico and beyond. AHC selected a book by a Mexican American author for *The Big Read*, an NEA funded program to revitalize the role of literature in American society, and led a month of free programs on- and off-site to bring Atlantans together to discuss Mexican-American border issues and immigration. Part of this project included writing workshops with Latino youth at three area middle schools. AHC also hosted an exhibit on Latino influence on U.S. popular music, called *American Sabor*.

As a direct result of the listening sessions in

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We are moving the needle in small ways, and getting people who attend our programs to challenge or reconsider their long held beliefs about Latinos...If one attendee to a lecture walks away feeling empathy toward an undocumented resident, to me, we have really done something.

— Kate Whitman

Vice President of Public Programs,  
Atlanta History Center

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Atlanta, AHC was able to recruit two new board members from Atlanta's Latino community. In having a board that more accurately reflects the Atlanta community, AHC could better build awareness and strengthen relationships with broader audiences. New relationships with community partners were also developed: the Latin American Association and Georgia Association of Latino Elected Officials (GALEO) in Atlanta.

These activities were strengthened for AHC because *Latino New South* gave them increased credibility. As AHC met potential new partners during listening sessions and through the project network, the overall initiative set the stage for credible engagement. “The [Atlanta] History Center continues to amaze me with its wonderful finger-on-the-pulse of Latino culture,” said Jeffrey Tapia, Executive Director of the Latin American Association.

“Having 50 people attend a lecture that discussed Latinos’ impact on politics is as much a sign of our success as having 350 people attend a Civil War lecture. We are moving the needle in small ways, and getting people who attend our programs to challenge or reconsider their long held beliefs about Latinos. Quality over Quantity. If one attendee to a lecture walks away feeling empathy toward an undocumented resident, to me, we have really done something. Feeling compassion or empathy is what moves people to action after all, and is a huge goal of this work and this project, to create an Atlanta community that values all our residents,” said Kate Whitman, Vice-President of Public Programs at the Atlanta History Center.

### ***Birmingham Civil Rights Institute***

*Latino New South* provided a framework for BCRI to be more effective in its partnering with the Latino community. BCRI's civil rights mission and the renewed activism around changing immigration legislation in Alabama uniquely positioned BCRI as place of convergence. Priscilla Hancock Cooper, Vice President of Institutional Programs at the BCRI noted, “BCRI is viewed as a place that gives inspiration and credibility to





current immigrant activism and offers parallels between the historic civil rights movement and contemporary issues.”

Because of this, BCRI has hosted a series of immigration related events. For example, they have hosted the regional board of the National Council of La Raza, participated in a U.S. Congressional hearing on HB 56, and a community town hall on federal immigration reform with U.S. Representative Terri Sewell.

Following the listening sessions, BCRI established a local *Latino New South* Advisory Committee. With the engagement of these committee members, BCRI has expanded its outreach with a workshop for teachers of English Language Learners, hired a young “Dreamer” activist as its Hispanic outreach intern, and increased its visibility in Latino-targeted media.

BCRI, in partnership with the Alabama Coalition on Immigrant Justice, is developing a project called *Alabama Immigrant Stories*. In this initiative, they are recording, archiving, and presenting the stories of documented and undocumented Alabama families and how current immigration laws and practices affect them. BCRI, based on input from their *Latino New South* Advisory Committee, hosted a Cinco De Mayo program focusing on education equity for Latino children that highlighted the exhibition *Los Para Todos Ninos* about the Mendez v. Westminster case that desegregated California’s public schools in 1947.

## **Levine Museum of the New South**

For Levine, the changes extend beyond exhibits and programming. Melina Monita-Pacheco, Levine’s *Latino New South* Project Coordinator at the time of the *Innovation Lab* noted, “*Latino New South* has changed the DNA of the museum.” Their store includes more Spanish books, visitor services staff welcome in Spanish or English, the museum has softened its family membership policy to include extended family members, and they are changing marketing practices, such as the use of Spanish language radio for advertising and social media directed at Latinos.

The staff at Levine recognizes that they are better equipped to develop and deliver cross-cultural programming that is relevant and appropriate. For example, *Papalote (The Magic Kite)* is a community response exhibit presented by Levine where Charlotte children who have been impacted by the deportation of one or both of their parents shared their stories alongside a display of kites they made with the help of a local artist using clothing left behind by their deported parent. Feedback from Charlotte’s Latino community reflected that they felt validated and heard in this exhibit, reinforcing the relationships and trust initiated in the listening sessions. Levine has also started to host naturalization ceremonies and workshops, giving candidates an opportunity to use their exhibits to learn about and understand their community.

In Charlotte, civic leaders see the museum as providing historic context to contemporary issues, and they look to Levine as a source of expertise. For example, the Chief Administrative Officer for the Charlotte school system reached out to Levine staff to learn from their experiences as part of the Superintendent’s task force on cultural competence. CEO Emily Zimmern is serving as vice-chair of the City of Charlotte’s Immigrant and Immigration Task Force. The Task Force is taking the lessons of the listening session developed in *Latino New South*, and using an adapted version of the listening sessions as part of their design process.

The Levine Museum is increasingly seen as a safe place for the Latino community to host their programs and engage in conversations with people of different backgrounds. Latino organizations and community groups request, often with little notice, use of their meeting rooms. Levine sees this as a positive sign of acceptance by Latino community members, and they have worked internally to accommodate these last minute requests and unbudgeted costs.

## **Contributions to the Field**

The Innovation Team has published and presented what they have learned through the *Latino New South* project. They have shared process lessons —

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Through all the twists and turns of creating an exhibit, we take our ideas back to the community, and this gives us great confidence.

— **Tom Hanchett**  
Staff Historian, Levine Museum

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what they learned about collaboration and hosting listening sessions — and they have shared with the museum field their findings about engagement strategies for their Latino communities. Members of the Innovation Team have presented at the American Alliance of Museums Annual Meeting, the Southeastern Museums Conference, the American Association of State and Local History, and the Association of African American Museums. Members of the collaboration have shared their learning outside of the museum field as well, including Immigration Matters, a conference presented by the Center for International Understanding, a MIT Civic Media Conference, the Independent Sector National Forum, Welcoming Cities and Counties Annual Meeting, and the EmcArts National Innovation Summit for Arts and Culture. The American Association for State and Local History published a technical leaflet on listening sessions developed by the *Latino New South* Innovation Team.

## LESSONS IN EFFECTIVE COLLABORATION

The three organizations working together on *Latino New South* were experienced collaborators, each with a long history of working with other organizations within their own cities. The geographic distance and duration of *Latino New South* pushed these collaborative skills to a new level, and in doing so revealed features that are important to a successful collaboration.

The organizations had prior experience with one another, yet most of the individuals involved were meeting for the first time through this project. During the Intensive Retreat they realized that there were big differences in their organizations, and that if they did not come to understand those better, it would become a barrier to them effectively working together. They did not start out in a position of high trust; trust grew out of their willingness to commit the time and effort needed to build a healthy collaboration.

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— Jamie Gamble, Developmental Evaluator

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## **Unique Strengths**

While these three organizations share common interests and a shared purpose in *Latino New South* and have many similar values, they have diverse missions, structures, staffing, and budgets. Their success as collaborators was a result of their differences rather than their sameness. They each brought unique specialties: AHC's marketing expertise, Levine's community engagement experience, and BCRI's knowledge of activism. Having a multi-institution and multi-disciplinary team meant they could each contribute something unique and garner specific insights from the listening sessions based on their individual experience and expertise. They also learned to challenge the assumption that you don't want conflict in a collaborative effort. Conflict can spark new and creative ideas. The members of the Innovation Team were comfortable in raising their differences, and they built trust in a respectful and productive way. This trust, and the value that comes from productive differences, has helped to sustain the collaboration beyond the duration of the Lab.

## **Candid Relationship**

Throughout the Intensive Retreat, they challenged one another on several issues; for example, the disproportionate number of Innovation Team members coming from Charlotte, the appropriate use of civil rights language, and the expected resource commitment from each institution. Each time they faced an issue, they paused and worked to find a common understanding. This meant stepping back, surfacing assumptions that some or all had made, and considering alternatives. Having the trust and candor to surface issues early allowed them to address challenges before they could worsen into a larger concern, potentially destructive to the collaboration. All three organizations, and in particular Levine, invited and welcomed the feedback and input of others

throughout. There was genuine and universal commitment to respond to what each was hearing from the others, and react in helpful ways. As a result, all organizations felt agency within the project, even if there was one organization leading.

## **Clear Boundaries**

An asymmetrical collaboration can be successful. It is often unreasonable and ineffective to assume all partners play an identical role. The key is that these differences are commonly understood and negotiated. For example, AHC is the largest institution, but they were the most restricted in their capacity to invest in the project because of their longer planning horizon and confirmed commitments. BCRI has a unique perspective given their focus on civil rights history. Levine was better positioned to invest money and staff time. Early in the *Innovation Lab* process, the collaborators realized that it was unproductive to assume that all three partners could put the same resources on the table. In knowing the boundaries of the others, the group could more effectively organize around these constraints and ensure that steps were taken to address them.

## **Ongoing Communication**

To facilitate communication during the planning phase, the team held bi-weekly conference calls that followed the same basic agenda, a process that allowed each site to respond to three questions: *What do I need to know since last time we met? Are there any cautions or surprises? What do we need to know in the meantime until we meet again?* The calls were facilitated, and a chance to have a discussion on two levels: planning the listening sessions and exploring their emerging thinking about the issue. The former focused on logistics and budgets, and the latter on new learning, updated demographic data, and evolving concepts.

# **THE IMPLICATIONS OF ORGANIZATIONAL CULTURE**

The distinct organizational cultures of Levine, BCRI, and AHC shaped how they engaged with the project and how they have applied what they learned. Levine and BCRI are smaller, younger organizations, with greater flexibility and responsiveness. AHC has a significantly larger scale of operations and a longer tenure, and thus operates with more structure, long-term planning and formal procedures — an advantage in efficient large-scale operations, but a disadvantage for rapid adaptation.

## **Different Intensities of Change**

For Levine, *Latino New South* has become part of their core strategic direction. *Latino New South* is now a central focus for the organization, influencing much of their current programming as well as some museum practices. For AHC, *Latino New South* fits within a broader organizational shift toward a more entrepreneurial culture. AHC recognizes that they need to be better positioned to change in response to their community, and an evolving museum field. *Latino New South* aligns with this desired change; the listening sessions have helped to recruit new board members from Atlanta's Latino community. BCRI and Levine were already highly adaptive, meaning they could more quickly integrate the insights of *Latino New South* into exhibits and organizational practices. For AHC, moving toward a more adaptive culture is naturally going to be slower because of their size and where they are starting from; yet, it could eventually be the most profound organizational shift of the three.

## **Embracing Risk**

In building an intensive process for listening to the community, Levine, AHC and BCRI through *Latino New South* could have alienated the very community with whom they sought to connect. Mishandling

this engagement could have resulted in the loss of organizational reputation; however, the risk is worth it. An adaptive culture helps to mitigate risk, as does pursuing this objective authentically and respectfully with the Latino community as a full partner. Levine, for example, has instituted a board practice for discussing potentially risky material. In their process, Board Members are given time — individually and collectively — to explore the benefits and risks of the proposed exhibit. Because Levine has been able to develop trustworthy relationships, and is consistently responsive to what they hear, they are increasingly able to engage in challenging topics.

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### ***Open to Learning***

Not only did the organizations need to develop the ability to listen as institutions, but their leaders also needed to embrace the same. Priscilla Hancock Cooper, BCRI's VP of Institutional Programs remarked, “I have learned so much, especially how much I didn't know.” Tom Hanchett, Levine's Staff Historian, said of their CEO Emily Zimmern, “She is the most listening leader I've ever run into.” Kate Whitman, AHC's VP of Public Programs remarked, “I have a new outlook on my role. I realize we can serve a small group of people with a deep experience and this has great value.” This style of leadership is well suited to adaptive work because it is open to new ways of thinking; ready to receive feedback; and willing to change in response to what emerges.

These organizations continue to apply techniques and strategies for staying open to learning that were developed through the *Innovation Lab*. For example, Levine has integrated the After Action Review – a debriefing technique introduced in the Lab – to other projects. Similarly, as the three organizations have continued to collaborate on the design of *iNUEVOlution!*, the dialogue with the Latino community has remained open and iterative. For example, when initial ideas from the community were incorporated into *iNUEVOlution!*, Latino community partners felt that some of the ideas and concepts over-simplified what they were saying, leading to another discussion about how to better approach the complexity of the issues. This

feedback could not be simply be added on to what had already been developed, it meant going back to the drawing board. While holding something open for an extended period is the enemy of efficiency, it is the friend of innovation.

## WHAT IS THE CONTRIBUTION OF THE INNOVATION LAB TO LATINO NEW SOUTH?

Without the *Innovation Lab*, Levine would still be working on *Latino New South*. This initiative was the next step in a trajectory that was already unfolding for this museum. It would not, however, have been a collaboration involving three history museums from three different states. Even if they tried, it is unlikely that they would have gained sufficient momentum, clarity, and familiarity to sustain the collaboration. Without the Lab, Levine would not have the capacity to include two other organizations in the *Latino New South* exploration, nor the exhibit development for *iNUEVOlution!*.

One of the risks in initiating a new collaboration within an environment of external supports is that they fail once the supports are no longer available. The *Latino New South* collaboration remains intact, it's legacy is the work currently underway in developing *iNUEVOlution!* and the learning network's commitment to future joint learning and activity. The Lab provided the framework and support for the partners to build sufficient social and intellectual capital so that the collaboration would sustain beyond the Lab's duration. Advice, mentoring, and financial support to convene and to carry out activity on behalf of the collaboration were vital contributions, as was building the learning network from the outset with a view to sustainability.

The *Innovation Lab* brought structure to the prototyping of the listening sessions. The more

deliberate design, structured evaluation, and testing in a variety of contexts are the result of the *Innovation Lab*. Levine would have continued to build their engagement practice through listening, but this would have been more ad-hoc, and a slower refinement of the technique.

The *Innovation Lab* also provided a container from which important knowledge products were developed and disseminated. The *Latino New South* Innovation Team has had useful things to say about their collaboration, the technique of listening sessions, and lessons for museums on engaging the Latino community.

Through the Lab, these institutions came to trust one another enough to continue to be involved with each other. They were encouraged to formalize their collaboration through a letter or agreement of something similar. There was a concern that the collaboration would diminish without this. To date, they have not taken the step to formalize the partnership, and the collaborators are not sure this is necessary. The partners continue to act with one another in a spirit of reciprocity. Because the trust is high, and Levine invests the time to reach out and include the others as the exhibit moves forward, they can successfully function informally.

## WHAT DOES THE LATINO NEW SOUTH CASE TELL US?

As the American South undergoes this major demographic transformation, these organizations are figuring out how they can help people understand the changes around them in a way that encourages a more welcoming community. As these three museums work together to develop programs, new practices, and a major new exhibition, they support the people in their communities to consider the lessons of the past and the present. In doing this, they advocate without being activists and play a role as an intermediary and facilitator in each community's exploration of significant change.



The essence of this case is that cementing an idea in a community involves careful listening. The engagement is more than a way to develop new content; it is a catalyst for thinking differently about the role of cultural institutions in welcoming communities. As the demographics of the nation change, museums that cannot find a meaningful way to connect with a more diverse audience will become increasingly irrelevant.

*Latino New South* has helped these organizations expand their local networks, and in doing so, they build fellow travelers for a difficult journey. In seeding change at a systems level, organizations must be proactive in working outside their existing boundaries or zone of control. In order to play a contributing role in the community, organizations must become adept at linking the institution to larger changes occurring around them. Levine, BCRI and AHC have demonstrated that this is not some abstract concept. It is work that is grounded in human connections and people's stories.

In working together, these three institutions also illustrate the power of collaboration. In trying something out in three communities and three institutions, a diversity of circumstances are created. Such diversity is useful in testing something new. If what they figure out can work in different contexts, it is likely a more potent idea, and something that is likely more resilient, and of interest to a range of museums.

In this case, collaboration's benefit is twofold: to fully expand the idea, and to harness a broader reach for greater influence. *Latino New South* dispels a common myth of collaboration – that it reduces the resources required to do something. *Latino New South* demanded, and will continue to demand, an intensity of effort.

The Levine Museum, BCRI and AHC have chosen to act decisively, and together they will accomplish something great. *iNUEVOlution!* will be a significant milestone and contribution, but *Latino New South* is the beginning of a much bigger cycle. One in which these organizations are increasingly adept at responding to the ever-changing needs of their community.



# End Notes

1

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4

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5

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