Culture change in a museum: An action research analysis

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Abstract. The move of a museum in the western United States to larger quarters resulted in an increase in visitors and requests for tours. To respond to the greater number of tours, new volunteers (docents) were recruited and trained. But conflicts arose between the old and new docents. As Docent Chair, one of the authors worked with the Curator of Education to understand the culture change faced by the old docent group and integrate the old and new docent groups. This paper analyzes the culture change using Lewin's Action Research model. The success of the culture integration was demonstrated when the old and new docents moved away from «this is how it should be done…» to «this is what I see…» in speaking about an event or problem. The language and perception changes were steps toward building a common meaning.

Key words: Culture, change, museum, action research, non-profit.

Introduction

There is a common consensus in the field of business that the pace of change has accelerated as the world has become a more global market. The boundaries between countries and industries no longer exist, as technology has enabled every business, no matter how small, the potential of

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having the world as its marketplace. Thus, these changes to business' external environment greatly impact the business' internal environment, its products or services, its own technology, and, most certainly, its people. An organization's leaders must steer their company through this sea of outside changes, but doing so does not insure success. The greater art lies in anticipating change and moving a company or organization in the direction of maximizing the opportunities change presents instead of having the change become a threat. The many theories regarding the best way for a company's leaders to lead through change all contain one common critical element necessary to effect successful change: the company's human resource, its employees.

In this analysis one must understand that organizational development (OD) is still evolving as a science. Unlike well-established fields where one learns a body of knowledge as a "known" truth, in the OD literature similar concepts are often defined from different angles, using unique words and mental pictures. These multiple paths provide us with a rich understanding of social systems and change. Through analysis of the case study below, we apply organizational change theories to the real life organizational environment. While this is a jointly-authored paper, the actual case experience was from Author C. Authors A and B have contributed with analysis and diagnosis of the case situation.

Museum background/context

The museum in this case is located in a metropolitan area of 900,000 in the western United States which is strong in tourist attractions. In 1994 the art museum began a multistep process to reinvent itself. At that time, the Board agreed on a large-scale change process. The first aspect of the change included a new focus and direction for building the museum's art collection and its teaching programs. Along with this new vision came a strategic plan to bring the museum up to national accreditation standards. It carried out this plan, applying for and receiving accreditation in 1997. A simultaneous effort to build the endowment fund brought the museum's endowment to $5.6 million. Next came a county and statewide effort to move the museum to a larger facility, out of a bucolic residential community to a more publicly accessible space.[1] A site was chosen in the midst of a new county park, which would house a new botanical gardens as well as an existing historic village. In the midst of the 90-acre gardens would be a new 45,000 square foot art museum.

These changes, under the guidance of an experienced Executive Director, brought multiple internal changes. Positions and staff members changed. Facilities closed and reopened while still under construction. Along with the location change came a goal to serve a broader audience, including an economically and ethnically diverse population. Physical space changed completely.

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[1] The new location was more centrally located. However, some of the long-time museum supporters were unhappy about "losing" their local museum to the "the city".

Internal organizational culture also changed, in part due to the nature of the job tasks being modified. The friendly, familial culture gave way to a more professional, sophisticated atmosphere.

Organizational culture change

One aspect of this culture in which Author C was directly working has several features that can be illuminated by reference to organizational development. The organizational culture change had most impact on the docent group, a volunteer branch of the organization whose purpose is to provide tours and art education to the community. The model we will apply to this case is the Action Research Model, as originally conceptualized by Lewin (1947), and developed by French (1969), Frohman, Sashkin, and Kavanagh (1976), Schein (1987), and French and Bell (1999). Table 1 below shows the steps in the action research model along with a time line of the museum's changes. This model allows examination of many of the subtler points of the organizational change. Schein's insightful additions to the model give voice to the subtler undercurrents of feelings that became relevant to identify in this major culture change.

When the museum was moving and building a larger docent program, the Executive Director asked Author C (an experienced docent) if she would serve as a Docent Chair to help the docent group maintain cohesiveness and focus during the change. The old docent group was small, cohesive, and familial (their norms were similar to those of museum staff). Author C agreed and served in the Chair role directly reporting to the Curator of Education, a position held by three dif-

Table 1
Action Research Model (adapted from French, 1969)

Museum Time Line	Steps in the Model
11/99	1. Key executive's perception of the problem
12/99-1/00	2. Data gathering and analysis/diagnosis
2/00-3/00	3. Joint action planning with client group based on the data
4/00-5/00	4. Action
5/00	5. Data gathering after the action (reassessment of the state of the system)
6/00	6. Feedback to key client or group
8/00	7. New action plan
continuing	8. Recurring loop between Steps 4 and 7

ferent people during a two-year period[2]. The old group met this new Curator with uncertainty. She was new to the task of supervising a docent group, and was less familiar with modern art than the previous curators, with the exception of the two prior short-tenure curators (see footnote 2). These facts later impact the change process.

"Old" docents (i.e., the all-female group who had been docents in the previous museum location) made the move as an intact group, and a new docent training program began in the new facility. Thirty-five students applied for training as docents, a number that would greatly augment the existing team of twelve. The training program lasts one year so there was an initial delay of any problems surfacing. New docents sat with old docents in classes, as old docents provided weekly descriptions of the old procedures. Superficial efforts were made to build group cohesiveness such as "meet and greet" sessions (i.e., meetings to get acquainted) and coffees, etc. The new Education Curator and Author C met numerous times discussing museum procedures and history. Most of the old group had been trained under a scholarly Education Curator who had high standards for art research, formal analysis and historical references.

During the initial six months, the old docents kept to themselves, operating in the way that they had performed as a group in the old facility. They prepared for and gave tours in the old manner, teaming with each other in familiar pairings. They lunched together and sat together and the new docents made little impact on their functions. The group's unspoken structure was also intact, with several of the elderly docents[3] revered but not really providing assistance, with a docent 'mom' performing group maintenance tasks (e.g., birthday cards, flowers for illness). The only change to this group was the beginning of a 'separation from the fold' by Author C by the mere fact that she accepted the Docent Chair position, and had set out to help the new docents learn.

With the new facility came many more requests for tours. The old docents were overextended under the obligations and the new Curator decided to graduate the more able new docents a few months early to assist the old docent group in handling the tour load. This was the first incident of strain, as it was a break from the old norm that one could only begin leading after a year of training. Whole areas of touring had not yet been taught. The second break from norm occurred when the Curator announced that the old group would learn about the new exhibit on its own, and then teach the new group the material. Previously, the Education Curator had provided exhibit training and scholarly materials to study. This escalated many unspoken feelings to an outburst of frustration, with nearly half of the old group threatening to resign their posts, and, in effect, poten-

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[2] Curator A (9/98 – 11/98) stayed for the three-month probationary period. It seems likely that she and the Executive Director disagreed on goals for the Education Department. Curator B (hired in spring 1999) resigned after three-month probationary period in order to change careers. Curator C (hired in fall 1999) is the primary change agent in this case study. She arrived at the museum from a nearby museum and holds a master's degree in Art History. Although she did not initially communicate her in-depth knowledge, she produced a 100-page docent manual for the first group meeting in September 1999, a feat that particularly impressed the old docent group.

[3] The average age of the "old" docent group was 65-70. The new group was significantly younger (mean age = low 50's) and included some males as well as newcomers to the area.

tially weakening a very crucial prong of the museum's new teaching program. It was at this point that the Education Curator realized the seriousness of the matter and Author C began to work with her using the Action Research model to find a resolution to this problem (November 1999, see Table 1).

The first step in French's (1969) Action Research model is the key executive's perception of the problem. In this case the initial problem was reluctance of the old docent group to work with the new. When Author C was asked by the Curator what she should do, the author explained that the Curator's actions had hurt the feelings of the old group, and that perhaps an apology would be in order and would provide time to find a solution. She sent a letter that was positively received by the old group who agreed to continue to provide tours. Author C then began the work in the next phase, that of data gathering. Essentially this was the beginning of diagnosing the current state of the system using behavioral data. Data collection included speaking to every old docent and writing down their views about norms and procedures. Many of the docents-in-training were also interviewed about their views. At this time Author C was working with a Vice Chair from the new group, and they compared insights. This was helpful, for the Vice Chair's experience had begun in the new facility and her insights revealed certain biases that Author C had due to her experience as an old docent. This is one of the shortcomings of having an internal person perform OD functions. As an old docent, Author C had to recognize that her experiences and preferences might color her search for a path to ease the transition.

Cultural differences between the docent groups

In order to identify differences, a list was developed of the assumptions and behaviors that emerged in the interviews. This list presented in Table 2 points to substantive differences of norms and values that needed resolution.

The last set of attitudes, the primary goals of the group, were the same. Both sides truly loved and valued art and sharing their knowledge of art. This common and central goal was something the group could build on. However, group cohesion and resolution of other differences had to precede this effort.

Several critical elements emerged in the data analysis/problem diagnosis. While complaining and acting out, the old group was actually unfreezing and entering into disequilibrium. First, there was disconfirmation of the status quo. Although the docents were anxious about having to change, they were overworked and needed the new group and, at some level, recognized this. Second, their angry feelings were masking some feelings of guilt at their rough treatment of the new Curator. Third, by issuing a letter of apology, the Curator had provided recognition for their feelings, acknowledgement that some of her actions had been ill thought out, and a restatement that the true goal and primary purpose was training to teach.

Subsequent meetings of the Curator, her assistant, Author C and the (new group) Docent Vice Chair proceeded through the next step of the Action Research model, that of joint action plan-

Table 2
Differences between Old/New Docent Attitudes

Focus	Norms
Learning about the art	**Old docent attitude**: No matter what our background, we all should approach this learning with an open, inquisitive mind. We share whatever we learn (e. g., on trips to other museums) with the entire group. **New docent attitude**: Some of us already know a lot due to our solid knowledge and education in art.
Personal interpretation of the art	**Old**: Never overlay your own interpretations on artwork. It is okay to provide the artist's direct interpretations and influences (from documented sources). **New**: Subjective, evaluative comments about artwork are okay, especially if it makes the work more accessible to the viewer.
Role of humor in tours	**Old**: Comments about artwork, in the form of humor, are demeaning to our role of docent (teacher). We should not inject humor in this manner. **New**: It is okay to inject humor into our tour using the artwork as a subject matter. Serves to 'lighten' the mood of a tour.
Interrupting partner	**Old**: (In docent team tours) Always let the other docent finish speaking, without interrupting her(*). **New**: Okay to interrupt the docent you may be touring with if they are forgetting an important point, or if you have something insightful to add.
Primary goal of docents	**Old**: Teaching others about art, and giving others tools to understand modern art is our primary goal. **New**: Teaching others about art, and giving others tools to understand modern art is our primary goal.

(*) The "old" docent group was all female. The new group included males.

ning. Specifically, they discussed the attitudes and values of both groups and decided that they (the executive group) would need to develop the standards and new behaviors that would be expected of the entire group. This group developed measures to assess the new docents' readiness to lead tours, guidelines for the use of subjective comments during tours, and team assignment procedures. These items then were folded into an action plan that contained multiple steps. The executive group derived the action plan collaboratively although the docents were not directly involved.

Actions and results

The first step is that the Curator developed a final exam to determine if the new docents were ready to give tours. Each docent was required to research one artwork in detail and to give a

20-minute in-depth analysis to the group. This would serve multiple purposes: it would be a true test of whether a docent was ready to give tours by demonstrating speaking skills, and it would teach the others in the group about the art works, which were new to the entire group. The results of this step were phenomenal. The new docents were both wonderful speakers and capable researchers. They brought new insights to all. The first substantive barrier was broken as the old group saw excellent qualities in the new. Further, their academic rigor impressed the old group, who had never been asked to do such a massive job on their own.

A second change addressed a new norm, that of doing a tour on one's own. Since the new members were not old friends, their speaking styles differed substantially. Docent pairs struggled to retain a single conceptual strand when teaming. To resolve these issues, the Curator queried the group, and many said that they would rather have the option of teaming. The Curator granted their request which allowed old members to continue to support each other, but did not subject anyone to mandatory pairing.

A third aspect of the action plan was designed to build the group's appreciation for each other. A semester end event was held for the entire group. One of the activities included a written game with questions about the background of various unidentified docents. The object was to go around the room and discover who was the person behind the "little known facts" such as «this person holds a doctorate in biology», etc. Questions involved both old and new members, forcing the members to find the answers from each other and learn a little more about each other's lives. Prizes were awarded for the most correct answers.

The fourth step of the action plan was the completion of a comprehensive, blind survey addressing shortcomings and improvements needed in the docent programs. (Additional data collection like this often occurs throughout the Action Research cycle). A small gift was given for completing the survey. All members poured out their frustrations, compliments and recommendations in this initial docent survey. This step addresses the model's data gathering after the action step. From the results, the Curator drew up a new set of learning priorities. She thanked members for their comments, shared what was viewed as top priorities, and arranged the next semester's learning accordingly. At the top of the list by both old and new members was learning formal art analysis, thereby addressing one of the old norms.

The Action Research model provides for a recurring path between data gathering after the action and feedback to key client (sometime labeled "evaluation"). This is happening at the museum as the initial survey has now become a regular event at each semester's end. Based on its results, the Curator fine-tunes the program to provide the tools needed. She has also modified behavior by changing the reward system. Specifically, the museum continues to recognize docent length of service, but new awards have been started such as a "Spirit" Award and a peer evaluated "Best Tour Giver". These awards address both attitude and effort, two previously unrecognized elements.

Both the subjective comments and the humor comments during tours have been addressed in the docent training. Their resolution further reduced the differences between members. Two sets of recent comments serve to illustrate docent sentiments. Recently the docents were jointly evaluating a 1996 untitled work. They were analyzing the face of the young boy in the painting, when one of

the new docents said, «This face looks exactly like the face of the boy who flew the plane into the building in Florida» (A Spring 2002 U.S. news event). This clearly subjective comment must have registered in the surprised faces of the other docents for – once again – here was a behavioral conflict. Seeing the looks, the docent hurriedly said, «Of course, I would never say that to my tour group!» recognizing that assigning this type of meaning is not, in fact, the group norm. A second set of comments occurred in a recent class discussing the history of a specific time period. When several contributed to a discussion, an old docent stated, «Collectively, we all know a lot!» at which point a new docent said, «Collectively, we can all learn a lot from each other», to which everyone agreed. This reinforced the values of sharing knowledge and learning together.

Before leaving the Action Research model, we would like to point out several shortcomings in the change process, ones that are not unique to this organization. In examining the larger internal and external environment, this organization was in the throes of major transformation, facing much bigger problems of developing public awareness of the museum, building education programs and dealing with ongoing construction. There was literally too much to do. The volume of work that demanded everyone's attention caused a delay in clearly addressing the small problems, which at first seemed insignificant. Delays of this sort are typical in organizations undergoing major transformation. The data collected about these problems became an unfreezing force for the key client. Second, there was no experiential history to guide the melding of the two groups; it was a first time occurrence for this museum. While every aspect of training and task accomplishment was well planned, it was harder to predict the need for attention in the areas of values and behavioral norms.

Change agent use of process consultation principles

We would now like to turn to Schein's (1987) work regarding the 10 principles of process consultation. These had value for Author C when approaching the museum problem. Early in the change, frustration was building and possible solutions came to mind. It was frustrating to see so many good workers becoming alienated. However, as a volunteer, Author C did not have the legitimate authority to implement solution strategies. She made periodic suggestions, but they sounded like unnecessary measures to the others. It was inappropriate for her to just tell the Curator what to do. Thus Schein's principle of «Always stay in touch with the current reality» reminded her that she needed to understand each party's opinions, understandings, beliefs and reactions before thinking about solutions and not just prescribing what «Author C thinks should be done». Another very helpful principle is «The client owns the problem and the solution». This problem was one of many that the Curator would face, and solving it was her job, not that of Author C. The principle «Be constructively opportunistic with confrontive interventions» discusses "teachable moments". This helped in querying the old docents and discovering why they had so much resistance. If Author C had just called up a docent and said, «Listen, what is your problem?», that would have no doubt resulted in a defensive feeling. Instead, she waited for the moment when they openly

shared their views, and then was able to begin a discussion using observations from their words and stated feelings. A final principle, «Everything is information; errors will always occur and are the prime source for learning», was helpful in supporting the Curator who felt very frustrated during this bumpy process.

Change Agent Learning

Additional learning occurred for Author C regarding the nature of OD. In Gellerman, et al.'s (1990) guidelines for OD/and Human System Development Professionals, consultants should enable clients to provide for themselves instead of fostering continued reliance on the consultant. Here it would have been very easy for Author C to actively treat all of the symptoms of this problem on her own, claiming part of the success, but that would not have been truly professional. Author C's real task was to support the Curator in any way that she was capable, including identifying underlying problems and correcting processes. Another guideline relates to acting impartially when involved in conflicts between parties. In this case, the old docents implored Author C to speak with the Executive Director and advocate retaining the old methods. However, the more appropriate path for Author C was to remain impartial and to resolve differences in the best manner for the whole organization.

A final look at this group brings to light Peter Senge's perspectives on team learning (1999). As this docent group has now been integrated for two years, many of these earlier problems have faded and members have adopted more productive behaviors. Since the docent's primary task is to teach, it is inherent in their task that they become competent learners, both individually and as a team. Senge's work includes other concepts that are valuable to docents. The first is the concept of thinking insightfully about issues, that is, developing dialogue practices to discover common meaning within the group. This practice occurs regularly as the docents bring a subject up and then look at ways that they can best present it. Because so much of what the docents discuss is based on subjective formal analysis, they have incorporated a vocabulary of phrases that allow them to present an idea for consideration by others and to examine it collectively. Some of these phrases include: «What I see in this piece is…» and «what are we assuming in order to arrive at this place…» (Terminology developed by Abigail Housen and Philip Yenawine, as part of their Visual Thinking Strategies curriculum. See www.org/whatisvts.html). These types of statements also match Bohm's (Senge, 1990) necessary conditions for dialogue and allow the group to find a "free flow of meaning". This type of exchange transfers well to other group situations and allows members to evaluate options without feeling threatened when presenting their personal views.

A second point Senge brings up is the need for an "operational trust" to develop where each member remains conscious of other team members and can be counted on to act in ways that complement each other's actions. As the museum's educational program has become more rigorous, docents have had to rely on each other's strengths more in order to deliver a strong teaching product. This coordinated action is possible because the docents are all focused on the same core goal. Senge would say that their "arrows are aligned."

A final observation is that the existence of certain elements in the entire group indicate that the group has become integrated. Lewin would address this state as "refreezing". This stage has also been described as an Institutionalization Framework (Cummings & Worley, 2001, 189-93). Indicators of institutionalization include knowledge, performance, preferences, normative consensus and value consensus. Evaluating the docents, one finds normative and value consensus (See Figure 2), as well as preference. Nearly all members have accepted the changes; those who have not have left the program or become much less active. Performance is not fully institutionalized, as described in the example above. Incongruence still exists in some behavior during tours, although it is often reviewed openly and is part of a normal learning curve. It appears that knowledge of new desired behaviors is also present. However, this new desired behavior is not a static product. As the group continues to change both knowledge base and program goals, they further modify the original interventions, and begin more cycles of institutionalization.

Next Step for the Docent Group

One of the first recommendations that the authors would suggest is to look outside this museum into the learning environment of other museums. Author C has observed many different types of programs at other museums, and thinks that this museum would benefit from «best practices benchmarking» to broaden both the thinking and the practices of the docent group. Further, since learning is such a central function to this group, continued and varied learning, including learning new methods, would keep the group invigorated and maintain a high learning curve. Also, observing other institutions in a benchmark exercise would find ways to add value to the teaching element that don't exist in the museum's present educational system.

Conclusion

Understanding change models and processes is critical to organizations undergoing change. But they alone are insufficient to foster sustained change. In *The Dance of Change* (1999), Peter Senge describes the organization as a living system, because its primary components, humans, are living changing beings. Like growth in nature, which begins small, changes in organizations must begin small, with one and two individuals, then expand to a small group, and then spread throughout the organization. This rings true to us, and we believe that here Senge presents another critical element of change. For successful change, the additional needed tools are those concepts, vocabulary, and mental models that will help the individuals grow and change. By building increased understanding at the individual level and incorporating ways to communicate that understanding, people are able to connect with each other. Going back to Author C's docent experience, one of the most exciting events was when the old and new group moved away from «This is how it should be done…» to «This is what I see…» in speaking about an event or a problem, beginning the first step

toward building a common meaning. Before the group learned and practiced these words, this type of discussion would not have happened.

Determining the needed intervention for an organization or group is a highly individualized process, as each organization is comprised of a unique composite of systems. Discovering the appropriate change process takes an open and impartial mind, close observation, and understanding of human values and attitudes, behavior, and social dynamics. It also benefits from continued awareness of new OD theories and tools. What worked last year may not be what will be needed in the year to come. These are some of the most interesting and exciting aspects of organizational development – the ability to synthesize all of the above components.

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Resumo. A mudança, para instalações maiores, de um museu no Oeste dos Estados Unidos teve como resultado o aumento do número de visitantes e pedidos para visitas guiadas. A fim de responder a este aumento, foram recrutados e formados novos voluntários (docentes). No entanto, verificou-se o surgimento de conflitos entre os novos e os velhos docentes. Na posição de *Docent Chair*, um dos autores deste artigo colaborou com o *Curator of Education* no sentido de compreender a mudança de cultura sentida pelos velhos docentes e integrar os dois grupos. Este artigo analisa a mudança cultural utilizando o modelo de Investigação em Acção de Lewin. O sucesso da integração cultural fica ilustrado com a modificação de posturas dos grupos quando se referem a eventos ou problemas, de uma postura tipo «isto é como as coisas devem ser feitas…», para uma outra tipo «isto é o que eu acho…». As mudanças na linguagem e percepção foram passos na construção de significados partilhados.
Palavras-chave: Cultura, mudança, museu, investigação em acção, não-lucrativa.