



**American
Public Gardens
Association**

Creating a More Diverse, Equitable, and Inclusive Garden

FACILITATOR MANUAL

VERSION 7.23.19

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OVERVIEW

Inclusion, diversity, equity, and accessibility are much more than trendy buzzwords or meeting legal standards. Just as diversity in nature promotes a healthy, vigorous garden, diversity among people promotes healthy work environments and vigorous organizations.

While these are complicated topics, which require hard work, critical thought, and sometimes difficult situations, creating a Garden that all people feel valued and respected in is important and joyful. It is a rewarding and exciting experience to bring people together and, regardless of difference, celebrate what makes a community unique and to learn from and with one another.

As the American Public Garden Association's Inclusion, Diversity, Equity, and Accessibility (IDEA) Committee works to develop strategy, resources, and tools for member gardens like yours, it has become apparent that there is no "one size fits all" solution. Just as gardens seek diverse visitors and staff, public gardens are unique based on resources, geography, and culture.

The workshop outlined in this manual is informed by principles of Appreciative Inquiry, a method of problem solving which honors the specific strengths of each organization. The process begins with recognizing individual strengths that can be leveraged to create systematic change. The workshop begins with personal reflection that is shared with a partner, then used as a foundation for small group work, and finally used to inspire and change the entire organization. By beginning with time for self-discovery and reflection, participants gain individual ownership of the activities and outcomes from the workshop. Similarly, the gradual increase of collaboration, self to partner to small group to whole group, makes the workshop most effective.

This relationship between individual and group discovery is demonstrated in Figure 1. Further information about Appreciative Inquiry can be found in Appendix A.

We recommended you review this manual in tandem with the Sample Participant Workbook. All of the workshop activities outlined can be adapted for your garden's needs. The Sample Participant Workbook, for example, can be modified to use different language or wording that will resonate best with your organization.

This workshop can be implemented no matter where your Garden is on its IDEA journey; recommendations of preliminary activities are outlined in the next section. You may decide to host this workshop more than once as you achieve and develop your goals over time.

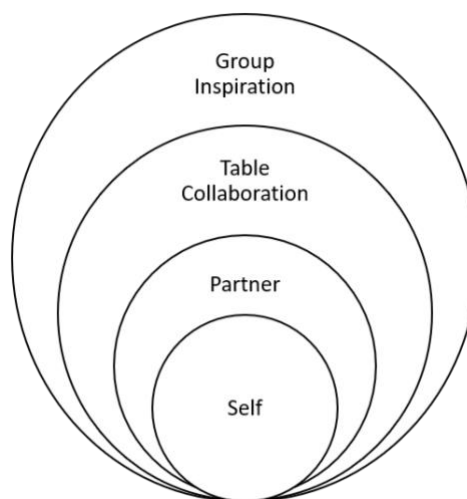


FIGURE 1. LEVELS OF COLLABORATION

PREPARING YOUR GARDEN FOR THE WORKSHOP

STRATEGIC PLANNING

This workshop is designed for gardens that have identified diversity, equity, inclusion, and accessibility as strategic goals for their institutions. As an outcome of this workshop, your Garden will come away with concrete initiatives to work towards these goals that are developed by the staff, board, volunteers, and other stakeholders. Therefore, it is imperative that those involved are prepared for this work.

There is a multitude of ways to begin advocating for IDEA to your staff, board, and other stakeholders. Begin by consulting the [Public Gardens Sustainability Index](#). This is a vital resource, developed by the Association, regarding a variety of principles and practices that public gardens should be familiar with for sector-wide sustainability.

In the Public Gardens Sustainability Index, the section regarding [Employee Development, Diversity, and Inclusion](#) provides core definitions, goals, and case studies that can be helpful in building commitment to IDEA goals among staff, board, and other stakeholders. Consider use the [Self-Audit Worksheet](#) to begin drafting IDEA strategy, which may include this workshop. The Public Gardens Sustainability Index has many resources that will work in tandem with and support this workshop.

As each Garden has unique opportunities, challenges, resources, and expertise, it is difficult to provide precise steps of preparation. By familiarizing yourself with the Sustainability Index and this workshop, as well as auditing your Garden, you will be able to determine when staff, board, and other stakeholders are committed to IDEA at the Garden and have a baseline understanding of the major issues your Garden is facing.

INDIVIDUAL PREPAREDNESS

When the institution begins committing itself to diversity, equity, inclusion, and accessibility, consider hosting a series of IDEA 101 training sessions to ensure that the staff, board, and stakeholders involved in the initiatives are familiar with major IDEA topics. This may include definitions of diversity, equity, inclusion, and accessibility; unconscious bias awareness; LGBTQ+ ally training; and active bystander empowerment. Refer to Appendix B for resources to develop these trainings. A simple handout of the definitions of diversity, equity, inclusion, and accessibility, with infographics is included in Appendix B.1.

These pre-workshop trainings are especially important as the workshop is driven by the participants. While it is important that participants “come as they are” to the workshop, they should be exposed to some primary definitions, as well as understand the context of why the Garden is taking on this strategic goal. These initial training sessions should also begin to challenge some of the preconceptions regarding IDEA topics so staff, board, and stakeholders are prepared for the critical thinking required in the workshop.

Consider creating a library of introductory resources or an orientation before the workshop. This library or orientation may include information about the definitions of diversity, equity, accessibility, and inclusion; examples of IDEA initiatives at other Gardens and cultural

institutions; and an overview of the workshop. Use the Association's [Media Center](#) to collect such resources. This should include the Public Gardens Sustainability Index's Employee, Diversity, and Inclusion attribute.

Preparation of the participants could also include a pre-survey (Appendix C), similar to the Self-Audit in the Public Gardens Sustainability Index, to provide institutional context for the workshop.

Additionally, all participants should feel that it is worth their time to attend the workshop and that their input will be valued. Participants may have previously experienced conferences or other professional development opportunities where they felt overwhelmed by the topic, not challenged enough, or on the periphery of importance. Because this workshop is grounded in collaborative input from all participants, it is crucial that this workshop be messaged in a way that addresses previous concerns and affirms that this work will be different.

Some participants may feel uncomfortable or under-equipped to discuss diversity and inclusion with their colleagues and community. In preparing for this workshop, participants should understand that these anxieties are common and should be communicated at the workshop for a productive and honest conversation.

There is no one way to prepare participants. Instead, consider all of the people who will be present at the workshop and the emotional or informational resources they will need to feel equipped and empowered to contribute during the workshop.

PLANNING YOUR WORKSHOP

No one should take on planning this IDEA workshop alone. Create a planning group that will work together to prepare for the workshop. Depending on the number of participants you are expecting, the working group may be just two people or may need to be larger. Consider the people in your Garden community who have the interest, time, and skills to take on planning the workshop. Also, consider who will be able to get all participants excited for the event. The coordination team should work closely with Garden leadership throughout the development of and preparation for the workshop.

This coordination team should familiarize themselves with this manual, the Sample Participant Workbook, and resources related to IDEA topics and action planning. The Association offers an [introduction to Employee Diversity, Equity, and Inclusion](#) on their website and additional resources in the [Media Center](#).

WHO SHOULD FACILITATE?

In a perfect world, a third-party consultant with credentials and experience in IDEA training should host your workshop. It is important that the facilitator be unbiased and knowledgeable in subjects such as Appreciative Inquiry, Conflict Management, and IDEA topics in order for the workshop to run smoothly and produce the best results.

However, many institutions may not be in the position to hire such an individual. In that case, look to your community for consultants with similar expertise. Consider a volunteer from a peer institution with experience in workshop facilitation or teaching. Many universities look for field work or thesis projects for their students; consider reaching out to professors of business, nonprofit management, or positive psychology who could facilitate. The Appreciative Inquiry Directory in Appendix A has a short list of such resources.

If a third-party specialist cannot be identified, co-facilitation by the HR Department, leadership team, or other group can still produce great results. Consider having these staff members participate in training on IDEA topics and workshop facilitation to ensure the best results. Such training may be offered through a local university, community foundation, or museum, nonprofit, and IDEA resource centers such as the American Alliance of Museums, TSNE Mission Works, BoardSource, National Diversity Council, and the National Council of Nonprofits.

While not ideal, the staff facilitation model promotes the collaborative spirit of the workshop and allows those individuals to participate in the activity as well.

ROLE OF THE FACILITATORS

The facilitator is responsible for keeping the workshop on time and on topic. Facilitators will introduce and prepare groups for each activity. The facilitator will circulate throughout the room, helping groups stay on topic, addressing conflict, and pushing groups to think more critically. Throughout this Facilitator Manual, there are sections called “Additional Prompts,” which rephrase the activities or offer additional questions for consideration. The facilitator may use these as they drop in to each group.

The facilitator should also have an eye on the time. Listen in on each group to see if they need more or less time on an activity. The facilitator will need to be nimble in adjusting the

allotted time for each activity. While Appendix D offers a suggested schedule for the day, the actual schedule will fluctuate depending on how the groups work together. It can be difficult to find a balance between rushing groups and fitting into the scheduled time for the workshop, but it is important that the discussion flows productively so that the groups are learning and working together.

WHO SHOULD BE THERE?

This IDEA workshop thrives when many stakeholder groups come together around a topic. This means thinking outside of the box and inviting more than just management staff. Consider inviting every staff person, garden members, frequent and new visitors, neighbors, trustees, volunteers, town or city leadership, leaders of other cultural institutions, community activists, local school groups... the list goes on.

While some IDEA workshops, strategic planning activities, and similar activities invite community stakeholders, this specific workshop does require a knowledge of the Garden. Individuals who do not work closely with your Garden may not feel they can participate to the same degree as staff, trustees, and volunteers. However, their voice is critical to this work. Your Garden should consider hosting a community forum, meeting with these organizations, or otherwise including their experience and perspective in the IDEA planning and initiatives in your Garden.

SELECTING LOCATION

In finding a location for the workshop, consider a space that will accommodate all participants comfortably. Ideally, the room should be set up with round tables or circles of chairs. As the workshop involves many conversational activities, some groups may decide to relocate to the corners of a room or hallway for a less noisy environment. However, all participants should be able to return to the same room at the end of each activity in order to emphasize the importance of collaboration.

HOW LONG SHOULD IT BE?

Many workshops based in Appreciative Inquiry take place over a few days, where the first day focuses on the Discovery and Dream stages and the second day focuses on Design and Destiny. A two-day workshop allows for participants to have ample time for each activity, as well as time for reflection between each session. However, if this is not possible for your organization, consider two days within a few days of each other. Do not let too much time lapse between the sessions or the group may lose momentum. The session can also be condensed into one work day. However, shortening the timeline much further will not give participants adequate time to complete each activity with proper depth and detail.

The Sample Participant Workbook has been created for a one-day workshop. A detailed schedule can be found in Appendix D.

CREATING GROUPS

As participants arrive at the workshop, divide them into small groups based on available seats at each table or assign seats ahead of time. It is important that each group be made up of individuals from different departments, leadership levels, experience in the organization, etc. In order for the most robust and realistic ideas to come forth, no table should appear superior to the others, nor should tables be composed of individuals who often work closely with one another. Depending on the overall number of attendees, five to ten participants per group is an appropriate size.

There will be a good deal of partner work, so there should be an even number of participants at each table. Any tables with an odd number should create a group of three.

MATERIALS FOR THE WORKSHOP

This workshop requires few materials. Every participant will need a copy of the participant workbook as you have adapted it for your Garden and a pen or pencil. Each table will use several sheets of poster paper and pads of sticky notes. Scrap paper is helpful as well. You may also consider creating a PowerPoint to project with a slide for each activity, but this not necessary.

Because the participant workbook is so long, you may consider stapling the packet or passing out each worksheet as you announce the activity. If you have created a PowerPoint, make sure it includes the page number of the activity.

To ensure groups stay on track, make sure there is a clock in the room or use an alarm clock or online timer to keep track of time. By simply typing “Google Timer” into the Google.com search engine, you can use a free timer application online.

CAPTURING THE INFORMATION & ACCOUNTABILITY

While the facilitator is responsible for managing the flow of the workshop, the coordination team still can play an important role. In addition to participating, these individuals and Garden leadership should be taking notes throughout the workshop, recording any important ideas, themes, trends, points of conflict, or other items of note.

The coordination team and Garden leadership will also play a central role in carrying out the IDEA strategy after the workshop, especially if the facilitator is not a staff member. Throughout this manual, there will periodically be “Measuring Success” sections, providing guidance regarding measurement for the facilitator, coordination team, and Garden leadership, which is referred to as the “Accountability Team.” While not a central part of the workshop itself, these sections are important for ensuring these initiatives are successful and serving their intended purpose after the workshop has been completed.

For more information about the concept in the “Measuring Success” sections or other concepts surrounding measurement, visit the [Project Management Institute’s website](#). Their articles and project management dictionary provide additional information and support for the Accountability Team.

GROUP CONTRACTING

Any kind of organizational change is both stressful and exciting. When considering the IDEA topics, individuals can feel uncomfortable, afraid, or triggered by certain discussion topics.

Therefore, it is important to set ground rules, or a group contract, for the workshop that participants can hold each other accountable to.

Below are some important rules to convey at the workshop. You may propose these rules to the group as a foundation for participant feedback or ask for their suggestions of rules without prompts. Either way, it is important that this is a collaborative activity and the participants are involved in setting the ground rules for the event to promote teamwork and accountability.

Suggested Ground Rules:

- We treat each other with respect.
- We are courageous, confident, and compassionate... with ourselves and with others.
- We approach confusion and discomfort with curiosity and a desire to explore and experiment.
- We work to creatively and strategically reframe challenges as opportunities.

MITIGATING CONFLICT

While the preparation of participants and group contracting serves to limit derailing discussion, it is bound to occur. Either at the beginning of the meeting or in the moment, create a “parking lot,” a piece of paper where certain questions, topics, or ideas can be revisited later. These might be especially lengthy, controversial, or hotly debated topics that would distract from the scheduled activity, but are important to address at another time.

Facilitators can mitigate such conflict by saying, "I'm glad you all seem to be so passionate about this topic, but since we seem to be at odds about it and we only have half an hour left, I'd like to suggest that we park it for now and come back to it after having gone through the other ideas in the group."

PART 1: DISCOVERING OUR STRENGTHS

ACTIVITY 1: HIGH POINT STORY

The first activity of the workshop is the High Point Story, which is an opportunity for participants to reflect on their experience at public garden and cultural institutions or professional life and consider a time they felt that they could be their authentic selves. Examples include contributing new ideas to a project, sharing personal details about themselves, or feeling an equal part of a group. Participants are encouraged to thoroughly consider that story, identifying their feelings now and at the time, what was at play to create an authentic experience, and how any challenges were addressed or overcome.

This activity begins to set the stage for the workshop, having participants consider meaningful connections they have had in the past, the feelings these connections bred, and how they define success. This positive story creates a foundation and point of reference for each participant throughout the workshop.

As participants will vary how long they have been connected to the Garden, the story does not need to be from the Garden. It is more important that the story be a potent memory of a time that they had a meaningful connection with another person that resulted in greater enthusiasm for the project they were working on or the place they were visiting/working at.

If participants have more than one high point story, they can reflect on two. However, it is important that they take the time to thoroughly consider each story, so more than two will likely not be effective.

ACTIVITY 2: SHARING YOUR HIGH POINT STORY

In pairs, participants will share their high point stories with one another. The interviewer should listen closely, noting what they feel are key details about the interviewee's story. They may ask for clarification or ask the interviewee to elaborate, but this is not a conversation. The interviewer should be listening for and noting the important, positive elements of their partner's story. The interviewer will then ask the interviewee to consider their personal strengths, attributes, values, or guiding principles. They may ask how this is connected or exemplified by the high-point story.

The roles will then reverse, allowing the first interviewer to tell their story in detail.

Marissa is telling her story to Robert. She talks about starting a community garden with students at a local elementary school when she was a freshman in college.

As he listens, Robert notes the following key elements that facilitated Marissa's positive experience:

- Ownership of the project
- Independence and authority
- Excitement of the students
- Professors supporting her helped calm nerves
- Responsibility to teach biology curriculum
- Joy of the students harvesting vegetables for the first time
- Being the leader, despite being the youngest team member

EXAMPLE 1. HIGH-POINT STORY

As each interviewee tells their story, the interviewer should record the key elements of the story that contributed to it being a positive experience in the space provided in their Participant Workbook. This may include the interviewee's personal strengths and values, or how others in the story supported the positive experience. They can be as general or as specific as the interviewer would like.

The pairs will then, together, discuss the similarities between each story and consider the factors at play that facilitated each person having such a memorable moment. This serves as an important positive foundation for participants to understand what inclusion feels like based on their own experience. These elements will continue to impact the activities of the workshop and influence how the Garden can adapt more inclusive practices for staff, visitors, volunteers, and the community at large.

The first step at doing that is having the pairs identify the pairs consider the strengths, values, and practices that make fuel the Garden and facilitate authenticity for all stakeholders. The question "What are three core factors that give the Garden life?" ensures that the Garden's unique mission, history, and values are preserved and honored throughout the process. Coupled with the question "How is authenticity promoted at the Garden right now?" pairs will consider how those core factors influence an inclusive atmosphere for all.

PART 2: DISCOVERING THE STRENGTHS OF OUR COMMUNITY

Following the personal and partner discovery in the first activities, each table will begin to work together as a small group. The previous activities serve as a foundation for the ideas and discussion generated throughout the rest of the workshop.

GROUP ROLES

First, the table should identify group roles, which will assist in managing the discussion, data, time, and report:

- A **Discussion Leader** will keep the group on track, ensuring that everyone has a chance to speak, and that the group is focused on each activity or discussion topic.
- A **Time Keeper** will work with the Discussion Leader to keep track of time. They may choose to set a timer or stopwatch to ensure every person has a chance to speak or that every aspect of an activity is completed.
- A **Recorder** will manage the sticky note ideas or capture thoughts directly on flip chart paper. As people speak, the Recorder may write down new ideas that had not be captured by the individuals or partners. The Recorder can assist in managing time and keeping the group focused by asking participants to rephrase or summarize their thoughts.
- A **Reporter** will be prepared to present the small group's work to the larger group at the workshop. They will work with the Recorder to create a final product that synthesizes all the information in a clear and compelling way.

There may be more people at each table than there are roles. Therefore, tables may decide to have multiple Recorders or Reporters. They may also decide to rotate roles throughout the workshop. No one should feel pressured to fill a role they are not comfortable with. However, if a participant is consistently disengaged, giving them a role, such a Time Keeper, will ensure they are participating in some way.

GROUP INTRODUCTIONS

This part of the workshop begins by having each pair quickly introduce each other to the small group, based on what they learned in Activity 2. At this time, the introductions will be brief, giving the highlights and important information about each person. Having partners introduce each other rather than introducing themselves in an important aspect of this activity. Having someone else verbalize your identified strengths in their own words is rewarding and invigorating. Partners may use different language or mention seemingly unimportant details that provide new perspective and insight.

Throughout these introductions, the Recorder will take note of the key elements of each story, capturing the speaker's words as closely as possible. At a later stage of the activity, groups can rephrase the elements of each story. Individual participants can use the worksheets in their participant workbooks or scrap paper to take notes on anything that resonates with them throughout this discussion.

After the introductions, the table should review the Recorder's notes and discuss items of interest further. They may decide to focus on one story that was told or discuss common themes among the introductions and information considered with the question: "What can you see as key strengths, values, qualities, ways of working, or best practices that enabled these high point stories to occur?" This is a time for each group to identify the core of each story and what facilitated success.

After reviewing these stories in depth, groups should connect these stories to how the Garden is currently operating, as well as opportunities for improvement. They will consider the prompt: "What are three core factors that give the Garden life? How is authenticity promoted at the Garden right now?"

As new thoughts are uncovered, the Recorder should continue to transcribe them onto chart paper, as well as begin organizing common ideas. The other group members can also have input into how the chart should be organized to best reflect the discussion.

The Sample Participant Workbook offers two worksheets to capture information about how authentic interactions have been promoted in the group's stories, as well as specifically how the Garden is doing this.

PART 3: VISIONS OF AN IDEAL FUTURE

As a group, participants will work together to consider the ideal future of diversity, equity, and inclusion at the Garden, moving towards the dream phase of the workshop. Independently, participants will consider their ideal vision of diversity, equity, and inclusion, as if they awoke from a deep sleep and awoke five years in the future. As if by magic, the Garden has become the diverse and inclusive space that the group has dreamt of.

Then, each participant will share their idea with their group. The Recorder will capture the core elements of each story on flipchart paper.

Then a series of questions in the Participant Workbook (Step 3) will encourage the groups to thoroughly consider these ideal futures, at individual, organizational, and community levels. The more specific the vision, the higher the impact it will have in the subsequent activities, eventually leading to achievable goals and action steps. Within this time, each group will begin to develop one shared vision for 2024.

The group may not agree on the ideal future for the Garden. They may have different priorities or disagree on goals. This is important dialogue for the pair to engage in, guided by the group contract discussed at the beginning of the workshop. By definition, this work welcomes a variety of views and opinions through thoughtful discussion and compromise. By talking through their differing opinions, the pair will already begin the diversity, equity, and inclusion work, picturing a future that will make each of them feel proud to be part of the Garden.

When the group has considered and discussed the prompts in Step 3, they may move on to Part 4 of the activity. Some groups may move faster than others, so it is alright if they jump ahead to the next part without an official break in the workshop and introduction of Part 4. However, the facilitator should ensure that all groups are moving on to Part 4 with at least

Additional Prompts: Visions of an Ideal Future

- What is happening throughout the Garden? What is happening for the individuals within the organization?
- How is the Garden connecting with other organizations and the community?
- What are some of the core beliefs that are shared at the Garden?
- What do you see in terms of outcomes, both in terms of the organization and community?
- Complete the sentence “I will be most proud of the Garden’s diversity and inclusion efforts when...”
- What is going on in 2023 that demonstrates the ideal inclusive Garden you would be most proud to see and be a part of?

PART 4: DREAMING WITH OUR FEET ON THE GROUND

IDENTIFYING THE SHARED IDEAL FUTURE

Looking at the Recorder’s notes, each group will begin to identify common themes, homing in on what values are important to all, answering the question: “What is happening that is new, different, or better as it relates to deepening connections and creating welcoming environments for all communities?” While the initial idea may be vague, the Discussion Leader should challenge the group to consider every aspect of this ideal future. This may include operations and logistics, organizational structure and culture, resources of all kinds, how outcomes will be measured, and impact on the stakeholders.

GROUNDING IN REALITY

The subsequent questions charge the groups with considering actions that can be taken to achieve this ideal future, first a small step and then a giant leap. Consideration of the small step helps to identify the achievability of the ideal future. It also showcases the impact that small changes can have in creating a diverse, equitable, and inclusive garden.

Then, the group will consider a giant leap that could be made. This part of the activity will encourage each pair to think outside the box and beyond real or imagined barriers to this ideal future. This exercise will help identify the greater, strategic changes that need to be made to achieve the vision of diversity, equity, and inclusion.

CREATING A NEWSPAPER STORY

After the designated time, the group will work to summarize this future in a headline and sub-headline that might be on the front page of a major newspaper in your area, celebrating this accomplishment.

Each table should think outside the box and consider a transformation of the Garden. However, the vision should still be grounded in the Garden’s mission and identity. Consider what the Garden, as it currently stands, could achieve within five years if the proper resources, expertise, and strategy appeared. As each group crafts their news story, they will need to create concrete steps that the Garden would need to take to reach this future, such as

Have you considered...?

- Relationships with community partners, stakeholders, and populations served
- Organization image and reputation
- Operations, logistics
- Organizational structure, workplace culture, and quality of work life
- Nature of internal relationships, including senior management, and between colleagues of all levels
- Communications practices
- Physical space and surroundings
- Collaboration, teamwork, inclusion, levels of innovation
- Ways of demonstrating inclusivity and a welcoming environment
- Decision-making, problem-solving, and planning processes
- Technology, networks, and sharing of information
- Excellence in training, learning, and development
- Concrete results, measures, and outcomes

securing a major grant, creating a new position, or constructing a new garden area. This activity might be considered an “achievable dream.” The facilitator may ask groups to consider the items in the box to the right.

As each table considers the many ideal futures presented, they should work, not only to find the commonalities, but also the points of contention. It is important that groups facilitate thoughtful dialogue, to understand different viewpoints and opinions. The variety of thoughts may result in compromises between participants to achieve a news story that everyone would be proud to be a part of.

Each group will create a final product to be displayed on chart paper. At a minimum, this will include a headline and sub headline of a fictional newspaper article, as well as concrete actions taken and important connections that could facilitate this future. Some groups may decide to draw accompanying photos or create characters to support this news story, but this is not necessary. Any method that elaborates on the dream and supports the activity should be encouraged.

PRESENTATIONS

The Reporter will present the news story to the larger group. The presentation time for each group should be long enough that there is time to explain the news story capturing the ideal future, as well as the steps taken to achieve that vision.

All participants are encouraged to take notes regarding the futures, action steps, or any other elements that resonate with them. The Sample Participant Workbook suggests making notes on two subjects: elements of the vision that are important or exciting and opportunities for action; in other words, the what and how of each vision.

The group presentations provide every participant with more ideas and opportunities to consider. This is not a competition, but an exchange of thoughts to achieve a more diverse, inclusive, and equitable future for the Garden.

If there is not time for presentations to the larger group, all the final products should be displayed throughout the room. Over lunch, participants should take time to review each group’s vision, noting the visions, opportunities, and possibilities that resonate with them. If they have been verbally presented to the group, there should still be an opportunity for participants to review each of the visions at their own pace over lunch.

MEASURING SUCCESS: DEFINING SUCCESS & IDENTIFYING CRITICAL SUCCESS FACTORS

It can be difficult for organizations to identify how to measure their success regarding IDEA, primarily because success can be interpreted in many ways. During Part 3, each group is beginning to define, more concretely, what IDEA success looks like at your Garden and who it matters to.

As each group presents, the Accountability Team (facilitator, coordination team, and Garden leadership) may begin noting, not just how each group defines success, but also what is needed to facilitate success, or the Critical Success Factors (CSF). These may be elements currently existing at the Garden, something that needs to change, or something that needs to be added.

Part 3's "Achievable Dream"	Critical Success Factors
Attract diverse talent	Focus on identifying and hiring the right skill sets; requires awareness of unconscious biases
Attract and welcome diverse visitors	Identify and gain the attention of targeted groups
Increase outreach and awareness of horticulture in our community	Identify and build sustaining relationships and educational programs with targeted community organizations and institutions
Ensure handicap, visual and hearing-impaired accessibility	Obtain board approval and funding for targeted areas

EXAMPLE 2. CRITICAL SUCCESS FACTORS

In order to precisely identify CSFs, the facilitator, coordination team, and Garden leadership should consider the questions below. Though these questions may not be explicitly asked of or answered by each group, they are important to consider.

- What variables or factors are likely to impact our desired outcome?
- Are we able to perform statistical analysis based on past data?
- What changes in behavior must occur to create the desired outcomes?
- What conditions must exist or change to create the desired outcomes?
- What skills do we need to add or acquire to achieve success?
- What tools must we add or master to allow us to achieve our goals?

PART 5: CONSIDERING AREAS OF OPPORTUNITY

In this phase, groups will begin to identify areas of strategic opportunity that would move towards a more diverse and inclusive Garden.

You may choose to define an area of strategic opportunity for each table to consider or have each group identify their own. You may decide to further specify the area of strategic opportunity by matching it with a diverse population. For example, groups could focus on the Visitor Experience of Individuals with Varying Physical/Intellectual Abilities or Attracting New Audiences with Socio-Economic Diversity. These population may be identified by existing gaps in the Garden, the Strategic Plan, or other governing documents or entities. The Sample Participant Workbook assumes that each group has been given an area of opportunity to focus on. See Appendix E for sample areas of opportunity.

During this activity, groups are charged with coming up with as many ideas as possible regarding the Garden's current areas of opportunity as it relates to diversity, equity, and inclusion. Where the previous activity was creating a vision of the ideal future, this activity begins to translate that vision into actionable steps.

First, participants connect with their original partner from Part 1 and discuss their insights. This is a time for participants to learn what inspires their colleagues and be given new perspective on the activity.

Once the group comes back together, in two minutes total, each table member will share the most potent elements of the visions shared before lunch.

Then, the group will come together around their area of opportunity. Groups will consider what needs to be done at the Garden now to achieve the visions from Part 3. To begin, groups will remain in the dream phase to answer the question: *"Assuming anything imaginable is possible, what are the strongest ways we could achieve diversity and inclusion as it relates to our area of opportunity?"* They should also be sure to use inspiration from the visions in Part 3 to develop the most ideas related to their area of opportunity.

This activity is not a discussion, but a rapid-fire exchange of ideas in order to collect as many ideas as possible. Participants may share a bit of context or reasoning, but at this stage of the activity, it is important that each person has time to share their ideas. The key is quantity over quality. Throughout the activity, the Recorder will capture these ideas on sticky notes, so they can be manipulated for future activities.

Facilitators should allocate no more than 5-10 minutes for this activity. Groups should feel the pressure to get as many ideas out on the table as possible before thoughtfully digging into them in the next activity.

Brainstorming Rules

- Defer judgement – don't dismiss any ideas
- Encourage wild ideas – be radical
- Build on the ideas of others – no "buts," only "ands"
- Don't contest ideas, but ask for more details on context to understand
- Stay focused on the topic
- Hold one conversation at a time
- Be visual
- Go for quantity

PART 6: IDENTIFYING STRONG STRATEGIC OPPORTUNITIES

Now, the groups should take a moment to review the breadth of ideas and opportunities offered by their groupmates. The focus will now shift from quantity to quality with the goal of finding the three strongest opportunities.

To begin, each group will reorganize the many ideas based on common features. Groups may look for patterns based on the intended audience, common methods, staff/resources required, department, or area of the Garden. At this point, duplicates may be removed or interconnected ideas stacked together.

Finally, the groups will begin to pare the list down, aiming to identify the three strongest initiative. Considering all of the ideas available, groups will consider the question: “Which ideas do you as a table see as the most crucial for creating a more diverse, equitable, and inclusive Garden?”

This will be a difficult activity for each group as there may be conflicting opinions of the most important ideas or opportunities. To address difference of opinions, groups should look for common themes across several items on the list. There may be themes regarding:

- how the Garden should approach diversity, equity, inclusion
- similar activities or systems that need to be changed
- areas where the Garden thrives and could invest more
- areas where the Garden currently struggles, but has the power, resources, and/or strength to improve
- areas where the Garden needs to do more work and develop new capacity

As these concepts are vast and can be overwhelming, groups may want to consider, which ideas:

- affect the most people with the least amount of effort or resources
- affect a small group of people the most strongly
- offer a service, space, or opportunity that does not currently exist in the community, but is needed

As these items are discussed, the Recorder will assist in organizing and recording the ideas to identify the group’s Top 3 Strategic Opportunities. Once the group agrees on these three ideas, they should be written on their own flipchart.

MEASURING SUCCESS: CATEGORIZING CRITICAL SUCCESS FACTORS

If each group has been assigned an Area of Strategic Opportunity, the CSFs identified in Part 3 will already begin to be categorized by function or Garden department. Upon completion of the workshop, the Accountability Team will want to further categorize the CSFs. The categories may align with the suggested “Sample Areas of Strategic Opportunity” in Example 3 or another way that makes sense to the team.

Categorizing CSFs based on common factors identifies who will be overseeing or primarily accountable for those factors. It also helps to organize the many ideas and opportunities that arise throughout the workshop.

PART 7: DESIGNING RAPID PROTOTYPES

Honing in on the three strongest strategic opportunities identified by the group, participants will work to further develop these ideas into actionable steps, considering how existing resources and strengths of the organization can be leveraged, and new initiatives that could be launched soon to work towards the ideal vision of a diverse, inclusive, and equitable garden. Just as prototypes are created to test, challenge, and improve new inventions, the group will create actions from the strategic opportunities and, through discussion, identify the strongest ideas.

Considering the top three ideas, but keeping in mind all of the brainstorming from the previous activity, participants should thoroughly consider every aspect of the strategic opportunities and how they could be realistically implemented at the Garden, affecting meaningful change.

The strategic opportunities can take many forms:

- an initiative that creates real, practicable value
- a new structure or service
- a redesign of a program
- a training manual or session
- a new communication program
- tools for efficiency
- new process design
- a partnership within the community
- ...the possibilities are endless.

With the discussion and development of each idea, participants should think critically about the initiative, ensuring it is as strong as possible. They may ask themselves:

- Have we gone far enough in terms of thinking about resources, initiatives, and innovation of our community or the public garden sector?
- Is it clear how these ideas are connected and how they support the Garden's mission, as well as diversity and inclusion efforts?
- Are there additional assets that the Garden could leverage to support these ideas?
What else can we offer to support these ideas or move these initiatives forward?

As the discussion time comes to a close, the groups should reevaluate their top "prototypes," identifying a few of the strongest ideas. If a group finds themselves in disagreement, they may decide to vote in order to identify which ideas resonate with majority.

Then, each group will present a two-minute report on their top "prototypes," details about the initiative, and context on how they arrived at this decision. There should be time for questions from the larger group. These questions will provide new insight, areas for development, or unforeseen effects of the ideas, which will be important in the final group activity.

MEASURING SUCCESS: CONSIDERING KEY SUCCESS INDICATORS

As these prototypes are presented and discussed, the Accountability Team should be listening for the proposed actions that can be measured to quantify success, or the Key Success Indicators. A good Key Success Indicator should meet the SMART requirements: Specific, Measurable, Achievable, Result-oriented, and Time-bound.

Though it may not be intentional, the Key Success Indicators for each prototype will be naturally apparent in each idea. If a group has begun to propose ways that success will be measured, the Accountability Team may ask question to prompt further consideration of the SMART characteristics.

If a proposed prototype does not have apparent Key Success Indicators, ask the group how they would determine if their idea was successful and what could be added/changed to measure its success. If no Key Success Indicators can be identified, that group should be tasked to consider this in Part 6's Action Planning.

PART 8: ACTION PLANNING

As the final activity of the day, each group will develop their strongest prototype into an action plan that will be implemented at the Garden. Taking into consideration the questions posed during the presentation of the prototype, new information and inspiration gathered from other groups, and the wealth of brainstorming done throughout the day, this action plan will be a realistic initiative for the Garden to take on immediately, addressing diversity, inclusion, and/or equity.

The “Group Action Plan” outlined in the Sample Participant Workbook walks each group through the many aspects of developing a viable initiative, including determining themes, visions, and goals of the initiative, the steps needed to achieve success, resources needed, and individual commitments from each member of the group.

When determining the “Vision of the Initiative,” the group should reflect on how this action plan connects to the first activities of the workshop. Groups should be as specific as possible, describing who will be affected, how they will be affected, and how this fits into the Garden’s overall mission, vision, and values, specifically concerning IDEA.

Looking to the “Discovering Our Strengths,” “Discovering Strengths in Our Community,” and “Identifying Key Strategic Opportunities” activities, each group will outline what needs to be done in order to support this vision. This area will be quite robust and specific. The plan should include detailed steps that the Garden needs to undertake to achieve the specified goal. This should include the exact people and departments who will need to be activated, as well as the necessary resources and assets needed.

Groups should keep in mind that this Action Plan needs to be grounded in reality. If the proposed Action Plan requires money, facilities, or other resources not realistically achievable, the group is thinking too large. Instead, the Action Plan should include resources and assets readily available or a sustainable plan to acquire them. The group should also consider what their individual commitments are to this plan. This can be specific to their job function at the Garden or their personal knowledge, skills, or expertise. The Sample Action Plan (Appendix F) outlines how this might look. The Sample Participant Workbook also includes a worksheet to track the various actions and commitments needed to bring this project to fruition.

After the groups have been given adequate time to create their Action Plans, they will present to the group. As before, the groups may decide to have one person report out or multiple and may use any visual aids they would like. It is important that each group make clear their personal commitments to the Action Plan and what they need from others.

The larger group is encouraged to ask questions about the Action Plan and make suggestions. However, the suggestions should not drastically change the Action Plan. As the initiative has been identified by the group as strategic, realistic, and founded in their personal

Additional Prompts: Creating an Action Plan

- How does this initiative work to create a more diverse, equitable, and inclusive Garden?
- What will this action plan achieve?
- How could you frame this initiative so [the board] [Garden leadership] would also be convinced?



strengths and values, it is important that the idea remain relevant and potent to the group who has committed to making it a reality.

The larger group may also offer their personal commitments to the initiative. These additional commitments should be written down on another piece of chart paper and incorporated into the Action Plan document.

It is important that Garden leadership, such as directors and trustees, demonstrate their endorsement or commitment to each Action Plan by making personal commitments to the plan or approving expenses and other needed resources. Leadership may offer suggestions on how the group will be held accountable and how success will be measured. As each Action Plan is presented, this accountability and success structure may be formalized for all groups.

Each Action Plan plays an important role in the overall IDEA goals and strategy of the Garden. Groups may find that there are ways to collaborate and build off each other. While these are presentations of each group's distinct project and initiative, they should feel cohesive and working towards a shared vision for the Garden. The facilitator can assist in making these connections by tracking common themes of each project.

Are We Really Taking on ALL These Action Plans?

Yes. In order for this activity to be the most effective, each participant must feel that they are personally empowered to create change and play an important role in the overall IDEA strategy and goals of the institution. Therefore, *every* Action Plan should be accepted by Garden leadership and implemented by the group that created it.

However, this may not be ideal in all situations. Instead, the Action Plans could be presented as proposals that Garden leadership discuss and approve following the workshop. If this course of action is taken, ensure that it is framed in a way that maintains the spirit of personal investment in and shared ownership of the Garden's IDEA strategy. Staff and stakeholders who created Action Plans that are not implemented should be given meaningful opportunities to participate in other Action Plans of IDEA initiatives.

MEASURING SUCCESS: IDENTIFYING KEY SUCCESS INDICATORS

As each group finalizes their Action Plan, the Key Success Indicators considered in Part 5 will become more fully developed, specifically in the “Key Success Factors & Milestones” section of the Action Planning worksheet in Sample Participant Workbook.

During the presentation of these action plans, the Accountability Team should be careful to note the Key Success Indicators of each plan, how it will be measured, and who will be responsible for collecting this information. The Accountability Team may choose to elect themselves to this task during the presentation. However, given the collaborative nature and shared ownership of these Action Plans, it is important that others are involved in measuring success, not solely the Accountability Team.

Following the workshop, the Accountability Team and those who are also responsible for the measurement of one or more Action Plan should come together to solidify the Key Success Indicators of each Action Plan, including what information will be collected, how it will be collected, and when it will be analyzed. It is also important to review the Key Success Indicators and tie them to the Critical Success Factors identified in the Part 3. The Critical Success Factors explain what is necessary for success to happen, whereas the Key Success Indicators connect the CSFs to each other to create measurable outcomes.

As the Key Success Indicators for each Action Plan are laid out by this group, ensure that they are:

- Connected with organization goals
- Indicators of performance desired by the organization
- Easy to understand

WRAP UP: REFLECTING ON THE DAY & NEXT STEPS FOR ACTION

It is important that participants take the time to reflect on the day, following the presentations. The work done throughout the day, while empowering and invigorating, is also strenuous. Time for reflection will allow participants to begin to synthesize all of the information and discussion.

As collaboration is at the core of this workshop, the reflection can take the form of a discussion with interview partners or the small table groups. Each participant should reflect on what they learned, what they were inspired by, and their overall takeaway from the workshop. They should also reiterate their personal commitments to IDEA at the Garden that support the Action Plans. This is also a time for participants to consider areas for further learning and development, either through personal research, professional development opportunities, or Garden-wide training.

The importance of a shared reflection activity is that participants, again, learn more about each other. Such insight will be the foundation of future initiatives and activities, as well as personal and professional relationships. The understanding established between participants will seep into the IDEA initiatives at the Garden that affect staff, volunteers, and visitors.

FOLLOW UP

The wealth of information gathered during this workshop is rich, potent, and important in becoming a more diverse, equitable, and inclusive Garden. Therefore, it is vital that the momentum not be lost. Garden leadership should commit themselves to overseeing the various Action Plans and intervening when any projects appear to have stalled or gone off course. Additionally, participants should be empowered to hold each other accountable as outlined in the Action Plans.

Garden leadership or the Accountability Team may decide to have formal check-in meetings with each group or designate a time and place for all groups to share their progress. The collaborative spirit of the Action Plans should not be lost after the workshop. The spirit of shared ownership of each initiative and the Garden's overall IDEA goals should not be lost.

This workshop can be adapted and reused in the future in order to spawn new initiatives and built upon the foundation of the first workshop. The initiatives will likely bring out new strengths of the Garden, fostering new ideas, values, and visions based on the work done in this first workshop. Similarly, new staff, volunteers, and community stakeholders will become part of the Garden over time. This new energy and perspective necessitate a continuous revisit and revitalization of IDEA initiatives, goals, and strategy for the Garden.

APPENDIX A

INTRODUCTION TO APPRECIATIVE INQUIRY

This workshop is grounded in the principles of Appreciative Inquiry, a shift in perspective focused on strengths and opportunities in order to create positive organizational change. The development of Appreciative Inquiry is largely attributed to David Cooperrider of Case Western University. Cooperrider, a scholar of organizational behavior, observed that focus on “problem-solving” in organizations was hampering improvement because the focus was on changing what was wrong, rather than what was going well. Instead, Appreciative Inquiry transforms “problem-solving” into “opportunity solving.”

Five principles guide Appreciative Inquiry:¹

- The Constructionist Principle or “Words Create Worlds”
Reality, as we know it, is a subjective vs. objective state and is socially created through language and conversations.
- The Simultaneity Principle or “Inquiry Creates Change”
Inquiry is an intervention. The moment we ask a question, we begin to create a change. “The questions we ask are fateful.”
- The Poetic Principle or “We Can Choose What We Study”
Teams and organizations, like open books, are endless sources of study and learning. What we choose to study makes a difference. It describes – even creates – the world as we know it.
- The Anticipatory Principle or “Image Inspires Action”
Human systems move in the direction of their images of the future. The more positive and hopeful the image of the future, the more positive the present-day action.
- The Positive Principle or “Positive Questions Lead to Positive Change”
Momentum for [small or] large-scale change requires large amounts of positive affect and social bonding. This momentum is best generated through positive questions that amplify the positive core.

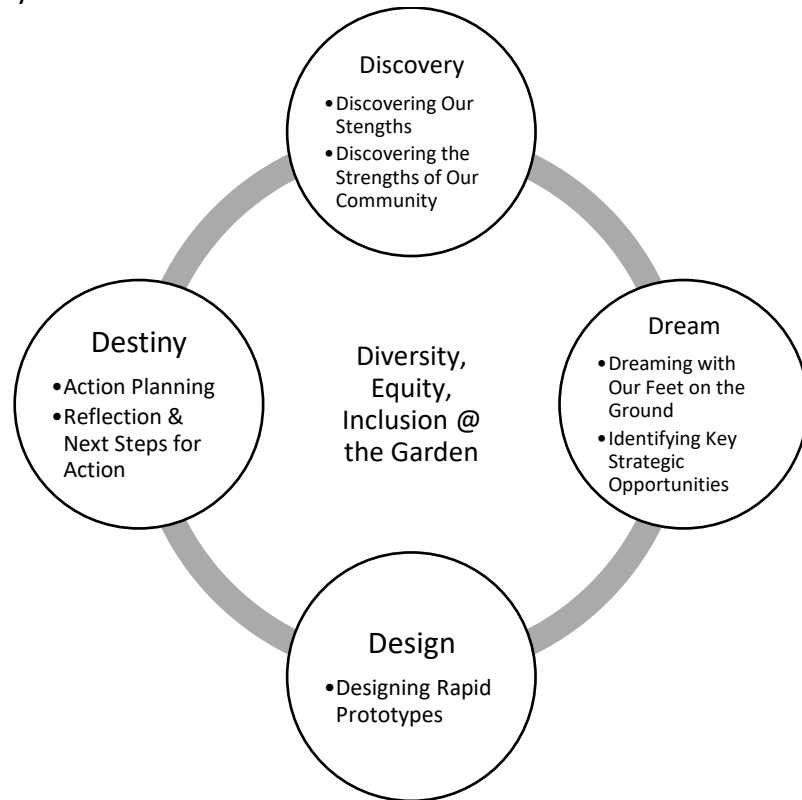
With these principles at the core of every Appreciative Inquiry activity, Cooperrider further outlines four steps to leveraging these principles to create positive change. The process begins with the *Discovery* phase, where the individual strengths and assets of the organization are identified. This does not only include what the organization does well, but also the strengths of the people within the system that contribute to these positive aspects.

With that bank of strengths and assets, focus continues to the *Dream* phase. Precisely as it sounds, this stage of the process considers the ideal future of the organization. It is a period to consider the potential for the organization without currently existing barriers. People often have differing opinions of their dream for the organization, but it is important to identify shared themes and explore the differences. In fact, this is often where the core identity, mission, vision, and values of a system begin to appear.

A brief primer on Appreciative Inquiry, endorsed by the Center for Appreciative Inquiry can be found on YouTube using this link: <https://www.youtube.com/watch?v=QzW22wwh1J4>

¹ Quoted from *The Center for Appreciative Inquiry* website

To put Appreciative Inquiry into the context of this workshop, the activities correspond to phase of AI in this way:



FURTHER READING

Cooperrider, D., Whitney, J.M., & Stavros, J.M. (2008). *The Appreciative Inquiry Handbook: for Leaders of Change (2nd Edition)*. Berrett-Koehler Publishers.

Miller, C., Aguilar, C. R., Maslowski, L., McDaniel, D., & Mantel, M. J. (2003). *The Nonprofits' Guide to the Power of Appreciative Inquiry*. Denver, CO: Community Development Institute.

APPRECIATIVE INQUIRY DIRECTORY

FINDING AN AI PROFESSIONAL & OTHER RESOURCES

AI Commons

<https://appreciativeinquiry.champlain.edu/>

AI Practitioner, International Journal of Appreciative Inquiry

<https://aipractitioner.com/>

Center for Appreciative Inquiry

<https://www.centerforappreciativeinquiry.net/>

UNIVERSITY CENTERS & PROGRAMS

Benedictine University

Lisle, IL

Degrees Offered: Online Masters in Management and Organizational Behavior

Case Western Reserve University

Cleveland, Ohio

Degrees Offered: PhD in Organizational Behavior, MS in Positive Organization Development & Change

Champlain College

Burlington, VT

David L. Cooperrider Center for Appreciative Inquiry

<https://www.champlain.edu/appreciativeinquiry>

Programs Offered: Undergraduate AI Badge, AI Practitioner Certificate, Online Graduate Certificate in Positive Organization Development

Claremont Graduate University

Claremont, CA

Degrees Offered: PhD in Positive Organizational Psychology

University of Michigan

Ann Arbor, MI

Center for Positive Organizations

<http://positiveorgs.bus.umich.edu/>

No formal degree program, but several undergraduate and graduate courses are offered in conjunction with the Ross School of Business

University of Pennsylvania

Philadelphia, Pennsylvania

Positive Psychology Center

<https://ppc.sas.upenn.edu/>

Degrees Offered: Master of Applied Positive Psychology

APPENDIX B

INCLUSION, DIVERSITY, EQUITY, AND ACCESSIBILITY RESOURCES

ADVOCATING FOR & DEVELOPING IDEA STRATEGY

- America Public Gardens Association: [Employee Development, Diversity, and Inclusion](#) (attribute of the Public Gardens Sustainability Index)
- American Alliance of Museums: [Facing Change, Insights from AAM's Diversity, Equity, Accessibility, and Inclusion Working Group \(2018\)](#)
- National Council of Nonprofits: [Why diversity, equity, and inclusion matter for nonprofits](#)
- Spark Consulting: [Include Is a Verb: Moving From Talk to Action on Diversity and Inclusion](#)
- TSNE MissionWorks: [Diversity and Inclusion Initiative: A Step By Step Guide](#)

CORE DEFINITIONS

- American Alliance of Museums: [Definitions of Diversity, Equity, Accessibility, and Inclusion](#)
- USC School of Social Work: [Diversity Toolkit: A Guide to Discussing Identity, Power and Privilege](#)
- YWCA: [Social Justice Glossary](#)

LGBTQ+ ALLY TRAINING

- American Alliance of Museums: [LGBTQ Alliance Welcoming Guidelines](#) (2016)
- [The Safe Zone Project](#)

TACKLING RACE

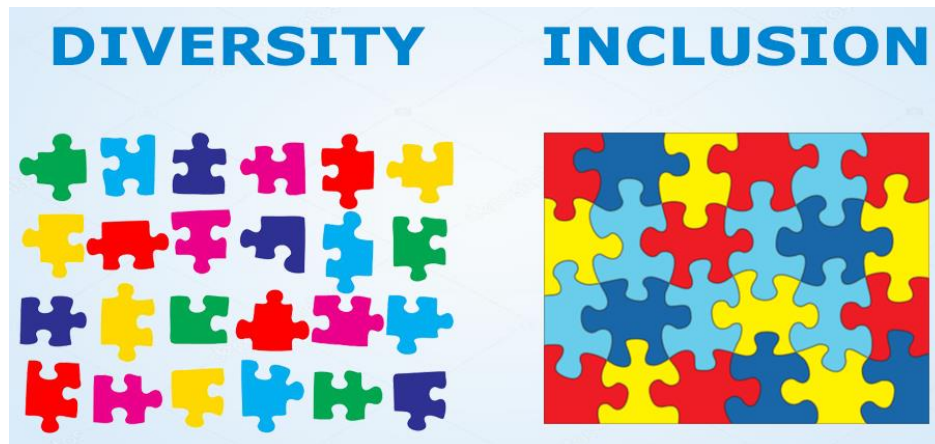
- TEDTalk: [Melody Hobbson: Color blind or color brave?](#)

UNCONSCIOUS BIAS AWARENESS

- American Alliance of Museums: [Unconscious Bias and Personal Work](#) (a finding of the 2018 Report of AAM's Diversity, Equity, Accessibility, and Inclusion Working Group)
- Harvard University: [Project Implicit](#)

APPENDIX B.1 INCLUSION, DIVERSITY, EQUITY, & ACCESSIBILITY DEFINITIONS

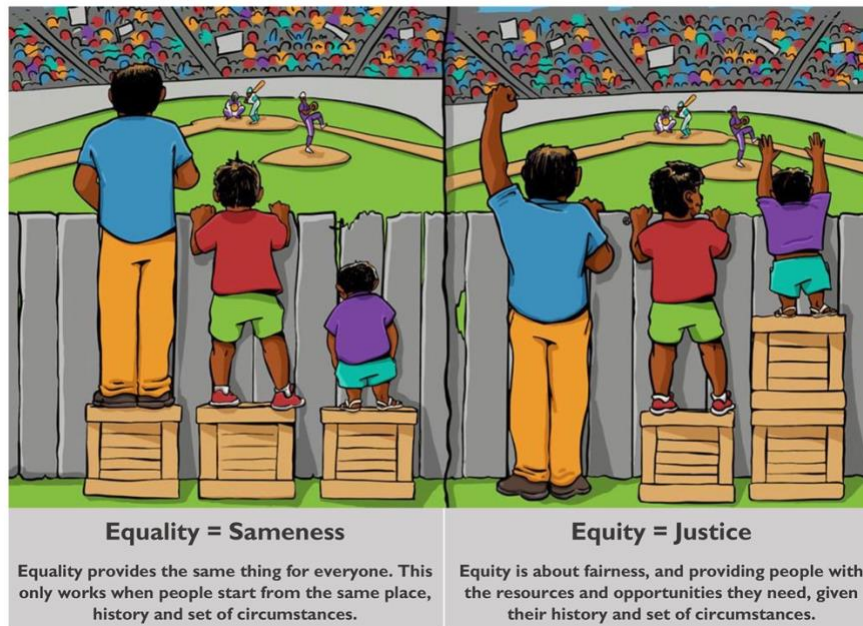
INCLUSION refers to the intentional, ongoing effort to ensure that diverse individuals fully participate in all aspects of organizational work, including decision-making processes. It also refers to the ways that diverse participants are valued as respected members of an organization and/or community. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”







DIVERSITY is all the ways that people are different and the same at the individual and group levels. Even when people appear the same, they are different. Organizational diversity requires examining and questioning the makeup of a group to ensure that multiple perspectives are represented.



EQUITY is the fair and just treatment of all members of a community. Equity requires commitment to strategic priorities, resources, respect, and civility, as well as ongoing action and assessment of progress toward achieving specified goals.



ACCESSIBILITY is giving equitable access to everyone along the continuum of human ability and experience. Accessibility encompasses the broader meanings of compliance and refers to how organizations make space for the characteristics that each person brings.

HEARING DIFFICULTY	VISUAL DIFFICULTY	COGNITIVE & NEUROLOGICAL	PHYSICAL DISABILITY
Hearing impaired users range from those who have difficulty hearing soft sounds or some frequencies to those who are completely deaf.	Visually impaired users range from those who are fully blind to those who are color blind in some way.	These disabilities may affect a variety of intellectual and social functions, such as memory, concentration, perception.	Users with this disability may have difficulty with mobility or muscle control.
			

Definitions as printed in “Facing Change: Insights from the American Alliance of Museums’ Diversity, Equity, Accessibility, and Inclusion Working Group” (2018)

APPENDIX C

SAMPLE PRE-SURVEY

In order to frame the workshop’s objectives, some participants may be motivated by insight into how their co-workers and the community see IDEA at the Garden. Therefore, a pre-survey may be conducted.

The pre-survey should not be seen as a prescription for your Garden or a good/bad grade. Instead, the pre-survey works to identify patterns that may inform the workshop activities. Individuals who extract meaning from numbers and those who are afraid of being “the only one” who thinks or feels something may benefit from hearing the results of a pre-survey of their co-workers and community.

The pre-survey should be conducted anonymously a few days before the workshop. SurveyMonkey and Google Forms are free, web-based survey platforms that could host this survey.

The Association offers [guidelines on best surveying practices](#) as part of their Sustainability Index.

Garden leadership communicates about diversity

- a) Very infrequently
- b) On an as-needed basis
- c) Regularly
- d) When discussing the garden’s mission, strategy or goals
- e) More than I am comfortable

When discussing the garden’s mission, strategy or goals, diversity and Inclusion programs at the Garden have a strong focus on:

- a) Creating an inclusive environment for employees
- b) Bringing in new audiences
- c) Creating an inclusive environment for the community and visitors
- d) None of the above
- e) We do not have D & I programs

The Garden has the following strategies in place:

- a) Recruit diverse candidates for employment
- b) Develop a pipeline of diverse leaders
- c) Provide opportunities for diverse employees
- d) Demonstrate fairness in performance and compensation decisions
- e) None of the above
- f) I don’t know

Primary oversight and decision-making authority for diversity and inclusion initiatives lies with:

- a) Human resources

- b) Senior leadership
- c) The Board of Directors/Trustees
- d) Other

The Garden offers trainings that focus on:

- a) Embracing differences in the workplace
- b) Overcoming bias
- c) General information about diversity and inclusion

The primary objective of the Garden's diversity, inclusion, equity, and accessibility focus is:

- a) Comply with legal requirements
- b) Enhance external reputation
- c) Attract and retain talent
- d) Respond to community expectations
- e) Achieve business results

Lack of diversity is a barrier to progression/growth of the Garden.

- a) Strongly Agree
- b) Agree
- c) Neutral
- d) Disagree
- e) Strongly Disagree

APPENDIX D

SAMPLE 1-DAY DETAILED WORKSHOP SCHEDULE

Morning Session: 9am – 12:00pm

- 9am-9:15am: Sign-in and Finding Your Assigned Table
- 9:15am-9:30am: Welcome and Introductions
- 9:30am-9:40am: Overview of Workshop & Group Contracting
- 9:40am-10:00am: Discovering Our Strengths
 - Activity 1: High Point Story (5 minutes)
 - Activity 2: Sharing Your High Point Story (15 minutes)
- 10:00am-10:35am: Discovering the Strengths of Our Community
 - Introduction of Group Roles (5 minutes)
 - Steps 1 – 3: Sharing High Point Stories (10 minutes)
 - Step 4: Identifying Key Strengths and Values (10 minutes)
 - Step 5: Thinking About the Garden (10 minutes)
- 10:35am-11:05am: Visions of an Ideal Future
 - Discussion (30 minutes)
- 11:05am-12:00pm: Dreaming With Our Feet on the Ground
 - Creating Presentations (25 minutes)
 - Presentations (30 minutes)

Working Lunch: 12:00pm – 12:45pm

- Tour the “Gallery” of High Points, Strengths, and Ideal Futures
- Reflection on Expanding Sense of Possibility
- Insights from the Morning

Afternoon Session: 12:45pm-4pm

- 12:45pm-1:15pm: Considering Areas of Opportunity
 - Step 1: Partner Sharing (10 minutes)
 - Step 2: Sharing Thoughts (5 minutes)
 - Step 3 & 4: Developing Areas of Opportunity (15 minutes)
- 1:15pm-1:30pm: Identifying Strong Strategic Opportunities
- 1:30pm-2:10pm: Designing Rapid Prototypes
 - Group Discussions (20 minutes)
 - Presentations (20 minutes)
- 2:10pm-3:00pm: Action Planning
- 3:00pm-3:40pm: Presentation of Commitments for the Future
 - Presentations (40 minutes)
- 3:40pm-3:55pm: Reflection on the Day and Next Steps for Action
- 3:55pm-4pm: Closing

APPENDIX E

SAMPLES AREA OF STRATEGIC OPPORTUNITY

AREAS OF OPPORTUNITY

- Visitor Experience
- Customer Service
- Youth & Adult Education
- Marketing & Communications
- Workplace Environment
- Professional Development
- Recruitment (Board, Staff, and/or Volunteer)
- Interpretation
- Volunteer Program
- Community Outreach
- Research
- Private Events & Rentals
- Gift Shop or Café
- Amenities (i.e. restrooms)
- Entry & Admission Experience
- Exhibition Themes/Topics

DIVERSE POPULATIONS

<p style="text-align: center;">People with Varying Physical Abilities <i>This could include individuals who use wheelchairs, walkers, canes, or crutches, as well as individuals who are paralyzed, amputees, blind, color-blind, deaf, or mute.</i></p>	<p style="text-align: center;">Language Diversity <i>This could include people who use sign language or braille. If your Garden’s predominant language is English, this will include English language learners, parents who do not speak English, and other mixed language families.</i></p>
<p style="text-align: center;">People with Mental Health Conditions <i>This could include individuals who experience PTSD, bipolar disorder, schizophrenia, depression, or anxiety.</i></p>	<p style="text-align: center;">Cultural or Ethnic Diversity <i>This could include immigrants, refugees, asylum seekers, first generation Americans, and undocumented immigrants. If your Garden is predominantly white, it may also include people of color.</i></p>
<p style="text-align: center;">People with Varying Intellectual Abilities <i>This could include individuals with cognitive impairments, learning disabilities, developmental disabilities, Autism, or Down Syndrome.</i></p>	<p style="text-align: center;">Socio-Economic Diversity <i>This could include individuals who live below the poverty line, are homeless, experience housing insecurity, or have otherwise limited discretionary income.</i></p>
<p style="text-align: center;">Family Make-Up Diversity <i>This could include single parent households, foster or adoptive parents, gay or lesbian parents, or multi-generational families.</i></p>	<p style="text-align: center;">Gender Identity Diversity <i>This could include transgender, gender queer, or non-binary individuals. If your Garden attracts predominantly male staff or visitors,</i></p>

	<i>it may include attracting female and non-binary people to work or visit (or vice versa).</i>
<p>Sexual Orientation Diversity <i>This could include making a safe space to work and visit for people who identify as gay, lesbian, bisexual, queer, asexual, or another non-straight identity.</i></p>	<p>Geographic Diversity <i>This could include attracting visitors or staff from a county, neighborhood, or other area that the Garden does not predominantly reach.</i></p>
<p>Experience Diversity <i>This could include connecting with veterans, previously incarcerated individuals, homeless people, or survivors of abuse.</i></p>	

APPENDIX F

SAMPLE ACTION PLAN

Name of Strategic Initiative: *Creating a Bilingual Visitor Experience*

Design Team

Names and email addresses of the group members who will support this initiative

- *Sofia, Development Manager*
- *Rachel, Marketing Designer*
- *Jose, Garden Volunteer*
- *Frank, Custodian*
- *Alex, Director of Education*
- *Jessica, Information Desk Associate*
- *John, Gift Shop Manager*

Vision of the Initiative

What are the aims or mission? What are the big goals you are trying to achieve?

After English, Spanish is the most commonly spoken language in our city. People who self-identify as Hispanic of Latino make up 20% of our immediate community. Many Spanish-speaking families who come to visit have to rely on their younger children or grandchildren to translate Garden signage and information from staff from English into Spanish. With our initiative, we will create several pieces of important Garden collateral that are available in both Spanish and English in order to create a more welcoming environment for our Spanish-speaking visitors. Everyone should be able to visit the Garden and have the same educational and recreational experience, regardless of native language. We hope to replicate this initiative into one more language by next year.

Course of Action, Assets to Be Leveraged, and Commitments of Support

Include what will be done to support this vision. Include what assets or strengths of the Garden will need to be activated to make this a success. Also share what your group is willing to dedicate in order to make this initiative happen.

1. *Translating our Garden Map content, including interpretive and descriptive information, into Spanish*
 - a. *Jose, who is a native Spanish speaker, can commit 1 hour each week on Tuesdays to translating the interpretive and descriptive information on the Garden Map into Spanish.*

- b. *Alex will be available on Tuesday afternoons for Jose to call, email, or talk if there are any questions about the interpretive information on the map. As many words and concepts are not quickly translatable, Alex and Jose can discuss these pieces of information to ensure that the meaning is translated into Spanish accurately.*
 - c. *Sofia speaks a minimal amount of Spanish, primarily with her grandmother. She will support Jose with the translation as needed.*
- 2. *Designing & Printing the Bilingual Map*
 - a. *Once the content translation is finished, Rachel will insert the Spanish text into Garden Map. She estimates this may take 4 hours of her time because the word count may be different than the English version. She will make sure that the same graphics are used in the Spanish map, so the two maps look identical.*
 - b. *Without money in this year's budget for a large printing of this map, Rachel can have 20 copies of this map printed and laminated at the office store for a reasonable price.*
- 3. *Implementing the Spanish Map*
 - a. *Jessica will have the laminated Spanish maps displayed prominently at the Information Desk. No one will have to ask for the maps, but simply grab them as they do the English maps.*
 - b. *As there are two English maps on sign posts in the Garden, Frank will post the Spanish maps next to the English maps. This may require building two additional sign posts. He has scrap wood in the shop that he can use for this.*
- 4. *Creating a Bilingual Experience*
 - a. *Jessica and John will brainstorm common questions that they receive at the Information Desk and Garden Shop, such as directions to the bathroom and hours of café.*
 - b. *Sofia can commit one hour a week to translating the answers to these questions. She will consult Jose if she is unsure. She will write down the answers to these questions.*
 - c. *Jessica and John will practice the verbal answers to these questions. They both have downloaded a Spanish-tutoring app on their phones and will commit 1 hour a week to practicing the language.*
 - d. *Jessica and John will serve as the primary Spanish liaisons at the Information Desk and Garden Shop. They will also begin to teach their colleagues.*
- 5. *Additional Commitments*
 - a. *The group is very enthusiastic about this initiative, so they would like to start a Spanish-speaking lunch hour, every other Monday. Any staff member can attend in order to begin learning, brushing up on, and lending their expertise in speaking Spanish.*
 - b. *Sofia will begin looking for grants that could fund printing a full order of the Spanish maps for next year, as well as pay for translation services into one other language common to our community and visitors. Alex will also look into grants specific to interpretation so that other materials and signage throughout the Garden can be translated into Spanish. They each can commit to two hours a month of research.*

- c. *Alex and Rachel will connect with their colleagues in the Public Garden and Museum Education fields about how their institutions have implemented bilingual programs and design.*
- d. *Some of the signs throughout the Garden need to be replaced due to wear and tear. Rachel and Frank will work to ensure the replacement signs are in both English and Spanish.*

Key Success Factors & Milestones

Be as specific as possible in terms of how you will measure outcomes. Also include short-term (first three weeks), moderate-term (first three months), and longer-term (one year) milestones, goals, and targets.

Short-Term (3 Weeks):

- *At least half of the map is translated.*
- *The first Spanish-speaking lunch has been held.*
- *The Information Desk collateral has been re-organized to make room for the Spanish maps to be as easily accessed as the English maps are.*
- *A solution for posting the Spanish maps on sign posts throughout the Garden is being considered.*

Moderate-Term (3 Months):

- *The map has been fully translated and printed.*
- *Jessica and John are able to answer simple questions in Spanish with minimal help from the script.*
- *At least 3 other staff members have joined the Spanish-speaking lunch group on a regular basis.*
- *Spanish-speaking individuals are picking up the map at the Information Desk, sometimes with prompting from the information desk staff.*
- *Fewer Spanish-speaking families are relying on translation from their family members.*
- *A solution for posting the Spanish maps on sign posts throughout Garden has been found and is being implemented.*

Long-Term (1 Year):

- *Spanish-speaking individuals are picking up the map at the Information Desk.*
- *More families are speaking Spanish in the Garden, rather than relying on translation from family members.*
- *All information desk associates and shop staff can answer basic questions about the Garden in Spanish.*
- *Funding for a run of Spanish maps for next year is secured through a grant or decreased quantity of English maps.*
- *At least 75% of the signs replaced or designed throughout the year are bilingual.*
- *Map translation has begun in at least one other language.*

- *Many staff members consistently participate in the Spanish-speaking lunch hour; non-native Spanish speakers are using the language outside of the lunch.*

Other Stakeholders

Name the groups, organizations, and individuals you may want to include in this initiative and how you will take steps to include them.

- *We will work with the Visitor Services Manager to allow for periodic training and tutoring time every other week for the other desk associates. John has committed to making this time for the Garden Shop associates as well. He will help Jessica coordinate this with her supervisor.*
- *We will reach out the city's senior center and invite the Spanish-speaking reading group to pilot the Spanish map. We will ask for their feedback on the map and redesign or change wording as necessary. Sofia's grandmother is a part of this group, so she will facilitate this connection.*
- *Once the bilingual map is implemented, Jose will make an announcement at his church about this initiative. Pending approval from the Director of Development, he will pass out Garden passes to the congregation, which totals 100 people.*
- *Rachel will reach out to the Communications, Design, and Spanish departments at the local universities for students who would be interested in supporting bilingual design initiatives as interns.*
- *Sofia and Alex will reach out the local Community Development Centers about how the Garden can better serve communities who do not speak English. They will work to learn about other ways the Garden can become more welcoming to Spanish-speakers, as well as other populations who would benefit from translation services at the Garden. We hope this can be the start of more collaborative programming between the Garden and the community.*

Communications

How will you maintain contact and forge connections within this group to help this prototype succeed?

- *Our group will develop a shared folder to save our materials. This will also be accessible to any staff member who is interested in the project.*
- *Weekly, on Fridays by 5pm, every member of this group will email this group their progress for the week. We understand if progress hasn't been made due to work load. However, if any group member has not made progress for two weeks, we agree to hold each other accountable and discuss how we can better support that individual.*
- *For the first three months, we will meet every other week for one hour to discuss our responsibilities and progress. Then, we will have a monthly meeting. Any staff member who is interested in the initiative can attend.*

- *We will discuss our progress at the monthly staff meeting so everyone understand where we are in the process, when to expect a final product, and how other departments can help us.*

Final Recommendations

Summarize the above, showcase strength and relevance of initiative, and get the audience excited about this potential of this strategic initiative.

Creating a Spanish map and having out front-of-house staff learn Spanish to answer common questions will work to create a better experience for our Spanish-speaking visitors. Using the resources and expertise we already have, including Jose and Sofia's knowledge of the language, Rachel's design experience, Alex's interpretive skills, and Frank, John, and Jessica's commitment to the initiative in their jobs, the group believes that this is a realistic and strong step towards improving the guest experience for this population.

The initiative will require each staff member to make the time to work on this project, but we have all committed to manageable responsibilities given our workload. With the support of our departments and colleagues, we believe we can get this map developed within three months.

While a small step, this initiative has the potential to improve the experience of 20% of our city's population, expanding our audience to communities that may not have felt welcome before. With an expanded audience, we will gain more volunteers, new inspiration for programming, and new members and donors to support our Garden. We hope that we can make meaningful connections in the Spanish-speaking community through this initiative and it serves as an example for other cultural institutions. Eventually, we hope that we can do the same for other populations in our city.