Leadership, Succession, and Transition in Public Sector Folklore

Report on a Two-Part Workshop at the American Folklore Society Meeting

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Introduction and Overview

A two-session workshop was held at the American Folklore Society’s annual meeting in October of 2012. The workshop was designed to help public folklorists identify goals and challenges and plan for support as we consider leadership development, succession planning, and transitions to, from and within public folklore practice.

Over 40 people attended each of the two parts of the workshop. About half the total number at each attended both parts of the workshop. Participants included folklorists working in independent non-profit folklore organizations, state arts agencies, museums, universities, the Library of Congress, and other contexts. Graduate students, new professionals, mid-career folklorists, senior folklorists and recent retirees were all represented.

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Workshop Objectives

- Identify needs and interests of participants and of public folklore more broadly.
- Strategize ways to meet those needs and work with those interests – build the foundation for an action plan to address leadership, succession and transition challenges.
- Establish a network of people who can support one another in meeting identified needs.
- These workshops become part of the commitment on the part of the field to working through a transition in the field that we are here to begin to understand.
We were guided by folklorist and long-term organizational consultant, Mal O’Connor. Over the course of the two sessions, we covered a wide range of topics in the service of meeting workshop objectives. They included:

- How public folklorists can have the greatest impact in today’s world.
- How we can create a robust and inclusive vision for public practice.
- How we can benefit from working collaboratively to support one another.
- How selective partnerships outside the field can enhance our ability to have the kinds of impact we want to have.

**Preparing for the Workshop**

Preparation for the workshop began in 2011 at PACT’s Spring 2011 meeting in Washington D.C. Building on the success of PACT’s forum on succession at the 2010 AFS Annual Meeting, PACT members determined that a workshop addressing immediate succession needs for public folklorists and that encouraged different generations of folklorists to work together to develop leadership in the field would be relevant and useful to PACT members, AFS members and meeting attendees. AFS Executive Director Tim Lloyd and then President Diane Goldstein agreed and AFS co-sponsored the workshop.

In order to help participants prepare for the workshop, workshop leaders circulated general questions about leadership, succession and transition to PACT members.

1. **As you think about the field of public folklore:**
   a. What are the 2-3 most significant leadership challenges we’re facing? What are 2-3 strengths we have to draw on to help meet those challenges?
   b. What do you see as our 2-3 most important succession and transition challenges, and what strengths do we have to help meet those challenges?

2. **As you think about yourself and your work at this point in your professional life:**
   a. What are the leadership capabilities that you have found to be critical to your success?
   b. What skills would you like to develop further in order to be an effective leader in the field?

3. **What are 2-3 things you want to learn, experience, and take away from the workshops that will help you become a more effective leader, or help promote more effective leadership in public folklore?**

Workshop leaders used the responses to these questions as a guide to designing the workshop. Responding to the questions was a way for participants to begin their participation before the workshop itself.

**A Few Guiding Principles**
The workshop was not going to solve problems, but it could create an action plan for solving them.

The workshop would only be successful if it served as a launching pad for the work needed to create opportunities for further learning about leadership transition and succession in the field.

The workshop needs to address the needs of different generations of public folklorists – and provide opportunities for learning across those boundaries.

**Workshop Part I: Identifying Shared Understandings and Important Themes**

Based on responses to pre-workshop questions, workshop leaders developed questions that would help identify shared understandings and themes (including visioning the field, building partnerships, acting on assumptions, leadership skills, our practice of flexibility and adaptability, and growing the field). Questions (see page 3) were distributed to participants who conducted diagnostic interviews of each other.

Each participant interviewed (and was interviewed by) two others. Interviewers then gathered in a caucus to share what they learned. For example: The 5-6 people who asked Question A shared their data with one another. A scribe summarized the common ideas and recorded the outliers. These notes were then presented to the whole group.

Caucus group presentations were followed by whole group discussion, notes were expanded as ideas were examined, elaborated on, or challenged. This exercise was used to learn about the topics, issues, and challenges that were on the minds of our participants. Workshop leaders used these notes to create a working set of themes for Workshop II. (Notes from this session are on page 9.)

**Workshop Part II: Refining Themes and Making Action Plans**

Participants reported on Workshop I outcomes, and new participants were invited to give feedback. Emergent working group themes were presented, refined and voted on by participants who divided into groups based on topics of interest or relevance. Each group was asked to address the following questions in order to create a common template for action plans:

- What is included in the topic?
- What is the purpose and value of discussing this topic with colleagues?
- Identify questions to be addressed related to the topic.
- What are requests of AFS and/or PACT?
- Identify potential next steps.

This activity aimed to create a space for folklorists grappling with similar issues in public practice to learn about how others are thinking about or addressing these issues and for the
groups to articulate supports and professional development that could be provided by AFS, PACT or others. Here are salient points from each group’s work:

**Group 1: Building Partnerships Outside of our Discipline (details on page 17)**

What are skills we need to develop and build effective partnerships? This group focused on learning about and growing capacity for collaborating within our field and outside.

*Recommended Next Step:* Ask AFS to support professional development—at the Annual Meeting through workshops, panels, and website—specifically around building and then evaluating partnerships. Bring in outside expertise as needed.

**Group 2: Increasing the Visibility of Public Folklore (details on page 19)**

Increasing our visibility includes working with others (allies, advocates, educational institutions), broadening the concept of (and honing our ability to talk about) “folklore,” and examining and developing how we interface with the public.

*Recommended Next Step:* Develop case studies (and video clips) that demonstrate our work, and disseminate them widely inside and outside the field.

**Group 3: Future Leaders (details on page 20)**

Development of leadership skills and identifying opportunities for leadership roles in public folklore is essential for the sustainability of our field. This group’s conversation included a discussion/questions about what is needed to be a leader in our field, and how to gain the skills necessary to take on leadership.

They identified emerging leaders at two levels:

- Students, junior/new professionals (both often called next generation)
- Mid-level professions (often left out of conversations about new leadership).

*Recommended Next Step:* Apprenticeships, mentoring, and other informal – and intentional - opportunities to meet with current senior leaders would be helpful for emerging leaders.
**Group 4: Succession Planning for Non-profit Public Folklore Organizations & Understanding the Succession Issues We Face (details on page 22)**

This group identified a short-term and a longer-term challenge. Most pressing is the short-term challenge faced by a number of non-profits whose founders are on the verge of retirement. They face organizational, governance and economic challenges, and perhaps most pressing – the preparation and handing off of responsibilities to the next leader of the organization.

The longer-term challenges include building succession planning into the ongoing work of public folklore organizations. This is experienced as a new task because most folklore non-profits have only been in existence through one generation of leadership – usually a founder of the organization. The next generation of leaders and staff face a very different world than the founders faced, and need to prepare for that.

**Recommended Next Step:** Succession support is needed now. Two major needs:
- Supporting next generation leadership training, knowledge, and transitions
- Getting support from AFS (and one another) in planning for and implementing succession strategies in order to safeguard current successful non-profits and to allow for necessary change and growth of new public folklore entities.

**Group 5: Funding Sources in the New Economy (details on page 25)**

This group touched on marketing/communications, mission, scale, development strategies, and new economic contexts, emphasizing how funding sources are tied to multiple aspects of our continued work. They identified avenues for important research (new vocabulary and paradigms, case studies of successful models) and partnerships (local and national) that could impact public folklorists funding landscapes.

**Recommended Next Step:** AFS and PACT create shared staff infrastructure to provide marketing, development and administrative assistance. Begin with a retreat to outline new funding venues and ideas like the L3C (low-profit limited liability) organization and other organizational and funding forms that are emerging in new economic contexts.
To address professional development needs, we asked workshop participants to identify areas of public folklore practice (process/method/skills) that they would be willing to share with others and areas where they would like to learn and grow. Common areas for learning and growth include:

- Funding Sources – with emphasis on new opportunities beyond the existing sources
- Leadership and general professional development
- Succession

Page 27 includes a chart of areas for teaching and learning, including individuals who are offering or seeking knowledge.

**Recommended Next Steps:** AFS and PACT coordinate a peer-to-peer teaching/learning exchange. And that AFS create a systematic approach/program of professional development for public folklorists.

**Two Major Concerns at the Close of the Workshop**

At the end of Part II participants were asked to share an idea or insight that they had gained from the workshops. Responses show that many participants left the workshop thinking about two issues:

- Succession including how we might partner with one another to support leadership transitions and the recognition that we do not have a set of useful practices or an approach for planning for succession in the variety of settings in which we work (SAA, independent non-profit, and others).
- The need to build partnerships within the field and with public organizations, scholars, and others outside of our field.

On page 17 is a list of all of the ideas/insights organized into workshop categories.

**In Conclusion**

Many parts of an action plan for public folklore emerged from the work of participants at the workshop. The five themes and their recommended next steps, as outlined above (with detailed notes following this overview), can serve as the initial set of areas for focused effort over the next 3-5 years.

We recommend taking both a short-term and longer-term approach to addressing issues described by the five theme groups. Often the urgent crowds out the important, and taking a two-pronged approach can help address both. For example, there are immediate needs that are both urgent and important to support those non-profits in the middle of leadership
transition and succession without the knowledge or expertise to know how to navigate these transitions. These organizations, and there are a number of them, need AFS and PACT support immediately.

One way of addressing the longer term would be to bring a group together comprising the three generations outlined during the workshop ("junior/new/next generation" + mid-career + senior members of the field) and charge them with examining the results and recommendations of the workshop – and with recommending a prioritized set of steps along a 3-5 year timeline.

Finally, we would like to thank PACT and AFS for supporting this important work. The future of the field of public folklore depends on their ongoing insight and support.

**Workshop Leaders**
- Selina Morales, Philadelphia Folklore Project - smorales@folkloreport.org
- Dr. Mal O’Connor, CFAR Consulting - moconnor@cfar.com
- Sally Van de Water, Independent - sallyfolklore@yahoo.com
Workshop Part I: Notes

A: Imagine it is October, 2020. Since January of 2013 there has been a 200% increase in employment for public folklorists. What sparked this change, and what are these folklorists doing?

The Spark:
- Catastrophe (environmental, collapse of non-profits, SAA model collapse, etc.)
- Dramatic Opportunity:
  - People’s craving for roots
  - Increasing demographic diversity
  - We stop being insular, homogeneous, & privileged (the definition of who is doing the work has changed – not just folklorists)
  - People reinvent themselves, work beyond “65”

What are Folklorists Doing?
- We are integrated across sectors
  - “Beyond Genres & Traditionality”
  - We’re not so no narrowly defined
- We are addressing community concerns & supporting community structures
- Folklorists’ skill sets are highly valued – as ethnographers, mediators, problem solvers, presenting the power of beauty
- Using electronic media, we are working in worldwide networks.

Whole group additions:

The Spark:
- Can be easy to assume it will happen like in the past; we can’t assume it will be like a “New” New Deal; it may have to happen totally differently
- Spark: Take a more active role; don’t wait for change. What can we do? What’s our role?
- How do we become pro-active in creating the “Dramatic Opportunity” … in sparking the change?
- What are the FEARS walking into this change?
- Connecting folklore to civic education
Skill sets. Preservation.

For the increase we want stop the top down only work of folklorist. Do it on the local & regional level

We found new ways to educate folklorists outside academia

Higher Ed model has to change. Certificates to specific skill sets to meet needs of many local folklorists

Spark: Someone writes a bestselling thriller featuring a folklorist as a sleuth. Making folklorists sound wild & fun & sexy & clever etc. & absolutely necessary.

**B: Responses to questions before the workshop indicated that we need to be more proactive in building partnerships with others outside the field. What are 2-3 examples of other fields, organizations, and other kinds of partnerships we should pursue? What are 1-2 strengths that we bring to these kinds of partnerships?**

**New & Unconventional Fields & Partnerships:**

- Health & Community wellness: using stories as database for health professionals
- Public Humanities – Digital Humanities: Linked data & engaging users w/ data
- Sustainability – Food & Agriculture
- Labor & Occupation
- Human Rights
- Corporate & Private
- Chambers of Commerce
- Education
- Youth Development

**Strengths (we don’t have a monopoly over these strengths):**

1. Knowledge of community/understanding of community
2. Ethnography to strengthen organizations/partners
3. People-centered orientation
4. Translate & apply academic knowledge in community settings
5. Bringing the **living** element of culture
6. Ability to reinvent ourselves
7. Recognition of different kinds of “cultures”
Whole group additions:

- Skilled connectors; passion to connect people
- Ability to be reflexive—not always be in the center of things
- Mediators
- Reconnect to trained folklorists who left “the field” and work in these areas already
- Marketing
- Historic Preservation
- Tourism; Civic education efforts
- Parks & Land
- Creative Aging
- Global organizations i.e. not Brooklyn
- If we are constantly reading outside our field—How do we maintain our core essence?
  We need a handbook for this.
- Urban Design & Planning/Economic Development
- Engineering & Blg design
- Education Field; Youth Development Field
- Grass-roots movements
- Law

C: What are 1-2 assumptions we make about Public Folklore (tacitly or explicitly) that may hold us back from the success we’re trying to achieve? What are 1-2 assumptions we make that, if we were to say them out loud more often, could help us get where we’re trying to go?

Assumptions that hold us back:

- The idea that folklore as a discipline is an underdog, marginal, scrappy, & we like it that way
- That our jobs were secure, safe, stable, and desired – that we’d be loved for our good works
- That we had control of our trajectory
- That our relevancy would be automatically understood and appreciated.
- That we already “know” and need not look further
That we have the skill set to “do it all”

**Assumptions that could help us:**

- Look beyond disciplinary boundaries and be willing to share authority – learn from those we study
- Be less risk averse
- Ask ourselves “So what?” Why does it matter and who cares?
- Move beyond the non-profit and government models. Be flexible

**Whole group additions:**

- Last point about generational values shift and the case of succession and transformation seems like an important thing to discuss in more detail
- Maybe we need an AFS workshop on the values that the younger folklorists are bringing to the field of public folklore so that we can build on those strengths for the future.
- “So what?” question needs to be done/asked ALL the time
- Not the young & old, remember the middle age folklorists
- Need to really let go of authority – in the participatory age – involve others
- Learn from those we study AND partner with people in other fields

**E: What are 3-4 skills needed to be a leader in Public Folklore today – individually in your local setting, and in the field of public folklore overall? What are the 3-4 most important skills that will be required in the next 10-15 years?**

**Skills of Leadership:**

- Ability to read cultural landscapes & respect culture
- Ability to articulate what we do (even w/o “folk”) – both the field and our organizations
- Entrepreneurial/fundraising
- Fundraising as fieldwork
- Vision. Creativity, passion
- Understanding of micro & macro political landscapes (policy, lobbying, shifts) – how to read them
- Being a learner and a listener – including knowing what we don’t know and what other people are doing
- Follow up with communities
• Energy, drive, passion
• Vision and clarity
• Openness to all possibilities (new technology, different partnerships)
• Flexibility, multitasking
• Being able to work collaboratively
• Being respected, not for one’s position but for how one does one’s work
• Being able to write a report in under 2 hours
• Being able to turnaround a grant in under a week

**Outlier:** Ability to collaborate, work with and support even when we’re not the main focus

**Post-It skills:** Bilingual/multilingual about the core values of our work – very important!

**Entrepreneurial skills, pioneering new models:** strategic thinking

**Business skills:** fiscal management, running meetings.

**Whole group discussion:**
• Understand better the generational differences & challenges of our own field and our constituents
• Entrepreneurial skills – pioneering new models—strategic thinking. Business skills – fiscal management, running meetings
• Bilingual—Multilingual about the core values of our work—very important!
• Code switching
• Vision & clarity: know why we are here & what we want to accomplish
• Independent & local folklorists. Tax stuff. Running small business.
• Ability to conceive new models. Social media & networking
• Digital media
• How can we not be so “siloed”? What do we mean by “vision,” “collaborative” & learning? How do these address power [types [unclear SV]]… (can mean widely diff. things)
• “Listening & Learning” – “Vision & collaboratively” – Need clarification. Where does “coalition” get us?
• A leader is someone who is known for their humanity, for their passion, for their openness to new skills, technologies, ideas & opportunities, for their continued pursuit
of knowledge, for their ability to multi-task & be nimble, and for nurturing those who
work for and with them.

G: As Public Folklorists, many of us believe that flexibility and adaptability are two
of the capabilities we have had to develop in order to be successful. As we look ahead
to the future, what are 2-3 things we will need to be flexible and adaptable about –
and how do we need to strengthen these capabilities?

Repeated themes: Flexibility/Adaptability re:
- Partnerships in/with other sectors (business, health) – learning the languages of other
  fields
- Sources of support – learning the languages of other fields
- Read outside our fields to ID social/cultural trends
- Boundary-crossing within Folklore
- Definitions of “communities” we study/work with
- Give up/modify/share our sense of authority, the notion that we have all the answers
  (that really count…)
- Marketing ourselves and the work that we do:: Speaking with media in concrete and
  precise ways
- Ability to change rapidly (like the rest of social trends)
- Not compromising our VALUES, but flexibility about where/with whom we enact them

Outliers:
- Look at/for things that aren’t there [yet]
- Look at/for people/places that “need a folklorist but don’t know it [yet]”
- Adapt AFS as an organization that eg provides/manages pension options, heath care
  coverage for individual folklorists/independent
- “Selective entrepreneurship”

Whole group additions:
- How do we retain the values and stop being insular?
- Be flexible on structure of programs & services
- How do we retain the values AND stop being “insular”?
- Make this work sustainable for the public folklorists (competitive salaries, retirement).
  Both individual & field issue. Current practice perpetuations the privilege problem.
Adapt AFS [into?] org that truly “serves the people.” Start with outcomes: be more diverse, part of movement building

- Ability to reinvent yourself but keep folklore self core
- “Alternatives” to models that emerge in business community

H: We’ve been in the process of intensively building the field of Public Folklore over the past thirty years. We face a dual challenge: There are many gains that we need to sustain; and there are things that we need to be created and/or recreated anew. What are 2-3 things that we must sustain? What are 2-3 things that we are going to have to face that will call for new and different approaches?

**Things to sustain:**

- Culture of warmth, generosity, collaboration (as public folklorists)
- Core values
- Strong community relationships

**What needs new approaches?**

- Getting money from different sources
- Understanding philanthropy better
- Entrepreneurship
- Advocacy for a place at the table for folklore & cultural work
- Improve our ability to communicate what we do
- Our do-it-all ourselves mentality

**Outliers:**

--Strength: Function as mediator/translator

--New: better understanding of changes happening in the communities around us
New: Think rich? Jettison our focus on lack of resources and scarcity – focus on thinking towards abundance.

New: Be more culturally inclusive within our discipline (ie at AFS, as folklorists)

New: Economic Development—Bridge the divide between ‘public’ & ‘academic’

**Whole group additions:**

- We are natural connectors / passion to connect
- Be ally or partner – question/detach ourselves from sense of authority
Workshop Part 2: Notes

Group 1: Building Partnerships Outside of our Discipline

What are skills we need to develop and build effective partnerships? This group focused on learning about and growing capacity for collaborating within our field and outside. They have requested that AFS support professional development—at the Annual Meeting through workshops, panels, and website—specifically around building and then evaluating partnerships.

What’s Included:

- Thinking outside the boxes
- Self-evaluation of skills, purposes
- Principles of partnership
- Tiers of partnership
- Developing and understanding partnerships
- Problematize partnership
- Get past “jargon” evaluating language we use in soliciting & building partnerships
- “Experts on tap not on top”
- “Nothing about us without us”
- Essentializing folklore in addressing issues & needs
- Courtship/shopping period in relationship, drop & add
- Setting up knowledge networks —grappling with discomfort in crossing disciplines

Purpose and Value

- Public folklore is facilitating awareness & understanding that traditional tangible & intangible culture is critical to the health and well-being of individuals & communities
- Advocacy Efficacy
- To work more effectively
- To distribute the workload
- To have access to useful & appropriate resources
- Disciplinary risk taking—taking our skills and knowledge out on a limb
- Be open to outside ideas & processes

Questions To Be Addressed
1. What are the interfaces that hold potential to collaborate?
2. What are the fields that have great potential for interfacing?
3. What are the best ways to connect with those fields?
4. How can we assess what makes a good partnership both for us and for the partner?
5. How do we evaluate the process of collaboration?
6. What skills do we need to facilitate collaboration?
7. Who does/How do we teach these skills and where do we obtain these skills?
8. How do we transcend limitations of our conceptions about collaborations?
9. How do we address pre-conceptions about folklore?
10. Where do we get the time and energy and $ to build collaborations?
11. What role does participatory practice have in building collaborations?

**Requests of AFS/PACT**
1. Help us find the time, energy, and funds to build capacity in advancing collaborative work—both in general and in strategic, specific arenas
2. Offer professional development, support, and funding for evaluation specific to collaborative work

**Next Steps**
1. Gather resources to post on AFS website
2. Plan professional development
3. Create a hub/umbrella to broker/support collaborations
4. Identifying other organizations that AFS will support delegates to attend meetings—a la ACLS
5. Suggest forums for future AFS conferences
6. Have Mal conduct whatever is needed to advance this kind of AFS reflection/pro-active thinking

**Resources**
- What color is your parachute
- Mary Hufford’s work
- IDEO company

**Group 2: Increasing the Visibility of Public Folklore**
Increasing the visibility includes working with others (allies, advocates, educational institutions), broadening the concept (and honing our ability to talk about) “folklore,” and examining and developing how we interface with the public. Case studies that demonstrate our work, disseminated widely across various arenas, are a recommended first step.

**What’s Included**

- Identifying ourselves as folklorists
  - What does that mean?
- Folklorists in popular media
- Broadening the concept of folklore as a way of working & seeing
- Proactive public presence
  - Interview expert lists
  - Letters to the editor
  - Insist on credit
- Cultivating others as advocates
- Targeted alliances
- Educational institutions, community colleges
- Specify what we bring to the table; give examples of our own & others’ work
- Case studies
- YouTube videos
- Public Folklore training in graduate programs

**Purpose and Value**

- Employment
- Facilitating community voices
- Getting the folklore perspective into more arenas
- Increasing diversity of the field
- Funding
- Education (K-12, college, public)

**Questions that Need to Be Addressed**

- Concise explanation, elevator speech, case studies
  - On AFS website
- Teaching marketing skills—the field & our skills
How to teach future teachers, get into education schools
- Get folklore into state education standards
- Get into other disciplinary streams
  - Business, journalism, health sciences, tourism, planning & zoning
- Double majors in Folklore & archives/education/museums/journalism

Resources
1. Case studies, previous successful projects
2. Folklore-friendly organizations

Requests of NEA, PACT, AFS (3)
- Short videos on website, case studies
- Branding, consistent message, tangible benefits of working with a folklorist
  - Testimonials from others
  - Highlight high-profile folklorists
    - diverse jobs/occupations

First/Next Steps
- Collect examples & case studies
  - Diverse, unusual, creative
- TED Talks

Group 3: Future Leaders

Development of leadership skills and identifying opportunities for leadership roles in public folklore is essential for the sustainability of our field. This group’s conversation included a discussion/questions about what is needed to be a leader in our field, and how to gain the skills necessary to take on leadership. They identified emerging leaders as students, junior/new professionals (both often called next generation), and mid-level professions (often left out of conversations about new leadership). Apprenticeships, mentoring, and other casual opportunities to meet with current leaders would be helpful for emerging leaders.

What’s Included?
- What are the skills to be a leader?
- What are the opportunities to grow leaders?
- What are our resistances/fears to
  - Handover
Assuming Power
Claiming/Self Identifying Leadership
Skills for maintaining, not just establishing
How do we recognize and nurture future leaders?
  Transition Process; it’s continuous
Emerging leaders: It’s happening now
It’s not always fun
  Identify the rewards
Different kinds of leadership (ex, ED/Position of leadership vs mentor vs someone others go to get stuff done)
Distinguish between ambition and leadership

**Purpose and Value**

  It’s happening now
  Sustainability: Continue Assets, Knowledge, so we can grow, adapt
    Public Folklore
    Organizations
    Jobs/paycheck
  Providing opportunities for all levels
    Juniors & mid-level
  There are emerging leaders in our field (& elsewhere!!!) who need and want the skills
  Communicate our value
  There aren’t people with the skills
    Broad Ranging Perspective
    As folklorist & Bureaucrat (?)

**Questions:**

  See “what’s included?” above
  Are there other sectors facing the same issue?
    Can we learn from them?
  Who is doing this well? (In our field & elsewhere)
  Can we mentor each other?
  How can we consistently bring people through the ranks?
  What are the qualities of a leader?
Obstacles/barriers?

How do we keep people in the field to become leaders?

Are there skills from other fields to make us more effective leaders?

How do we balance Theory & Practice?

What does it look like to functionally pass on the knowledge?
  ◆ Mentoring? Shadowing? Cross-field sharing?
  ◆ Is there a template?
  ◆ We can’t necessarily rely on an oral continuum (although we study it!)

Resources:

- Our current leaders & mentors & the “middles”
- We know more than we think
- Writing & talking that’s happening outside our field
- We run apprenticeships, why not apply this to ourselves?
- Turn the “folklore” lens on ourselves!
- Acknowledge that not every leader should be emulated

Top 3 Requests of AFS and PACT:

- Funding Mechanism for site-specific succession implementation (i.e. bring in co-directors before someone retires); always be bringing people along
- Shift the paradigm: Workshops not “schmoozing”. Nuts & bolts & big picture stuff
- Reverse travel award—student or emerging professional to organizations, or leaders to the students

Next Steps:

- Identify skills of good leadership & management *They are different things!
- Identify the “middles,” & what they need to move up & their responsibility to the juniors for continuous succession training
- “Adopt a student/newbie”

Group 4: Succession planning for non-profit public folklore organizations & Understanding the succession issues we face

There were two major issues for the succession group (1) supporting next generation leadership training, knowledge, and transitions and (2) getting support from AFS (and one another) in planning for and implementing succession in order to safeguard successful structures and to allow for necessary change.
**What's Included:**

- Current structures may not be future ones
- Does the field of public folklore exist?
  - The opportunity to invent yourself
  - Passing on the pioneering work that prior generations created
  - Understanding context of institutions
  - Identifying local institutions that can be the flexible shell for our work (maybe not arts councils)
- Creating a national anchor org.
- Board issues (financial priorities vs. mission)
- Address non profit specific issues
- Folklife nonprofit issues are similar to those in multipurpose organizations
- Be in dialog with next generation folklorists on career tract in public folklore
- Recognize the mid-career trained folklorists who are employed in adjacent fields and beyond (we need a survey)
- Understanding layers of succession—current leaders won’t necessarily leave the field
- Financial resources < attracting High Net Worth (HNW) individuals

**Purpose and value**

- Determines health & continuity of field
- Concern about mission drift in transition of succession
- Opportunity to document core of corpus of work that has been built—teasing out what are essential parts that must continue

Questions that Must Be Addressed (including tasks)

**Goals**

- Cultural Equity
  - How do we embed concept of cultural equity in everything we do?
- How to maintain what was built by predecessor?
- Creating networks & cohort & opportunities for next generation leaders to learn together via a Community of Practice
- Ensure the jobs are viable (salaries) & that next generation have skills to raise $
- How the build funding for this community of practice—Apprenticeships (5-6/yr) [sic]
- How to ensure current positions exist in future? (And not get lost in transitions)
- What are new mechanisms to build staff capacity?
- Looking at new business models for non profits
- Will current positions exist in future?
- Addressing competitive salary scales for similar training, skills, work in parallel fields
- Will future folklorists have quality of life to have security, to have families, etc.? (recognizing student loan debt)
- 1-person-show model needs to change
- How to break the cycle of doing too much (for too little)
- Health insurance & retirement program needed (& assisted living :-))

**Top 2-3 Requests (AFS/PACT)**
- Convene next generation/current leader convening
  - Mentorship program by AFS, NASAA (i.e. NYFS model)
- Resume bulletin board on AFS web & other ways to help next generation be known
- Address diversity NOW!
- Have regional meetings to address succession issues
- Have funding to pair transitioning leaders with selected new leaders (learning from other colleagues)
- Share models for planned succession
- Identify existing resources for new leader transition (i.e., Center link)

**Next Steps**
- Create task force (structure) – working groups now
- Prioritize most urgent cases to serve as models then develop tool kits based on case studies
Group 5: Funding Sources in the New Economy

This group touched on marketing/communications, mission, scale, development strategies, and new economic contexts, emphasizing how funding sources are tied to multiple aspects of our agencies’ continued work. They identified avenues for important research (new vocabulary and paradigms, case studies of successful models) and partnerships (local and national) that could impact public folklorists funding landscapes.

Discussion Theme—What’s included
- New Outcomes/New vocabulary for them/new products
- New opportunities
- How to articulate need
- What’s missing
- Identifying formulas
- Sustained new partners
- Sustainability
- Letting go
- Need for social justice. $ vs. “community organizing” “arts/humanities”
- Funders—rigid guidelines
- Real commitment to constituents
- Discipline based becoming issue based
- Collaborations
- Move from local → global → transnational, but keep mission
- Earned income experimental status, salary, new ways to make money

Purposed Value—Why does it matter?
- No money = no food/no staff
- Marketing/perception
- We have unique values, contributions
- Emphasizing “what do groups get?” makes us better resources
- Increases visibility
- Increases time for funding

Questions That Must Be Addressed
- How do we identify what’s working now?
- What are the new models/paradigms?
- How do we change our mindset towards making money?
- How do we make ourselves visually exciting without compromising values?
- How do we acquire money management skills new skill sets?
- How do we enlist the body politic?
- How do we keep abreast of all shifts happening?
- How do we help community partners know about all resources?
- Who are our partners in new economy?
- As we move forward, how [to] address the various scales of our organizations?

**Top 2-3 Requests from AFS, PACT, etc:**
1. Working group with funding or retreat at AFS
2. Ongoing working group
3. (PACT & AFS) Create shared infrastructure of staff (marketing, developing, administrative assistance) that agencies can access

**Board Source**

First Steps/Next Steps
- Distribute/share info from here
- Case studies as to what is working in new funding.
Teaching and Learning: Chart and Notes

Teaching

**Tapping into Funding Sources**
- Grant writing skills (Gwen Meister)
- Shaping funding proposals (J. Linzee)
- Realistic budgeting (J. Linzee)
- Unconventional funding ideas (Nancy Groce)
- Advocacy (Christina Barr)
- Philanthropy world, family foundations, donor advised funds, community foundations (Sue Eleuterio)
- Working effectively in political and lobbying contexts

**Making Public Folklore Organizations Work Effectively**
- Community development perspective for folklorists, specifically small business perspective (Gwen Meister)
- How to function with limited resources (J. Linzee)
- Topics about non-profit organizational development (Amy Kitchener)
- How to frame city and community environmental projects, and urban renewal challenges as places for folklorists to work (Zilia Estrada)
- Evaluation (Jessica Payne)
- Non-profit management, board development, getting a 501(c)3 (Sue Eleuterio)
- Programming of Public Programs (Bob Gates)
- Programming (Kay Turner)
- Grant narrative & budget (Kay Turner)
- Philosophy of public folklore (Kay Turner)
- Working effectively with boards

**Leadership Transition and Succession**
- Bringing along the next generation of folklorists. Thinking not just about keeping the work going, but also supporting the people who do it. That includes monetarily and in terms of jobs that are not too big to succeed at.
- Provide staff perspective on multiple executive transitions in non-profit contexts

**Engagement Beyond the Boundaries of Our Discipline**
Lessons learned from global/international “co-created” collaborative partnerships. (Kurt Dewhurst)

- Principles of partnership (Kurt Dewhurst)
- Building equity, mutuality, and representation into collaboration (Kurt Dewhurst)
- Being relevant (outside our own discipline) (Diane Goldstein)
- Working with partners (J. Linzee)
- Cross-cultural presenting: How to most effectively present the power and beauty of folklore to those outside the root community. (Maggie Holtzberg)
- How to frame city and community environmental projects, and urban renewal challenges as places for folklorists to work (Zilia Estrada)
- Advocacy (Christina Barr)
- I was a reporter for several years, can teach how to get the attention, meet the needs of newspapers, i.e. how to promote things. (Teri Klassen)
- Creative intersections (Kay Turner)

**Working with Communities**

- Working in immigrant and refugee communities (Ho-Thanh)
- Community development perspective for folklorists, specifically small business perspective (Gwen Meister)
- Ethnography (cultural) (J. Linzee)
- Advocacy (Christina Barr)
- How to put the knowledge, skills and language of folklore and folklife into the language, goals, and interests of various parts of healthcare – including hospitals; medical and public health education for practice; community health advocacy; health advocacy for specific identity groups; and community-based and community-inclusive health(care) research. (Bonnie O’Connor)
- Approaches to collaborating with newcomer groups
- Theory (process vs. product)
- Interviewing skills
- Community ethnography
- Mediation
- Understanding intangibles
- Techniques for working in communities – and conveying the need for and value of fieldwork in communities.

**Working in New Media**

- Digital humanities case study – crowdsourcing archival materials (Nicki Saylor)
Project management in archives/digital library context – including teamwork in this context (Nicki Saylor)

Working with audio and photography for fieldwork (J. Linzee)

**Genre-specific**

- Quilts & quilt history (Terri Klassen)

**I Want to Learn**

To address professional development needs, we asked Workshop participants to identify topics of public folklore practice (process/method/skills) that they want to learn more about. Here is a list of those needs and (in some cases) the people who are seeking knowledge. Common areas for learning and growth include:

- Money/Funding Sources
- Leadership and Professional Development
- Succession

**About Leadership and Professional Development**

- Sustainable leadership practices and models of distributed leadership (Amy Kitchener)
- How to be more productive (Christine B.)
- How to follow and support my vision for our work and field. (Christine B.)
- How to fully live an adventurous, productive, fulfilling life – and put this into practice. (Christine B.)
- How we, as a field, can be more proactive in spotting and participating in “next” ideas and policies. (Nancy Groce)
- If there is a deliberate effort from AFS/PACT/others to cultivate new leaders

**About Succession**

- To hear from the 5-6 individuals who are working on succession on how they are thinking about it. (Steve Zeitlin)
- I want to hear from the 5-6 individuals who want to step into those jobs and hear their aspirations and reservations about this work. On both ends, thinking about, “Do you want to do this job?” and “Can you do it?” (Steve Zeitlin)
- Models and practices for transition after a founder is no longer the Executive Director – and how to address this transition over the long term (not just 6 months, or 1-2 years before) (Amy Kitchener)
- How, if we assume generational differences, can we (baby boomers) better understand the millennials better and harness their energy to our field’s advantage? For example, “digital native,” ideas about “authority” “multiple approaches,” etc.
- Cross-generational synthesis of views of field/work and how to take advantage of knowledge and skills of generations to move the field forward into the future.

- Understanding and managing succession and generational change (Tim Lloyd)

- What next generation (@ PFP) needs to manage succession successfully. (Debora Kodish)

- What resources and supports we can identify/call on/develop connectivity to support the succession process. (Debora Kodish)

- How to identify a next staff person – and the skills/politics/background that are critical (Debora Kodish)

- About the demographics of the field – trends at the macro level that impact the future of the field

**About Making the Field More Visible**

- How to make ourselves more visible – so people, agencies and others that don’t know they need a folklorist will get that they do (Maggie Holtzberg)

- How we can create more visibility for the field (Nancy Groce)

- What the best strategies are for getting our stories out to a broader audience

- How to explain why and how public folklore is valuable (Emily Afanador)

- How best folklorists can gain a “seat at the table” – whatever that table may be. Too often others (non-folklorists) are quicker to step in (as in Zeitlin’s example of 9/11) to claim, and folklorists haven’t led any charges

- How to be a more effective spokesperson for our field (Christine B.)

- Tangible ways to bring more public attention to public folklore (R Hopkin)

**About Money, Funding and the Business of Public Folklore**

- How to ask for (enough) money

- Business savvy and marketing chops

- Fundraising skills

- The “ask” – how to raise money beyond grants (Sally Van de Water)

- Business models

- Understanding philanthropy (Diane Goldstein)

- How to find other sources of funding and become less reliant on arts funding (Maggie Holtzberg)

- The networks and communication channels of public folklore institutions and conventional funding sources (Zilia Estrada)

- How to feel more comfortable in developing relationships with rich people (potential donors) (Gwen Meister)
Fundraising planning and follow-up (Gwen Meister)

What folklorists out there are already doing that are the most sustainable kinds of work – in terms of job creation, fundraising, organizational structure, and audience

Effective ways of approaching individuals and corporations for funding


Peoples’ feelings on the long-term viability of the non-profit model.

How to establish or shape a viable, sustainable public folklore non-profit. (J. Linzee)

Entrepreneurial attitude and skills

How to “sell” folklore (I know how great it is, but I’m not good at explaining to the unconverted. I feel everyone “converts” when they know about it.) (R. Hopkin)

The most successful strategies to cultivate donors for our work.

Evaluation (Jessica Payne)

Evaluation tools & skills

Finding funding sources

How to work as an independent folklorist creating exhibits for museums (Teri Klassen)

About Policy

How to work at a policy level

How to join, participate in (and tolerate) public policy analysis groups

How to work with (and tolerate the political pushing and pulling of) town/county/state/federal governments in public planning and implementation

How to begin creating those relationships necessary to affect policy – the concrete steps that need to be taken.

How to read/work political landscapes (Sally Van de Water)

About Building Coalitions and Constituencies

How to build a constituency of those engaged, excited and supportive of this work

What ideas have NOT worked well by those who feel they have achieved some measure of success in their particular situations

About Crossing Boundaries within the Discipline

More (i.e., oral history) about ways to break out of my “niche” within Folklore, which is music
About Crossing Boundaries outside the Discipline

- What’s going on in other fields/disciplines that calls out for our kind of cultural work/UIImage.png
- How to more effectively advocate for our work in diverse settings. (Christine B.)
- About more partnership building – where we can place ourselves to be productive, reflexive, creative learners ourselves – and how to set up a system to place ourselves in these environments throughout our careers to continue to renew and challenge and reinforce what we do, and our values.
- Innovation case studies for partnerships

About Talking about Folklore to Others

- Ways to talk succinctly about the significance of this work without sounding didactic
- To make “folklore” fun and engaging

About Health and Healthcare

- How to work with (and tolerate) hospital and public health administrations
- More about the possibilities for funding for folklife projects in the realm of health
- How to position folklore programming to make it appealing for health related collaborations (or other non-arts programming)

About Using Multiple Types of Media

- How to meaningfully engage groups using different types of media
- About digital tools and best practices that work well for accessing, using and building tangible and intangible resources
- New media (film, digital technology)
- Digital humanities

About the Field of Public Folklore Itself

- What exactly is a public folklorist?
- Do public folklorists focus more on research, data collection, documentation, etc. – or do they create programs?
- Do public folklorists focus on arts programs or on more social justice, advocacy initiatives?
- How do folklorists get involved and integrate with the community to create programs?
- More about folklore – the works…(Ho-Thanh)
Matrix of Teach/Learn Responses from Leadership, Succession & Transition Workshops  
AFS 2012

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<td>Christina Barr</td>
</tr>
<tr>
<td>How to get the attention of newspapers/how to promote</td>
<td>Teri Klassen</td>
</tr>
<tr>
<td>Creative intersections</td>
<td>Kay Turner</td>
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<tr>
<td>How to work with (and tolerate) hospital and public health administrations</td>
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<tr>
<td>More about the possibilities for funding for folklife projects in the realm of health</td>
<td>?</td>
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<tr>
<td>How to position folklore programming to make it appealing for health related collaborations (or other non-arts programming)</td>
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<tr>
<td>How to put the knowledge, skills and language of folklore and folklife into the language, goals, and interests of various parts of healthcare – including hospitals; medical and public health education for practice; community health advocacy; health advocacy for specific identity groups; and community-based and community-inclusive health(care) research.</td>
<td>Bonnie O’Connor</td>
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<tr>
<td>Quilts &amp; quilt history</td>
<td>Terri Klassen</td>
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<td>--------------------------------------------</td>
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<tr>
<td>How to fully live an adventurous, productive, fulfilling life –and put this into practice</td>
<td>Christina Barr</td>
</tr>
<tr>
<td>Digital humanities case study—crowdsourcing archival materials</td>
<td>Nicki Saylor</td>
</tr>
<tr>
<td>Project management in archives/digital library context, including teamwork in this context</td>
<td>Nicki Saylor</td>
</tr>
<tr>
<td>Working with audio and photography for fieldwork</td>
<td>Jill Linzee</td>
</tr>
<tr>
<td>New media (film, digital technology)</td>
<td>?</td>
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<tr>
<td>About digital tools and best practices that work well for accessing, using and building tangible and intangible resources</td>
<td>?</td>
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<tr>
<td>How to meaningfully engage groups using different types of media</td>
<td>?</td>
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<tr>
<td>Digital humanities</td>
<td>?</td>
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One Minute Essays: At the end of Part II of the Workshop we asked participants to share an idea or insight that you gained from the workshops.

Leadership
- Leaders working in public folklore are not familiar with the range of people and skills in the field, so they are not sure who to look to as they think about retiring.

Assumptions
- Assumptions that work against us are widely shared yet often unexamined.

Funding
- Idea of thinking of fundraising as fieldwork
- The need to build relationships with individual/private major donors for our field
- The sociological shifts of the new economy globally directly impact every bit of our local work

Succession
- It’s very difficult to break out of the we’ve-always-done-it-this-way mentality. It is very heartening to have many younger folks participating and to hear their fresh ideas. We need them.
- There may be resources that can support long term transition from existing leaders to future leaders in folk arts organizations
- Non-profit and other public folklore position succession issues face similar challenges (about environment factors) but have some different tasks (boards, finances, etc.)
- That members in our field may be thinking at cross-purposes in matters of succession – Sometimes...But that we share the same overall concerns ~love of the field.
- The most striking idea for me as a concrete step is pairing transitioning leaders with their selected successors and having AFS provide mentorship to those successors by enabling them to visit key leaders in the field
- Moving towards funding transitions/pairings in succession
- That although planned succession is a concern shared by many in the field, there’s no model for implementation/funding for a successful succession in the field of public folklore

Partnership
- Need to give more attention to non-arts innovative partnership well beyond the usual disciplines/funders/etc.
- The need and creative possibilities for partnership with other fields – for more funding, visibility, diversity

- PACT is evolving and growing in ways that are complicating its original role – seems like the state arts, independent, other orgs are now participating [scale, mission, focus] challenging, rich/valuable but harder to create common ground

- Independent non-profits are [something] – representing issues impacting others (in SAAs) and we have and need capacity to shape new ways forward in ways that generate tools that may be of use more widely

**General professional development**

- My takeaway is to really think about what skills I need and want to begin to obtain – and who is out there that might help me with those

- Potential to identify specific roles that folklorists have played in certain projects or situations that demonstrate the value of what our knowledge/skills/practice can contribute to improve the general quality of life

- There are fears and resistances to change (even in a positive direction) that must be honored, articulated, expressed, ventilated, processed, metabolized and transformed.

- Dialogic [diagnostic] interviewing as a methodology and process for digging deeper into the issues through mutual listening and exchange

- The field of folklore does not like to self-advocate. It must is it is to survive into the future. We are smart about advocating for others and getting others to advocate for themselves. We need to use these skills for ourselves as well.

- That our collective creativity and innovations are untapped. We need more time for this practice together.

- Practical skills are needed in order to implement these ideas. We cannot acquire all of those ourselves – how can we get folklore-trained (or interested) people working with us? We have other skill sets (organizational, marketing, accounting).

- The possibility that ASF could become a platform for innovation and change within the field

- So much info to learn and connection and so little time

- We are finally ready to move forward as a field

- Others are facing the same thing that I have and the session helped me cope.

- At this conference I learned that folklore struggle[s] with re-evaluation of past work & sensitivity is always an issue even in evaluation. Projects and results that have impacted communities. Models and funding are always issues that need sharing.